EPAF Tutorial

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EPAF TUTORIAL

Introduction:

> - What is EPAF?
>   - EPAF is an acronym for **E**lectronic **P**ersonnel **A**ction **F**orm.
> - How do I access EPAF?
>   - With the appropriate security setup, EPAF can be accessed by clicking MYINFO from the MSU home web page at http://www.montana.edu/
> - What can I do with EPAF?

EPAF must be used to appoint the following Employee types:
- Student employee (non workstudy)
- Short Term(temp/hourly) Appointment
- Graduate Assistants
- Classified Employees including temporary (fixed term) appointments
- Professional Hourly Appointments

EPAF must also be used for the following personnel actions:
- Terminate employees
- Future labor distribution funding changes
- Reactivate employees who were termed in PEAEMPL

DEFINITIONS

GID: General ID - Assigned by Banner to identify a unique person or entity instead of the Social Security Number.

AY: Academic Year (August - May)
FY: Fiscal Year (July- June)

POSITION: Number assigned to a specific department and/ or job type used to allocate a budget for jobs. A position number consists of a prefix followed by 4 digits. Certain job types have only one position number for each position other job types have "pooled positions". A position number exists independently of the person holding that position.

POOLED POSITION: Position that can have more than one individual attached to the same number.
Each department has a unique 4-digit number preceded by a prefix. (Used for students, graduate assistants, temp hourly employees and adjunct faculty)

POSITION PREFIX: Identifies the campus and type of position: 1st digit identifies the campus. Each EPAF category description includes the prefix
For example:

- *Student Job -1 credits or more required 4S posn S1 suffix*
- *Classified Salaried (4M Position) 00 Suffix*

JOB NUMBER: A position that has been assigned to an employee.

JOB SUFFIX: Further identifies the job. Most nonstudent jobs have a suffix of 00;
                                S1, S2…- Non Work-study Students
                                00, 01…- Work-Study Students
                                00, 01…- Short Term hourly employees
The suffix is also used to create a unique active job for a student who may have two pay-rates within the same pooled position during the same pay period.   Example 4S6635- S1 could be used for a rate of   8.00/hr and 4S6635-S2 for 8.50/hr.

LABOR DISTRIBUTION: Funding source for the salary on a job.
        Consists of COA =1 (chart of accounts) and Index and Account code which defaults to
        FOAPAL= fund, org, account, program, activity, location
        Non work-study students- use acct 61225
        Temp hourly use 61224
        See link below for frequently used payroll account codes
http://www.montana.edu/hr/Payroll/Frequently Used Account Codes.doc

EPAF RECIPE: Quick reference for each EPAF category with specific instructions on data to be entered. Go here for EPAF recipes: http://www.montana.edu/hr/EPAF.htm

DATES

QUERY DATE: Determines which records you will find when searching EPAF. You will find all records with an effective date equal to or greater than the date entered. You can widen or narrow the results of a search with this date. With new EPAFS the query date will also default as the effective date on the job and labor distribution records.

EFFECTIVE DATE: This 'drives' the job record in BANNER. The effective date is the date the job record is recognized by Banner.
        Example: Student begins 8-15-07. Effective date entered as 08/15/2007 for active
        record) and 05/31/2007 for terminated record or prior date if known.

BEGIN DATE: For new hires and employees being assigned that job # for the first time, this is the same as the effective date Once assigned to that employee the begin date doesn't change.
        Example: Student is assigned job number 4S6635 –S1 effective 08/01/2005 and
        terminates 05/31/2006. The student is hired into the department AY2007. You would
        use the same job number, but the begin date does not change. The effective date
        changes to reflect the new record.

Electronic Personnel Action Forms are accessed through MYINFO at www.montana.edu and selecting MYINFO or go to https://atlas.montana.edu:9000/

Welcome to the MSU-Bozeman campus

You will need to use at least Netscape 4.0.7 or Internet Explorer 5.x to browse this web. Please do not use Internet Explorer ver. 7 with Banner until further notice.
You must have cookies enabled on your browser.

Enter Secure Area
Apply for Admission
General Financial Aid
Campus Directory
Class Schedule
CORE Classes
Spring 2007 Registration/Advising Information
Fall 2007 Registration/Advising Information
Registration Timetable
Course Catalog
Transfer Equivalencies
Frequently Asked Questions

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Select Enter Secure Area and login:

User Login

HELP   EXIT

Please enter your User Identification Number (ID) and your personal identification number (PIN). Your ID may be either your Social Security Number (without any dashes) **or your Student/Employee ID with a preceeding dash (-ID).** Your initial PIN is your birthdate entered as 6 digits MMDDYY or the last 6 digits of your Student/Employee ID. Change your PIN at your earliest convenience to protect your privacy and student records. To change your PIN, select Personal Information Menu. You have 5 tries to Login correctly. If unsuccessful, your PIN will be disabled. You must contact the Registrar's Office (employees should contact the Personnel and Payroll Office) to re-activate your PIN.

When you are finished, please Exit and close your browser to protect your privacy.

IMPORTANT INFORMATION: If you have forgotten your PIN, please enter your User ID and select the Forgot PIN button.

Students who require assistance may contact the Registrar's office, 994-6650. The Registrar staff is available to assist students with registration during regular business hours.

User ID: [   ]
PIN: [   ]

[Login]   [Forgot PIN?]

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Personal Information   Student Services   Financial Aid   Employee Services   Communications

SITE MAP   HELP   EXIT

Welcome, Max A. Thompson, to the Montana State University - Bozeman Information System! Last web access on Jun 13, 2007 at 04:42 pm

Attention: Have you been to MyMSU Portal recently? Remember, you may receive personal announcement there anytime; it's recommended you visit at least twice a week. Log in and check out What's New in MyMSU!

Announcing MyMSU Portal
Check here for vital information about the enhanced Web Communications and collaboration services for Students, Faculty and Staff

Personal Information
View your address(es), phone number(s), e-mail address(es); Change your PIN.

Student Services
Apply for Admission, Register, View your academic records. **View your Web Bill Summary / Attendance Confirmation / Pay via Web**

Electronic Billing and Payment
Review your most recent Electronic Billing Statement via QuikPay, make a Payment on Account, Setup an Authorized Payer.

Financial Aid
View your Financial Aid Awards; Accept your Financial Aid awards ; View documentation requirements; View charges and payments

Employee Services
View your leave history or balances, job information, pay stubs and more.
"IMPORTANT TAX RETURN DOCUMENT AVAILABLE"

Communications
University Communications

Return to Homepage

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Employee Services

Benefits and Deductions
Update or view your retirement plans, Health insurance information, Flex spending accounts, miscellaneous d

Pay Information
View your Direct Deposit breakdown; View your Earnings and Deductions History; View your Pay Stubs.

Tax Forms
View W-4 information; View your W-2 Form.
"IMPORTANT TAX RETURN DOCUMENT AVAILABLE"

Current and Past Jobs

Time Off Current Balances and History

Create Letter

Electronic Personnel Action Forms
EPAFs are available online for originators and approvers.

Electronic Personnel Act

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

➢ This tutorial was designed to provide guidance on EPAF navigation. We will be appointing a student who is not work study funded.   Please read the instructions on each page of the online EPAF or refer to the EPAF recipe tables (link above) for guidance on specific appointment types.

What EPAF category should I use to appoint a non work-study student?

```
                              ┌──────────────────────┐
          YES                 │  Is Student a current│              NO
        ┌─────────────────────│  or past employee?   │─────────────────┐
        │                     └──────────────────────┘                 │
        ▼                                                               ▼
┌─────────────────┐                                          ┌──────────────────────┐
│   Proceed to    │◄┈┈┈┈┈┈┈┈         ◇                        │ Send New-hire form,  │
│     EPAF        │        ┈┈┈┈    ◇    ◇                     │ I-9 and W-4 to       │
└─────────────────┘            ◇   HR    ◇◄┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈ │  Human Resources     │
        │                      ◇  Set up ◇                    └──────────────────────┘
        │                        ◇     ◇
        ▼                          ◇  ◇
┌──────────────────────┐
│ Is student enrolled in 1│
│ credit or more?         │──────────────────┐
└──────────────────────┘                     │
 YES                          NO             │
  │                                          ▼
  │                               ┌──────────────────────┐
  ▼                               │ Use Short Term EPAF  │
┌─────────────────┐               │ 4T Position          │
│ Use student EPAF│               └──────────────────────┘
│  4S position S1 │
│ suffix          │
└─────────────────┘
```

.
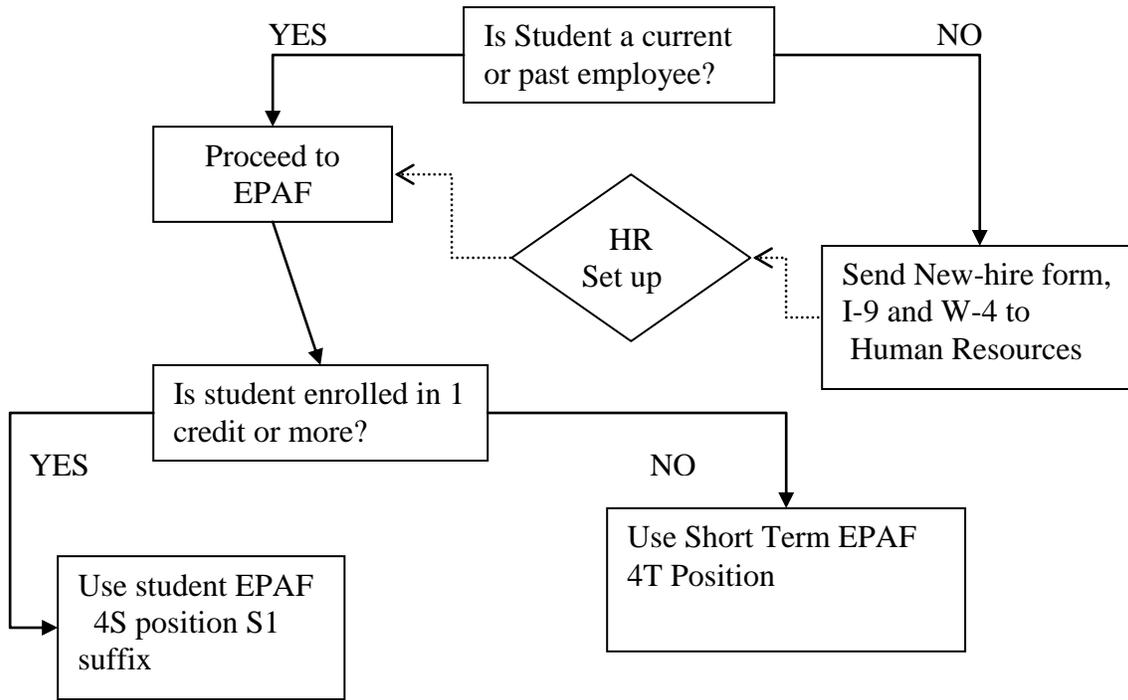
New EPAF Person Selection

❌ **Approval Category is a required field.**

ⓘ Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

✱ - indicates a required field.

ID: ✱ `-01790550` `Mumfred A Moose` 👤🔍

Query date should = or be prior to the effective date you enter on the next screen.
Make sure to use correct date format

Query Date: MM/DD/YYYY ✱ `02/05/2010`

Approval Category: ✱ `Not Selected` ▾

Click here to select EPAF category

`Go`

click go

EPAF Originator Summary

Return to EPAF Menu

Not Selected
Labor Distribution Change(OSP) sponsored program funded jobs, BZOSPF
Labor distribution change for Grad Asst 4DPOSN, BZLDGD
Labor distribution change- No Grant No 4DPOSN, BZLDCH
*Correct error Effective date cannot be after Empl Term Date, BZEMPL
Change Grad Title-hrs (ex; GRA-8 GTA-10), BZGRTL
Grad Assistant Job AY (4D position) 00 suffix - GRA, GTA,GSA, BZGRAD
Summer Grad Assistant (4D position) 01 suffix GRA, GTA,GSA, BZGDSM
Student or Short term -Change Pay Rate (4S, 4T posn #), BZMDST
Student Job -1 credits or more required 4S posn S1 suffix, BZJBSU
Short Term (not more than 90 days) 4T position 00 suffix, BZTHJB

For student jobs, suffix numbers are used to identify regular student employees versus work-study students. S # (beginning with S1) is used to identify non work-study positions and 0# (00 or 01) is used to identify work-study positions.

Suffix numbers are also used to identify two unique jobs with the same position number.

> Example: Mumfred has position 4S6635 with an S1 suffix which tells us he has a non-work study job with HR/P&P. If HR/P&P decided to hire Mumfred for a secondary job at a different rate during the same appointment period we would assign 4S6635 with an S2 suffix.

If Mumfred had 4S position with a 00 or 01 suffix we know we cannot use that position for a non work-study student appointment

New EPAF Job Selection

Instructions:

- Select a job by clicking the button in the "Select" column (Click "All Jobs" to see inactive jobs) OR
- Select the "New Job" row and use the search function or enter the position number
- Enter the suffix (non-workstudy student = S1, other = 00)
- Select Go.

ID: Mumfred A Moose, -01790550
Query Date: Feb 05, 2010
Approval Category: Student job -4S posn S1 suf, BZJBSU

"Tab" or 'Enter' after typing in Position

Job detail *date format- mm/dd/yyyy *do not use $ or ,, STADJB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job	4S6635	S1	STU - Personnel & Payroll	432300, Human Resources					◉

⚠ There are no active jobs based on the Query Date.

[All Jobs] ◀------

[Next Approval Type] [Go] — 'Enter' before clicking 'Go'

If you don't know the position number you may use the search feature.

Job detail *dat

Search	Type
🔍	New Job

Position Search

New Position Selection

Personal Information | Student Services | Financial Aid | **Employee Services** | Communications

ℹ️ Enter search criteria and select Go. Then select the link under Position to select it.

Search Criteria

Position Number:	[ ]
Employee Class:	All / 1H, Student Labor/Work Study
COA:	All / 1, Montana State University
Budget Organization:	432201, Parking Facility / 432300, Personnel & Payroll Services

[Go]

Hint* type in the first digit of the home org for a quicker search

Return to EPAF Menu

| Personal Information | Student Services | Financial Aid | Employee Services | Communications |

RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

New Position Selection

ⓘ Enter search criteria and select Go. Then select the link under Position to select it.

Search Criteria

Position Number: [   ]

Employee Class:
```
All
1H, Student Labor/Work Study
```

COA:
```
All
1, Montana State University
```

Budget Organization:
```
All
311...01, ...Office
```

[Go]

click the position number to select

Search Results

△▽ Position	△▽ Title	△▽ Employee Class	△▽ COA	△▽ Budget Organization	Begin Date	End Date
4S6632	Student	1H, Student Labor/Work Study	1	432300, Personnel & Payroll Services	Jul 01, 1998	
4S6635	STU - Personnel & Payroll	1H, Student Labor/Work Study	1	432300, Personnel & Payroll Services	Jul 01, 1998	

Return to EPAF Menu

For student jobs, suffix numbers are used to identify regular student employees versus work-study students.
S # (beginning with S1) is used to identify non work-study positions and 0# (00 or 01) is used to identify work-study positions.
Suffix numbers are also used to identify two unique jobs with the same position number.

> Example: Mumfred has position 4S6635 with an S1 suffix which tells us he has a non-work study job with HR/P&P. If HR/P&P decided to hire Mumfred for a secondary job at a different rate during the same appointment period we would assign 4S6635 with an S2 suffix.

If Mumfred had 4S position with a 00 or 01 suffix we know we cannot use that position for a non work-study student appointment

Please read instructions for each section on the EPAF

Job detail *date format- mm/dd/yyyy *do not use $ or ,, 4S6635-S1 STU - Personnel & Payroll

Instructions:

1. Enter Job begin date. This should be the same as the "Current Value" or if no "Current Value" the same as the Effective Date
2. Enter Job Effective Date. This is the date of job change or addition (for Student jobs it is the 1st day of the pay period)
3. Select Contract Type - "Primary" or "Secondary" (1st or only job is "Primary", all other jobs are "Secondary")
4. Enter Regular Rate. This is the hourly wage
5. Enter Title. Non-student temp hourly jobs must match the classification chart
6. Enter Timesheet Orgn. This is the org number where the timesheet/card is delivered for this job
7. Select Job Change Reason from pull-down menu (New Hire, Rehire, Salary increase, etc.)

Activate or Change Employee Job

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		
Jobs Effective Date: MM/DD/YYYY		08/01/2007
Personnel Date: MM/DD/YYYY		08/15/2007
Contract Type:		Not selected
Job Status: (Not Overrideable)		A
Title:		
Job Change Reason:		Not Selected
Regular Rate:		
Timesheet Orgn:		
Time Entry Method: (Not Overrideable)		P
Time Entry Type: (Not Overrideable)		N
Employer Code: (Not Overrideable)		BZ
Payroll Id: (Not Overrideable)		4M
Leave Rept Pay ID: (Not Overrideable)		4M
Salary Group: (Not Overrideable)		2008
Factor: (Not Overrideable)		12
Pays: (Not Overrideable)		12
Step: (Not Overrideable)		0

See recipe card for help with field values

These are default values that cannot be changed

Sample Student "Recipe" card below:

Recipe for student job:

Begin Date: If student is new to the position this date is the same as the effective date. If student is being rehired or a change is being entered this date is the original begin date for this job. This can be found in the "Current Value" column or in Banner form NBAJOBS.

Effective Date: IMPORTANT: This date 'drives' Banner. It used by the system to determine the date the record becomes active or changes. The active ('A') record effective date should be the first of the pay period. For the term ('T') record the last day of the pay period should be used. (Student Summer appointments Active record effective 6/01 Term record effective 7/31, Student AY appointments active effective 8/01- term effective 5/31) NOTE: *The effective date cannot be less than the first day of the current pay period.*

Job Status: Cannot change; A= Active, T= Terminated

Contract Type: Employee must have one active primary job. All others are secondary. If employee has no other job then contract type should be primary.

Title: Student: Banner will default the title from the position if left blank. Always use 'student' in the title (e.g. Student – HR/PP)

Timesheet Orgn: This is the Z orgn used for Web time entry and corresponds with the employee's department and supervisor.

Regular Rate: Hourly rate of pay

Job Change Reason: Leave at default unless a change in rate.

Comment: You must include a brief job description in the comment box.

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		07/01/2007
Jobs Effective Date: MM/DD/YYYY		07/01/2007
Job Status: (Not Overrideable)		A
Contract Type:		Secondary
Title:		Student - HR/P&P
Personnel Date: MM/DD/YYYY		07/01/2007
Timesheet Orgn:		432300
Regular Rate:		8.50
Job Change Reason:		SUMRS, Summer Session
Salary Group: (Not Overrideable)		2008
Pays: (Not Overrideable)		12
Factor: (Not Overrideable)		12
Step: (Not Overrideable)		0

Continue Labor Distribution

Effective date here should match the Jobs effective date.

Change the labor distribtuion if needed. Index, Account and Percent are required. You may add a row and remove the default

Current
Effective Date: 06/01/2007
COA Index Fund Organization Account Program Activity Location Project Cost Percent

New
Effective Date: MM/DD/YYYY 06/01/2007

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
1	4A2300	411201	432300	61226	06	08				100.00
									Total:	100.00

☑ Job Labor Distributions defaulted from the approved Position Labor Distrib

Save and Add New Rows

If you know the job ends before the default enter date here

Terminating record for student summer job

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY(Not Overrideable)		07/31/2007
Job Status: (Not Overrideable)		T
Job Change Reason: (Not Overrideable)		SUEND

Student jobs should always have a term record

Routing Queue

To change the default labor distribution, add a new index and account on the row below the default. Select "Save and Add New Rows" then remove the default row and press Save again. Banner will verify the FOAPAL and make you re-enter the account number.

You will get an error if there is a future dated labor distribution change in the record.

New
Effective Date: MM/DD/YYYY 06/18/2007

Banner makes you re-verify the account number after Save

check here to remove row

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Remove
1	4A2300	411201	432300		06					100.00	☑
1	4A2500	411201	432500		06					100.00	☐
										Total:	100.00

Fund, Org and Program default from the Index

Save and Add New Rows

IMPORTANT: Enter a job description in the comment box and any other comments you wish to make.

Approval Level	User Name		Required Action
95 - (BZPERT) Bozeman Personnel Technicians	DHALPIN	Darcy L Halpin	Approve
97 - (BZBENT) Bozeman Benefit Technicians	HBARNABY	Heather Leigh Barnaby	FYI
99 - (BZPAYT) Bozeman Payroll Technicians	KMATHERS	Kallie R Mathers	Apply
50 - (DEPTHD) Department Head/Director			Not Selected
95 - (OSP) Office of Sponsored Programs			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected

Save and Add New Rows

Comment

Makes copies, files, keeps logs, general office work

Make sure to give a brief job description Approvers can add comments

Job descriptions are required by auditors and for workers compensation purposes

Approval Types | Account Distribution | Routing Queue | Transaction History

Save   Press save when complete

Return to Top

New EPAF | EPAF Originator Summary
Return to EPAF Menu

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NEXT: you must select a routing queue for specific users. The users are defined by categories. HR categories are required and should include each technician in your HR customer service team.

Your team name and members may be found at www.montana.edu/pps and clicking on HR Customer Service teams

NOTE: Your department/college may have its' own approval requirements (see the section on default routing queues to set defaults for a specific EPAF type)

Routing Queue

An apply action is required

Approval Level	User Name		Required Action
95 - (BZPERT) Bozeman Personnel Technicians	🔍 DHALPIN	Darcy L Halpin	Approve
97 - (BZBENT) Bozeman Benefit Technicians	🔍 HBARNABY	Heather Leigh Barnaby	FYI
99 - (BZPAYT) Bozeman Payroll Technicians	🔍 KMATHERS	Kallie R Mathers	Apply
50 - (DEPTHD) Department Head/Director ▼	🔍		Not Selected ▼
95 - (OSP) Office of Sponsored Programs ▼	🔍		Not Selected ▼
Not Selected	🔍		Not Selected ▼
50 - (DEPTHD) Department Head/Director	🔍		Not Selected ▼
75 - (VP_RES) VP for Research			
80 - (FINAID) Financial Aid Office			
80 - (GRDOFF) Graduate Studies Office			
85 - (PAYROL) Payroll Apprvl for Adj Faculty			
90 - (PROV) Provost's Approval			
95 - (BZPERT) Bozeman Personnel Technicians			
95 - (OSP) Office of Sponsored Programs			
97 - (BZBENT) Bozeman Benefit Technicians			
97 - (HRMAP) MAP Data Changes			
98 - (HUMRES) Human Resources Jobs Changes			

Select the dropdown box for approval categories
Use search to find approvers

You must select an action (approve or FYI)

Personal Information | Student Services | Financial Aid | **Employee Services** | Communications

Electronic Personnel Action Form

✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

Name and ID:	Mumfred A Moose, -01785644	Job and Suffix:	4S6635-s1, STU - Personnel & Payroll
Transaction:	35559	Query Date:	Jun 18, 2007
Transaction Status:	Waiting	Last Paid Date:	
Approval Category:	Student summer job 6 credits or more, BZJBSU		

Select Submit when finished.
(there is a button at the bottom also)

Save   Submit   Delete

Approval Types | Account Distribution | Routing Queue | Transaction Hist

Tip: Save prior to submitting.

Electronic Personnel Action Form

❌ **Job Labor Distribution Total Percentages must be exactly 100%.**

ℹ️ Enter the information for the EPAF and either Save or Submit

Name and ID:	Mumfred A Moose, -01785644	**Job and Suffix:**	4S6635-s
Transaction:	35559	**Query Date:**	Jun 18, 20
Transaction Status:	Waiting	**Last Paid Date:**	
Approval Category:	Student summer job 6 credits or more, BZJBSU		

[Save] [Submit] [Delete]

New

Effective Date: MM/DD/YYYY 06/18/2007

Account must be re-entered

Labor distribtuion must be 100%

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Remove
1	4A2300	411201	432300		06					100.00	☐
1	4A2500	411201	432500		06					100.00	☐

Total: 200.00

COA code is always 1

NOTE: You may be asked to verify the account number after selecting submit. Retype and SAVE

❌ **Error(s) occured.**

ℹ️ Enter the information for the EPAF and either Save or S

Name and ID:	Mumfred A Moose, -01785644	J and	
Transaction:	35539	**Query D**	
Transaction Status:	Waiting	**Last Pai**	
Approval Category:	Student AY job -6 credits or more, BZSTJB		

[Save] [Submit] [Delete]

Errors and warnings appear here.
Errors must be corrected before submitting

Approval Types | Account

Errors and Warning Messages

Type	Message Type	Description
Routing Queue	ERROR	Required Action must be entered.
Routing Queue	ERROR	Required Action must be entered.

You must correct errors before you can successfully submit.
See EPAF Trouble Shooting Guide for help on common errors

TIPS: Make sure to check the labor distribution date. If you enter a date greater than the job effective date for the labor distribution, the position default labor distribution will be effective until the effective date you entered.

Approval Category: Student AY job -6 credits or more, BZSTJB

Save Submit Delete

correct error and submit

...unt Distribution | Errors | Comments | Routing Queue | Transaction History

Errors and Warning Messages

Type	Message Type	Description
Add/Change student AY job- Position begins with 4S	ERROR	*ERROR* A Primary Job has not been defined for this employee.
Add/Change student AY job- Position begins with 4S	WARNING	*WARNING* Encumbrance has been set to 0, because method is Hours Input
Add/Change student AY job- Position begins with 4S	WARNING	*WARNING* Encumbrance has been set to 0, because method is Hours Inpu...
Add/Change student AY job- Position begins with 4S	WARNING	*WARNING* Encumbrance has been set to 0, because method is Hours Inpu...
Add/Change student AY job- Position begins with 4S	WARNING	*WARNING* Total FTE for this position is greater than budgeted FTE.

Add/Change student AY job- Position begins with 4S

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		08/01/2007
Jobs Effective Date: MM/DD/YYYY		08/01/2007
Job Status: (Not Overrideable)		A
Contract Type:		Primary

Electronic Personnel Action Form

☑ The transaction has been successfully submitted.

ⓘ Enter the information for the EPAF and either Save or Submit

Name and ID:	Mumfred A Moose, -01785644	Job and Suffix:	4S6635-S1, STU - Personnel & Payroll
Transaction:	35539	Query Date:	Jun 14, 2007
Transaction Status:	Pending	Last Paid Date:	

Congratulations, you have successfully submitted an EPAF.

Let's look at what we have done. Go to the links at the bottom of the EPAF

Transaction History

Action	Date	User Name
Created:	Jun 14, 2007	Max Alan Thompson
Submitted:	Jun 14, 2007	Max Alan Thompson

Approval Types | Account Distribution | Errors | Comments | Routing Queue | Transaction History

Return to Top

New EPAF | EPAF Originator Summary

Return to EPAF Menu

EPAF Originator Summary allows you to view the EPAFs you have submitted and awaiting

your approval.

Click on the name to review the EPAF.

As an approver you may approve, disapprove, or return the EPAF for correction. Be sure to add a comment if you are disapproving or returning the EPAF for correction.

RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

EPAF Approver Summary

As an approver, you can view the EPAF
Disapprove or return for correction
Add comments if appropriate

Current   In My Queue   History

ⓘ Select the link under Name to access details of the transaction.

Queue Status: All / Pending   Go

New EPAF | Update Proxies | Search | Proxy or Superuser or Filter Transactions

Select All   Reset   Save

1 - 1 of 1

Select the name to view the EPAF

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Moose, Mumfred A. STU - Personnel & Payroll, 4S6635-S1	-01785644	35539	Student AY job -6 credits or more	Jun 14, 2007	Jun 14, 2007	Approve	☐	**Comments Warnings

1 - 1 of 1

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**Comments Exist

Select All   Reset   Save

As an originator you may void the transaction removing it from the approval queue.

EPAF allows you to select a **default routing queue** for all the EPAFs you submit in that category.

The level number tells you the order of the approval queues. You may select more than one level with the same level

Personal Information | Student Services | Financial Aid | Employee Services | Communications

RETURN TO EMPLOYEE MENU | SITE MAP | HELP | EXIT

EPAF Default Routing Queue

Select Approval category and "Go" to set default

Select an Approval Category and Go. Once the page refreshes, select the Approval Level User ID and action.

Approval Category: Student AY job -6 credits or more, BZSTJB ▼ [Go]

You can select the usernames you want to appear each time you access this EPAF category. You may also select additional default approval levels

Approval Queue

Approval Level		User Name		Required Action
95 - (BZPERT) Bozeman Personnel Technicians ▼	🔍	LBUSS	Lisa D Buss	Approve ▼
97 - (BZBENT) Bozeman Benefit Technicians ▼	🔍	HBARNABY	Heather Leigh Barnaby	FYI ▼
99 - (BZPAYT) Bozeman Payroll Technicians ▼	🔍	KMATHERS	Kallie R Mathers	Apply ▼
50 - (DEPTHD) Department Head/Director ▼	🔍	MAXT	Max Alan Thompson	Not Selected ▼
95 - (OSP) Office of Sponsored Programs ▼	🔍	CFIKE	Carmen Lee Fike	Not Selected ▼
Not Selected ▼	🔍			Not Selected ▼
Not Selected ▼	🔍			Not Selected ▼

☑ Mandatory Levels defaulted from Electronic Approval Category Form (NTRACAT).

[Save and Add New Rows] Dont forget to save!

EPAF Originator Summary

Return to EPAF Menu

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Personal Information | **Student Services** | **Financial Aid** | **Employee Services** | Communi

Electronic Personnel Action Form

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

If you are an approver you may assign a proxy during your absence

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Personal Information | **Student Services** | **Financial Aid** | **Employee Services** | **Communications**

EPAF Proxy Records

Approval Level: Department Head/Director, DEPTHD ▼ Go

EPAF Approver Summary
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Be sure to refer to the "delegation of authority" policy before assigning a proxy.

MSU Policy and Procedures
http://www2.montana.edu/policy/

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EPAF Proxy Records

Approval Level: Department Head/Director, DEPTHD ▾ Go

Name	Remove	Add
Not Selected ▾		☐

Save

Select the name of your proxy and save

EPAF Approver Summary

Return to EPAF Menu

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RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

EPAF Approver Summary

Current | In My Queue | History

ⓘ Select the link under Name to access details of the transaction.

Queue Status: All / Pending   Go

Select to approve as a proxy for another user

New EPAF | Update Proxies | Search | Proxy or Superuser or Filter Transactions

Select All   Reset   Save

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EPAF Transactions

▲ Name ▼	▲ ID ▼	▲ Transaction ▼	▲ Type of Change ▼	▲ Submitted Date ▼	▲ Effective Date ▼	▲ Required Action ▼	Action	Links
Moose, Mumfred A. STU - Personnel & Payroll, 4S6635-S1	- 01785644	35539	Student AY job -6 credits or more	Jun 14, 2007	Jun 14, 2007	Approve	☐	**Comments Warnings

1 - 1 of 1

Proxy or Superuser or Filter Transactions

ℹ️ Act as a proxy or a superuser and enter the following criteria to filter transactions.

Proxy For: [Self ▼]

Act as a Superuser: ☐

Submitted From Date: MM/DD/YYYY [   ]

Submitted To Date: MM/DD/YYYY [   ]

Transactions Per Page: [25 ▼]

[Go]

> Here you can select the Proxy for username and filter by date

EPAF Approver Summary
Return to EPAF Menu

In order for a person to be assigned a job an Employee record must be active in the Banner Form PEAEMPL.   If an employee is returning to work at MSU after being terminated you may use EPAF to request the PEAMPL record be reactivated. Once active in PEAMPL the employee can be appointed using an Add/change job EPAF.

MyInfo MSU-Bozeman

Personal Information | Student Services | Financial Aid | **Employee Services** | Communications

RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

New EPAF Person Selection

ℹ️ Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

✱ - indicates a required field.

ID: ✱ [   ] [   ] 🧍 [·]

Query Date: MM/DD/YYYY ✱ [08/06/2007]

Approval Category: ✱ [Not Selected ▼]

[Go]
  Not Selected
  Add/Change a student job AY with 6 credits or more BZ, BZJBST
  Activate employee record (PEAEMPL status), BZEMPL

> If you would like to request a terminated employee record be reactivated use this EPAF

EPAF Originator Summary
Return to EPAF Menu

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Activate employee record status (PEAEMPL)

Item	Current Value	New Value
Employee Status: (Not Overrideable)		A
Employee Class Code: (Not Overrideable)		NH
Home Organization:	🔍	432300
District Code: (Not Overrideable)		BZ
Benefit Category: (Not Overrideable)		ZZ

The only field you need to enter is the home org of the employee and your HR team approvers.

Routing Queue

Approval Level	User Name		Required Action	Remove
95 - (BZBENT) HR/P&P Benefit technician -BZ	🔍 HBARNABY	Heather Leigh Barnaby	FYI	
96 - (BZPERT) HR/P&P Personnel Tech - BZ	🔍 LBUSS	Lisa D Buss	Apply	
Not Selected ▾	🔍		Not Selected ▾	
Not Selected ▾	🔍		Not Selected ▾	
Not Selected ▾	🔍		Not Selected ▾	
Not Selected ▾	🔍		Not Selected ▾	

[Save and Add New Rows]

Comment

Use comments to let us know more details if needed.

Transaction:	39759	Query Date:	Aug 06, 2007
Transaction Status:	Waiting	Last Paid Date:	
Approval Category:	Activate employee record (PEAEMPL status), BZEMPL		

[Save] [Submit] [Delete]

Approval Types | Errors | Routing Queue | Transaction History

If the appropriate employee information is not in BANNER you will receive errors. Please send an I9,W4 and NewHire Listserv form to HR/☐

Errors and Warning Messages

Type	Message Type	Description
Activate employee record status (PEAEMPL)	ERROR	*ERROR* The Employee Class Code, Home COAS and Organization must exist.
Activate employee record status (PEAEMPL)	ERROR	*ERROR* First Name, SSN, Birth Date, Sex Code or Ethnic Code incomplete.
Activate employee record status (PEAEMPL)	ERROR	Invalid value for Organization. Press LIST for valid codes.
Activate employee record status (PEAEMPL)	ERROR	*ERROR* The Chart of Accounts Code is required ifBanner Finance is installed.
Activate employee record status (PEAEMPL)	ERROR	Invalid value for Organization. Press LIST for valid codes.
Activate employee record status (PEAEMPL)	ERROR	*ERROR* No address information exists.

After HR/☐ receives the appropriate forms and enters the information there is no need to submit this EPAF. (please delete)

Activate employee record status (PEAEMPL)

Item	Current Value	New Value
Employee Status: (Not Overrideable)		A
Employee Class Code: (Not Overrideable)		NH
Home Organization:	🔍	432300
District Code: (Not Overrideable)		BZ
Benefit Category: (Not Overrideable)		ZZ

Routing Queue

Approval Level	User Name	Required Action	Remove
	🔍		

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FAQ

How do I know which users to put in my approval queue?

- Each college or department has slightly different routing procedures for forms. Please ask your supervisor or department head if you are unsure of your specific department's procedure.
- You are required to route all grant funded appointments to OSP and all Ag or Extension funded EPAFs to AES or ES. The dropdown menu in the routing queue has a list of the approval category levels which contain the approvers.
- Each EPAF has a mandatory routing queue for Human Resources. Each department is assigned an HR/PP customer service team. Go to www.montana.edu/hr to find your departments team members.

There are several date fields on EPAF what dates do I use?

See the *Recipe card* in *The Quick Reference Guide* for the specific EPAF. Each card gives instruction or an explanation about what to enter in each field for a specified EPAF. The Definition section in this tutorial has general information about the dates.