

2012

Michigan Tech

Michigan Technological University
Human Resources

[PROCESSING EMPLOYEES USING EPAF – APPROVERS & FYI HANDBOOK]

What you need before you start: EPAF Training, Complete Banner Access Form

4.19.2012

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What is EPAF?

EPAF stands for Electronic Personnel Action Form. EPAFs allow users to process online personnel actions electronically through [Employee Self Services \(Banweb\)](#) through a defined approval queue with the final step of the action applied to the database.

Who can be processed through an EPAF?

Students who have an active employment record with the University. This means that they do not need a new I-9 or an I-9 review.

What actions can be processed through an EPAF?

Hourly Student Jobs

- New Student Job, Active Employee
- Rehire Student to Previous Job, Active Employee
- Extend Student Job End Date
- Change Student Job Pay Rate

Stipend Student Jobs

- New Student Job, Active Employee
- Rehire Student to Previous Job, Active Employee
- Change Student Job Pay Rate

All Student Jobs (Hourly & Stipend)

- Change Index on Student Job
- Terminate Student Job Early

How do I know I have an EPAF to Review?

You will receive a daily summary email if you have EPAFs to review. The email will list who the EPAF(s) is for and the type of EPAF(s). You will receive this email as long as you have EPAFs to review.

Approving vs. Acknowledging (FYI)

In the routing queue for an EPAF, you can be added to approve an EPAF or sent an FYI. If you are in the routing queue to approve an EPAF, you must act on the EPAF for it to continue on for processing. If you are in the routing queue as FYI, action is not required by you to process the EPAF. You are only getting notification that this EPAF is being processed. You will want to acknowledge the EPAF (see Acknowledging an EPAF) in order for the daily email to stop.

Getting Started

EPAFs are processed through [Employee Self Service \(ESS/Banweb\)](#).

Step 1. Sign on to Employee Self Service (ESS): <https://www.banweb.mtu.edu/>



Home

Michigan Tech Login

Welcome to Michigan Tech's Login Page

This system is not available from 2 a.m. until 2:30 a.m. EST daily, for system backup processing.

Please enter your campus username and ISO password (This is the same username and password you use for HuskyMail, Husky Hub, and Blackboard) and click login. If you have forgotten your password, or have other questions regarding this login page, please visit <http://www.login.mtu.edu>.

Username

Password

Step 2. Click on the Employee Service box.

The image shows the main navigation area of the Michigan Tech BANWEB! website. At the top is the Michigan Tech logo and a "Browse" dropdown menu. To the right are "Sign Out" and "Help" links. Below the logo is a search bar with the text "Find a page...". The main content area features a horizontal menu with four categories: "Personal Information", "Employee Services", "Other Payments", and "New WebTailor Administration". Each category has a list of sub-items. "Personal Information" includes address information, safety alerts, emergency contacts, marital status, and surveys. "Employee Services" includes employee information. "Other Payments" includes student insurance, enrollment deposits, parking tickets, broomball fees, graduation fees, and direct deposit information. "New WebTailor Administration" includes customizing web menus, user roles, web modules, and login return locations. A "SITE MAP" link is located at the bottom right of the page.

Step 3. Click on the Electronic Personnel Action Forms box.

The screenshot shows the Michigan Tech BANWEB interface. At the top left is the Michigan Tech logo with the tagline 'Create the Future'. To the right are 'Sign Out' and 'Help' links. Below the logo is a 'Browse' dropdown menu. The main heading reads 'Welcome, to BANWEB!' with a search bar on the right. A breadcrumb trail shows 'Home > Employee Information'. Below this is a navigation bar with buttons for 'Personal Information', 'Employee Services', 'Other Payments', and 'New WebTailor Administration'. The main content area is a grid of links:

Time Sheet Web Time Entry	Compensation Statement Comprehensive Overview of Salary and Benefit Costs to the employee and Michigan Tech	Electronic Personnel Action Forms EPAFs	Benefits and Deductions Retirement, health, flexible spending, miscellaneous deductions, and compensation statement
Pay Information Direct deposit allocation, earnings and deductions history, and pay stubs	Tax Forms Federal W4 and W2 information	Leave Balances Vacation, Sick, Personal, and Annual Leave	Most Recent Paystub Your most recent Michigan Tech paystub
Campus Directory Employee Directory	Non-Payroll Direct Deposits History View Direct Deposits (non-Payroll)	Non-Payroll Direct Deposit Destination View/Modify Direct Deposit Repository (non-Payroll)	Open Enrollment Click here to begin open enrollment.

Step 4. Click EPAF Approver Summary to see the EPAFs you currently have to approve.

*Note: This is the main EPAF Menu. You will not see any options other than **Act as a Proxy** until you have an EPAF to approve.*

The screenshot shows the 'Electronic Personnel Action Form' page. At the top is a 'Browse' dropdown menu. Below it is a navigation bar with buttons for 'Personal Information', 'Employee Services', 'Other Payments', and 'New WebTailor Administration'. The main heading reads 'Electronic Personnel Action Form'. A breadcrumb trail shows 'Home > Employee Services > Electronic Personnel Action Forms'. Below this is a text box with the following content:

For more handbooks to help Originators and Approvers, click the appropriate link below: (opens in a new window)

- [Originators' Handbook](#)
- [Approvers' Handbook](#)
- [EPAF Approver Summary](#)**
- [EPAF Originator Summary](#)
- [New EPAF](#)
- [EPAF Proxy Records](#)
- [Act as a Proxy](#)

Step 5. Click on the name of the student employee to review the EPAF.

EPAF Approver Summary

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

Queue Status: All FYI Pending Go

New EPAF Update Proxies Search Proxy or Supenuser or Filter Transactions

Select All Reset Save

1 - 2 of 2

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Smith, John F. GADE/GADI GRAD SCHOOL, S25001-00	M82234238	12404	Terminate Student Job Early	Apr 17, 2012	Apr 01, 2012	Approve	<input type="checkbox"/>	**Comments Warnings
Smith, John F. STUDENT ASST HUMAN RESOURCES, Z41001-05	M82234238	12403	New Student Job, Active Employee - Hourly	Apr 17, 2012	Apr 01, 2012	Approve	<input type="checkbox"/>	**Comments

1 - 2 of 2
[Return to Top](#)
**Comments Exist

APPROVER SUMMARY SCREEN NOTES:

- EPAF Approver Summary Tabs
 - Current - EPAFs you have to approve.
 - In My Queue – EPAFs that you will soon have to approve.
 - History – EPAFs that you have approved.
- Employee Name & Title – Click on the name to review and approve the EPAF.
- Transaction Number – This number is used to reference this specific transaction.
- Type of Change – This is the type of EPAF being processed for this employee. See [What Actions Can Be Processed](#) for more information.

Reviewing an EPAF

We will explain the basic anatomy of an EPAF which will help you understand, review, and act on the EPAF. Depending on the type of EPAF, you will have more or less informational areas on the EPAF itself. This is due to how much information is needed to process a type of transaction.

Summary & Actions

The first part of the EPAF is the EPAF summary. The summary gives you the same information that you received from the list of EPAFs you have to review.

EPAF Preview

The screenshot shows the EPAF Preview interface. At the top left, there is a breadcrumb trail: Home > EPAF Preview. Below this, a green checkmark indicates the user is acting as an Approver. The main content area is titled "EPAF SUMMARY AREA" in red. It contains a table with the following information:

Name and ID:	John F Smith, M82234239	Job and Suffix:	ZEI001-00, STUDENT ASST ELECTRICAL ENGRG
Transaction:	12405	Query Date:	Apr 01, 2012
Transaction Status:	Pending	Last Paid Date:	
Approval Category:	New Student Job, Active Employee - Hourly, NHRLY		

Below the summary, there is a "Jump to Bottom" link and navigation arrows. The "EPAF ACTIONS" section is highlighted with a red box and contains the following buttons: Approve, Disapprove, Return for Correction, More Info, and Add Comment. At the bottom of the page, there is a navigation menu with the following options: Approval Types, Account Distribution, Comments, Routing Queue, and Transaction History.

Below the summary, you have buttons for the actions you are allowed to take on this EPAF as well as a link to add comments to the EPAF. Approvers have a few options, while FYI's only have the option to Acknowledge. See [Taking Action on an EPAF](#) for more information.

Note: These buttons are located at the bottom of the EPAF too.

Approval Types, AKA Job Details

The next areas of an EPAF are the details needed to create, change, or end a job. Banner calls these areas "Approval Types". Depending on what you are doing, you could have one or many approval types. We will look at the most common configuration of approval types.

Job Details

This is the collection of information to establish the record in banner for the employment action. If the action is a new hire, it will have the start date and rate of pay. A

termination will have the new end date. Below is a picture of the job details of a new job for a student employee, hourly.

HRLYN - New Job Details - Hourly, ZE1001-00 STUDENT ASST ELECTRICAL ENGRG

Enter Changes	Current Value	New Value
Job Begin Date:		04/01/2012
Contract Type: *		Secondary
Jobs Effective Date:		04/01/2012
Personnel Date:		
Hourly Rate: *		8.00
Timesheet Orgn: *		26500

- Job Begin Date: The date that the job will begin.
- Contract Type: This field is a payroll function and defines if this is the first job for this student employee.
- Job Effective Date: The date this job will begin. Same as the Job Begin Date
- Personnel Date: This date is used for retroactive changes to an employee. Banner does not allow changes to be made to an employee during a time period before a timesheet has been processed by payroll. This field notifies us that a retroactive change needs to be made.
- Hourly Rate: Hourly rate of pay.
- Timesheet Orgn: The routing code for the delivery of the employee's time sheet.

Below is a picture of the job details of a new job for a student stipend. Because this is a stipend, different information is required.

STIPN - New Job Details - Stipend, SE1001-00 GADE/GADI ELEC COMP ENG

Enter Changes	Current Value	New Value
Job Begin Date:		04/01/2012
Contract Type: *		Secondary
Jobs Effective Date:		04/01/2012
Salary: *		9000
Factor: *		9
Pays: *		9
Hours per Pay: *		40
Timesheet Orgn: *		26500

- Salary: The amount of the stipend to be paid from the Job Effective Date through the Job End Date.
- Factors & Pays: The number of pay periods between the begin date and end date. For stipends, these values are always the same.
- Hours per Pay: 40 hours for a full stipend, 20 for ½ stipend, etc.

Job End Date

If this job is being created, there will be an area requesting the new Job End Date.

HRLYT - Job End Date, SEI001-00 GADE/GADI ELEC COMP ENG

Enter Changes	Current Value	New Value
Job End Date:		08/04/2012
Job Status: *		Terminated

Earnings - Stipend EPAFs ONLY

On all stipend EPAFs, there is a section requesting the earnings information. This section is required in order to automatically pay a weekly stipend without submitting a time sheet. Students should always be paid at 001, Regular Rate and the Hours per Pay must match the Hours per Pay in the Job Details section.

EARNGS - Default Earnings Code & Hours, SEI001-00 GADE/GADI ELEC COMP ENG

Current						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
New						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
Apr 01, 2012	001, Regular Rate		40.00		1	

Index & Labor Distribution

This section shows the Index and Labor Distribution. The areas of review are the Index field, the Account field, and the Percent field. The other fields on a labor distribution line are populated by the Index.

LABOR - Index & Labor Distribution, ZE1001-00 STUDENT ASST ELECTRICAL ENGRG

Current												
Effective Date: 04/01/2012												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override End Date
New												
Effective Date: 04/01/2012												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override End Date
U	A11020	G00000	22501	P641	202					100.00		

Comments

This section lists the comments on the EPAF. Comments are viewable by everyone. They are date and user stamped. If comments do not exist for this EPAF, there will not be a comments section.

Comments

Date: Apr 17, 2012 11:12:34 AM
Made by: Lester John Brent, LIBRENT
Comments: This student was hired by Dr. Faculty.

Current Value vs. New Value

You will see columns or sections labeled Current (Value) and New (Value). The Current column will contain the previous record information, chronologically, in Banner. You will only see this column populated when previous information existed for a student's job. It will be blank for new student jobs/stipends for your department.

For changes to a job, this is how you compare the old value to the new value. For example, below is a rate change to a job.

HRLYUP - Change Job Details - Hourly, Z41001-00 STUDENT ASST HUMAN RESOURCES

Enter Changes	Current Value	New Value
Jobs Effective Date:	01/10/2011	04/01/2011
Personnel Date:	01/10/2011	
Job Status:	Active	Active
Hourly Rate:	7.4	8.40
Timesheet Orgn:	26500	
Job End Date:	05/13/2011	

LABOR - Index & Labor Distribution, Z41001-00 STUDENT ASST HUMAN RESOURCES

Current											
Effective Date: 01/10/2011											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
U	A11805	600000	26501	P641	280					100.00	
New											
Effective Date: 04/01/2011											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
U	A12345	600000	23155	P641	202					100.00	

In this EPAF, the hourly rate increased by \$1.00 and the Index changed from A11805 to A12345.

Additional Information

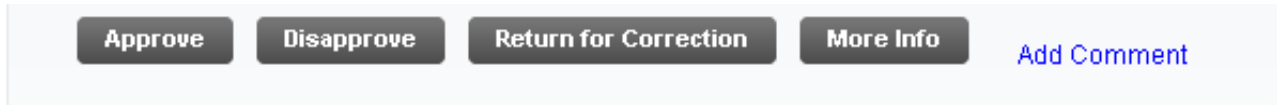
If you need additional information about reviewing EPAFs, please contact HR to answer any questions or to setup a one on one training session.

Taking Action on an EPAF

Approvers

Now that you have reviewed the EPAF, you will want to take action on that EPAF. You have four options available to you.

Note: It is recommended to add your comments before taking an action on an EPAF.



Option 1. Approve

Use this option to approve this EPAF and move it to the next person in the routing queue.

Option 2. Disapprove

Use this option if you do not approve this EPAF and it will move into everyone's history as disapproved.

Michigan Tech Best Practice: Always add a comment on why you are disapproving the EPAF.

Option 3. Return For Correction

EPAFs can only be altered by the Originator. If you feel there is an error, you can return the EPAF to the Originator so they can correct the mistake.

Michigan Tech Best Practice: Always add a comment on why you are returning an EPAF for correction.

Option 4. More Information

This option marks the EPAF status as More Info. This status is informational only and doesn't affect the EPAF in any way. Don't use this action unless you have a system in place in your department for this status.

FYI (Acknowledge)

Now that you have reviewed the EPAF, you will want to acknowledge the EPAF. Click the Acknowledge button.

It is recommended to add your comments before taking an action on an EPAF.

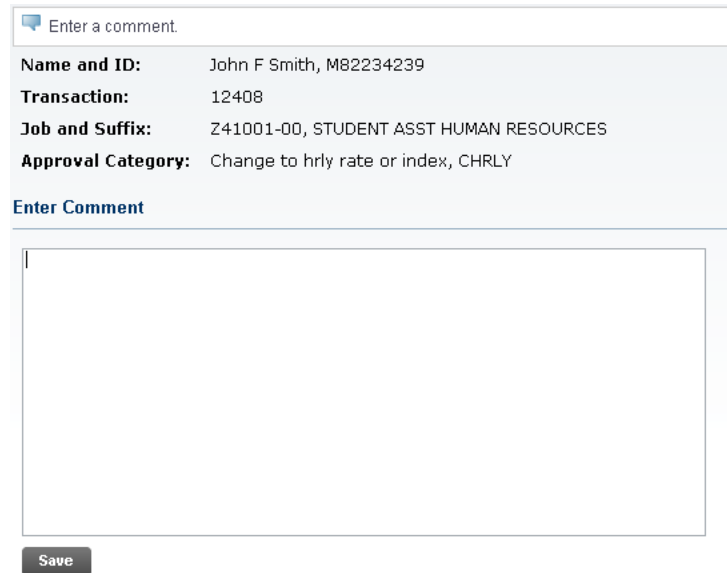


Adding a Comment

It is recommended to add comments to an EPAF to clarify any actions other than “Approve”. Comments can be read by anyone.

Step 1. Click on “Add Comment”

Step 2. Type your comment in the comment box provided. Remember, comments become part of the employee file.



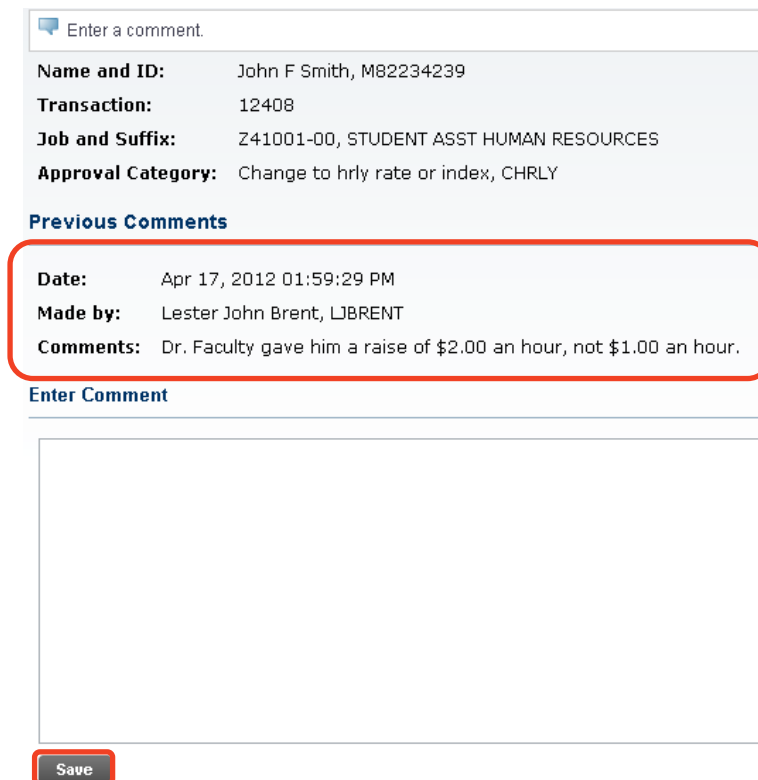
Enter a comment.

Name and ID:	John F Smith, M82234239
Transaction:	12408
Job and Suffix:	Z41001-00, STUDENT ASST HUMAN RESOURCES
Approval Category:	Change to hrly rate or index, CHRLY

Enter Comment

Save

Step 3. Click “Save”. You will see your comment displayed in the comment list.



Enter a comment.

Name and ID:	John F Smith, M82234239
Transaction:	12408
Job and Suffix:	Z41001-00, STUDENT ASST HUMAN RESOURCES
Approval Category:	Change to hrly rate or index, CHRLY

Previous Comments

Date: Apr 17, 2012 01:59:29 PM
Made by: Lester John Brent, LJBRENT
Comments: Dr. Faculty gave him a raise of \$2.00 an hour, not \$1.00 an hour.

Enter Comment

Save

Step 4. Click “EPAF Preview” to return to the EPAF screen.

Enter Comment

Save

[EPAF Approver Summary](#) ■ [EPAF Preview](#) ■ [Electronic Personnel Action Form](#)

[Return to EPAF Menu](#)

How do I Set up a Proxy?

EPAF approvers may set up proxies. Proxies have the ability to approve EPAFs in the Approver's absence. Proxies do **not** receive the daily email if there is an EPAF to approve. A proxy must complete EPAF Approver training and complete a [Banner HR Access Form](#).

Step 1. From the Main EPAF Menu, click on "EPAF Proxy Records".



Step 2. Select the approval level you wish to establish a proxy. Then, using the drop down list under Name; select the proxy user ID. Check the check box to the right of the name, then click "Save"

EPAF Proxy Records

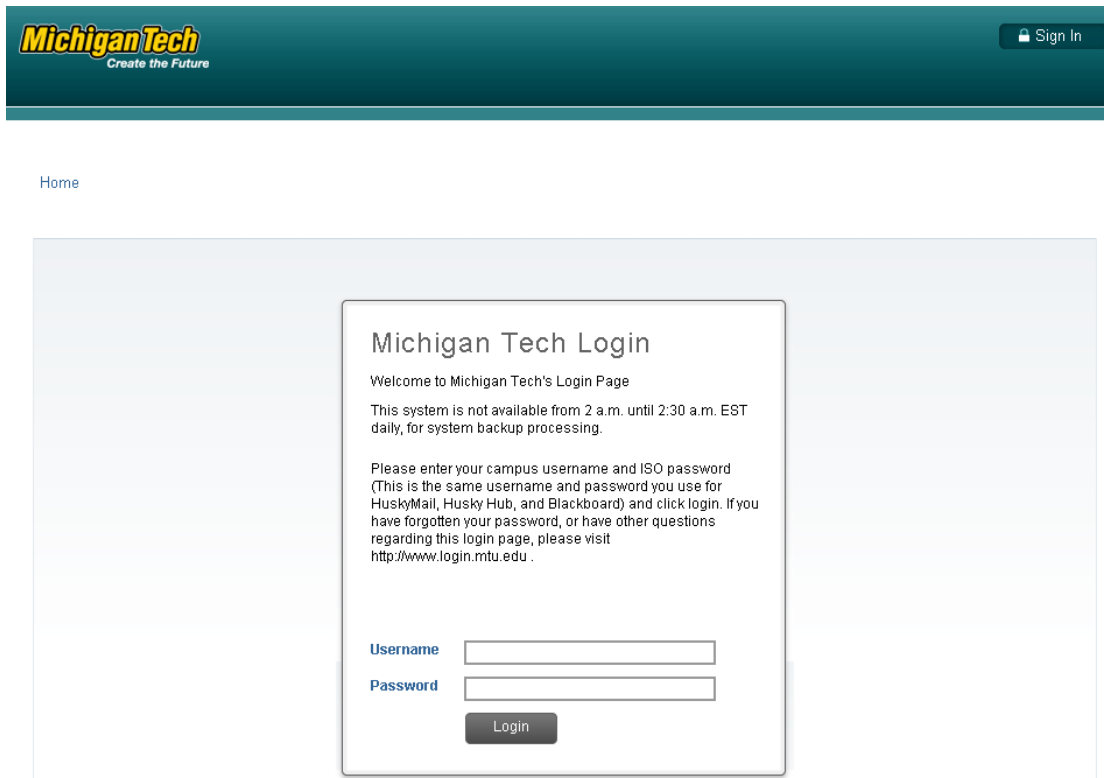
Home > EPAF Proxy Records

A screenshot of the "EPAF Proxy Records" form. At the top, there is a breadcrumb trail "Home > EPAF Proxy Records". The form contains an "Approval Level:" dropdown menu with "Dept EPAF Approver, DCOORD" selected, highlighted by a red box. Below this is a "Name" dropdown menu with "Not Selected" selected, also highlighted by a red box. To the right of the "Name" dropdown is a "Remove" button and an "Add" button. A red arrow points from the "Name" dropdown to an unchecked checkbox. Below the "Name" dropdown is a "Save" button, also highlighted by a red box. At the bottom of the form, there are two links: "EPAF Approver Summary" and "Return to EPAF Menu".

Note: To remove a proxy, select the remove box next to their name and click save.

How to Act as a Proxy

Step 1. Sign on to Employee Self Service (ESS): <https://www.banweb.mtu.edu/>



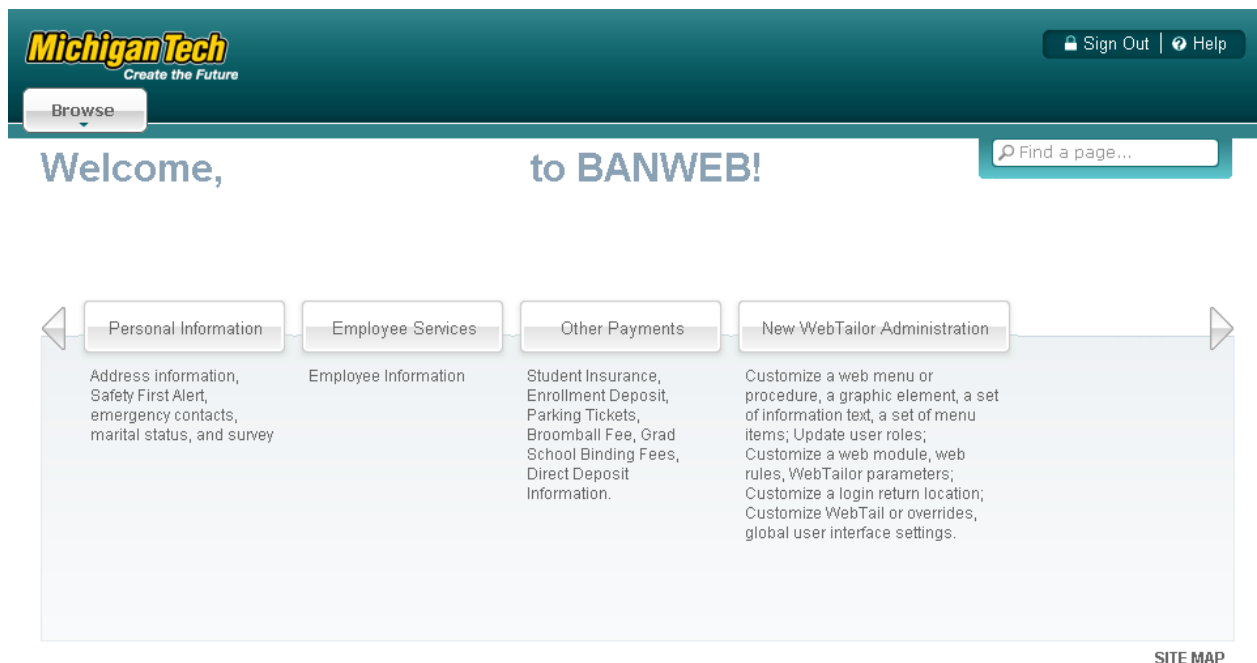
The screenshot shows the Michigan Tech login page. At the top left is the Michigan Tech logo with the tagline "Create the Future". At the top right is a "Sign In" button. Below the logo is a "Home" link. The main content area is a white box with a grey border containing the following text:

Michigan Tech Login
Welcome to Michigan Tech's Login Page
This system is not available from 2 a.m. until 2:30 a.m. EST daily, for system backup processing.

Please enter your campus username and ISO password (This is the same username and password you use for HuskyMail, Husky Hub, and Blackboard) and click login. If you have forgotten your password, or have other questions regarding this login page, please visit <http://www.login.mtu.edu>.

Username
Password

Step 2. Click on the Employee Service box.



The screenshot shows the Michigan Tech BANWEB main page. At the top left is the Michigan Tech logo with the tagline "Create the Future". At the top right are "Sign Out" and "Help" buttons. Below the logo is a "Browse" button. The main content area features a large heading "Welcome, to BANWEB!" and a search bar with the text "Find a page...". Below the heading is a horizontal navigation menu with four items:

- Personal Information**: Address information, Safety First Alert, emergency contacts, marital status, and survey
- Employee Services**: Employee Information
- Other Payments**: Student Insurance, Enrollment Deposit, Parking Tickets, Broomball Fee, Grad School Binding Fees, Direct Deposit Information.
- New WebTailor Administration**: Customize a web menu or procedure, a graphic element, a set of information text, a set of menu items; Update user roles; Customize a web module, web rules, WebTailor parameters; Customize a login return location; Customize WebTailor or overrides, global user interface settings.

At the bottom right of the page is a "SITE MAP" link.

Step 3. Click on the Electronic Personnel Action Forms box.

The screenshot shows the Michigan Tech BANWEB interface. At the top left is the Michigan Tech logo with the tagline "Create the Future". To the right are "Sign Out" and "Help" links. Below the logo is a "Browse" dropdown menu. The main heading reads "Welcome, to BANWEB!" with a search bar on the right. A breadcrumb trail shows "Home > Employee Information". Below this is a navigation bar with buttons for "Personal Information", "Employee Services", "Other Payments", and "New WebTailor Administration". The main content area is a grid of links:

Time Sheet Web Time Entry	Compensation Statement Comprehensive Overview of Salary and Benefit Costs to the employee and Michigan Tech	Electronic Personnel Action Forms EPAFs	Benefits and Deductions Retirement, health, flexible spending, miscellaneous deductions, and compensation statement
Pay Information Direct deposit allocation, earnings and deductions history, and pay stubs	Tax Forms Federal W4 and W2 information	Leave Balances Vacation, Sick, Personal, and Annual Leave	Most Recent Paystub Your most recent Michigan Tech paystub
Campus Directory Employee Directory	Non-Payroll Direct Deposits History View Direct Deposits (non-Payroll)	Non-Payroll Direct Deposit Destination View/Modify Direct Deposit Repository (non-Payroll)	Open Enrollment Click here to begin open enrollment.

Step 4. Click on "Act as a Proxy".

The screenshot shows the breadcrumb trail "Home > Employee Information > Electronic Personnel Action Forms". Below the trail is a list of links: "EPAF Approver Summary", "EPAF Proxy Records", and "Act as a Proxy". The "Act as a Proxy" link is highlighted with a red box.

Step 5. Using the Proxy For drop down, locate the approver you will be acting as a proxy then click "Go"

Proxy or Superuser or Filter Transactions

The screenshot shows the breadcrumb trail "Home > Approver Transactions Filter". Below the trail is a form with the following fields:

- Act as a proxy or a superuser and enter the following criteria to filter transactions.
- Proxy For:** A dropdown menu with "Self" selected.
- Act as a Superuser:** An unchecked checkbox.
- Submitted From Date:** A text input field with the placeholder "MM/DD/YYYY".
- Submitted To Date:** A text input field with the placeholder "MM/DD/YYYY".
- Transactions Per Page:** A dropdown menu with "25" selected.
- Go:** A red button.

Step 6. This will then take you to the EPAF Approver Summary page. Click on the name of the student employee to review and approve the EPAF.

EPAF Approver Summary

The screenshot shows the EPAF Approver Summary page. At the top, there are three tabs: 'Current', 'In My Queue', and 'History'. The 'Current' tab is selected and highlighted with a red box labeled '1'. Below the tabs is a search bar with the text 'Select the link under Name to access details of the transaction.' and a 'Queue Status' dropdown menu with options 'All', 'FYI', and 'Pending'. Below the search bar are buttons for 'New EPAF', 'Update Proxies', 'Search', and 'Proxy or Superuser or Filter Transactions'. There are also buttons for 'Select All', 'Reset', and 'Save'. Below these buttons, it says '1 - 2 of 2'. The main content is a table of EPAF Transactions. The table has columns: Name, ID, Transaction, Type of Change, Submitted Date, Effective Date, Required Action, Action, and Links. The first row shows a transaction for 'Smith, John F.' with ID 'M82234238' and Transaction '12404', with a 'Type of Change' of 'Terminate Student Job Early'. The second row shows a transaction for 'Smith, John F.' with ID 'M82234238' and Transaction '12403', with a 'Type of Change' of 'New Student Job, Active Employee - Hourly'. The 'Name' column is highlighted with a red box labeled '2', the 'Transaction' column is highlighted with a red box labeled '3', and the 'Type of Change' column is highlighted with a red box labeled '4'. Below the table, it says '1 - 2 of 2', 'Return to Top', and '**Comments Exist**'.

APPROVER SUMMARY SCREEN NOTES:

5. EPAF Approver Summary Tabs

- Current - EPAFs you have to approve.
- In My Queue – EPAFs that you will soon have to approve.
- History – EPAFs that you have approved.

6. Employee Name & Title – Click on the name to review and approve the EPAF.

7. Transaction Number – This number is used to reference this specific transaction.

Type of Change – This is the type of EPAF being processed for this employee. See [What Actions Can Be Processed](#) for more information.

Step 7. Review and take action on the EPAF. See [Reviewing an EPAF](#) and [Taking Action on an EPAF](#) for more information.