

2016

MichiganTech

Michigan Technological University
Human Resources

**[PROCESSING EMPLOYEES
USING EPAF – ORIGINATOR
HANDBOOK]**

9.15.2016

Contents

What you need before you start: EPAF Training, Complete Banner Access Form, ID Number (M #), Position Number, Timesheet Organization Code, Employee list by specified Time Sheet Org (HYOPAYG002E), Job Details (Start Date, End Date and Pay Rate), Labor Distribution (Chart of Accounts, Index Number, Account Code and Percent) and Faculty Summer EPAF calculator.

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Beginning the Process

Step 1. What you need before you start: EPAF Training, Complete Banner Access Form, M Number, Position Number, Timesheet Organization Code, Employee list by specified Time Sheet Org (HYOPAYG002E), Job Details (Start Date, End Date and Pay Rate), Labor Distribution (Chart of Accounts, Index Number, Account Code and Percent) and Faculty Summer EPAF calculator.

Step 2. Sign on to Employee Self Service (ESS): 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, HuskyHub, 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

Login

Step 3. Click the "Employee Services" tab.

The image shows the BANWEB navigation bar. At the top left is the Michigan Tech logo. At the top right are "Sign Out" and "Help" links. Below the logo is a "Browse" dropdown menu. The main navigation area says "Welcome, to BANWEB!" and includes a search box "Find a page...". Below this is a horizontal menu with three tabs: "Personal Information", "Employee Services" (highlighted with a red box), and "Other Payments". Below each tab is a list of services: "Personal Information" includes address, safety alerts, and surveys; "Employee Services" includes employee information; "Other Payments" includes student insurance, enrollment deposits, parking tickets, and direct deposit information.

Step 4. Click "Electronic Personnel Action Forms".

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!". A search bar contains the text "Find a page...". A breadcrumb trail shows "Home > Employee Information". Below this are three tabs: "Personal Information", "Employee Services", and "Other Payments". The "Employee Services" tab is active. A grid of service tiles is displayed, with "Electronic Personnel Action Forms" (EPAFs) highlighted by a red rectangular box. Other tiles include "Time Sheet", "Compensation Statement", "Benefits and Deductions", "Pay Information", "Tax Forms", "Leave Balances", "Most Recent Paystub", "Campus Directory", "Non-Payroll Direct Deposits History", "Non-Payroll Direct Deposit Destination", and "Wellness Incentive".

Step 5. Click "New EPAF".

The screenshot shows the Michigan Tech BANWEB interface for the "Electronic Personnel Action Form" page. 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 "Electronic Personnel Action Form". A breadcrumb trail shows "Home > Employee Information > Electronic Personnel Action Forms". Below this are three tabs: "Personal Information", "Employee Services", and "Other Payments". The "Employee Services" tab is active. A list of links is displayed, with "New EPAF" highlighted by a red rectangular box. Other links include "EPAF Approver Summary", "EPAF Originator Summary", "EPAF Proxy Records", and "Act as a Proxy".

Option A: Change Employee Job Index, INDEX

Use this option when the employee needs to be paid from a different Index or Account Code. This change is NOT retroactive. You will need to process a reallocation for the funds already paid.

- Step 1. Enter the employee's **M Number** in the ID field and press "Tab"; their name will automatically appear in the next field if you have entered in the correct ID.
- Step 2. Enter the employee's **Query Date** which is the effective date and must be greater than the last paid date. (see [Approval Category Definitions](#))
- Step 3. Select the correct **Approval Category** from the drop down menu. (Not sure which approval category to use? See [Approval Category Definitions](#))
- Step 4. Click "Go".


New EPAF Person Selection

Home > New EPAF Person Selection

Instructions:

- Enter the employee M number.
- Enter the Query Date (the date that the employee action starts).
- Select the type of EPAF (Approval Category) you wish to process.
- Select Go.

* - indicates a required field.

ID: * 

Query Date: MM/DD/YYYY*

Approval Category: *

[EPAF Approver Summary](#) ■ [EPAF Approver Summary](#)

[Return to EPAF Menu](#)

- Not Selected
- Not Selected
- STUDENT HOURLY EPAFS -----, HRLY
- New Student Job, Active Employee - Hourly, NHRLY
- Rehire Student to Previous Job, Active Employee - Hourly, RHRLY
- Extend Student Job End Date (Query Date = Old End Date), EXHRLY
- Change Student Job Rate - Hourly, CHRLY
- STUDENT STIPEND EPAFS -----, STIP
- New Student Job, Active Employee - Stipend, NSTIP
- Rehire Student to Previous Job, Active Employee - Stipend, RSTIP
- Change Student Job Rate - Stipend, CSTIP
- ALL STUDENT EPAFS -----, STDNT
- Change Student Job Index, SINDE
- End Student Job Early, STERM
- Test Multi Index Changes, TEST
- ALL EMPLOYEE TYPES ----- SALL
- Change Employee Job Index - All, INDEX
- End Employee Job - All, ETERM

Step 5. Select the position on the right and click “Go”.

ID: John F Smith, M82234239

Query Date: Feb 02, 2013

Approval Category: Change index, INDEX

Index & Labor Distribution, LABOR

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job	<input type="text"/>	<input type="text"/>							<input type="radio"/>
	Primary	P43020	00	Sr Programmer/Analyst	26500, Human Resources	Jan 06, 2013			Active	<input type="radio"/>

All Jobs
Go

Step 6. You have two options to change the Index and Labor Distribution:

- A. Over write the Index in the Index field and click “Default from Index”. This will cause the Account code to disappear while the correct Fund, Org and Program codes populate.

Enter the appropriate Account Code and click “Save”.

LABOR - Index & Labor Distribution, P43020.00 Sr Programmer/Analyst

Current

Effective Date: 01/06/2013

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
U	A11138	G00000	29300	P111	238					100.00		

New

Effective Date: MM/DD/YYYY

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Ov
<input type="text" value="U"/>	<input type="text" value="A11138"/>	<input type="text" value="G00000"/>	<input type="text" value="29300"/>	<input type="text" value="P111"/>	<input type="text" value="238"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="100.00"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total:										100.00	

✓ Defaulting values for Labor Distribution from the Job records.

Default from Index Save

- B. On the next distribution line, enter a U in the COA field, the new Index in the Index field, the Account Code in the Account Field, and the correct percentage in the Percent field.

Click "Save".

Scroll back down to the Index & Labor Distribution area. On the right side, a check box next to each distribution line can be seen. Select the Index you want to delete and click "Save".

Note: Unless you save the EPAF at least once, the remove checkbox will not appear.

	Percent	Encumbrance Override End Date	Remove
<input type="checkbox"/>	100.00		<input checked="" type="checkbox"/>
<input type="checkbox"/>	100.00		<input type="checkbox"/>
<input type="checkbox"/>			

- Step 7. Complete the *Routing Queue* by inserting the **User Name** for each mandatory approval level.

If the job is funded by a sponsored account you will need to add a new approval level with the appropriate grant accountant from Sponsored Programs Accounting. (Use Banner Form FZAREBL to look up the proper grant accountant.)

- Step A. If this index change is moving from a sponsored account to a non-sponsored account (Indexes starting with A, D, etc...), add the appropriate grant accountant for the original Index as an FYI.

Note: If there are multiple Indexes, please add additional Financial Managers with an action of FYI. Financial Managers only need to Acknowledge, not Approve an EPAF.

- Step 8. Click "Save".

Routing Queue

Approval Level	User Name	Required Action
220 - (ALL10) Sr Admin (Deans/Chairs/Dir)	<input type="text"/>	Approve
299 - (FM) Financial Manager	<input type="text"/>	FYI
305 - (HRAPPL) HR Apply	<input type="text"/>	Apply
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

Step 9. Give a detailed explanation of why a change is being made in the **Comment Box**.

If a change is being made to a sponsored account, list the **dollar amount** to be paid as well as the **end date** for the change.

Note: The end date is for informational purposes only. If the end date is before the end of the job, you MUST complete a second EPAF to change the Index for the remainder of the job.

Step 10. Click "Save".

Comment

All comments are stored and can be read by anyone who accesses the EPAF or Employee File.

Transaction History

Action	Date	User Name
Created:	Feb 14, 2012	Lester John Brent

Approval Types ■ Account Distribution ■ Routing Queue ■ Transaction History

Save Submit Delete

[Return to Top](#)

Step 11. Once you have double checked to make sure everything has been entered correctly, click "Submit".

Approval Types ■ Account Distribution ■ Routing Queue ■ Transaction History

Save Submit Delete

[Return to Top](#)

Step 12. Verify at the top of the EPAF to see whether it was submitted successfully.

✔ The transaction has been successfully submitted.

[New EPAF](#) | [EPAF Originator Summary](#)

Instructions:

- Update or add information needed to process this EPAF.
- If all information is correct, click "Submit" to send the EPAF for approval.

For more information on how to process EPAFs, please use the [Originator's Handbook](#).

Note: Make sure you have saved the EPAF if you have made any changes before submitting it.

Name and ID:	John F Smith, M82234239	Job and Suffix:	P43020-00, Sr Programmer/Analyst
Transaction:	12709	Query Date:	Feb 02, 2013
Transaction Status:	Pending	Last Paid Date:	
Approval Category:	Change Employee Index - All, INDEX		

Step 13. The EPAF you submitted is now located in your History on the "EPAF Originator Summary" screen.

EPAF Originator Summary

[Home](#) > EPAF Originator Summary

Current **History**

Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

Transaction Status:

Option B: Ending an Employee Job, ETERM

This option is used when an employee has resigned or retired, if you are ending a secondary position, or if you are ending a temporary or fixed term position before the current end date.

- Step 1. Enter the employee's **M Number** in the ID field and press "Tab"; their name will automatically appear in the next field if you have entered the correct M Number.
- Step 2. Enter the employee's **Query Date** which is the effective date and must be greater than or equal to the last paid date. (see [Approval Category Definitions](#))
- Step 3. Select the correct **Approval Category** from the drop down menu: (Not sure which approval category to use? [Approval Category Definitions](#))
- Step 4. Click "Go".

New EPAF Person Selection

Home > New EPAF Person Selection

Instructions:

- Enter the employee M number.
- Enter the Query Date (the date that the employee action starts).
- Select the type of EPAF (Approval Category) you wish to process.
- Select Go.

* - indicates a required field.

ID: *

Query Date: MM/DD/YYYY*

Approval Category: *

[EPAF Approver Summary](#) [EPAF Approver Summary](#)

[Return to EPAF Menu](#)

Not Selected

Not Selected

----- STUDENT HOURLY EPAFS -----, HRLY
New Student Job, Active Employee - Hourly, NHRLY
Rehire Student to Previous Job, Active Employee - Hourly, RHRLY
Extend Student Job End Date (Query Date = Old End Date), EXHRLY
Change Student Job Rate - Hourly, CHRLY
----- STUDENT STIPEND EPAFS -----, STIP
New Student Job, Active Employee - Stipend, NSTIP
Rehire Student to Previous Job, Active Employee - Stipend, RSTIP
Change Student Job Rate - Stipend, CSTIP
----- ALL STUDENT EPAFS -----, STDNT
Change Student Job Index, SINDE
End Student Job Early, STERM
Test Multi Index Changes, TEST
----- ALL EMPLOYEE TYPES -----, SALL
Change Employee Job Index - All, INDE
End Employee Job - All, ETERM

Step 5. In the right edge of the *Change Job Details* section, select the position and click "Go".

Instructions:

- New Job: Type the position number and suffix into the fields below. The employee should have never had this position and suffix before.
- All other EPAFs: Select the position and suffix from the list. You will need to click "All Jobs" if you need to select a previous job.
- Click "Go".

Notes: Do not click "Next Approval Type".

ID: John F Smith, M82234239
Query Date: Dec 30, 2012
Approval Category: End Employee Job, ETERM

End Employee Job Details, ETERM

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job	<input type="text"/>	<input type="text"/>							<input type="radio"/>
	Primary	P43020	00	Sr Programmer/Analyst	26500, Human Resources	Jan 06, 2013			Active	<input checked="" type="radio"/>

Step 6. If the job end date is retroactive (less than last paid date), then you must enter the retroactive end date for the job in the **Personnel Date**.

ETERM - End Employee Job Details, P43020-00 Sr Programmer/Analyst

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)		<input type="text" value="12/30/2012"/>
Job Status: *(Not Enterable)		<input type="text" value="T"/>
Personnel Date: MM/DD/YYYY		<input style="border: 2px solid red; background-color: yellow; width: 100px; height: 20px;" type="text"/>
Job Change Reason: *(Not Enterable)		<input type="text" value="TERM"/>

Step 7. Complete the *Routing Queue* by inserting the **User Name** for each mandatory approval level.

If the position is funded by a sponsored account you will need to add a new approval level with the appropriate grant accountant from Sponsored Programs Accounting with an action of FYI. (Use Banner Form FZAREBL to look up the proper grant accountant.)

Note: If there are multiple Indexes, please add additional Financial Managers with an action of FYI. FM's do not need to approve, only Acknowledge.

Step 7. Click "Save".

Routing Queue

Approval Level	User Name	Required Action
200 - (HRREV) HR Review	<input type="text"/>	Approve
203 - (BREV) Benefits Review	<input type="text"/>	FYI
220 - (ALL10) Sr Admin (Deans/Chairs/Dir)	<input type="text"/>	FYI
299 - (FM) Financial Manager	<input type="text"/>	FYI
305 - (HRAPPL) HR Apply	<input type="text"/>	Apply
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

Step 8. Please give a short explanation of why the employee job is ending. Remember that the comments are part of the employee record.

For example, if this is a resignation, leave the comment Resignation. If the job ends early due to lack of funding, leave the comment Lack of Funding.

Step 9. Click "Save".

Comment

All comments are stored and can be read by anyone who accesses the EPAF or Employee File.

Transaction History

Action	Date	User Name
Created:	Feb 14, 2012	Lester John Brent

[Approval Types](#) ■ [Account Distribution](#) ■ [Routing Queue](#) ■ [Transaction History](#)

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Step 10. Once you have double checked to make sure everything has been entered correctly, click "Submit".

Approval Types ■ Account Distribution ■ Routing Queue ■ Transaction History


Save **Submit** Delete

[Return to Top](#)

Step 11. Verify at the top of the EPAF to see whether it was submitted successfully.

 The transaction has been successfully submitted.

[New EPAF | EPAF Originator Summary](#)

 **Instructions:**

- Update or add information needed to process this EPAF.
- If all information is correct, click "Submit" to send the EPAF for approval.

For more information on how to process EPAFs, please use the [Originator's Handbook](#).
Note: Make sure you have saved the EPAF if you have made any changes before submitting it.

Name and ID:	John F Smith, M82234239	Job and Suffix:	P43020-00, Sr Programmer/Analyst
Transaction:	12736	Query Date:	Apr 01, 2013
Transaction Status:	Pending	Last Paid Date:	
Approval Category:	End Employee Job - All, ETERM		

Step 12. Submit an employee resignation letter or other supporting documentation if applicable. (See [Uploading EPAF Supporting Documentation](#))

Option C: Change Employee Time Entry Information, CETIME

This option is used for updating time entry information for a current employee. You must only use time entry methods currently available to your department. For more information on moving to Department Time Entry or Web Time Entry, please contact Payroll Services.

- Step 1. Enter the employee's **M Number** in the ID field and press "Tab"; their name will automatically appear in the next field if you have entered in the correct ID.
- Step 2. Enter the employee's **Query Date** which is the effective date and must be greater than the last paid date. (see [Approval Category Definitions](#))
- Step 3. Select the correct **Approval Category** from the drop down menu. (Not sure which Approval Category to use? See [Which Approval Category Should be used?](#) Or [Approval Category Definitions](#))
- Step 4. Click "Go".

New EPAF Person Selection

Home > New EPAF Person Selection

Instructions:

- Enter the employee M number.
- Enter the Query Date (the date that the employee action starts).
- Select the type of EPAF (Approval Category) you wish to process.
- Select Go.

* - indicates a required field.

ID: *

Query Date: MM/DD/YYYY*

Approval Category: *

EPAF Approver Summary

Change Employee Time Entry Information, CETIME
Activate Student Employee with Previous Job - Hourly, ARHRLY
New Student Job, Active Employee - Hourly, NHRLY
Rehire Student to Previous Job, Active Employee - Hourly, RHRLY
Extend Student Job End Date (Query Date = Old End Date), EXHRLY
Change Student Job Rate - Hourly, CHRLY
----- STUDENT STIPEND EPAFS -----, STIP
Create New Student Employee - Stipend, CNSTIP
Activate Student Employee with New Job - Stipend, ANSTIP
Activate Student Employee with Previous Job - Stipend, ARSTIP
New Student Job, Active Employee - Stipend, NSTIP
Rehire Student to Previous Job, Active Employee - Stipend, RSTIP
Change Student Job Rate - Stipend, CSTIP
----- ALL STUDENT EPAFS -----, STDNT
Change Student Job Index, SINDEXT
End Student Job Early, STERM
Change Student Time Entry Information, CSTIM
----- FACULTY and STAFF EPAFS -----, NONSTD
Change Employee Job Index - All, INDEX
End Employee Job - All, ETERM
Change Employee Time Entry Information, CETIME

Step 5. Select the active job on the right and click “Go”.

New EPAF Job Selection

Home > New EPAF Job Selection

Instructions:

- New Job: Type the position number and suffix into the fields below. The employee should have never had this position and suffix before.
- All other EPAFs: Select the position and suffix from the list. You will need to click "All Jobs" if you need to select a previous job.
- Click "Go".

Notes: Do not click "Next Approval Type".

ID: John F Smith, M82234239
Query Date: Oct 01, 2012
Approval Category: Change Employee Time Entry, CETIME

Time Entry Information, TIME

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job	<input type="text"/>	<input type="text"/>							<input checked="" type="radio"/>
	Primary	P41024	00	Emplmt Svcs Business Analyst	26500, Human Resources	Aug 01, 2012			Active	<input type="radio"/>

Step 6. Fill in the **Timesheet Org.** field if changing.

*Note: The **Timesheet Org.** is a six digit number that may or may not be the same as your Home Org number. The **Timesheet Org.** number filters and routes timesheets to the proper areas within the University.*

Step 7. Select the **Time Entry Method** if it is changing to another type from one of the following options:

Option A. **Payroll Time Entry** – Use this option if you submit time via a paper timesheet.

Option B. **Employee Time Entry via Web** – Use this option if the employee submits time through Banweb/ESS.

Option C. **Department Time Entry with Approvals** – Use this option if your department submits time through Banner for this employee.

Note: The options Remove and Third Party with Approvals are not valid options with our current configuration. Do not use these options.

****Steps 8 – 11 are for WEB TIME ENTRY ONLY****

Step 8. (Web Time Entry Only) Change the **Time In/Out Ind** to “Yes” if the employee will need to put in their start and end times onto their **Web Time Entry** timesheet instead of reporting hours worked in a day.

*Note: This field defaults to “No” which will require the employee to report the hours worked in a day. This field only applies to **Web Time Entry**.*

Step 9. (Web Time Entry Only) Type the M# of the employee who will be approving the Web Time Entry timesheet of the employee into the **Approver ID** field.

Step 10. (Web Time Entry Only) Type the Position Number of the employee who will be approving the Web Time Entry timesheet of the employee into the **Approver Position** field.

Step 11. (Web Time Entry Only) Type the Position Suffix of the employee who will be approving the Web Time Entry timesheet of the employee into the **Approver Suffix** field.

Note: You must specify the M#, Position Number and Suffix of the employee who will be approving the Web Time Entry timesheet of the employee. This information is on the payroll roster.

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	08/01/2012	<input type="text" value="10/01/2012"/>
Timesheet Orgn:	26500	<input type="text"/>
Time Entry Method:	Employee Time Entry via Web	<input type="text" value="Not Selected"/>
Time In/Out Ind:	No	<input type="text" value="No"/>
Approver ID:		<input type="text"/>
Approver Posn:		<input type="text"/>
Approver Suffix:		<input type="text"/>

Step 12. Complete the *Routing Queue* by choosing the **Approval Level**, inserting a **User Name**, and selecting a **Required Action** (*Approve or FYI*).

Step 13. Click “Save”.

Routing Queue

Approval Level	User Name	Required Action
<input type="text" value="300 - (PAYROL) Payroll Staff"/>	<input type="text" value="TMWATER"/> Tammie M Vater	<input type="text" value="Apply"/>
<input type="text" value="Not Selected"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="Not Selected"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="20 - (DCOORD) Dept EPAF Approver"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="150 - (GRADSC) Graduate School"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="160 - (SPACTG) Spon Prog Acct Grad Student"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="160 - (SPACUG) Spon Prog Acct UnderGrad"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="300 - (PAYROL) Payroll Staff"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="500 - (HRIS) HRIS"/>	<input type="text"/>	<input type="text" value="Not Selected"/>

Step 14. Please give a detailed explanation of why a change is being made in the **Comment Box**.

Step 15. Click "Save".

Comment

All comments are stored and can be read by anyone who accesses the EPAF or Employee File.

Transaction History

Action	Date	User Name
Created:	Feb 14, 2012	Lester John Brent

[Approval Types](#) ■ [Account Distribution](#) ■ [Routing Queue](#) ■ [Transaction History](#)

[Save](#) [Submit](#) [Delete](#)

Step 16. Once you have double checked to make sure everything has been entered correctly, click "Submit".

Transaction History

Action	Date	User Name
Created:	Feb 14, 2012	Lester John Brent

[Approval Types](#) ■ [Account Distribution](#) ■ [Routing Queue](#) ■ [Transaction History](#)

[Save](#) [Submit](#) [Delete](#)

[Return to Top](#)

Step 17. Verify at the top of the EPAF to see whether it was submitted successfully.

[New EPAF | EPAF Originator Summary](#)

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID:	John F Smith, M82234239	Job and Suffix:	S25001-00, GADE/GADI GRAD SCHOOL
Transaction:	12268	Query Date:	Apr 01, 2012
Transaction Status:	Approved	Last Paid Date:	

Option D: Merit Lump Sum, MERIT

This option is used in conjunction with Salary Planner. This EPAF will provide the selected employee with a one-time lump sum merit increase. When this EPAF is created, the lump sum amount will become visible within Salary Planner.

- Step 1. Enter the employee's **M Number** in the "ID" field and press "Tab"; their name will automatically appear in the next field if you have entered the correct M Number.
- Step 2. Enter the **Query Date** provided within the Salary Planner communication. Be sure to follow the date format of MM/DD/YYYY.
- Step 3. Select the **MERIT** "Approval Category" from the drop down menu.
- Step 4. Click the "Go" button.

New EPAF Person Selection


Home > New EPAF Person Selection

Instructions:

- Enter the employee M number.
- Enter the Query Date (the date that the employee action starts).
- Select the type of EPAF (Approval Category) you wish to process.
- Click "Go".

Note: It is helpful to have looked up the employee in SZASTEM and have a current Employee List report before you begin.

* - indicates a required field.

ID: * 

Query Date: MM/DD/YYYY*

Approval Category: *

Not Selected
----- FACULTY and STAFF EPAFS -----, NONSTD
Merit Lump Sum, MERIT

Step 5. Enter the employee's **Position Number** in the "Position" field next to the "New Job" field. The employee's **Position Number** can be found on the departmental roster report or it can be found within Salary Planner. The **Position Number** will begin with "99xxxx" or "V9xxxx".

Step 6. Enter the two-digit suffix in the "Suffix" field next to the "Position" field, using the last two digits of the current fiscal year (FY2017 = 17).

Step 7. Click the "Go" button.

ID: John F Smith, M27667925

Query Date: Dec 20, 2015

Approval Category: Merit Lump Sum, MERIT

Merit Lump Sum Information, MERIT

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job									<input type="radio"/>
	Primary	999495	00	Business Analyst	26500, Human Resources	Aug 16, 2015		Aug 29, 2015	Active	<input type="radio"/>

All Jobs

Next Approval Type

Go

Step 8. Fill in the Merit Lump Sum Information section. The "Salary" field and the "Timesheet Org." field will be the only two fields to complete in this section. All other information in this section can be disregarded. These two fields will be marked with a red asterisk.

The "Salary" field will be the total Merit Lump Sum amount desired for the employee. Enter the employee's regular time sheet organization number in the "Timesheet Org." field. This number can be found on the departmental roster report.

* - indicates a required field.

MERIT - Merit Lump Sum Information, 999495-ML Business Analyst

Item	Current Value	New Value
Salary: *		<input type="text"/>
Timesheet Orgn: *		<input type="text"/>
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		<input type="text" value="12/20/2015"/>
Job Begin Date: MM/DD/YYYY(Not Enterable)		<input type="text" value="12/20/2015"/>
Contract Type: (Not Enterable)		<input type="text" value="S"/>
Job Status: (Not Enterable)		<input type="text" value="A"/>
Title: (Not Enterable)		<input type="text" value="Merit Lump Sum"/>
FTE: (Not Enterable)		<input type="text" value="0"/>
Employee Class Code: (Not Enterable)		<input type="text" value="ML"/>
Job Change Reason: (Not Enterable)		<input type="text" value="MERTL"/>

Step 9. Update the Index & Labor Distribution section. If the **Index is correct**, update the **Account** code in the "Account" field to the appropriate code for the Merit Lump Sum (See Chart 1). Click the "Save" button and move to Step 10.

Employee Group	Regular Position's Account Code	Merit Lump Sum Account Code
Faculty	Starts with "P0xxx"	P017
Exempt Staff	Starts with "P1xxx"	P117
Non-Exempt Staff	Starts with "P3xxx"	P317

Chart 1: Merit Lump Sum Account Codes

LABOR - Index & Labor Distribution, 999495-ML Business Analyst

Current
Effective Date: 12/20/2015

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
U	A11805	G00000	26501	P111	280					100.00		
										Total:	100.00	

Default from Index Save

If the **Index is incorrect**, change the **Percent** in the "Percent" field to zero. On the next available labor distribution line, type a **U** in the "COA" field. Next, type in the desired **Index** to charge in the "Index" field. Fill in the "Percent" field with the appropriate **Percent**. Repeat if needed until there is a total of 100% (note: the total percent does not change as you input; this will update when the "Default from Index" button is selected). Click the "Default from Index" button.

LABOR - Index & Labor Distribution, 999495-ML Business Analyst

Current
Effective Date: 12/20/2015

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance
U	A11805	G00000	26501	P111	280					0	
U	A11823									50	
U	A11850									50	
										Total:	100.00

Default from Index Save

Clicking on the "Default from Index" button will always cause an error. You are now at the top of the webpage again. Scroll back down to the Index & Labor Distribution section.

Error(s) occurred.

[New EPAF](#) | [EPAF Originator Summary](#)

Instructions:

- Complete the fields necessary to process this EPAF.
- Click "Save" at any time to save your work.
- Once you have completed the EPAF and saved your work, click "Submit".

For more information on how to process EPAFs, please use the [Originator's Handbook](#).

Note: You must save the EPAF before you will be able to submit it for approval.

Name and ID: John F Smith, M27667925

Transaction: **Query Date:** Dec 20, 2015

Transaction Status:

Approval Category: Merit Lump Sum, MERIT

Save

[Approval Types](#) ■ [Account Distribution](#) ■ [Errors](#) ■ [Routing Queue](#) ■ [Comments](#) ■ [Transaction History](#)

[Jump to Bottom](#)

Errors and Warning Messages

Type	Message Type	Description
Index & Labor Distribution	ERROR	Account code is required.
Index & Labor Distribution	ERROR	Account code is required.
Index & Labor Distribution	ERROR	Account code is required.

Merit Step 9 (Index is Incorrect)

You will notice that all of the **Account** codes are missing. Enter in the appropriate **Account** code in ALL of the “Account” code fields that have an Index (See [Chart 1](#)). Click the “Save” button.

LABOR - Index & Labor Distribution, 999495-ML Business Analyst

Current
Effective Date: 12/20/2015

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
U	A11805	G00000	26501		280					.00		
U	A11823	G00000	40010		265					50.00		
U	A11850	G00000	41101		271					50.00		
										Total:	100.00	

Default from Index **Save**

Step 10. In the Index & Labor Distribution section, place a check mark in all of the “Remove” boxes associated with Index lines with zero percent.

LABOR - Index & Labor Distribution, 999495-ML Business Analyst

Current
Effective Date: 12/20/2015

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date	Remove
U	A11805	G00000								.00			<input checked="" type="checkbox"/>
U	A11823	G00000								50.00			<input type="checkbox"/>
U	A11850	G00000								50.00			<input type="checkbox"/>
													<input type="checkbox"/>
													<input type="checkbox"/>

Step 11. In the Routing Queue section, insert the proper **User Name** in the “User Name” field next to the “Approval Level” field. If you are unsure of which **User Name** to enter, you can search for the **User Name** by selecting the search magnifying glass next to the “User Name” field.

Routing Queue

Approval Level	User Name	Required Action
259 - (MERIT) MERIT Lump Sum Approval	<input type="text"/>	Approve
299 - (FINMGR) Financial Managers	<input type="text"/>	FYI
400 - (EMPLOY) HR Employment Services	<input type="text"/>	Apply
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

Save

The Routing Queue section will default three “Approval Levels” that are the minimum requirement for this type of EPAF. One of these “Approval Levels” is for the Financial Manager(s) of the Index(es) in the “Index & Labor Distribution” section. If there is more than one Financial Manager involved, go to the next available line within the “Routing Queue” section (marked as **Not Selected**, and use the drop down function to add in an additional **Financial Managers** “Approval Level”.

Routing Queue

Approval Level	User Name
259 - (MERIT) MERIT Lump Sum Approval	DDRE
299 - (FINMGR) Financial Managers	RLHIL
400 - (EMPLOY) HR Employment Services	MWGA
Not Selected	
Not Selected	
2 - (PROXY) Proxy Level	
20 - (DCOORD) Dept EPAF Approver	
21 - (LOSPV) Level 1 Supervisors	
22 - (LTSPV) Level 2 Supervisors	
150 - (GRADSC) Graduate School	
160 - (SPACTG) Spon Prog Acct Grad Student	
160 - (SPACUG) Spon Prog Acct UnderGrad	
200 - (HRREV) HR Employment Review	
203 - (BREV) Benefits Review	
204 - (PREV) Payroll Review	
220 - (SRADMN) Sr Admin (Deans/Chairs/Dir)	
230 - (AAO) Affirmative Action	
240 - (SPA) Sponsored Programs Accounting	
259 - (MERIT) MERIT Lump Sum Approval	
260 - (EXEC) Executive Team	
295 - (PAYSTF) Payroll Staff	
299 - (FINMGR) Financial Managers	
300 - (ACADHR) Academic HR	
300 - (HRAPPL) HR Apply	

Merit Step 11 (add additional Financial Manager)

Next, add in the proper **User Name**. Finally, move to the “Required Actions” field and use the drop down function to change from **Not Selected** to **FYI**. Repeat until all Financial Managers involved are added to the “Routing Queue”.

	Required Action
d	Approve
Hiller	FYI
ne Gaddis	Apply
ala	Not Selected
	Not Selected
	Approve
	FYI
	Apply
	Superuser Submit

Step 12. Click the “Save” button.

Step 13. At this point, all of the necessary information has been completed.

Please review all of the entries made for this EPAF. If any changes need to be made, proceed to update the necessary field(s).

If any fields within the EPAF have been changed, you must “Save” the EPAF again prior to submission.

Once satisfied with the entries, click the “Submit” button to finish the EPAF. This will update the EPAF to a status of Pending. The EPAF is now pending the approval of the person chosen in the MERIT Lump Sum Approval level.

If the EPAF needs to be reviewed after it has been submitted, you can find this EPAF under the “History” tab of the “EPAF Originator Summary” menu.

Option E: Faculty summer teaching, TEACH

This option/approval category (TEACH) is used to set up the initial assignment for Faculty Summer Teaching.

The pooled position number of **F70033** is used for ALL Faculty Summer Teaching.

Use of the suffix numbers will identify multiple assignments for one employee.

- Step 1. Enter the employee's **M Number** in the "ID" field and press "Tab"; their name will automatically appear in the next field if you have entered the correct M Number.
- Step 2. Enter the **Query Date** which is the begin date of the assignment. Be sure to follow the date format of MM/DD/YYYY.
- Step 3. Select the **TEACH** "Approval Category" from the drop down menu.
- Step 4. Click the "Go" button.

Instructions:

- Enter the employee M number.
- Enter the Query Date (the date that the employee action starts).
- Select the type of EPAF (Approval Category) you wish to process.
- Click "Go".

Steps 1-4

Note: It is helpful to have looked up the employee in SZASTEM and have a current Employee List report before you begin.

* - indicates a required field.

ID: * M74727795 Shelley K Winter 🔍

Query Date: MM/DD/YYYY * 07/01/2016

Approval Category: * Summer Teaching, TEACH ▼

Go

- Step 5. Click on "All Jobs" to verify if the employee has had a summer teaching assignment already applied to the database so that you do not reuse the **Position Number/Suffix** combination.

Approval Category: Summer teaching, TEACH

New Job Record, NEWJOB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									⊕
	Primary	997902	00	Associate Professor	22500, Electrical and Computer Engineering	Aug 16, 2015			Active	⊖

All Jobs

Next Approval Type **Go**

Step 5

- Step 6. Enter the **Position Number F70033** in the “Position” field next to the “New Job” field.
- Step 7. Enter the **Suffix (00, zero zero, for first assignment; sequential numbers of 01, 02, etc. as the summer progresses)** in the “Suffix” field next to the “Position” field.
- Step 8. Click the “Go” button.

Query Date: Jul 01, 2016
 Approval Category: Summer Teaching, TEACH

Steps 6-8

New Job Record, NEWJOB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	F70033	00	Faculty Summer Teaching	26506, HR - Student Payroll Clearing					
	Primary	997902	00	Associate Professor	22500, Electrical and Computer Engineering	Aug 16, 2015			Active	<input type="radio"/>

All Jobs
 Next Approval Type

- Step 9. Enter the New Job details that are required as identified by the **red asterisk ***.
 The “Salary” field represents the amount to be paid for the assignment. The “Factor”, “Pays” and “Hours per Pay” are found by use of the Faculty Summer EPAF calculator. The “Timesheet Orgn” should follow the employee’s regular time sheet organization for their primary position (can be found on the departmental roster).
- The personnel change date should be left blank UNLESS this assignment is less than 1.0 factors. If the assignment is less than 1.0 factors, then assistance is needed by calling 7-2716 or emailing epaf@mtu.edu.

* - indicates a required field.

NEWJOB - New Job Record, F70033-00 Faculty Summer Teaching **Step 9**

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)		07/01/2016
Personnel Date: MM/DD/YYYY		
Salary: *		6000
Factor: *		3.1
Pays: *		3.1
Hours per Pay: *		36.78
Timesheet Orgn: *		26500
Job Change Reason: (Not Enterable)		SUMER
Contract Type: (Not Enterable)		S
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		07/01/2016

Step 10. Enter the assignment end date.

The personnel change date should be left blank UNLESS this assignment is less than 1.0 factor.

If the assignment is less than 1.0 factor, then assistance is needed by calling 7-2716 or emailing epaf@mtu.edu.

JOBEND - Job End Date, F70033-00 Faculty Summer Teaching

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		08/13/2016
Personnel Date: MM/DD/YYYY		
Job Status: (Not Enterable)		T
Job Change Reason: (Not Enterable)		TERM

Step 10

Step 11. Enter the Default Earnings Info effective date (begin date of assignment-query date used from Step 2)

Always Select "001" in the Earnings and enter the "Hours per Pay". The "Hours per Pay" must equal the "Hours per Pay" in Step 9 (From the Faculty Summer EPAF calculator).

EARNGS - Default Earnings Code & Hours, F70033-00 Faculty Summer Teaching

Step 11

Current						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
New Value						
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours			
07/01/2016	001, Regular Rate	36.78				
	Not Selected					
	Not Selected					
	Not Selected					

Save

Step 12. Update the Index & Labor Distribution section.
 Enter your index over the fault index of S79580. Click the “Default from Index” button.

LABOR - Index & Labor Distribution, F70033-00 Faculty Summer Teaching

Current

Effective Date: 07/01/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
New												
Effective Date: MM/DD/YYYY 07/01/2016												
Q	U	S79580	C20072	26506	Q	P033	700				100.00	
Q					Q							
Q					Q							
Q					Q							
Q					Q							
										Total:	100.00	

Step 12

Default from Index Save

Clicking on the “Default from Index” button will always cause an error. You are now at the top of the web page again. Scroll back down to the Index & Labor Distribution section.

Error(s) occurred.

[New EPAF | EPAF Originator Summary](#)

Instructions:

- Update or add information needed to process this EPAF.
- If all information is correct, click "Submit" to send the EPAF for approval.

For more information on how to process EPAFs, please use the [Originator's Handbook](#).
 Note: Make sure you have saved the EPAF if you have made any changes before submitting it.

Name and ID: Shelley K Winter, M74727795
Transaction: 142704 **Query Date:** Jul 01, 2016
Transaction Status: Waiting
Approval Category: Summer Teaching, TEACH

Save Submit Delete

Approval Types ■ Default Earnings ■ Account Distribution ■ Errors ■ Routing Queue ■ Comments ■ Transaction

[Jump to Bottom](#)

Errors and Warning Messages

Type	Message Type	Description
Index & Labor Distribution	ERROR	Account code is required.
Index & Labor Distribution	ERROR	Account code is required.

Step 13. You will notice that all of the **Account** codes are missing.

Enter in the **P033** in the **Account Code** in ALL of the “Account” code fields that have an Index.

Click the “Save” button.

LABOR - Index & Labor Distribution, F70033-0 Faculty Summer Teaching

Current
Effective Date: 07/01/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
Q U	Q A11805	G000000	26501	Q P033	280						100.00		
Q	Q			Q									
Q	Q			Q									
Q	Q			Q									
Q	Q			Q									
Q	Q			Q									
										Total:	100.00		

Default from Index Save

Step 13

Step 14. In the Index & Labor Distribution section, place a check mark in all of the “Remove” boxes associated with Index lines with zero percent.

Click “Save”. You will now be at the top of the web page.

LABOR - Index & Labor Distribution, F70033-00 Faculty Summer Teaching

Current
Effective Date: 07/01/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date	Remove
Q U	Q A11805	G000000	26501	Q P033	280					100.00				<input type="checkbox"/>
Q U	Q S79580	C20072	26506	Q P033	700					.00				<input checked="" type="checkbox"/>
Q	Q			Q										<input type="checkbox"/>
Q	Q			Q										<input type="checkbox"/>
Q	Q			Q										<input type="checkbox"/>
Q	Q			Q										<input type="checkbox"/>
										Total:	100.00			

Default from Index Save

Step 14

Step 15. In the Routing Queue section, insert the proper **User Name** in the “User Name” field next to the “Approval Level” field. If you are unsure of which **User Name** to enter, you can search for the **User Name** by selecting the search magnifying glass next to the “User Name” field.

Approval Level	User Name	Required Action
100 - (CHAIR) Chairs / Deans	<input type="text"/>	Approve
200 - (DEAN) Deans and Provost	<input type="text"/>	Approve
300 - (ACADHR) Academic HR	<input type="text"/>	Approve
500 - (HRAPPL) HR Apply	<input type="text"/>	Apply
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

Save

The Routing Queue section will default five “Approval Levels” that are the minimum requirement for this type of EPAF.

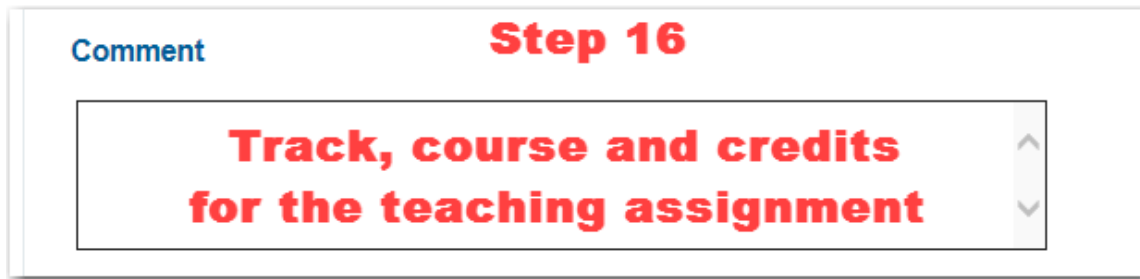
You will need to repeat this step for the Sponsored Programs Accounting level with the required action of **APPROVE** for the following indexes: E2’s, E34’s, E35’s, E4’s and E5’s

Click the “Save” button.

Approval Level

- 100 - (CHAIR) Chairs / Deans
- 200 - (DEAN) Deans and Provost
- 299 - (FINMGR) Financial Managers
- 300 - (ACADHR) Academic HR
- 500 - (HRAPPL) HR Apply
- 400 - (SPA) Sponsored Programs Accounting
- 20 - (DCOORD) Dept EPAF Approver
- 21 - (LOSPV) Level 1 Supervisors
- 22 - (LTSPV) Level 2 Supervisors
- 100 - (CHAIR) Chairs / Deans
- 150 - (GRADSC) Graduate School
- 160 - (SPACTG) Spon Prog Acct Grad Student
- 160 - (SPACUG) Spon Prog Acct UnderGrad
- 200 - (DEAN) Deans and Provost
- 200 - (HRREV) HR Employment Review
- 203 - (BREV) Benefits Review
- 204 - (PREV) Payroll Review
- 220 - (SRADMN) Sr Admin (Deans/Chairs/Dir)
- 259 - (MERIT) MERIT Lum Sum Approval
- 260 - (EXEC) Executive Team
- 295 - (PAYSTF) Payroll Staff
- 299 - (FINMGR) Financial Managers
- 300 - (ACADHR) Academic HR
- 300 - (PAYROL) Payroll Staff
- 400 - (EMPLOY) HR Employment Services
- 400 - (SPA) Sponsored Programs Accounting

Step 16. Enter in the specific information for the teaching assignment including the track, course, and credit # for each course in the comment box.



The screenshot shows a comment box with a light gray background. On the left, the word "Comment" is written in blue. On the right, "Step 16" is written in red. In the center, there is a white rectangular area with a thin black border containing the text "Track, course and credits for the teaching assignment" in red. To the right of this text are two small, light gray arrow icons, one pointing up and one pointing down.

At this point, all of the necessary information has been completed.

Please review all of the entries made for this EPAF. If any changes need to be made, proceed to update the necessary field(s).

If any fields within the EPAF have been changed, you must click "Save" again prior to submission.

Once satisfied with the entries, click the "Submit" button to complete the EPAF. This will update the EPAF to a status of Pending. The EPAF is now pending the approval of the 1st level identified in the routing queue.

To view the EPAF you just submitted, click "EPAF Originator Summary", and click on the "History" tab. EPAF's can be viewed in your history tab for six months if you need to reference the information submitted.

Option F: Faculty summer research, RESCH

This option/approval category (RESCH) is used to set up the initial assignment for Faculty Summer Research.

The pooled position number of **F70012** is used for ALL Faculty Summer Research. Use of the suffix numbers will identify multiple assignments for one employee.

- Step 1. Enter the employee's **M Number** in the "ID" field and press "Tab"; their name will automatically appear in the next field if you have entered the correct M Number.
- Step 2. Enter the **Query Date** which is the begin date of the assignment. Be sure to follow the date format of MM/DD/YYYY.
- Step 3. Select the **RESCH** "Approval Category" from the drop down menu.
- Step 4. Click the "Go" button.

Instructions:

Steps 1-4

- Enter the employee M number.
- Enter the Query Date (the date that the employee action starts).
- Select the type of EPAF (Approval Category) you wish to process.
- Click "Go".

Note: It is helpful to have looked up the employee in SZASTEM and have a current Employee List report before you begin.

* - indicates a required field.

ID: * M74727795 Shelley K Winter

Query Date: MM/DD/YYYY* 07/01/2016

Approval Category: * Summer Research, RESCH

Go

- Step 5. Click on "All Jobs" to verify if the employee has had a summer research assignment already applied to the database so that you do not reuse the **Position Number/Suffix** combination.

Approval Category: Summer Research, RESCH

New Job Record, NEWJOB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job									●
	Primary	997902	00	Associate Professor	22500, Electrical and Computer Engineering	Aug 16, 2015			Active	●

All Jobs

Next Approval Type Go

Step 5

- Step 6. Enter the **Position Number F70012** in the “Position” field next to the “New Job” field.
- Step 7. Enter the **Suffix (00, zero zero, for first assignment; sequential numbers of 01, 02, etc as the summer progresses)** in the “Suffix” field next to the “Position” field.
- Step 8. Click the “Go” button.

Query Date: Jul 01, 2016
 Approval Category: Summer Research, RESCH

Steps 6-8

New Job Record, NEWJOB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job	F70012	00	Faculty Summer Research	26506, HR - Student Payroll Clearing					
	Primary	997902	00	Associate Professor	22500, Electrical and Computer Engineering	Aug 16, 2015			Active	<input type="radio"/>

All Jobs
 Next Approval Type

- Step 9. Enter the New Job details that are required as identified by the **red asterisk ***. The “Salary” field represents the amount to be paid for the assignment. The “Factor”, “Pays” and “Hours per Pay” are found by use of the Faculty Summer EPAF calculator. The “Timesheet Orgn” should follow the employee’s regular time sheet organization for their primary position (can be found on the departmental roster). The personnel change date should be left blank UNLESS this assignment is less than 1.0 factors. If the assignment is less than 1.0 factors, then assistance is needed by calling 7-2716 or emailing epaf@mtu.edu.

* - indicates a required field.

NEWJOB - New Job Record, F70012-00 Faculty Summer Research

Step 9

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)		07/01/2016
Personnel Date: MM/DD/YYYY		
Salary: *		6000
Factor: *		3.1
Pays: *		3.1
Hours per Pay: *		36.78
Timesheet Orgn: *		26500
Job Change Reason: (Not Enterable)		SUMER
Contract Type: (Not Enterable)		S
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		07/01/2016

Step 10. Enter the assignment end date. The personnel change date should be left blank UNLESS this assignment is less than 1.0 factor. If the assignment is less than 1.0 factor, then assistance is needed by calling 7-2716 or emailing epaf@mtu.edu.

JOBEND - Job End Date, F70012-00 Faculty Summer Research

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		08/13/2016
Personnel Date: MM/DD/YYYY		
Job Status: (Not Enterable)		T
Job Change Reason: (Not Enterable)		TERM

Step
10

Step 11. Enter the Default Earnings Info effective date (begin date of assignment-query date used from step 2); always Select "001" in the Earnings and enter the "Hours per Pay". The "Hours per Pay" must equal the "Hours per Pay" in step 9 (From the Faculty Summer EPAF calculator).

EARNGS - Default Earnings Code & Hours, F70012-00 Faculty Summer Research

Step 11

Current						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
New Value						
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Spe		
07/01/2016	001, Regular Rate	36.78				
	Not Selected					
	Not Selected					
	Not Selected					

Save

Step 12. Update the Index & Labor Distribution section.
 Enter your index over the fault index of S79580. Click the “Default from Index” button.

LABOR - Index & Labor Distribution, F70012-00 Faculty Summer Research

Current
 Effective Date: 07/01/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
New												
Effective Date: MM/DD/YYYY 07/01/2016												
Q U	S79580	C20072	26506	Q P012X	700					100.00		
Q				Q								
Q				Q								
Q				Q								
Q				Q								
										Total:	100.00	

Step 12

Clicking on the “Default from Index” button will always cause an error. You are now at the top of the web page again. Scroll back down to the Index & Labor Distribution section.

Error(s) occurred.

New EPAF | EPAF Originator Summary

Instructions:

- Complete the fields necessary to process this EPAF.
- Click "Save" at any time to save your work.
- Once you have completed the EPAF and saved your work, click "Submit".

For more information on how to process EPAFs, please use the [Originator's Handbook](#).
 Note: You must save the EPAF before you will be able to submit it for approval.

Name and ID: Shelley K Winter, M74727795
Transaction: **Query Date:** Jul 01, 2016
Transaction Status:
Approval Category: Summer Research, RESCH

Approval Types ■ Default Earnings ■ Account Distribution ■ Errors ■ Routing Queue ■ Comments ■ Transaction History

[Jump to Bottom](#)

Errors and Warning Messages

Type	Message Type	Description
Index & Labor Distribution	ERROR	Account code is required.
Index & Labor Distribution	ERROR	Account code is required.

Step 13. You will notice that all of the **Account** codes are missing. Enter in the **P012X** in the **Account Code** in ALL of the “Account” code fields that have an Index. Click the “Save” button.

LABOR - Index & Labor Distribution, F70012-00 Faculty Summer Research

Current
Effective Date: 07/01/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
Q	U	A11805	G00000	26501	P012X	280					100.00		
Q													
Q													
Q													
Q													
Total:											100.00		

Effective Date: MM/DD/YYYY 07/01/2016

Default from Index Save

Step 13

Step 14. In the Index & Labor Distribution section, place a check mark in all of the “Remove” boxes associated with Index lines with zero percent. Click “Save”. You will now be at the top of the web page.

LABOR - Index & Labor Distribution, F70012-00 Faculty Summer Research

Current
Effective Date: 07/01/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date	Remove
Q	U	A11805	G00000	26501	P012X	280				100.00				<input type="checkbox"/>
Q	U	S79580	C20072	26506	P012X	700				.00				<input checked="" type="checkbox"/>
Q														
Q														
Q														
Q														
Total:											100.00			

Effective Date: MM/DD/YYYY 07/01/2016

Default from Index Save

Step 14

Step 15. In the Routing Queue section, insert the proper **User Name** in the “User Name” field next to the “Approval Level” field. If you are unsure of which **User Name** to enter, you can search for the **User Name** by selecting the search magnifying glass next to the “User Name” field.

Approval Level	User Name	Required Action	Remove
100 - (CHAIR) Chairs / Deans		Approve	
200 - (DEAN) Deans and Provost		Approve	
299 - (FINMGR) Financial Managers		FYI	
300 - (ACADHR) Academic HR		Approve	
500 - (HRAPPL) HR Apply		Apply	
Not Selected		Not Selected	
Not Selected		Not Selected	
Not Selected		Not Selected	
Not Selected		Not Selected	

Save

Step 15

The Routing Queue section will default five “Approval Levels” that are the minimum requirement for this type of EPAF. One of these “Approval Levels” is for the Financial Manager(s) of the Index(es) in the “Index & Labor Distribution” section. If there is more than one Financial Manager involved, go to the next available line within the “Routing Queue” section (marked as **Not Selected**, and use the drop down function to add in an additional **Financial Managers** “Approval Level”.

Routing Queue

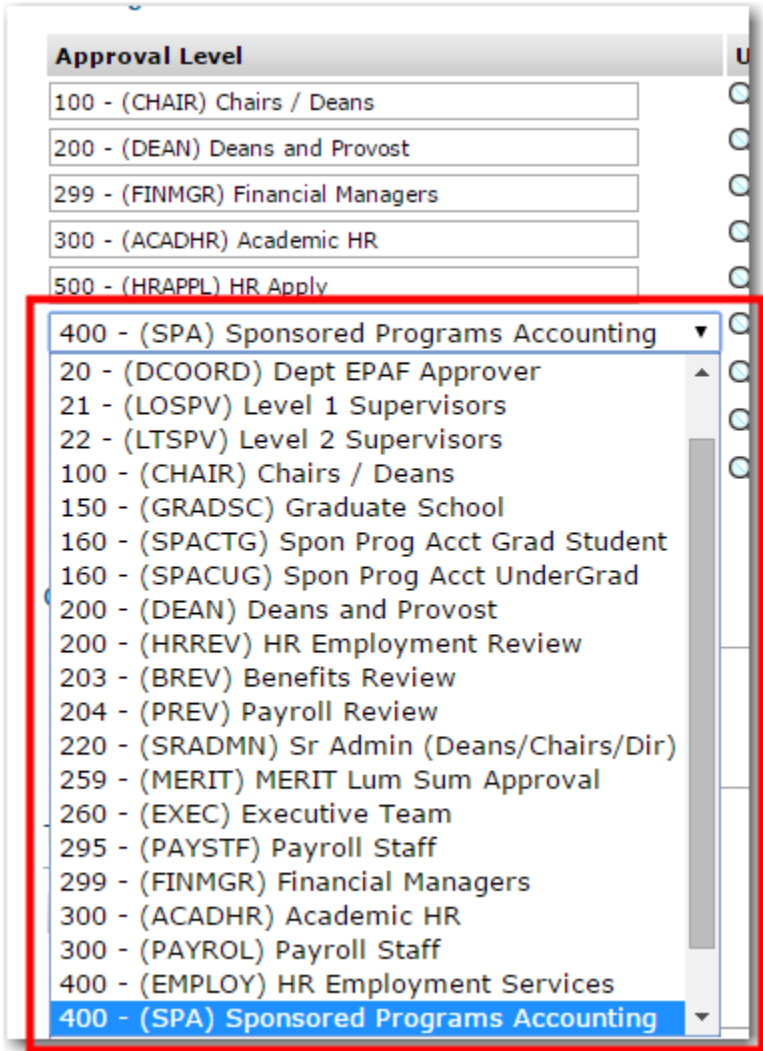
Approval Level	User Name
100 - (CHAIR) Chairs / Deans	
200 - (DEAN) Deans and Provost	
299 - (FINMGR) Financial Managers	
300 - (ACADHR) Academic HR	
500 - (HRAPPL) HR Apply	
299 - (FINMGR) Financial Managers	
Not Selected	
2 - (PROXY) Proxy Level	
20 - (DCOORD) Dept EPAF Approver	
21 - (LOSPV) Level 1 Supervisors	
22 - (LTSPV) Level 2 Supervisors	
100 - (CHAIR) Chairs / Deans	
150 - (GRADSC) Graduate School	
160 - (SPACTG) Spon Prog Acct Grad Student	
160 - (SPACUG) Spon Prog Acct UnderGrad	
200 - (DEAN) Deans and Provost	
200 - (HRREV) HR Employment Review	
203 - (BREV) Benefits Review	
204 - (PREV) Payroll Review	
220 - (SRADMN) Sr Admin (Deans/Chairs/Dir)	
259 - (MERIT) MERIT Lum Sum Approval	
260 - (EXEC) Executive Team	
295 - (PAYSTF) Payroll Staff	
299 - (FINMGR) Financial Managers	

Merit Step 11 (add additional Financial Manager)

Next, add in the proper **User Name**. Finally, move to the “Required Actions” field and use the drop down function to change from **Not Selected** to **FYI**. Repeat until all Financial Managers involved are added to the “Routing Queue”.

You will need to repeat this step for the **Sponsored Programs Accounting** level with the required action of **APPROVE** for the following indexes: E2’s, E34’s, E35’s, E4’s and E5’s

Click the “Save” button.



Step 16.

A screenshot of a web form. At the top right, the text "Step 16" is written in a large, bold, red font. Below it, the word "Comment" is written in a smaller, blue font. Underneath "Comment" is a large, empty rectangular text input box with a thin border and a small cursor icon in the bottom right corner.

At this point, all of the necessary information has been completed.

Please review all of the entries made for this EPAF.

If any changes need to be made, proceed to update the necessary field(s). If any fields within the EPAF have been changed, you must click “Save” again prior to submission.

Once satisfied with the entries, click the “Submit” button to complete the EPAF. This will update the EPAF to a status of Pending.

The EPAF is now pending the approval of the 1st level identified in the routing queue.

To view the EPAF you just submitted, click “EPAF Originator Summary”, and click on the “History” tab.

Option G - Faculty summer other, OTHER

Details yet to be added.

Option H: Change Faculty Summer Compensation, CFACSR

This option/approval category (CFACSR) is used to make a compensation change to a faculty summer teaching assignment **which has already been set up in banner** (EPAF has been created, approved and applied to banner).

The position number of **F70033** (faculty summer) with the appropriate suffix number will be modified using this option/approval category.

If an assignment needs to be terminated, process through an **ETERM** approval category (Option B).

If the labor distribution needs to be changed, process through an **INDEX** approval category (Option A).

NOTE: It will be necessary to utilize the **“FACULTY SUMMER CALCULATOR”** to recalculate the hours per pay. The **“FACULTY SUMMER CALCULATOR”** is found on the **EPAF RESOURCES** website.

- Step 1. Enter the employee’s **M Number** in the “ID” field and press “Tab”; their name will automatically appear in the next field if you have entered the correct M Number.
- Step 2. Enter the **Query Date** which is the effective date and must be greater than the last paid date.
- Step 3. Select the **CFACSR** “Approval Category” from the drop down menu.
- Step 4. Click the “Go” button.

New EPAF Person Selection

Home > New EPAF Person Selection

Instructions:

- Enter the employee M number.
- Enter the Query Date (the date that the employee action starts).
- Select the type of EPAF (Approval Category) you wish to process.
- Click “Go”.

Note: It is helpful to have looked up the employee in SZASTEM and have a current Employee List report before you begin.

* - indicates a required field.

ID: * M44199533 Shelley Winter

Query Date: MM/DD/YYYY * 06/20/2016

Approval Category: * Change Faculty Summer Compensation, CFACSR

Go

Steps 1 - 4

Step 5. Click on “All Jobs” to locate the position/suffix to be changed and select the position/suffix on the right and click “GO”.

ID: Shelley Winter, M44199533
Query Date: Jun 20, 2016
Approval Category: Change Fac Summer Comp, CFACSR

Step 5

Change Job Details - Faculty Summer, FACSRC

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job									<input type="radio"/>
	Primary	998896	00	Assistant Professor	26500, Human Resources	Apr 28, 2016			Active	<input type="radio"/>
	Secondary	F70033	00	Faculty Summer Teaching	26500, Human Resources	Jun 20, 2016			Active	<input checked="" type="radio"/>

Step 6. If the pay rate change is **retroactive (less than last paid date)**, you must enter the date for the pay rate change in the **Personnel Date**, otherwise leave blank.

Step 7. Enter in the new salary amount in the **Salary** field.

NOTE: This is the new total amount to be paid starting with the **Query Date / Effective Date** or the **Personnel Date**, which ever date is earlier, through the **Job End Date**.

Step 8. Enter the number of **Hours per Pay**, using the dates in step 7, utilizing the **FACULTY SUMMER CALCULATOR**.

Step 6 - 8

FACSRC - Change Job Details - Faculty Summer, F70033-00 Faculty Summer Teaching

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	06/20/2016	06/20/2016
Personnel Date: MM/DD/YYYY	06/20/2016	<input type="text"/>
Salary:	12667.5	15000
Hours per Pay:	126.68	116.00
Job End Date: MM/DD/YYYY(Not Enterable)		<input type="text"/>

- Step 9. Update the Default Earnings Code & Hours with **Effective Date to match the Query Date.**
- Step 10. Select “001, Regular Rate”.
- Step 11. Enter **Hours or Units per Pay** to equal the Hours per Pay entered in Step 8.
- Step 12. Click Save.

EARNGS - Default Earnings Code & Hours, F70033-00 Faculty Summer Teaching

Step 9 - 12

Current									
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date			
New Value									
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	Remove		
06/20/2016	001, Regular Rate	116.00 x			1				
	Not Selected				1				
	Not Selected				1				
	Not Selected				1				

Step 13. In the Routing Queue section, insert the proper **User Name** in the “User Name” field next to the “Approval Level” field. If you are unsure of which **User Name** to enter, you can search for the **User Name** by selecting the search magnifying glass next to the “User Name” field.

The Routing Queue section will default “Approval Levels” that are the minimum requirement for this type of EPAF.

Routing Queue

Step 13

Approval Level	User Name	Required Action	Re
100 - (CHAIR) Chairs / Deans	<input type="text"/>	Approve	
200 - (DEAN) Deans and Provost	<input type="text"/>	Approve	
300 - (ACADHR) Academic HR	<input type="text"/>	Approve	
500 - (HRAPPL) HR Apply	<input type="text"/>	Apply	
Not Selected	<input type="text"/>	Not Selected	▼
Not Selected	<input type="text"/>	Not Selected	▼
Not Selected	<input type="text"/>	Not Selected	▼
Not Selected	<input type="text"/>	Not Selected	▼

You will need to repeat this step for the Sponsored Programs Accounting level with the required action of **APPROVE** for the following indexes: E2's, E34's, E35's, E4's and E5's

Click the “Save” button.

Step 14. Summarize the change and enter in the comments section.

Comment

Step 14

**example: increased enrollment,
course XXX, additional \$\$\$\$**

At this point, all of the necessary information has been completed.

Please review all of the entries made for this EPAF. If any changes need to be made, proceed to update the necessary field(s).

If any fields within the EPAF have been changed, you must click "Save" again prior to submission.

Once satisfied with the entries, click the "Submit" button to complete the EPAF. This will update the EPAF to a status of Pending. The EPAF is now pending the approval of the 1st level identified in the routing queue.

To view the EPAF you just submitted, click "EPAF Originator Summary", and click on the "History" tab. EPAF's can be viewed in your history tab for six months if you need to reference the information submitted.

Uploading Supporting Documentation

In some instances, you will be required to upload supporting documentation for an EPAF. For example, if an employee resigns from the University, you need to upload the employee's resignation letter for the "Ending and Employee Job" EPAF.

Step 1. Scan the supporting documents to a PDF format and store them temporarily in an easy to find location.

Note: Make sure the scans aligned correctly and are legible.

Step 2. From the EPAF Main Menu, click on "Uploading Supporting Documents".

Electronic Personnel Action Form

Home > Employees > Electronic Personnel Action Forms



EPAF Handbooks:

[Originators' Handbook for Students](#)
[Approvers' & FYTs Handbook](#)



EPAF Related Reports:

[Employee List By Specified Time Sheet Org](#)

[EPAF Approver Summary](#)
[EPAF Originator Summary](#)
[New EPAF](#)
[EPAF Proxy Records](#)
[Act as a Proxy](#)

[Upload EPAF Supporting Documents](#)

Step 3. Using the drop down box, select the EPAF for which you will be uploading supporting documentation and click "Submit".

Note: Only EPAFs that allow you to upload supporting documentation will be listed. EPAFs will remain in this list, regardless if documentation has been uploaded, until the EPAF has been completed and applied to Banner.



Home > Employees > Electronic Personnel Action Forms > Upload EPAF Supporting Documents

Select the EPAF from the list below you need to upload further documentation for.

Pick an EPAF:

Step 4. Click the “Choose File” button next to the type of document you will be uploading.

Note: You should only see options relevant to the type of EPAF you are processing.

Home > Upload EPAF Documentation

Please select the file(s) to upload.

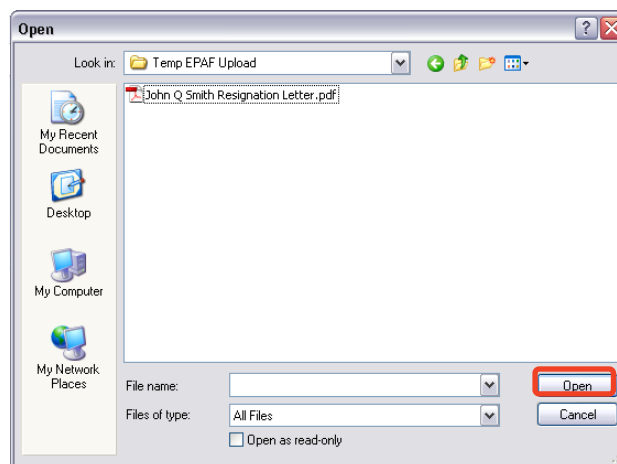
John Smith (M11111111) Employee

Termination Paperwork **Choose File** No file chosen

Submit

Cancel

Step 5. Navigate to the location of the PDF. Highlight the PDF and click “Open”.



Step 6. Click “Submit” once you have selected the file(s) to be uploaded.

Home > Upload EPAF Documentation

Please select the file(s) to upload.

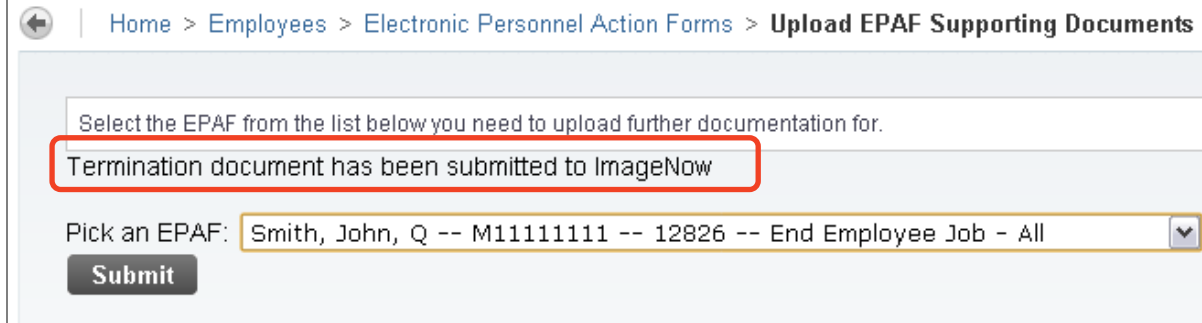
John Smith (M11111111) Employee

Termination Paperwork **Choose File** John Q Smith ...on Letter.pdf

Submit

Cancel

Step 7. Check to see if you received the completed message.



The screenshot shows a web interface for uploading documents. At the top, there is a breadcrumb trail: Home > Employees > Electronic Personnel Action Forms > Upload EPAF Supporting Documents. Below this, a message box contains the text: "Select the EPAF from the list below you need to upload further documentation for." A red rectangular box highlights the message: "Termination document has been submitted to ImageNow". Below the message, there is a dropdown menu labeled "Pick an EPAF:" with the selected option: "Smith, John, Q -- M11111111 -- 12826 -- End Employee Job - All". A "Submit" button is located at the bottom left of the form area.

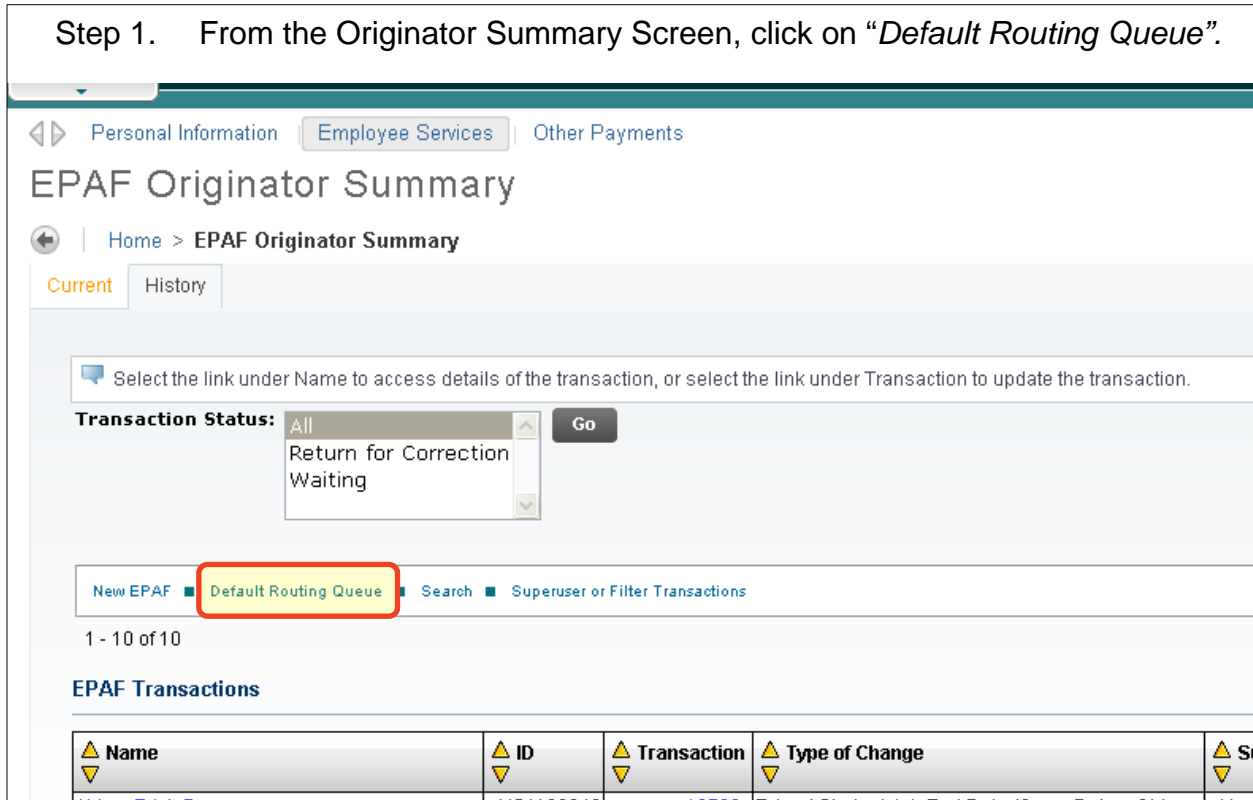
Step 8. Delete the temporary PDF file created for the upload.

Step 9. The day following EPAF submission you will receive an email detailing your current EPAF transactions and status. This email will also show if a document has been uploaded for an EPAF. Check this email to see if you are missing documentation that should have been uploaded.

Setting a Default Routing Queue

To make things more efficient, Banner has included a way to build a default routing queue for each type of EPAF.

Step 1. From the Originator Summary Screen, click on “*Default Routing Queue*”.



Personal Information Employee Services Other Payments

EPAF Originator Summary

Home > EPAF Originator Summary

Current History

Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

Transaction Status: All Go
Return for Correction
Waiting

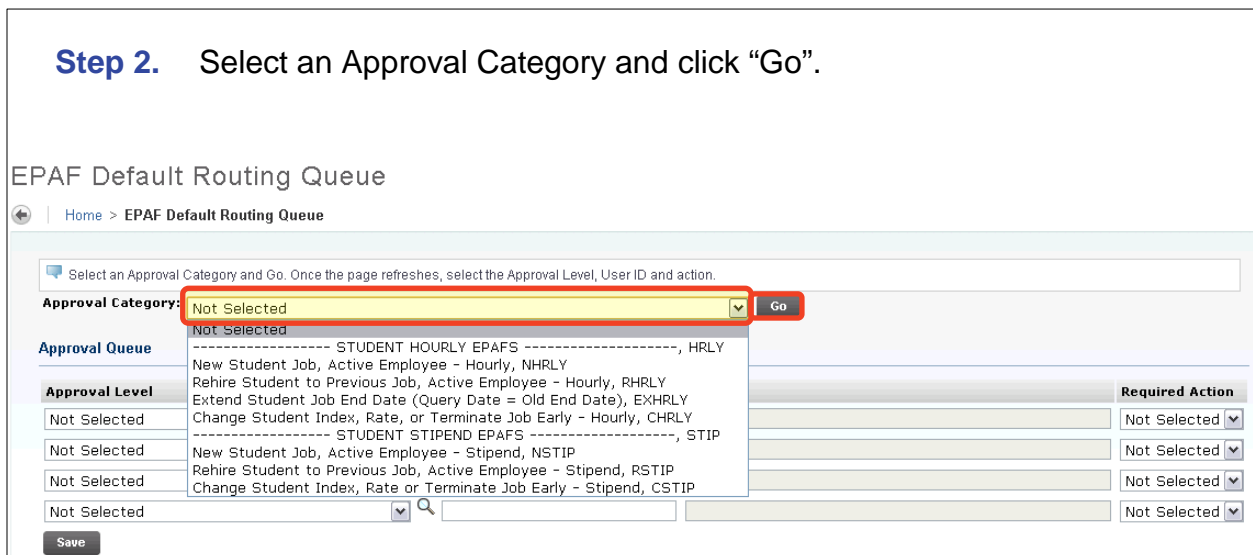
New EPAF **Default Routing Queue** Search Superuser or Filter Transactions

1 - 10 of 10

EPAF Transactions

Name	ID	Transaction	Type of Change	St
...	ME468812	43788

Step 2. Select an Approval Category and click “Go”.



EPAF Default Routing Queue

Home > EPAF Default Routing Queue

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

Approval Category: Not Selected Go
Not Selected

Approval Queue	Approval Level	Required Action
----- STUDENT HOURLY EPAFS -----, HRLY	Not Selected	Not Selected
New Student Job, Active Employee - Hourly, NHRLY	Not Selected	Not Selected
Rehire Student to Previous Job, Active Employee - Hourly, RHRLY	Not Selected	Not Selected
Extend Student Job End Date (Query Date = Old End Date), EXHRLY	Not Selected	Not Selected
Change Student Index, Rate, or Terminate Job Early - Hourly, CHRLY	Not Selected	Not Selected
----- STUDENT STIPEND EPAFS -----, STIP	Not Selected	Not Selected
New Student Job, Active Employee - Stipend, NSTIP	Not Selected	Not Selected
Rehire Student to Previous Job, Active Employee - Stipend, RSTIP	Not Selected	Not Selected
Change Student Index, Rate or Terminate Job Early - Stipend, CSTIP	Not Selected	Not Selected

Save

Step 3. Complete the *Routing Queue* by choosing the **Approval Level**, inserting a **User Name**, and selecting a **Required Action** (*Approve or FYI*).

If the position is funded by a sponsored account you will need to add the appropriate approver in the Sponsored Programs office.

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

Approval Category: Change Student Index, Rate, or Terminate Job Early - Hourly, CHRLY

Approval Queue

Approval Level	User Name	Required Action
300 - (PAYROL) Payroll Staff	<input type="text"/>	Apply
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

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

Step 4. Click "Save".

Step 5. Repeat for all other Approval Categories / EPAFs.

Sponsored Account Indexes that Need Approval

Listed below are the indexes that Sponsored Programs needs to review/approve. Please remember when you are processing an EPAF for an employee on one of these indexes, please add Sponsored Programs in the *Routing Queue*.

*** Indexes that start with E2, E34, E35, E4 or E5 ***

EPAF Status Definitions

The following are definitions for each of the statuses of an EPAF, where they can be located, and what actions to take next.

EPAF Status	Definition and Action	Location
Approved	The EPAF has been approved by all in the routing queue and is ready to be applied.	"History" tab of the originator summary
Completed	The EPAF has been applied to the database.	"History" tab of the originator summary
Disapproved	The EPAF has been disapproved by someone in the routing queue; review the EPAF comments for clarification; click on Update to make corrections, then save and resubmit.	"History" tab of the originator summary
More Information	The EPAF has been reviewed but the approver requires more information.	"History" tab of the originator summary
Pending	The EPAF has been submitted and is awaiting approval by someone in the routing queue.	"History" tab of the originator summary
Return for Correction	The EPAF has been returned; review the EPAF comments for clarification; click on Update to make corrections, then save and resubmit.	"Current" tab of the originator summary
Voided	The EPAF has been voided; it CANNOT be updated; review the EPAF comments for clarification.	"History" tab of the originator summary
Waiting	The EPAF has NOT been submitted.	"Current" tab of the originator summary

Approval Category Definitions

The following are approval categories and their definitions along with which query date should be used in accordance with each approval category.

Option	Approval Category	Definition	Query Date
A	Change Employee Index – All Employees	<i>Changing the Index from which an employee is paid.</i>	Effective Date, Must be Greater than Last Paid Date
B	Ending an Employee Job – All Employees	<i>Ending an active job for an employee. This EPAF applies to Primary, Secondary and Temporary positions.</i>	Effective Date, Must be Greater or Equal to the Last Paid Date
C	Change Employee Time Entry Information – All Employees	<i>Changing the Time Entry type, Time Entry Approver, or Time Sheet Org of an employee.</i>	Effective Date, Must be Greater than Last Paid Date
D	Merit Lump Sum – Eligible Non-Student Employees	<i>Use in conjunction with Salary Planner. EPAF is used to create a one-time lump sum merit increase.</i>	Query Date will be supplied during the process every year.

Links to Useful Information

Human Resources

Human Resources Website:

www.mtu.edu/hr/

Human Resources EPAF Resources:

www.mtu.edu/hr/supervisors-admins/epaf-resources/

Payroll & HR Calendar:

www.mtu.edu/calendar/month.php?cal=Payroll+Processing+Calendar&getdate

HR Training Calendar:

<http://www.mtu.edu/calendar/month.php?cal=HR+Events+Calendar&getdate>

Banweb / Employee Self Service

Banweb / Employee Self Service:

www.banweb.mtu.edu

Banweb link for EPAF Test Server:

www.banmirror.mtu.edu