2014

Michigan Technological University
Human Resources

[PROCESSING STUDENT EMPLOYEES USING EPAF – ORIGINATORS' HANDBOOK]

What you need before you start: EPAF Training, Complete Banner Access Form, Student's M Number, Departmental Student Position Number, Timesheet Organization Code, Job Details (Start Date, End Date, Pay Rate), Labor Distribution (Chart of Accounts, Index Number, Account Code, Percent)

11.17.2014

Contents

Beginning the Process

Step 1. Verify Employee Status by logging in to BANNER and reviewing the BANNER form SZASTEM.

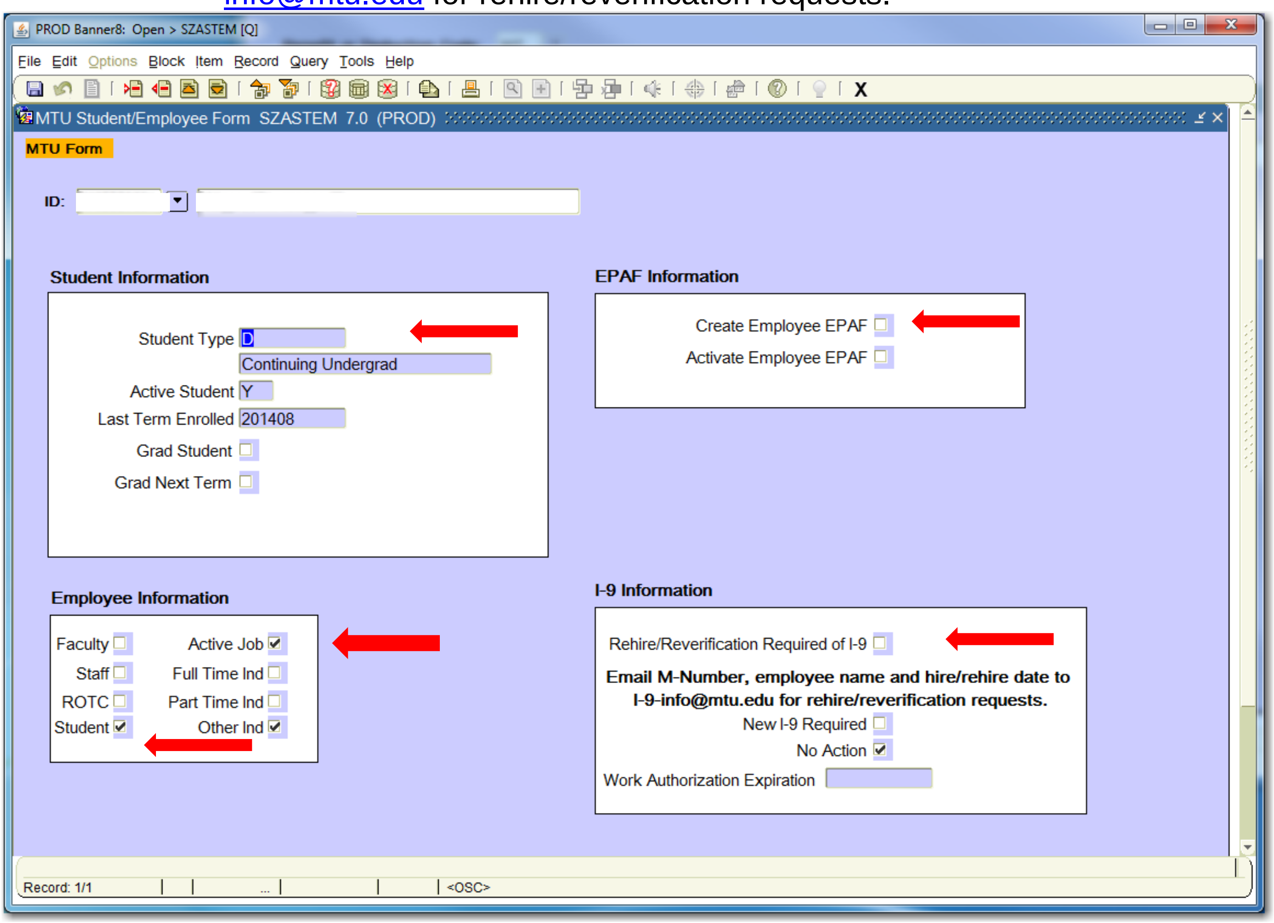
The *Student Information* block on the left will verify a variety of information:

- Student type, whether or not they are an active student
- The last term enrolled
- Whether or not they are a graduate student or will be a graduate student next term.

The *Employee Information* area on the left indicates whether or not employee is a student and also if the student has an active job

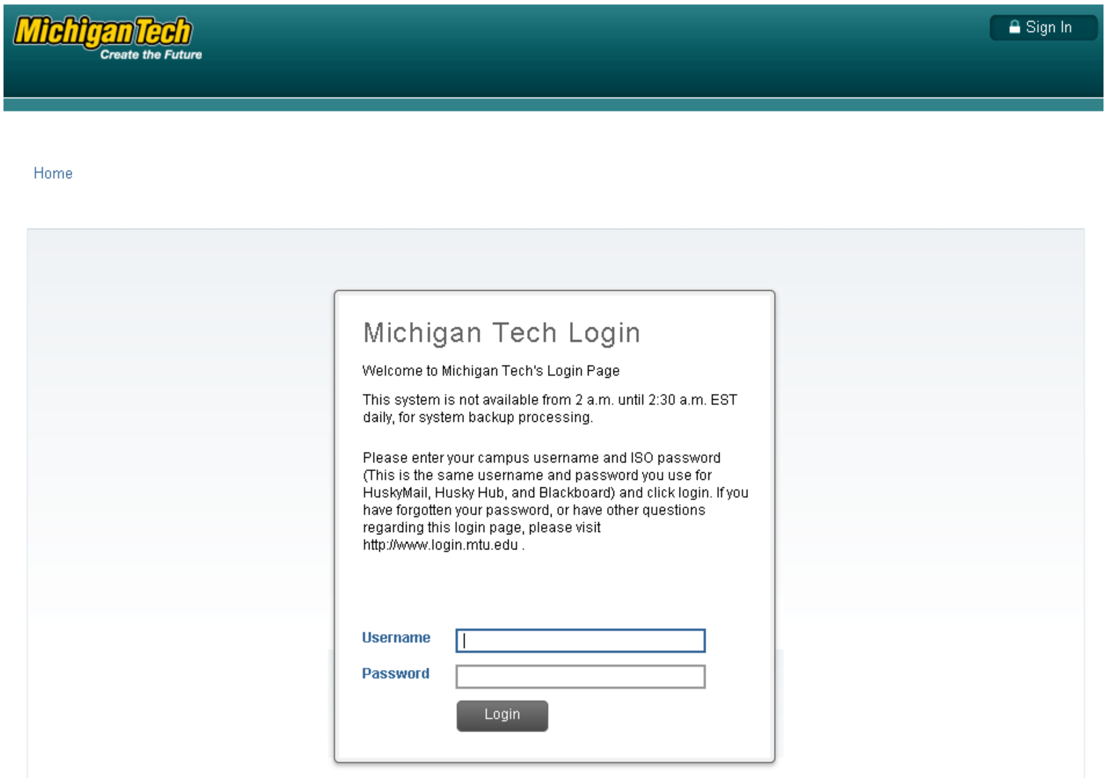
The *EPAF Information* tells you what kind of Epaf you have to originate (Approval Category)

The *I-9 Information* verifies whether or not an employment packet is required. If there is a checkmark in the box "Rehire/Reverification Required of I-9", Please Email M Number, employee name and hire/rehire date to I-9-info@mtu.edu for rehire/reverification requests.

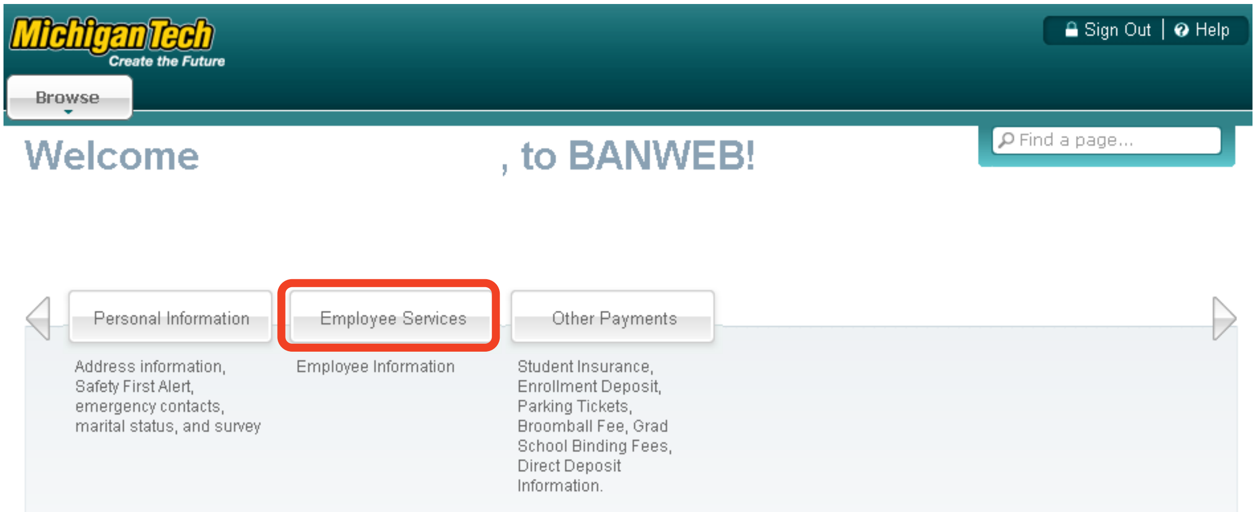


Step 2. Run report from within BANNER form GZAORPT to verify current job information.
System = H
Reporting Group = All Departments
Report = HYOPAYGOO2E

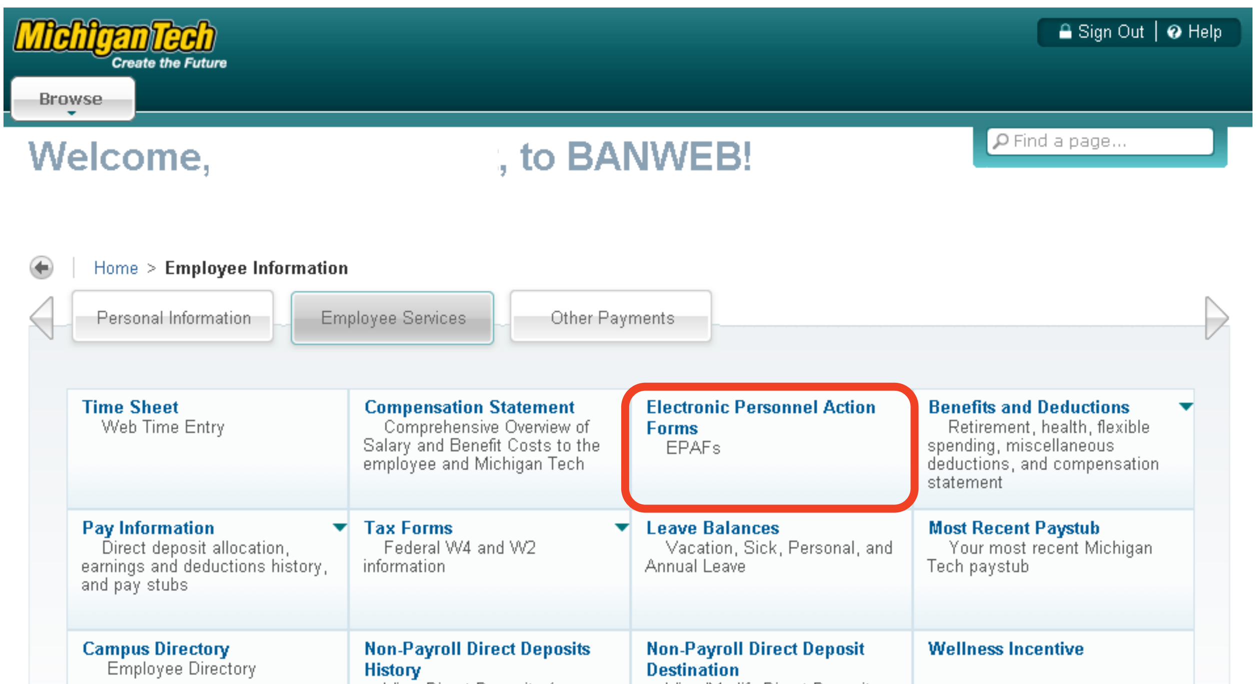
Step 3. Sign on to Banweb/Employee Self Service (ESS): www.banweb.mtu.edu



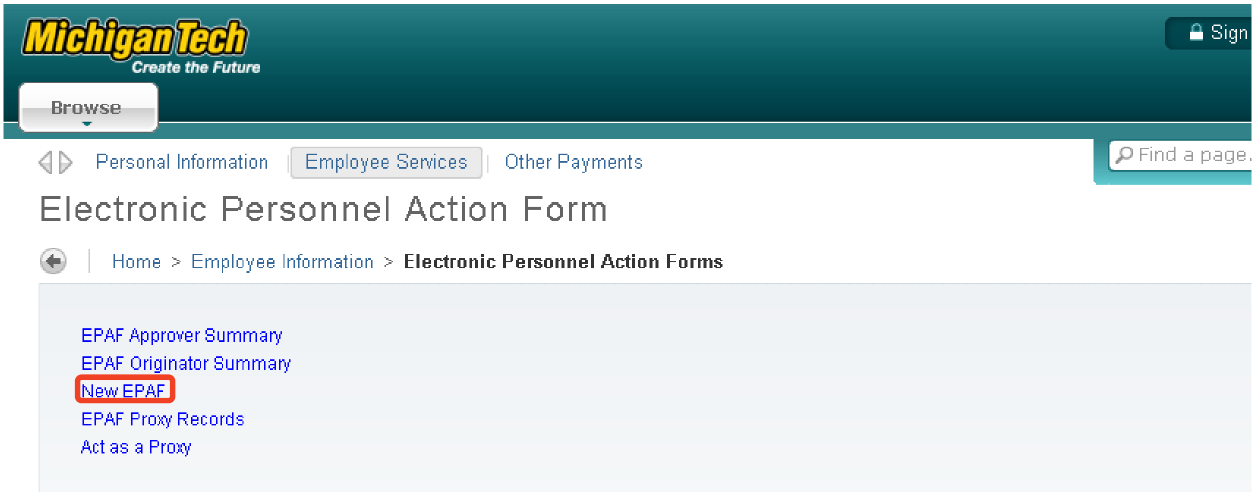
Step 4. Click the “Employee Services” tab.



Step 5. Click “Electronic Personnel Action Forms”.



Step 6. Click “New EPAF”.


Michigan Tech
Create the Future
Sign
Browse
Personal Information
Employee Services
Other Payments
Find a page.
Electronic Personnel Action Form
Home > Employee Information > Electronic Personnel Action Forms
EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

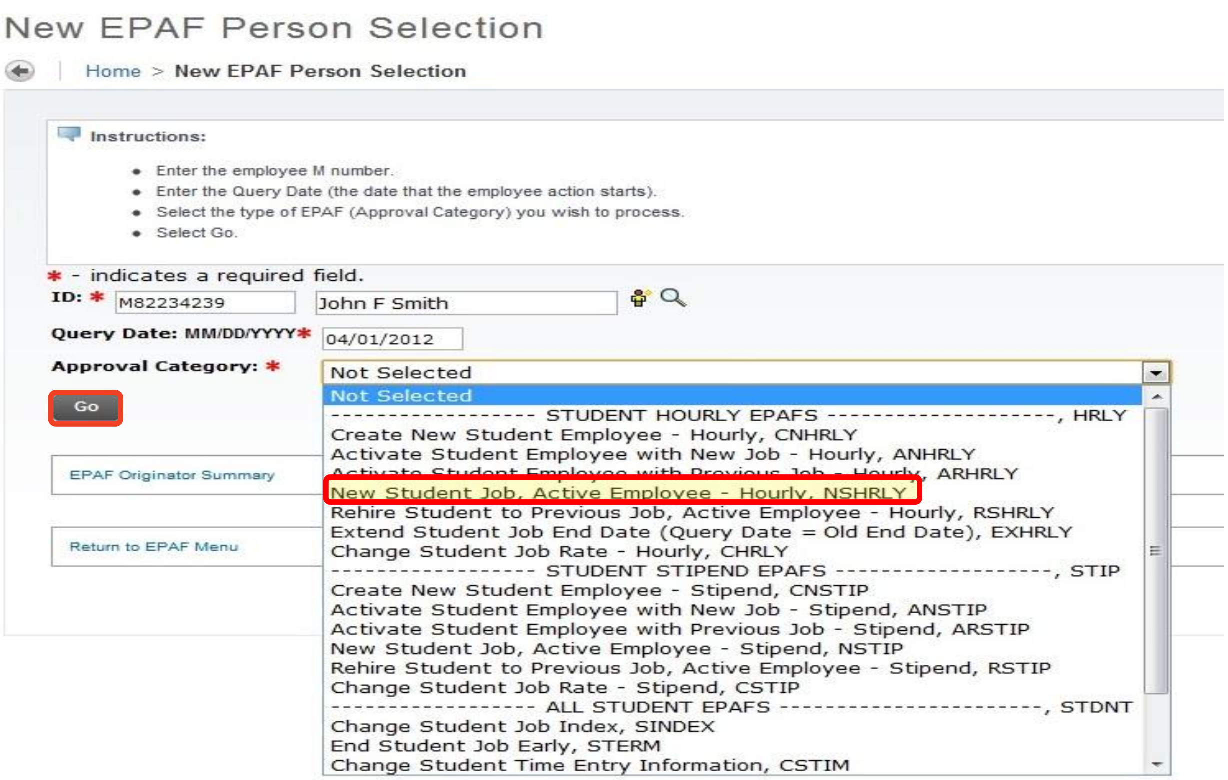
Option A: New Student Job, Active Employee – Hourly, NSHRLY

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 *(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".



Step 5. Click "All Jobs" to verify that the employee has never been employed in this departmental position. If the employee has previously held this position, you will need to start over and create an EPAF with the approval category Rehire Student into Previous Job, Active Employee - Hourly, RSHRLY.

Step 6. Enter the Departmental Position Number next to the New Job field.

Step 7. Enter in the appropriate **Suffix**:

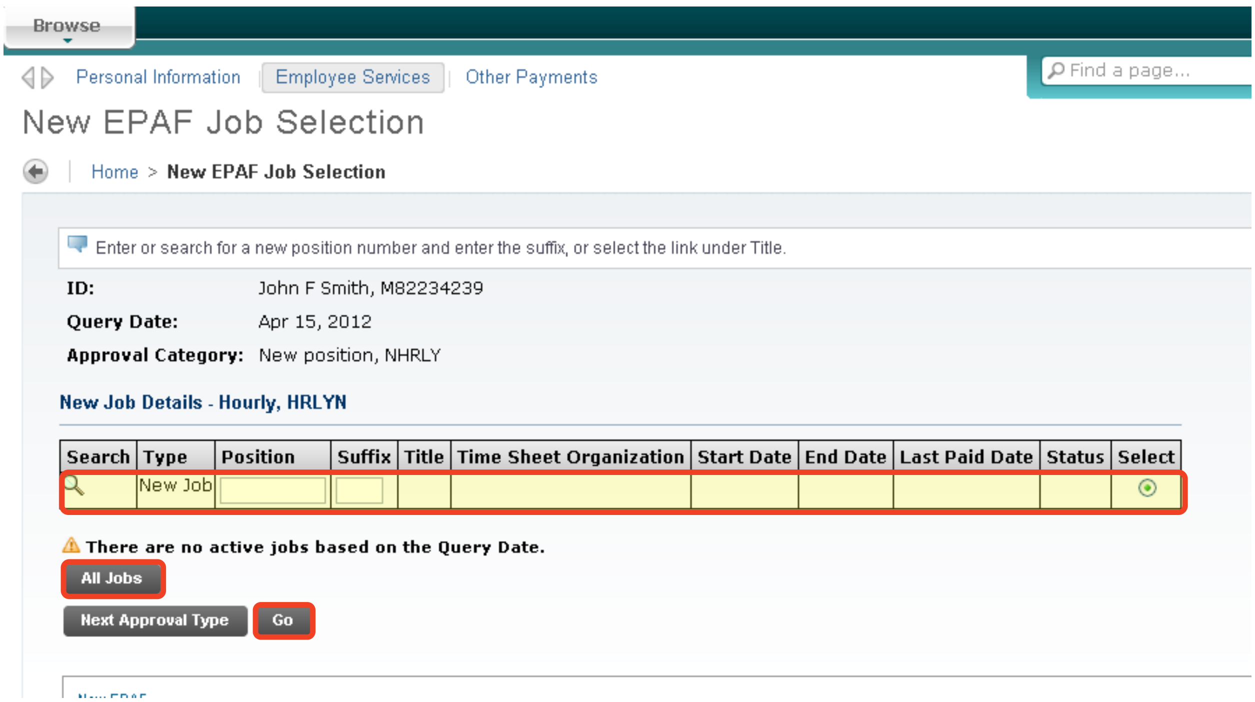
00 is the suffix if it is the first time the employee is being assigned the position number.

If the student has multiple jobs in your department, increase the suffix by one for each additional job. The new suffix needs to be different than any existing suffix on the current position.

Unique Identifier = M Number + Departmental Position Number + Suffix

Step 8. Make sure the position is selected on the right edge of the *New Job Details* area.

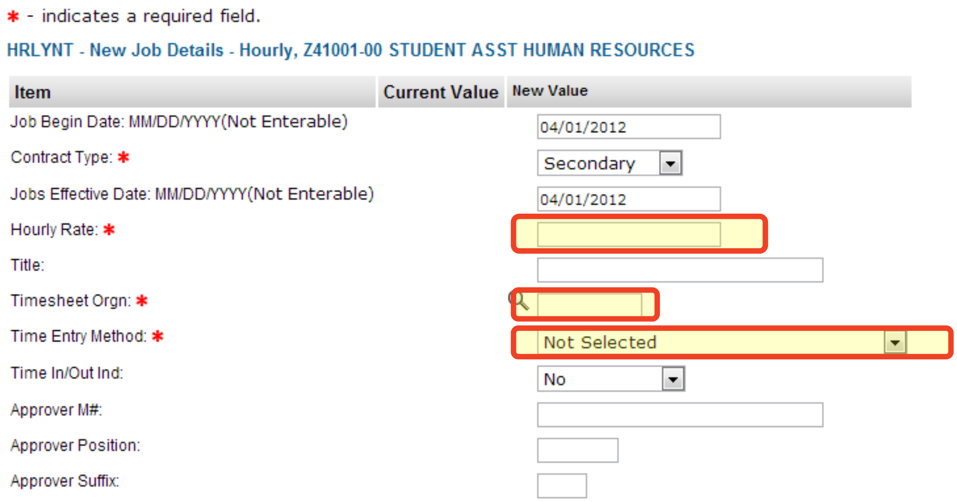
Step 9. Click “Go”.



Step 10. Fill in the *New Job Details* section.

NOTE: Any field with a * *next to it is required. However, the Job Begin Date and the Job Effective Date fields are not enterable and both default from the Query Date.*

Title: *The* ***Title*** *field is only used when a student needs a non-default title to help differentiate timesheets in* ***Web Time Entry****. Leave this field blank (see* *Student Job Title Rules**).*



Select the **Time Entry Method** from one of the following options:

Option 1. **Payroll Time Entry** (Default) – Use this option if you submit time via a paper timesheet.

Option 2. **Employee Time Entry via Web** – Use this option if the employee submits time through Banweb/ESS.

Option 3. **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.

*****The below steps are for WEB TIME ENTRY only.*****

(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 only report the hours worked in a day. This field only applies to Web Time Entry.

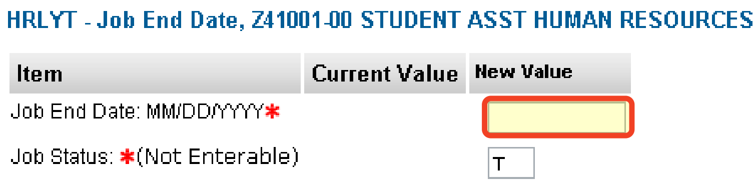
(Web Time Entry Only) Type the M# of the employee who will be approving the Web Time Entry timesheet of the employee into the *Approver ID* field.

(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.

(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.

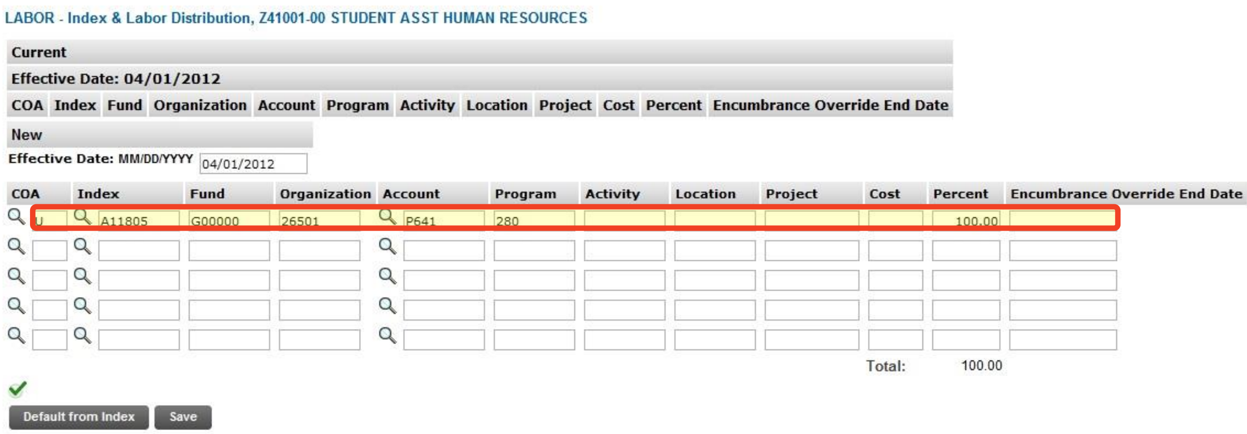
Step 11. Fill out the *Job End Date* Section.



HRLYT - Job End Date, Z41001-00 STUDENT ASST HUMAN RESOURCES

Item	Current Value	New Value
Job End Date: MM/DD/YYYY*		
Job Status: *(Not Enterable)		T

Step 12. Verify the *Index & Labor Distribution* for the job. The index and labor distribution will default from the position budget.



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

Current

Effective Date: 04/01/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date

New

Effective Date: MM/DD/YYYY 04/01/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
U	A11805	G00000	26501	P641	280					100.00	
								Total:		100.00	

Default from Index | Save

If no change is needed, click "Save" and continue to the *Routing Queue*.

If you need to change the Index, you have two options:

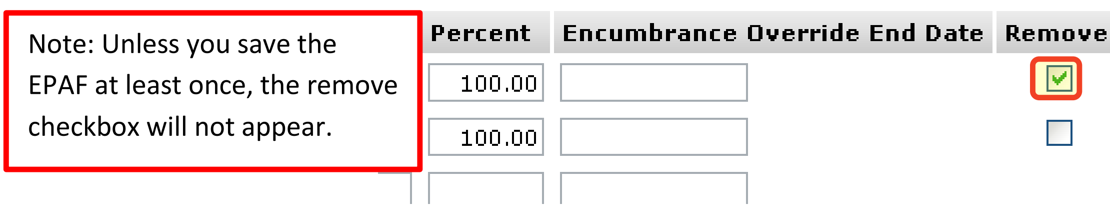
Option A. Overwrite the Index in the Index field and click "Default from Index". This will cause the Account code to disappear while the correct Fund, Org and Program codes populate.

Enter the appropriate Account Code and click "Save".

Option 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".

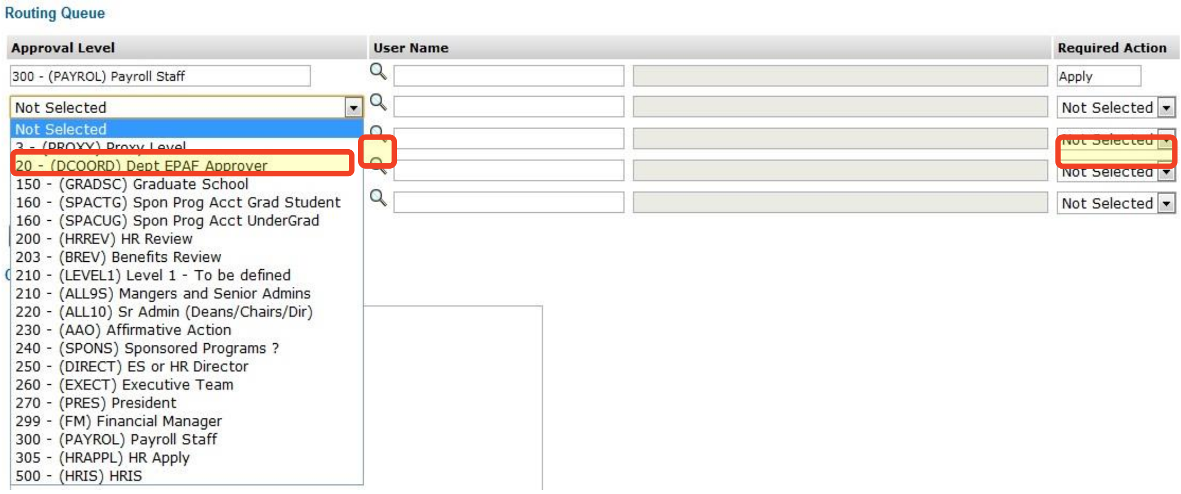
Scroll back down to the *Index & Labor Distribution* area. On the right side, a check box next to each distribution line can be seen. Select the Index you want to delete and click "Save".



Step 13. 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 research account you will need to add the appropriate approver in the Sponsored Programs office (Graduate or Undergraduate).

Step 14. Click "Save".



Step 15. You may insert comments into the **Comment Box**, but be aware that all individuals who can view the EPAF will be able to see the comments you create.

Michigan Tech Best Practice: Copy and paste the email request for the student hire as a comment.

Step 16. Click “Save”.

Step 17. Once you have double checked to make sure everything has been entered correctly, click “Submit”.

Step 18. Verify at the top of the EPAF to see whether it has been submitted successfully.

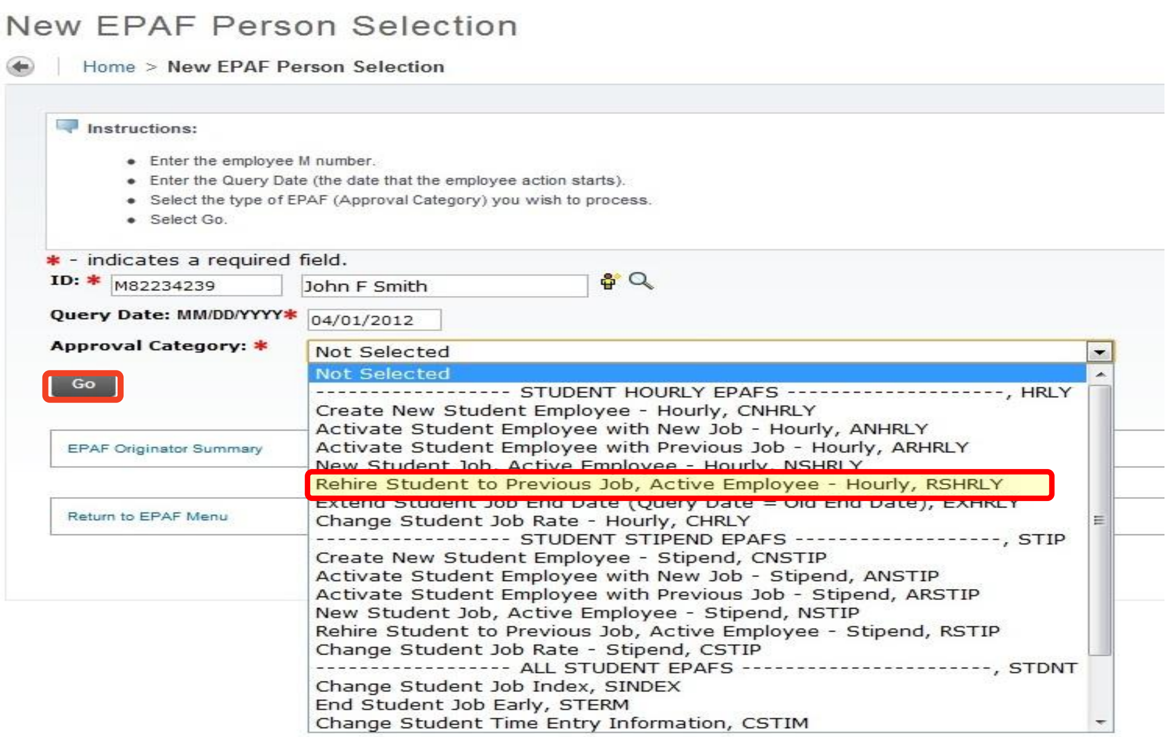
Option B: Rehire Student to Previous Job, Active Employee - Hourly, RSHRLY

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.

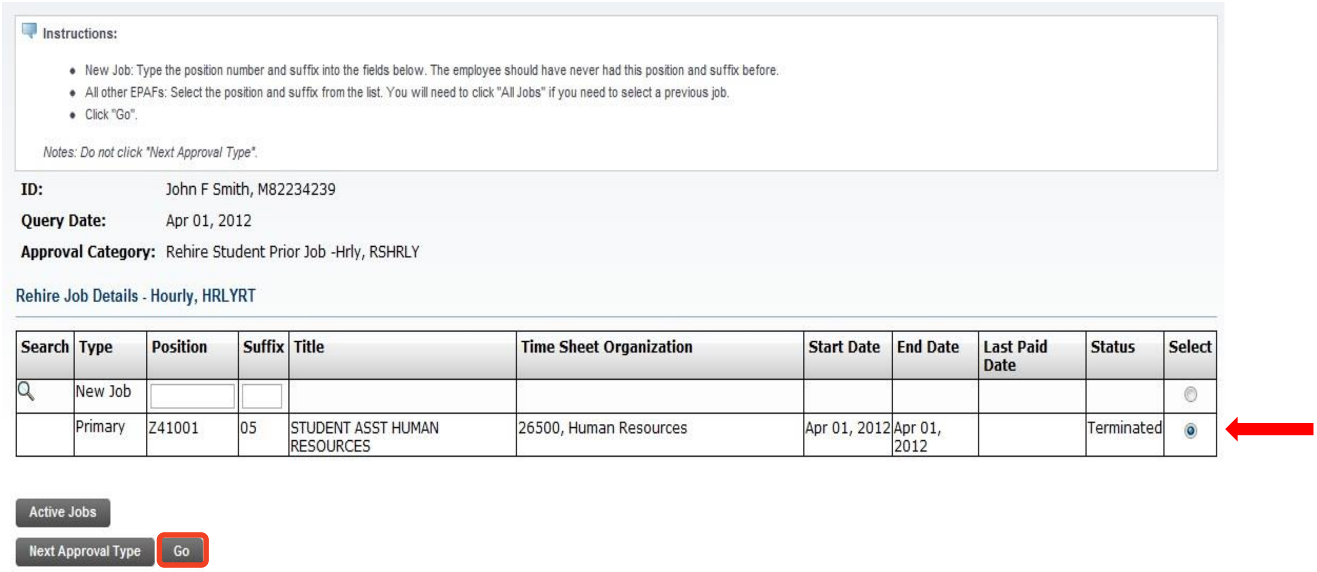
Step 2. Enter the employee's **Query Date** which is the effective date. The Query Date must be greater than the last paid date. *(See Approval Category Definitions)*

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".



Step 5. Click on the "All Jobs" button to locate the job you are rehiring the employee into. Make sure the job is selected on the right side of the screen 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: Apr 01, 2012
Approval Category: Rehire Student Prior Job -Hrly, RSHRLY

Rehire Job Details - Hourly, HRLYRT

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									
	Primary	Z41001	05	STUDENT ASST HUMAN RESOURCES	26500, Human Resources	Apr 01, 2012	Apr 01, 2012		Terminated	

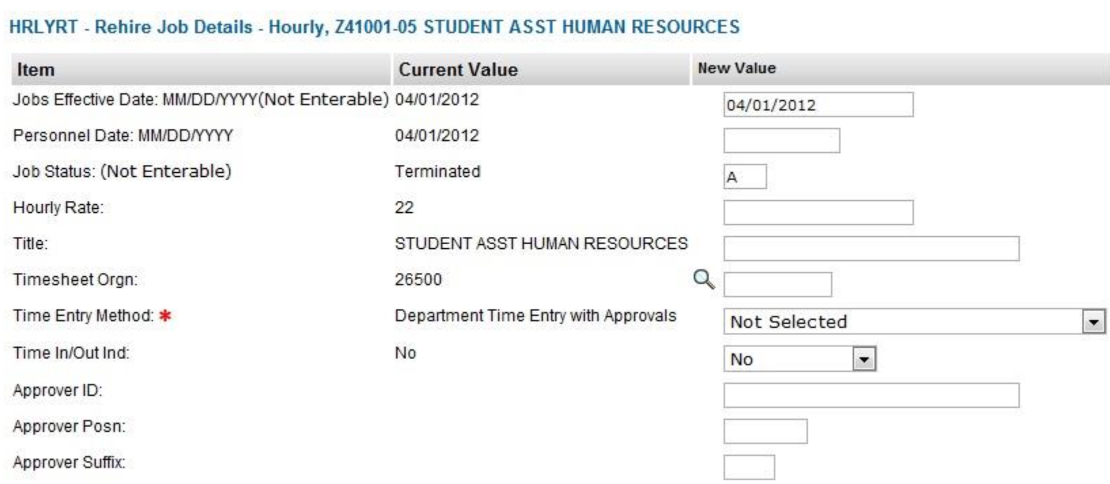
Active Jobs
Next Approval Type Go

Step 6. Complete the *Rehire Job Details* section.

NOTE: The Jobs Effective Date (defaults from the query date) and the Job Status cannot be changed. The Jobs Effective Date must be greater than the last paid date. All other fields may remain blank and will default from the current value column.

***Personnel Date:** If the rehire date is before the last paid date, i.e. retroactive change; you must enter that date in the **Personnel Date** field.*

***Title:** The **Title** field is only used when a student needs a non-default title to help differentiate timesheets in **Web Time Entry**. Leave this field blank (see Student Job Title Rules).*



HRLYRT - Rehire Job Details - Hourly, Z41001-05 STUDENT ASST HUMAN RESOURCES

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	04/01/2012	04/01/2012
Personnel Date: MM/DD/YYYY	04/01/2012	
Job Status: (Not Enterable)	Terminated	A
Hourly Rate:	22	
Title:	STUDENT ASST HUMAN RESOURCES	
Timesheet Orgn:	26500	
Time Entry Method: *	Department Time Entry with Approvals	Not Selected
Time In/Out Ind:	No	No
Approver ID:		
Approver Posn:		
Approver Suffix:		

Select the **Time Entry Method** from one of the following options if it needs to be changed:

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Option 2. **Employee Time Entry via Web** – Use this option if the employee submits time through Banweb/ESS.

Option 3. **Department Time Entry with Approvals** – Use this option if your department submits time through Banner for this employee.

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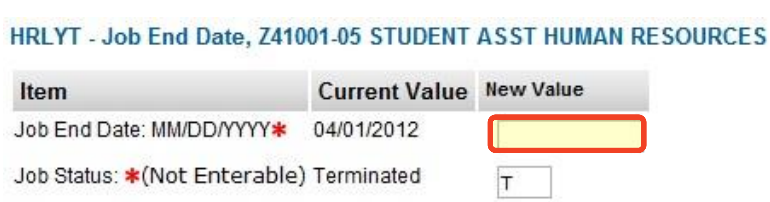
(Web Time Entry Only) Type the M# of the employee who will be approving the Web Time Entry timesheet of the employee into the *Approver ID* field.

(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.

(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.

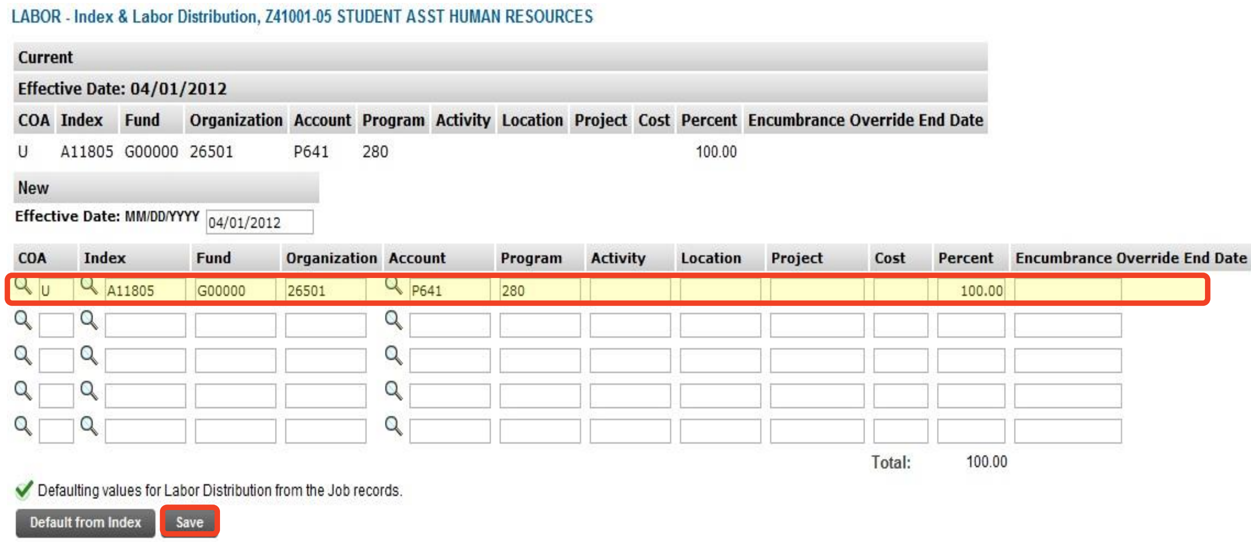
Note: You must specify the M#, Position Number and Suffix of the employee who will be approving the Web Time Entry timesheet of the employee. This information is on the payroll roster.

Step 7. Fill out the *Job End Date* Section.


HRLYT - Job End Date, Z41001-05 STUDENT ASST HUMAN RESOURCES

Item	Current Value	New Value
Job End Date: MM/DD/YYYY*	04/01/2012	
Job Status: *(Not Enterable)	Terminated	T

Step 8. Verify the *Index & Labor Distribution* for the job. The Index and Labor Distribution will default from the previous job information.



LABOR - Index & Labor Distribution, Z41001-05 STUDENT ASST HUMAN RESOURCES

Current

Effective Date: 04/01/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
U	A11805	G00000	26501	P641	280					100.00	

New

Effective Date: MM/DD/YYYY 04/01/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
U	A11805	G00000	26501	P641	280					100.00	
									Total:	100.00	

Defaulting values for Labor Distribution from the Job records.

Default from Index | Save

If no change is needed, click “Save” and continue to the *Routing Queue*.

If you need to change the Index, you have two options:

Option A. Overwrite 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.

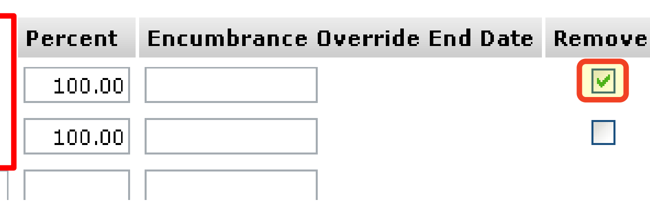
Enter the appropriate Account Code and click “Save”.

Option 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”.

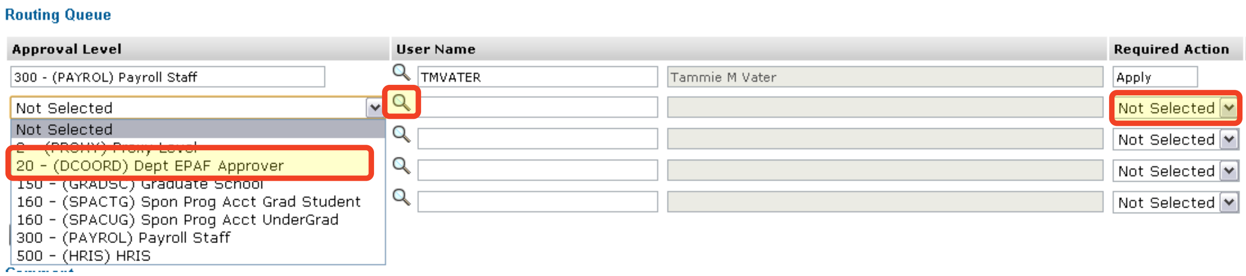
Note: Unless you save the EPAF at least once, the remove checkbox will not appear.



Step 9. Complete the *Routing Queue* by choosing the **Approval Level**, inserting a **User Name**, and selecting a **Required Action**.

If the position is funded by a research account you will need to add the appropriate approver in the Sponsored Programs office (Graduate or Undergraduate).

Step 10. Click "Save".



Step 11. You may insert comments into the ***Comment Box***, but be aware that all individuals who can view the EPAF will be able to see the comments you create.

Michigan Tech Best Practice: Copy and paste the email request for the student rehire as a comment.

Step 12. Click "Save".

Step 13. After verifying that all the information you have entered is correct, Click "Submit".

Step 14. You may now verify at the top of the EPAF to see whether it was submitted successfully.

The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID:	John F Smith, M82234239		
Transaction:	11567	**Query Date:**	Apr 15, 2012
Transaction Status:	Pending		
Approval Category:	Rehire Student to Previous Job, Active Employee - Hourly, RSHRLY		

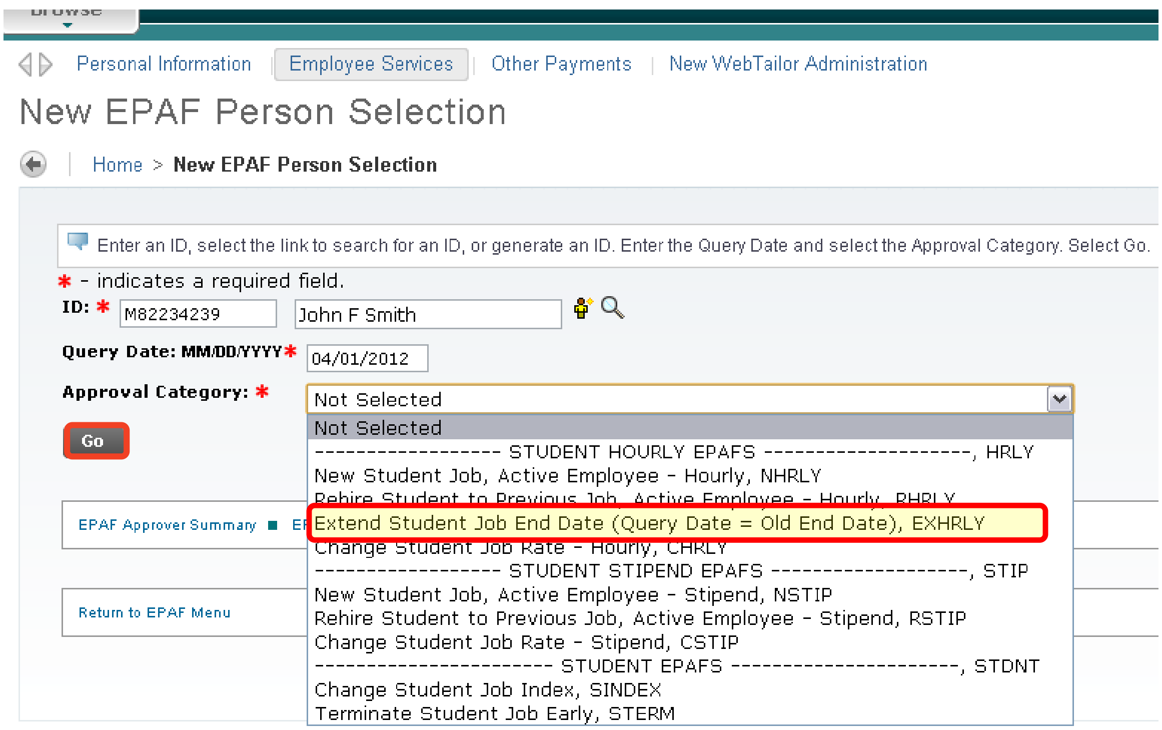
Option C: Extend Student Job End Date - Hourly, EXHRLY

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.

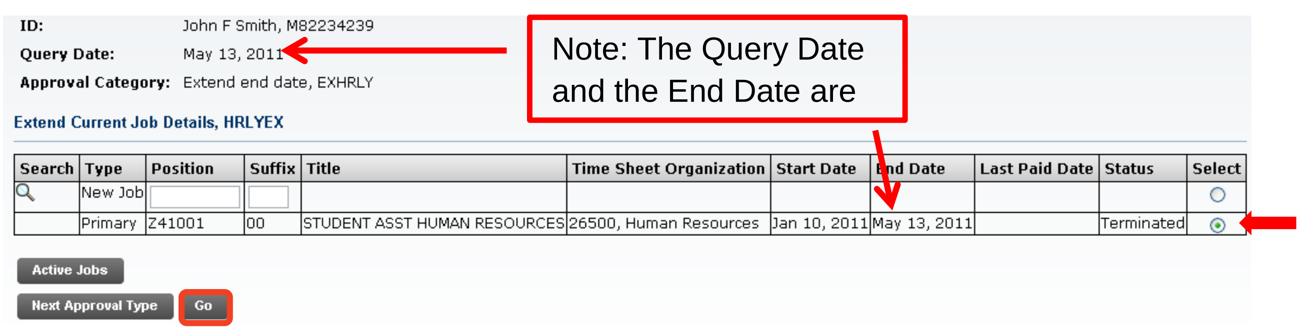
Step 2. Enter the employee's **Query Date** which is the **current Job End Date** *(see [Approval Category Definitions](#))*

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".



Step 5. Click "All Jobs". You will see the position that is due to end. Select the position and click "Go".



Step 6. Complete the *Extend Current Job Details* and *Job End Date*. You do not need to enter the Hourly Rate unless you wish to change it.

Note: The Jobs Effective Date will default from the query date and is not enterable. The Jobs Effective Date "Current Value" should equal the "New Value". If the dates are not the same, you must start the EPAF over to correct the Query Date.

HRLYEX - Extend Current Job Details, Z41001-00 STUDENT ASST HUMAN RESOURCES

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)	05/13/2011	05/13/2011
Job Status: *(Not Enterable)	Terminated	A
Hourly Rate:	7.4	

HRLYT - Job End Date, Z41001-00 STUDENT ASST HUMAN RESOURCES

Item	Current Value	New Value
Job End Date: MM/DD/YYYY*	05/13/2011	
Job Status: *(Not Enterable)	Terminated	T

Step 7. Verify the *Index & Labor Distribution* for the job. The Index and Labor Distribution will default from the position budget.

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	G00000	26501	P641	280					100.00	

New

Effective Date: MM/DD/YYYY 05/13/2011

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Over
U	A11805	G00000	26501	P641	280					100.00	
									Total:	100.00	

Defaulting values for Labor Distribution from the Job records.

Default from Index | Save

If no change is needed, click "Save" and continue to the *Routing Queue*.

If you need to change the Index, you have two options:

Option A. Overwrite 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.

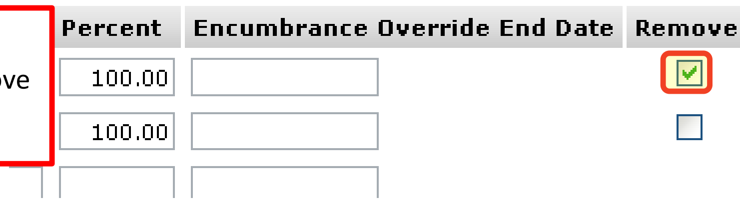
Enter the appropriate Account Code and click “Save”.

Option 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”.

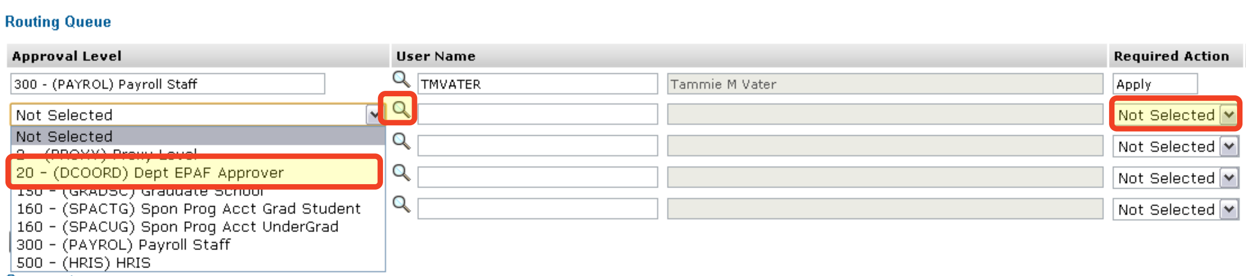
Note: Unless you save the EPAF at least once, the remove checkbox will not appear.



Step 8. 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 research account you will need to add the appropriate Approver in the Sponsored Programs office (Graduate or Undergraduate).

Step 9. Click “Save”.

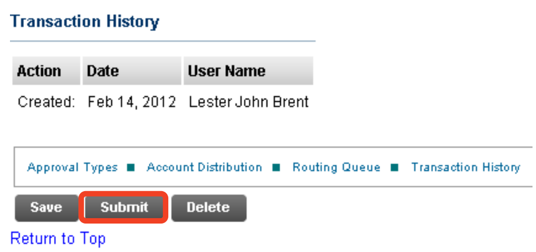


Step 10. You may insert comments into the **Comment Box**, but be aware that all individuals who can view the EPAF will be able to see the comments you create.

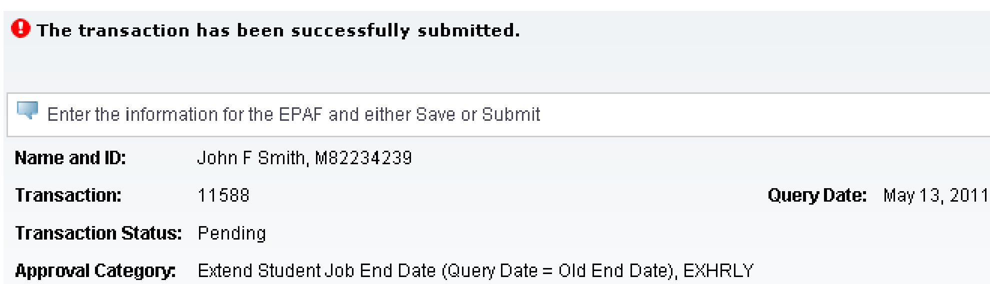
Michigan Tech Best Practice: Copy and paste the email request for the student job extension as a comment.

Step 11. Click “Save”.

Step 12. Once you have double checked to make sure everything has been entered correctly, click “Submit”.



Step 13. Verify at the top of the EPAF to see whether it was submitted successfully.



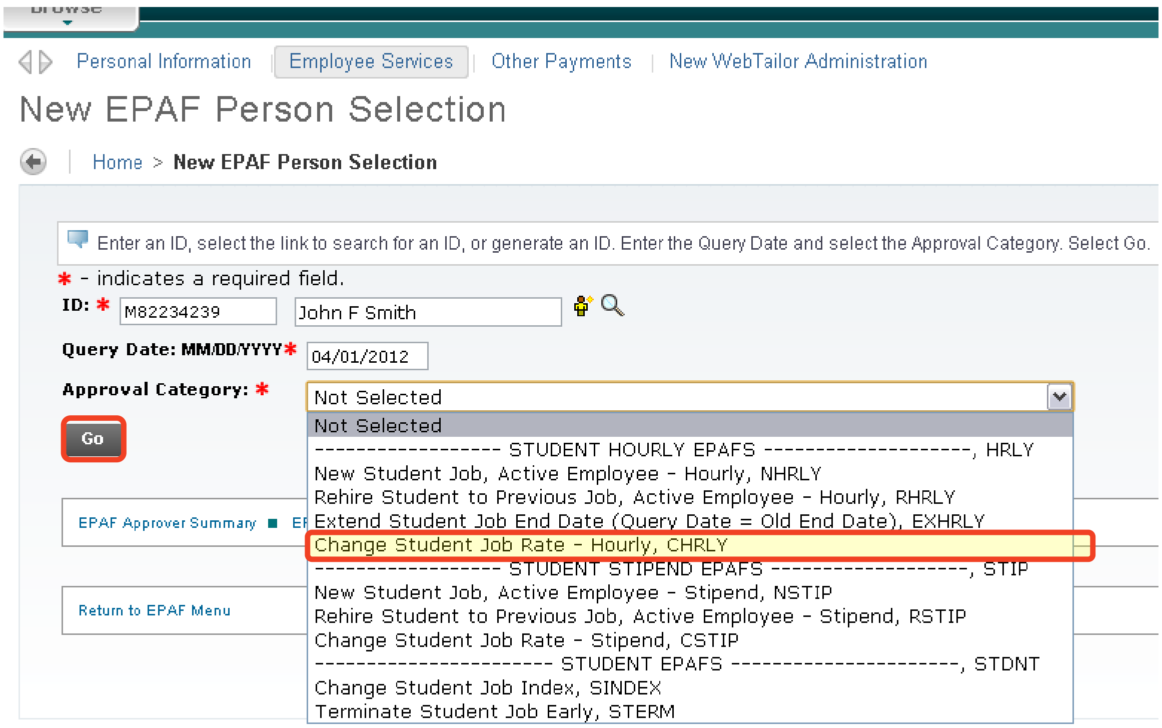
Option D: Change Student Job Rate - Hourly, CHRLY

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.

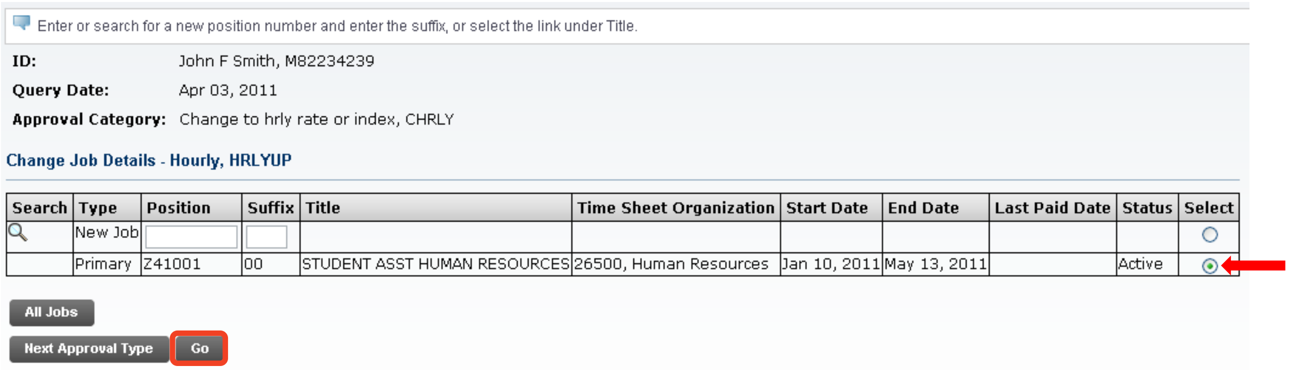
Step 2. Enter the employee's **Query Date** which is the effective date and must be greater than the last paid date. *(see Approval Category Definitions)*

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".



Step 5. Click "All Jobs". In the right edge of the *Change Job Details section,* select the job for the rate change and click "Go".


Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: John F Smith, M82234239
Query Date: Apr 03, 2011
Approval Category: Change to hrly rate or index, CHRLY

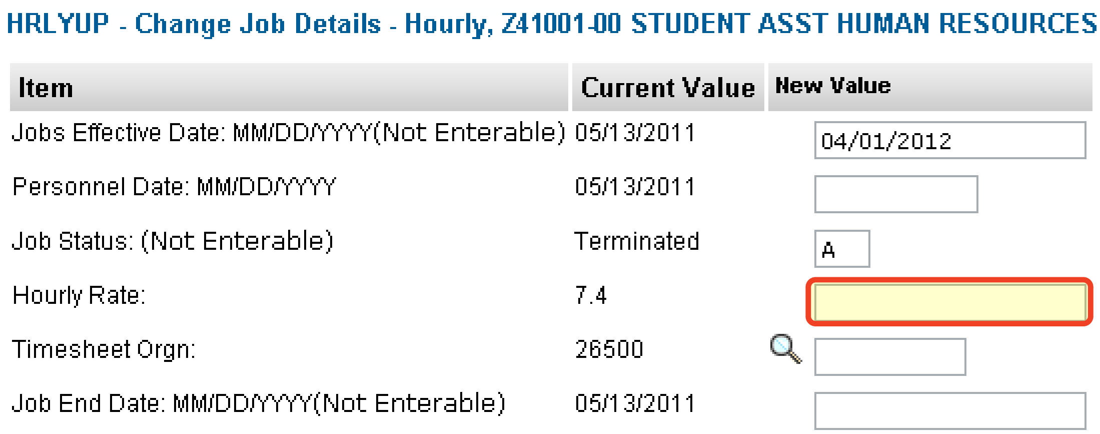
Change Job Details - Hourly, HRLYUP

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									
	Primary	Z41001	00	STUDENT ASST HUMAN RESOURCES	26500, Human Resources	Jan 10, 2011	May 13, 2011		Active	

All Jobs
Next Approval Type Go

Step 6. Enter the new pay rate in the **Hourly Rate** field.

Step 7. If the pay rate is retroactive (less than last paid date), then you must enter the date for the pay rate change in the **Personnel Date**.


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

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	05/13/2011	04/01/2012
Personnel Date: MM/DD/YYYY	05/13/2011	
Job Status: (Not Enterable)	Terminated	A
Hourly Rate:	7.4	
Timesheet Orgn:	26500	
Job End Date: MM/DD/YYYY(Not Enterable)	05/13/2011	

Step 8. **Change the Index & Labor Distribution -** If you need to change the Index, you have two options:

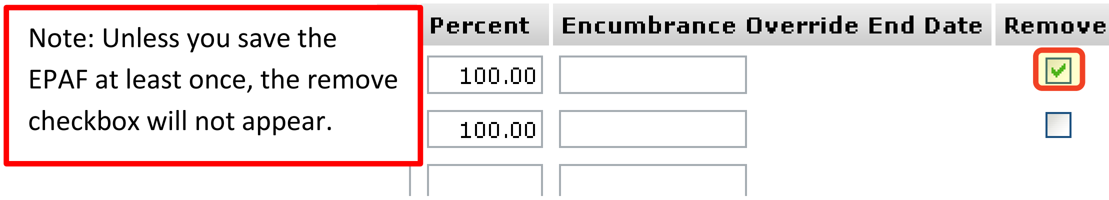
Option 1. Overwrite the Index in the Index field and click "Default from Index". This will cause the Account code to disappear while the correct Fund, Org and Program codes populate.

Enter the appropriate Account Code and click "Save".

Option 2. 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".

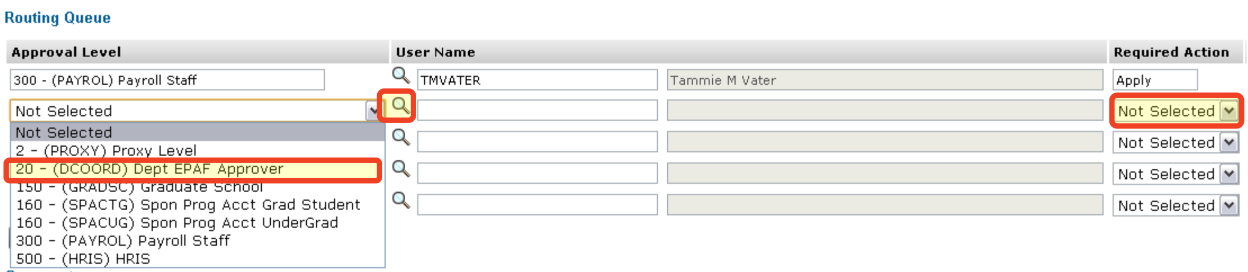
Scroll back down to the Index & Labor Distribution area. On the right side, a check box next to each distribution line can be seen. Select the Index you want to delete and click "Save".



Step 9. 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 research account you will need to add the appropriate Approver in the Sponsored Programs office (Graduate or Undergraduate).

Step 10. Click “Save”.



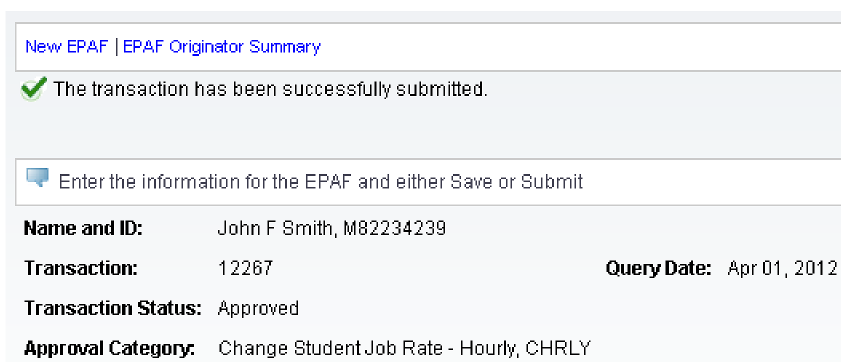
Step 11. Give a detailed explanation of why these changes are being made in the **Comment Box**. If a change is being made to a sponsored account, list the dollar amounts that are changing.

Michigan Tech Best Practice: Copy and paste the email request for the student hire as a comment.

Step 12. Click “Save”.

Step 13. Once you have double checked to make sure everything has been entered correctly, click "Submit".

Step 14. Verify at the top of the EPAF to see whether it was submitted successfully.



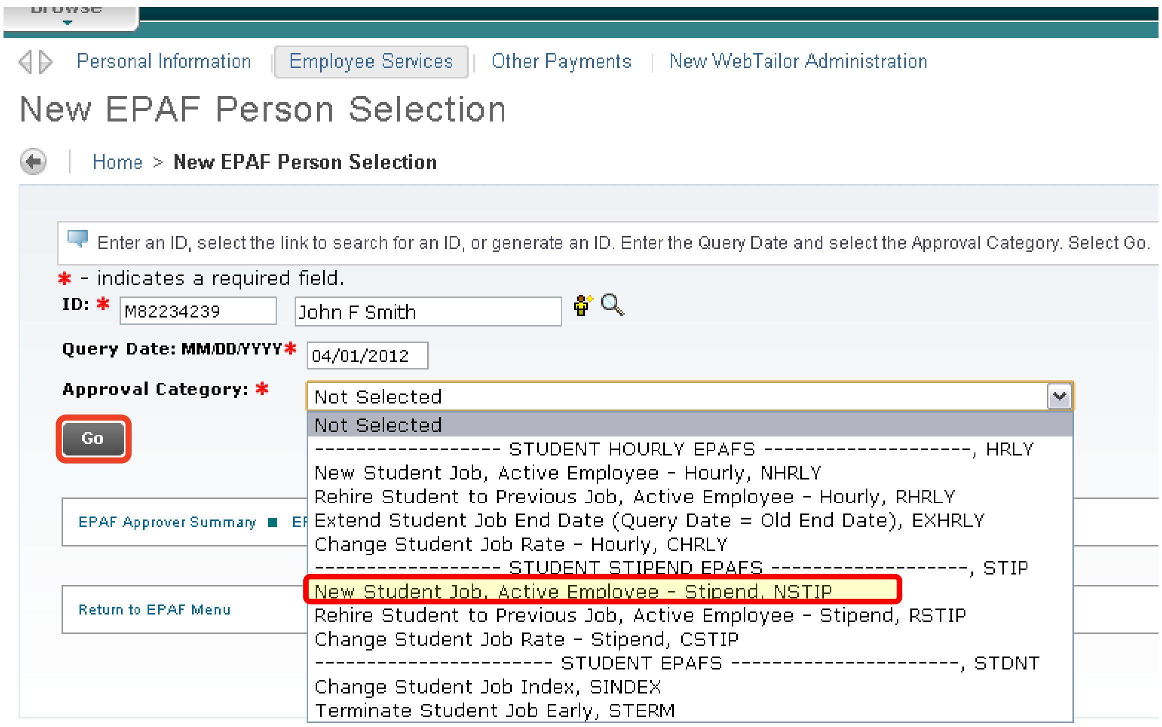
Option E: New Student Job - Stipend, NSTIP

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 *(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".



Step 5. Click "All Jobs" to verify that the employee has never been employed in this departmental position. If the employee has previously held this position, you will need to start over and create an EPAF with the approval category Rehire Student into Previous Job, Active Employee - Stipend

Step 6. Enter the Departmental Position Number next to the New Job field.

Step 7. Enter in the appropriate **Suffix**:

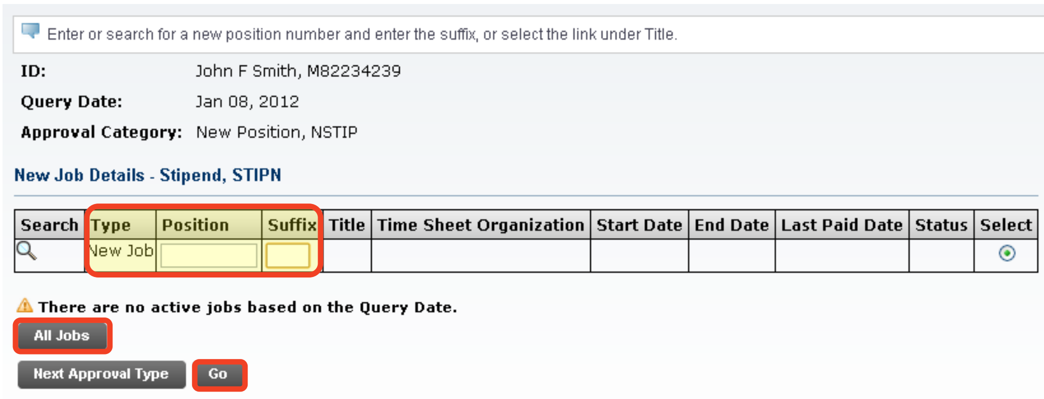
00 is the suffix if it is the first time the employee has been hired into your department.

If the student has multiple positions in your department, increase the suffix by one. The suffix needs to be different than the existing suffix on the current position.

Unique Identifier = M# + Departmental Position Number + Suffix

Step 8. Make sure the new position is selected on the right edge of the *New Job Details area*.

Step 9. Click “Go”.



Step 10. Complete the *New Job Details* and *Job End Date* sections.

*NOTE: Any field with a * next to it is required. However, the Job Begin Date and the Job Effective Date fields are not enterable and both default from the Query Date.*

The **Contract Type** will default to Secondary, only change this if the student has never had a position with the University or you receive an error on the EPAF requiring you to change this to Primary.

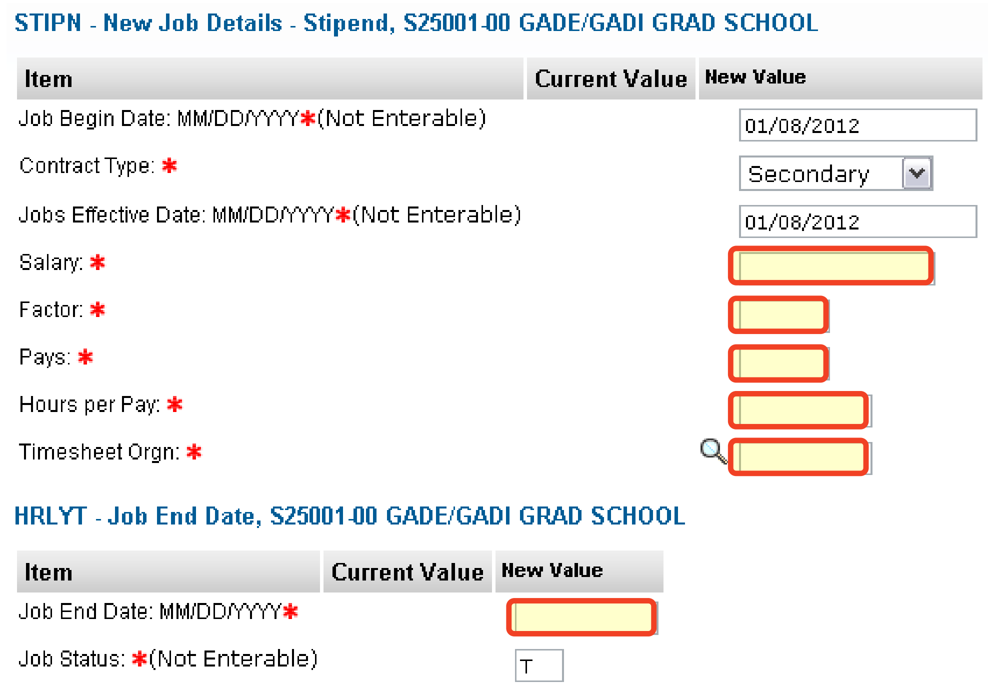
The **Annual Salary** is the Stipend Amount.

*****Factors and Pays are always equal for Stipends.*****

To calculate out the number of Pays, take the number of weeks of the length of the job and divide by 2.

Fractions of a Week/Pay: *Each work day (M, T, W, Th, F) is equal to 0.2 weeks. For example, if a job ends on a Wednesday, multiply 3 (M, T, W) by 0.2 to get a total of 0.6 weeks. Add this to the total number of full weeks and then divide by 2 for the number of pays.*

The **Hours per Pay** are based on the stipend; 40.00 for full stipend; 30.00 for ¾ stipend, 20.00 for ½ stipend, and 10.00 for ¼ stipend.



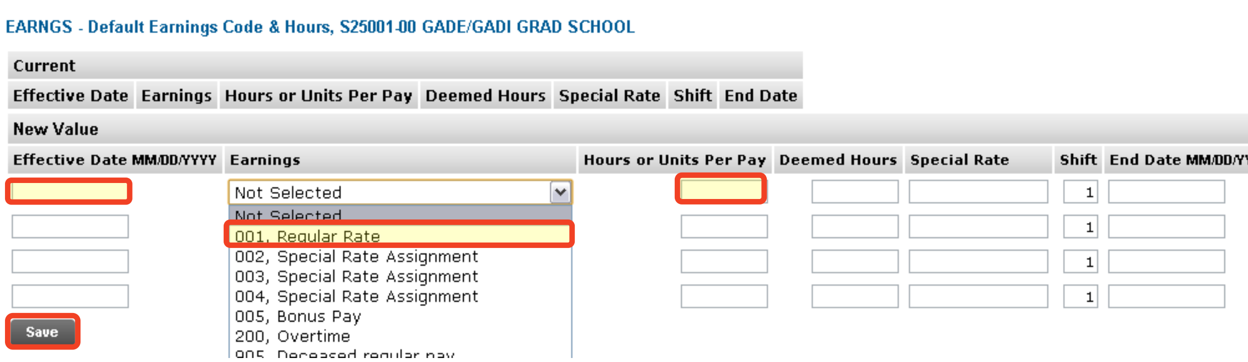
Step 11. Complete the *Default Earnings Code & Hours* section.

A. Use the Query Date as the Effective Date.

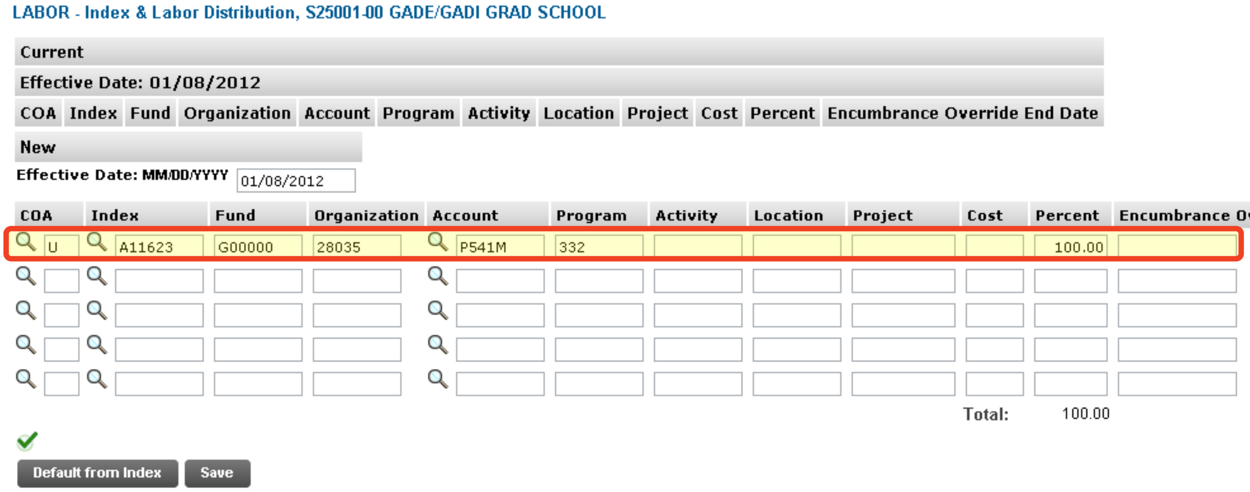
B. Select 001, Regular Rate for the Earnings Code.

C. Fill in the number of Hours per Pay. This will be the same number as the Hours Pay in the *New Job Details* section.

D. Click "Save".



Step 12. Verify the *Index & Labor Distribution* for the job. The Index and Labor Distribution will default from the position budget.



If no change is needed, click “Save” and continue to the *Routing Queue.*

If you need to change the Index, you have two options:

Option A. Overwrite 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.

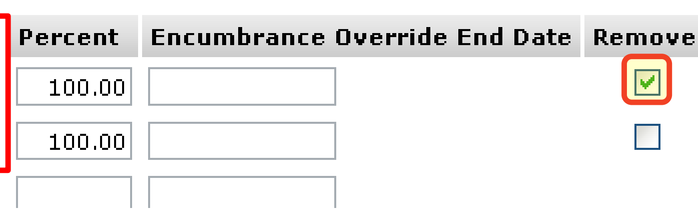
Enter the appropriate Account Code and click “Save”.

Option 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 hand side there is a check box next to each distribution line. 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.

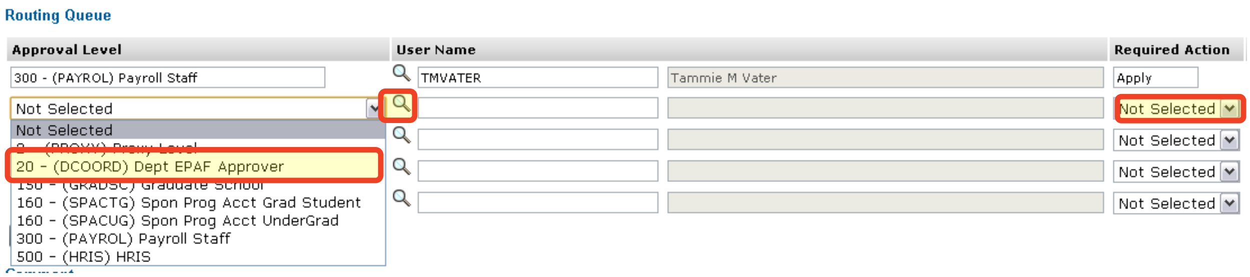


Step 13. Complete the *Routing Queue* by choosing the **Approval Level**, inserting a **User Name**, and selecting a **Required Action** *(Approve or FYI)*.

NOTE: All Stipends must be routed to the Graduate School for approval.

If the position is funded by a research account you will need to add the *appropriate Approver in the Sponsored Programs office (Graduate or Undergraduate).*

Step 14. Click “Save”.



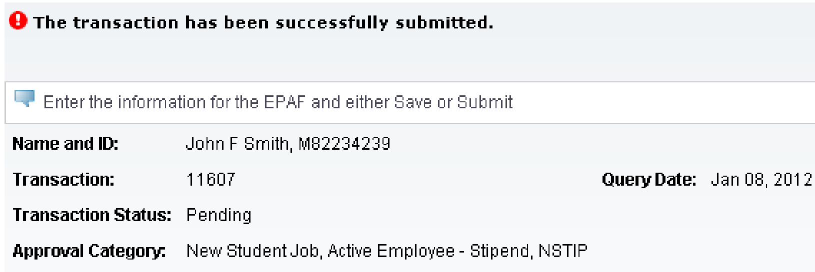
Step 15. You may insert comments into the ***Comment Box***, but be aware that all individuals who can view the EPAF will be able to see the comments you create.

Michigan Tech Best Practice: Copy and paste the email request for the student hire as a comment.

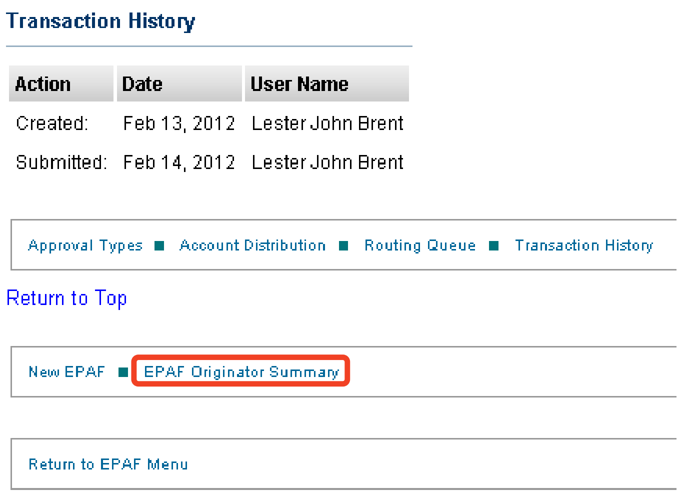
Step 16. Click “Save”.

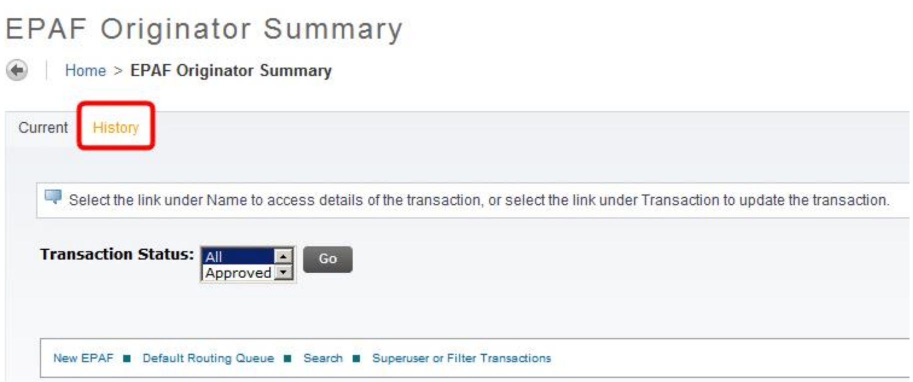
Step 17. Once you have double checked to make sure everything has been entered correctly, click “Submit”.

Step 18. Verify at the top of the EPAF to see whether it was submitted successfully.



Step 19. To view the EPAF you just submitted, click “EPAF Originator Summary”, and click on the “History” tab. For definitions of each status see [EPAF Statuses.](#)





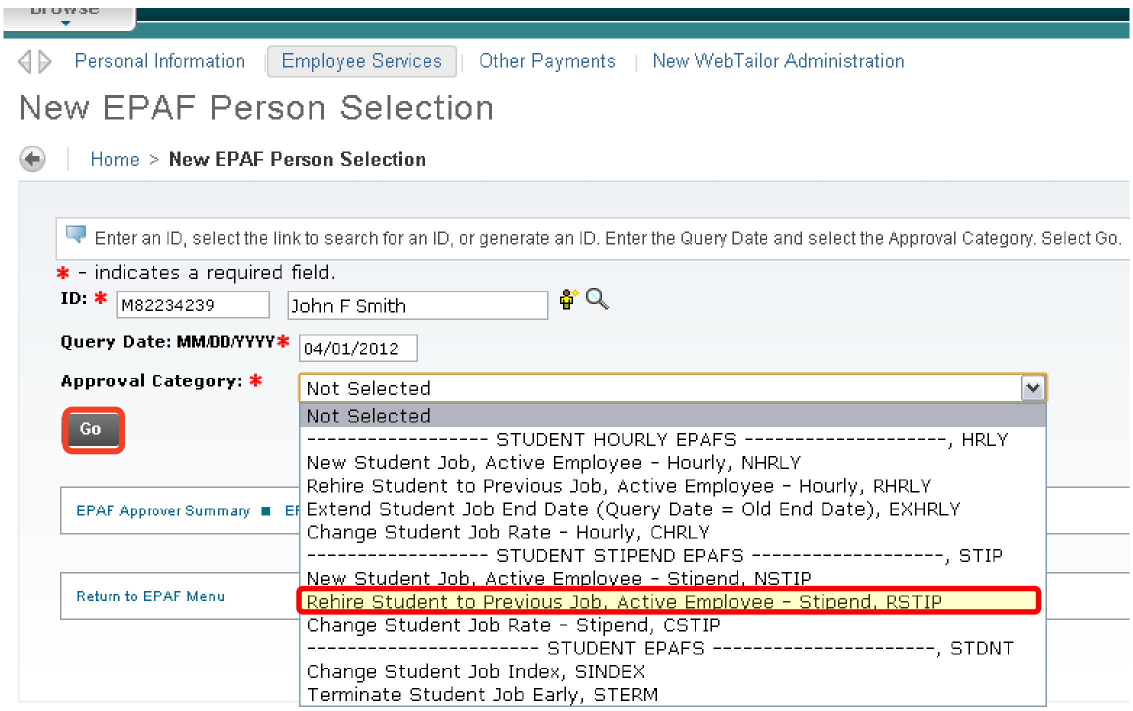
Option F: Rehire Student to Previous Job - Stipend, RSTIP

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.

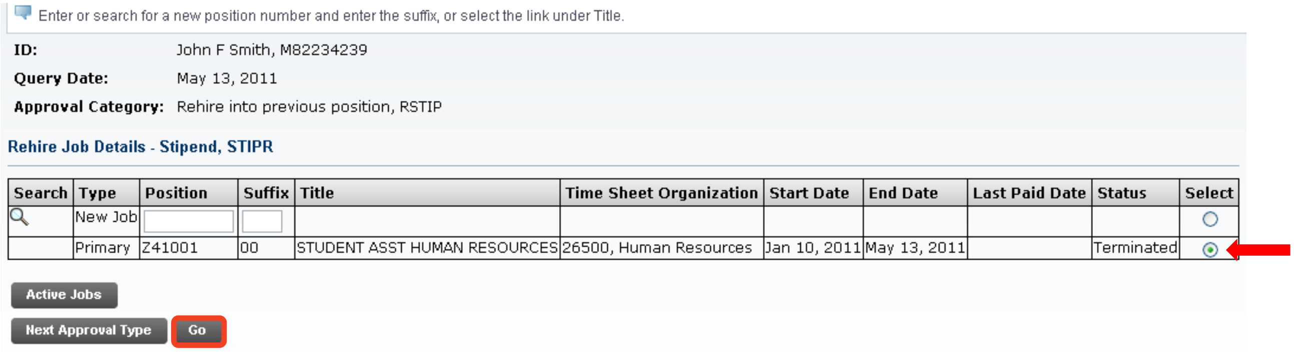
Step 2. Enter the employee's **Query Date** which is the effective date *(see Approval Category Definitions).*

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".



Step 5. Click on the "All Jobs" button to locate the position you are rehiring the employee into. Make sure the job is selected on the right side of the screen and click "Go".


Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: John F Smith, M82234239

Query Date: May 13, 2011

Approval Category: Rehire into previous position, RSTIP

Rehire Job Details - Stipend, STIPR

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									
	Primary	Z41001	00	STUDENT ASST HUMAN RESOURCES	26500, Human Resources	Jan 10, 2011	May 13, 2011		Terminated	

Active Jobs

Next Approval Type Go

Step 6. Complete the *Rehire Job Details* and *Job End Date* sections.

NOTE: Any field with a * *next to it is required. For all other fields, if no change is required from the previous time this employee had this position, you do not need to fill in the New Value.*

The **Personnel Date** is only used if this Rehire should have occurred before the “Last Paid Date”. This might happen if an employee’s job ended at the beginning of the pay period and you were rehiring the employee later in that pay period. If that occurs, the employee needs to be hired retroactively (earlier then the last paid date) during that payroll period.

The **Annual Salary** is the Stipend Amount.

The **Factor** and **Pays** are always equal. The **Factor** and **Pays** are equal to the amount of pay periods between the **Query Date** (or **Personnel Date** if retroactive) and the **Job End Date**.

To figure out the number of Pays, take the number of weeks of the length of the job and divide by 2.

Fractions of a Week/Pay: *Each work day (M, T, W, Th, F) is equal to 0.2 weeks. For example, if a job ends on a Wednesday, multiply 3 (M, T, W) by 0.2 to get a total of 0.6 weeks. Add this to the total number of full weeks and then divide by 2 for the number of pays.*

The **Hours per Pay** are based on the stipend; 40.00 for full stipend; 30.00 for ¾ stipend, 20.00 for ½ stipend, and 10.00 for ¼ stipend.

STIPR - Rehire Job Details - Stipend, Z41001-00 STUDENT ASST HUMAN RESOURCES

Item	Current Value	New Value
Contract Type:	Primary	Secondary
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	05/13/2011	05/13/2011
Personnel Date: MM/DD/YYYY	05/13/2011	
Job Status: (Not Enterable)	Terminated	A
Salary:	7696	
Factor:	26	
Pays:	26	
Hours per Pay:	40	
Timesheet Orgn:	26500	

HRLYT - Job End Date, Z41001-00 STUDENT ASST HUMAN RESOURCES

Item	Current Value	New Value
Job End Date: MM/DD/YYYY*	05/13/2011	
Job Status: *(Not Enterable)	Terminated	T

Step 7. Update the *Default Earnings Code & Hours* section.

A. Use the Query Date as the Effective Date. You will have to over write the "New Value" Effective Date.

B. If you changed the Hours per Pay in the *Job Details* area, you must update the Hours per Pay field.

C. Click "Save".

EARNGS - Default Earnings Code & Hours, Z41001-00 STUDENT ASST HUMAN RESOURCES

Current

Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
05/13/2011	001, Regular Rate	40.00			1	

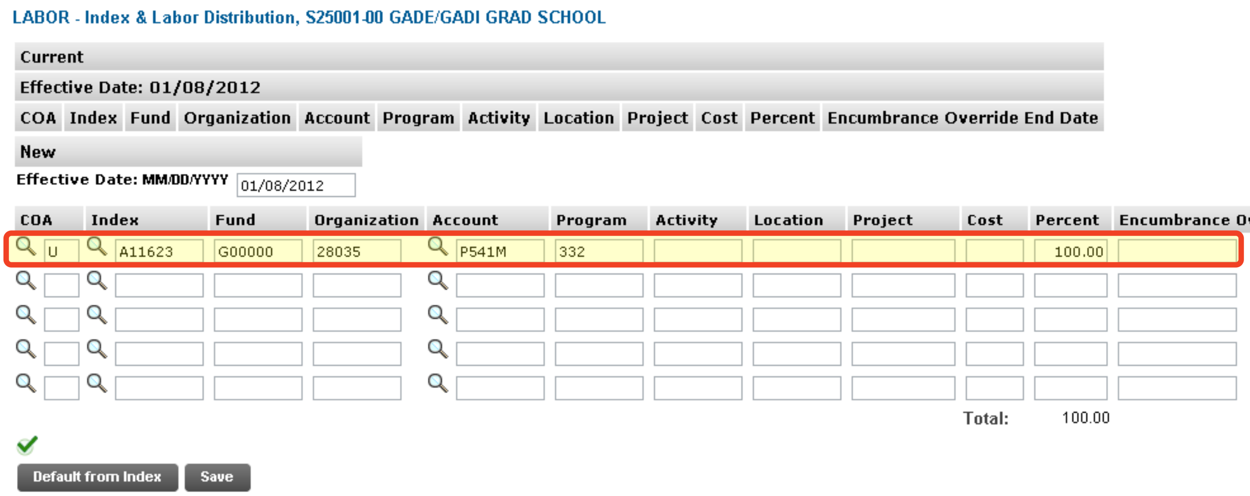
New Value

Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	Re
05/13/2011	001, Regular Rate	40.00			1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		

Defaulting values for Default Earnings from the Job records.

Save

Step 8. Verify the *Index & Labor Distribution* for the job. The Index and Labor distribution will default from the previous job information.



If no change is needed, click "Save" and continue to the *Routing Queue*.

If you need to change the Index, you have two options:

Option A. Overwrite 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.

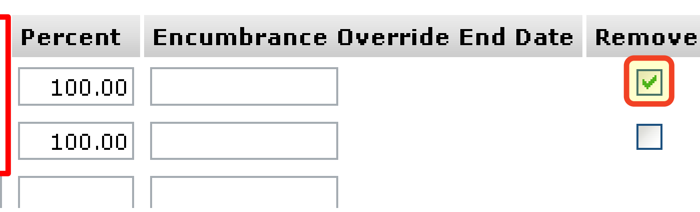
Enter the appropriate Account Code and click "Save".

Option 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 hand side there is a check box next to each distribution line. 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.

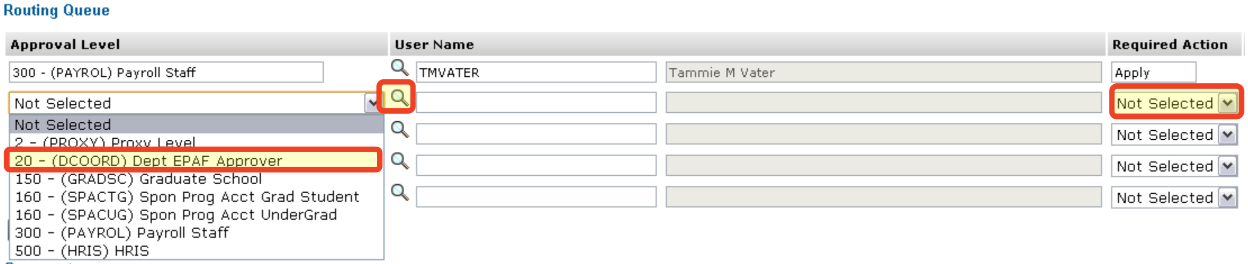


Step 9. Complete the *Routing Queue* by choosing the **Approval Level**, inserting a **User Name**, and selecting a **Required Action** *(Approve or FYI)*.

NOTE: All Stipends must be routed to the Graduate School for approval.

If the position is funded by a research account you will need to add the *appropriate* Approver in the Sponsored Programs office (Graduate or Undergraduate).

Step 10. Click "Save".



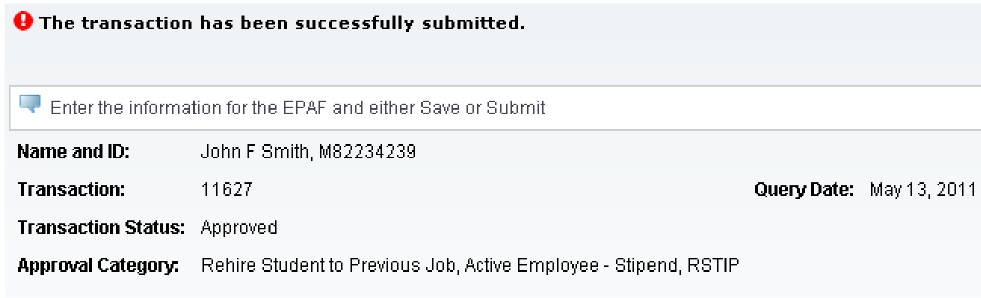
Step 11. You may insert comments into the ***Comment Box***, but be aware that all individuals who can view the EPAF will be able to see the comments you create.

Michigan Tech Best Practice: Copy and paste the email request for the student rehire as a comment.

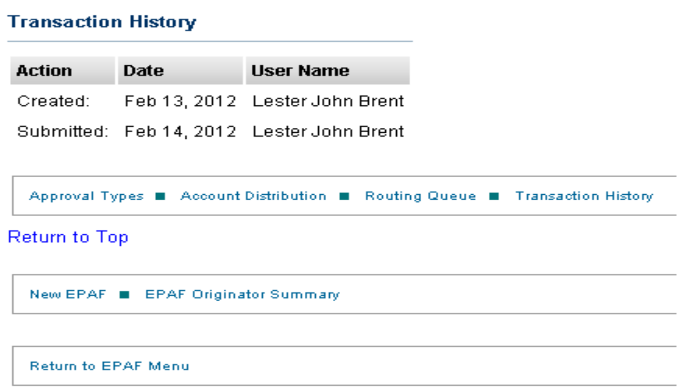
Step 12. Click "Save".

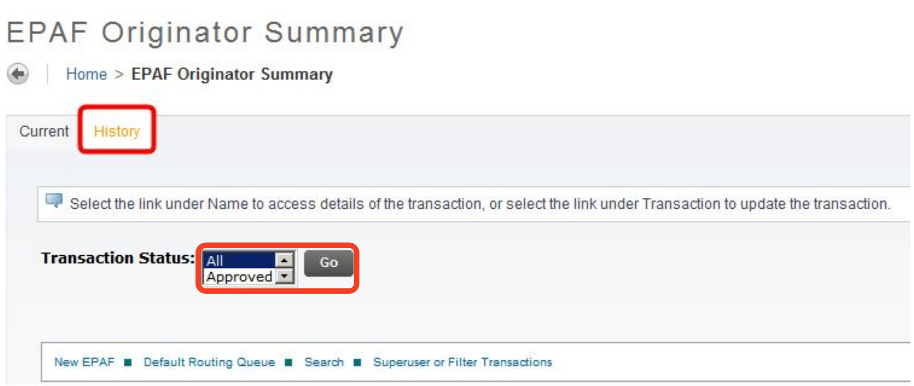
Step 13. Once you have double checked to make sure everything has been entered correctly, click "Submit".

Step 14. Verify at the top of the EPAF to see whether it was submitted successfully.



Step 15. To view the EPAF you just submitted, click "EPAF Originator Summary", and click on the "History" tab. For definitions of each status see *EPAF Statuses.*





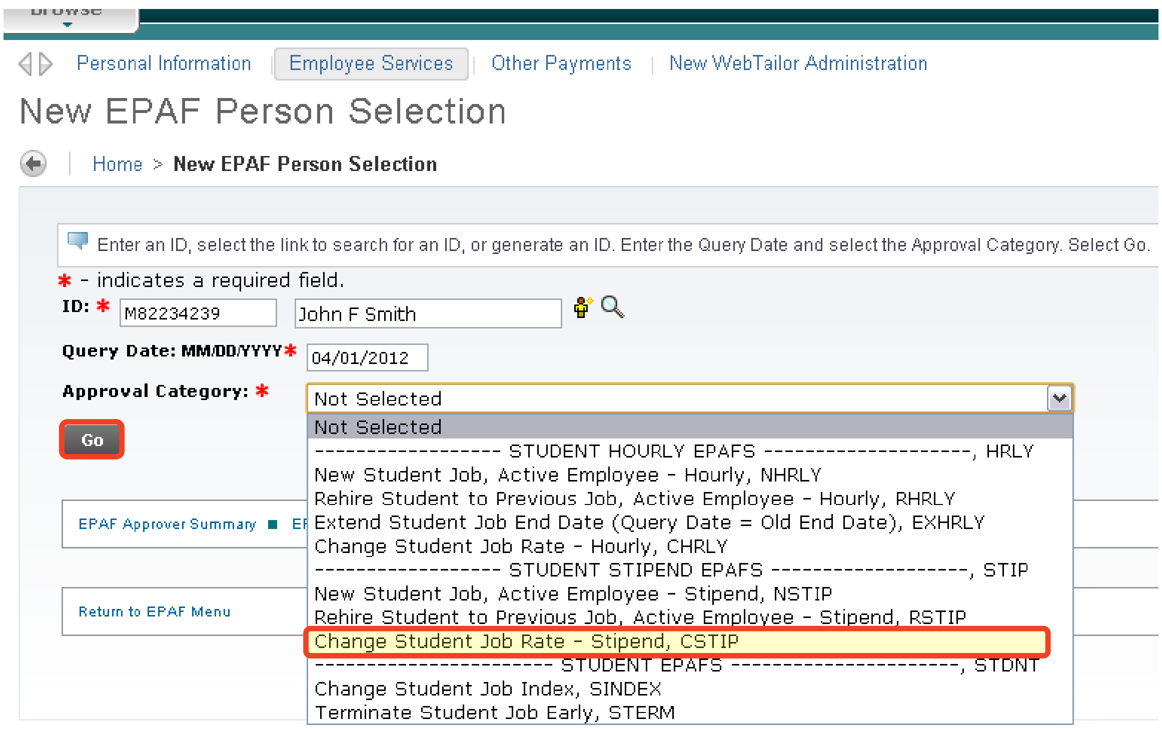
Option G: Change Student Job Rate - Stipend, CSTIP

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.

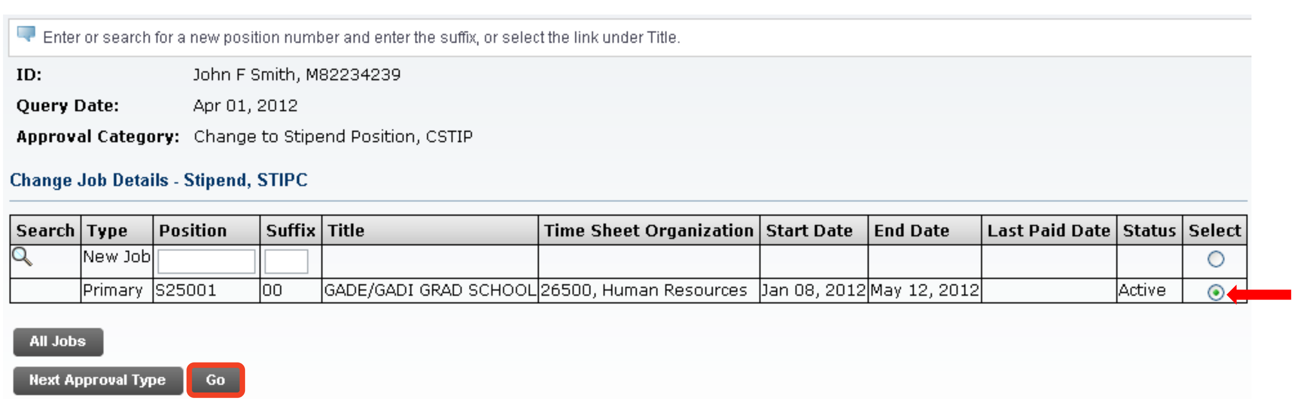
Step 2. Enter the employee's **Query Date** which is the effective date and must be greater than the last paid date. *(see Approval Category Definitions)*

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".



Step 5. Click "All Jobs". Select the position on the right and click "Go".



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**.

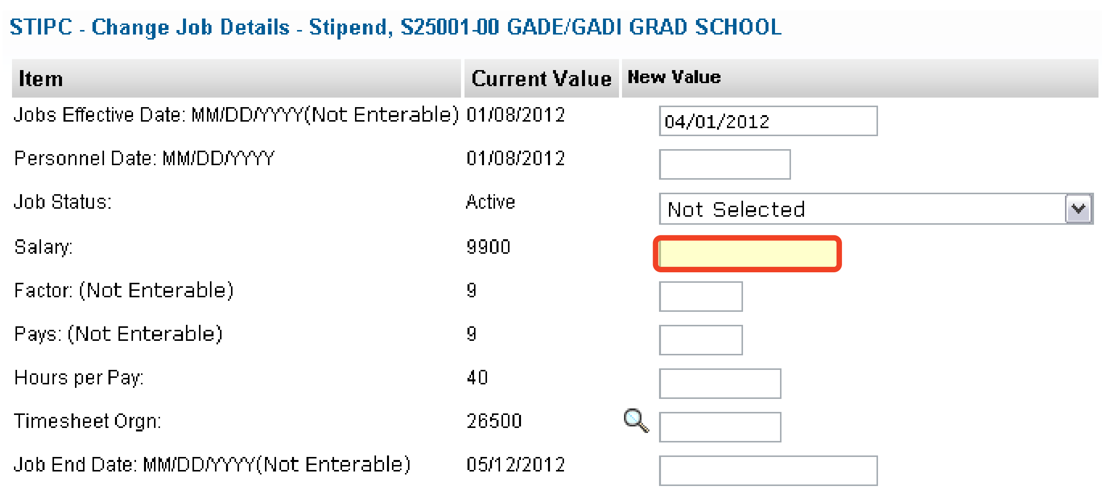
Step 7. Enter in the new stipend in the **Salary** field.

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

Step 8. Enter the **Factor** and **Pays**.

*NOTE: The **Factor** and **Pays** are always equal. The **Factor** and **Pays** are equal to the amount of pay periods between the **Query Date** (or **Personnel Date** if retroactive) and the **Job End Date**.*

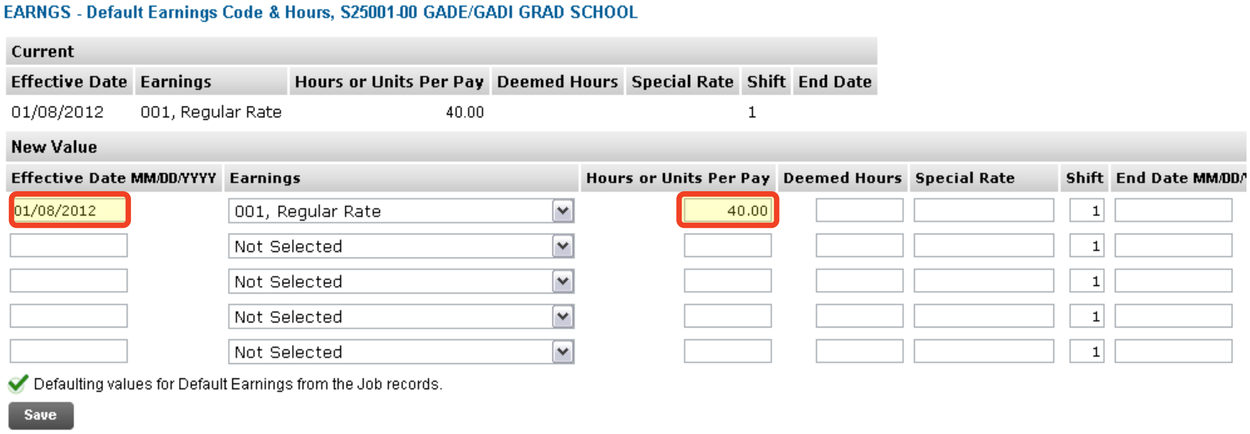
Step 9. Change the number of **Hours per Pay** if needed.


STIPC - Change Job Details - Stipend, S25001-00 GADE/GADI GRAD SCHOOL

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	01/08/2012	04/01/2012
Personnel Date: MM/DD/YYYY	01/08/2012	
Job Status:	Active	Not Selected
Salary:	9900	
Factor: (Not Enterable)	9	
Pays: (Not Enterable)	9	
Hours per Pay:	40	
Timesheet Orgn:	26500	
Job End Date: MM/DD/YYYY(Not Enterable)	05/12/2012	

Step 10. Update the *Earnings Code & Hours* **Effective Date** to match the **Query Date**.

Step 11. If you changed the number of **Hours per Pay**, you will need to update the **Hours per Pay** in this section as well.



Step 12. If you need to change the Index, you have two options:

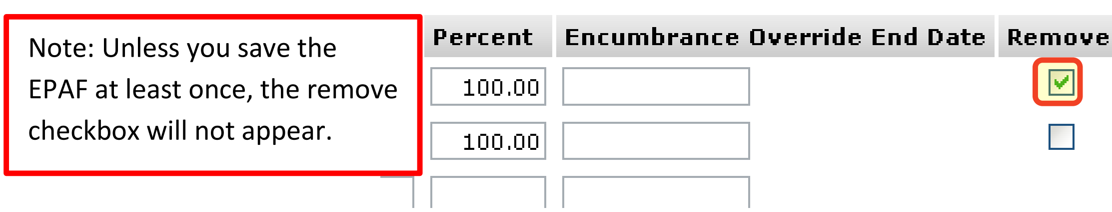
Option A. Overwrite the Index in the Index field and click "Default from Index". This will cause the Account code to disappear while the correct Fund, Org and Program codes populate.

Enter the appropriate Account Code and click "Save".

Option 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".

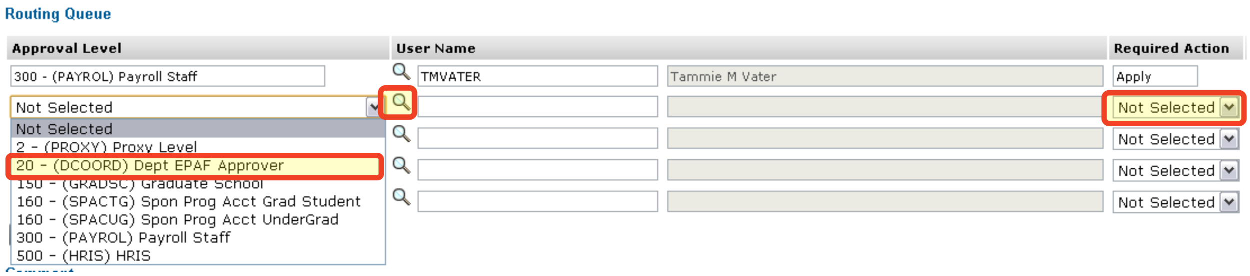
Scroll back down to the Index & Labor Distribution area. On the right side, a check box next to each distribution line can be seen. Select the Index you want to delete and click "Save".



Step 15. 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 research account you will need to add the appropriate Approver in the Sponsored Programs office (Graduate or Undergraduate).

Step 16. Click "Save".

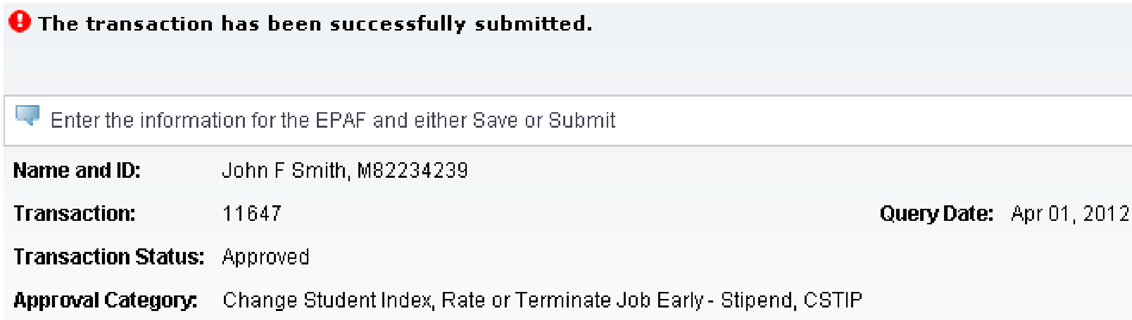


Step 17. Please give a detailed explanation of why a change is being made in the ***Comment Box***. If a change is being made to a sponsored account, list the dollar amounts that will be changing.

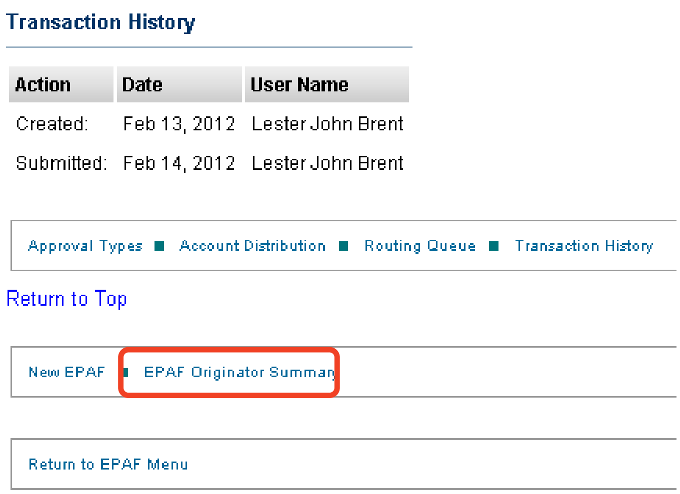
Step 18. Click “Save”.

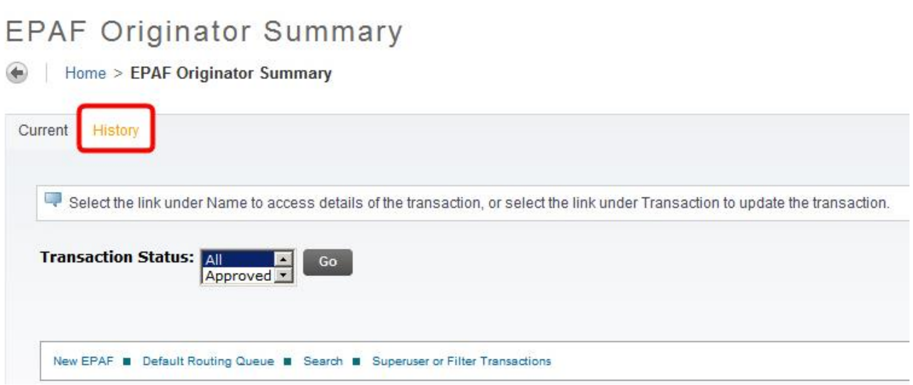
Step 19. Once you have double checked to make sure everything has been entered correctly, click “Submit”.

Step 20. Verify at the top of the EPAF to see whether it was submitted successfully.



Step 21. To view the EPAF you just submitted, click "EPAF Originator Summary", and click on the "History" tab. For definitions of each status see [EPAF Statuses.](#)





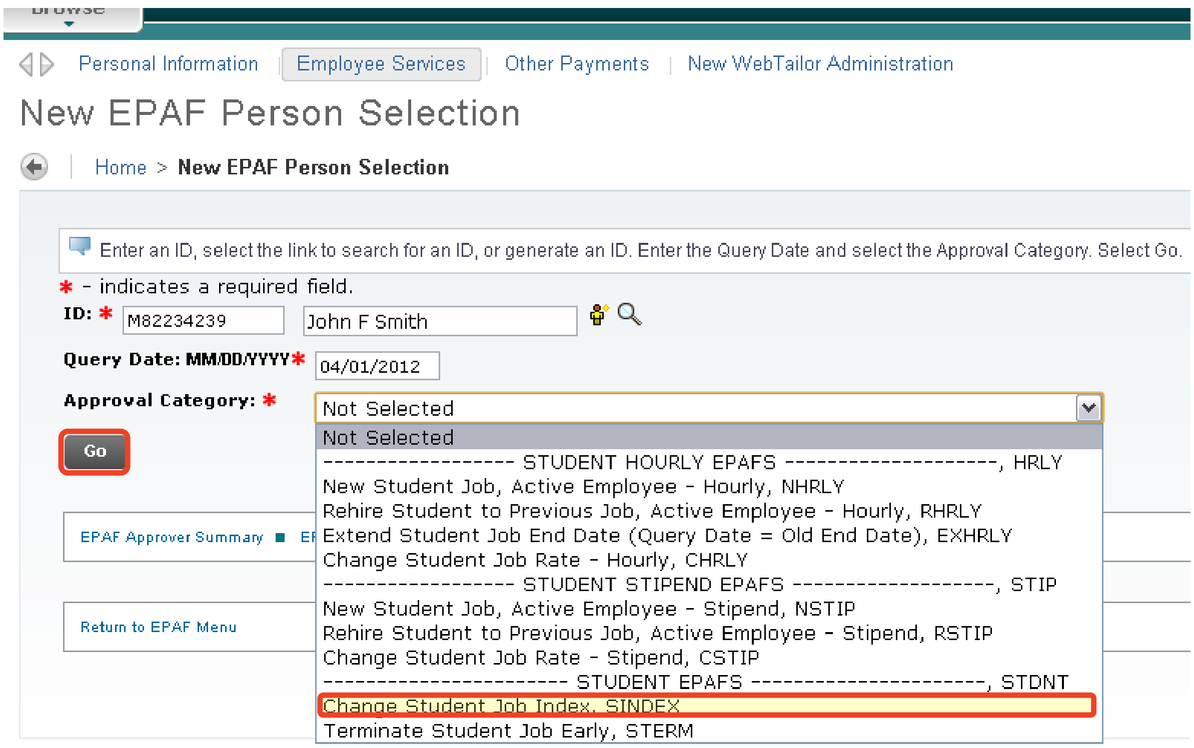
Option H: Change Student Index, SINDEX

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.

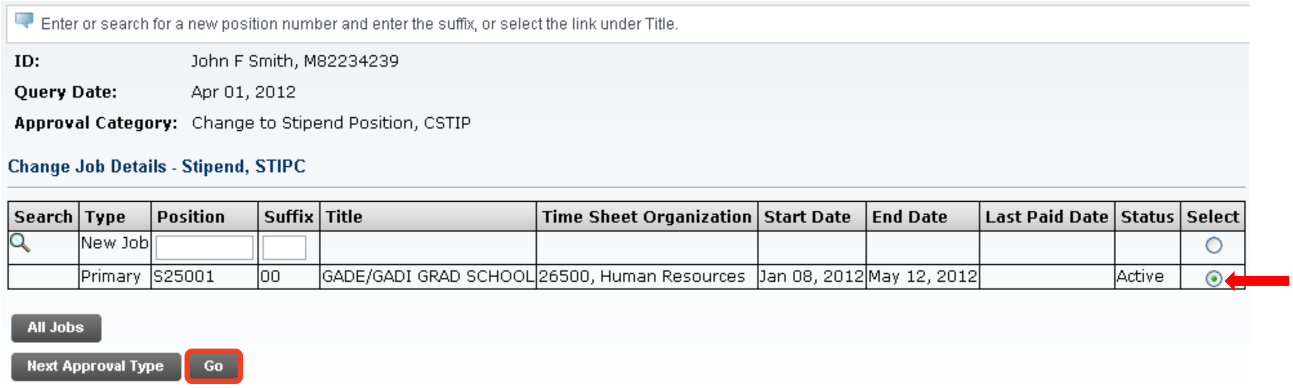
Step 2. Enter the employee's **Query Date** which is the effective date and must be greater than the last paid date. *(see Approval Category Definitions)*

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".



Step 5. Click "All Jobs". Select the job on the right and click "Go".



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

Option A. Overwrite 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.

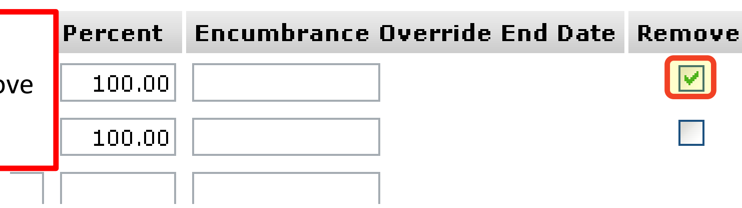
Enter the appropriate Account Code and click "Save".

Option 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".

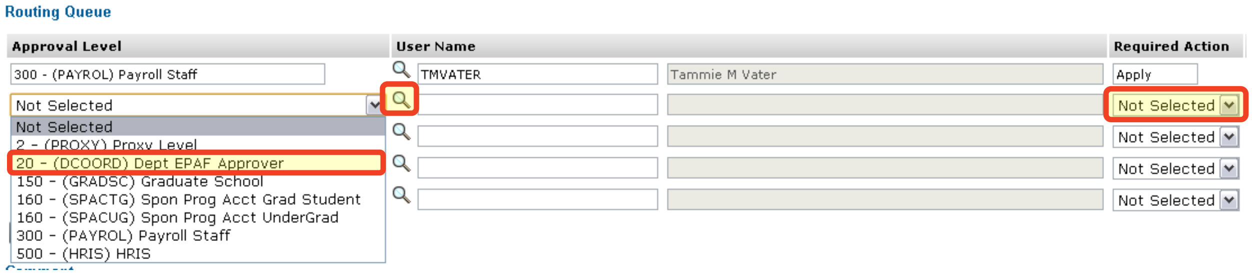
Note: Unless you save the EPAF at least once, the remove checkbox will not appear.



Step 7. 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 research account you will need to add the appropriate approval level in the Sponsored Programs office (Graduate or Undergraduate).

Step 8. Click "Save".



Step 9. Please 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 amounts that will be changing as well as the end date for this change.

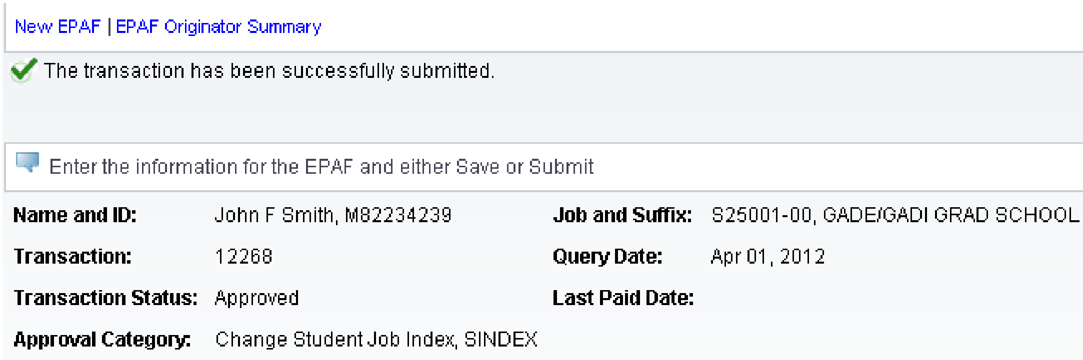
If the index will change again before the end date of the job, process a second EPAF with that change. Include Sponsored Programs as an FYI if moving from a sponsored account to a non-sponsored account.

Michigan Tech Best Practice: Copy and paste the email request for the index change as a comment.

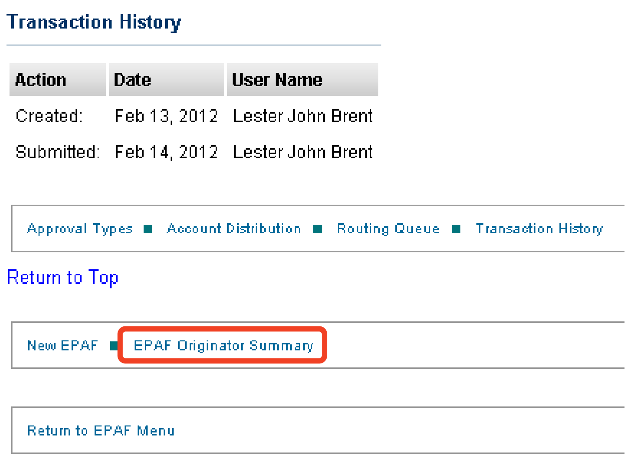
Step 10. Click “Save”.

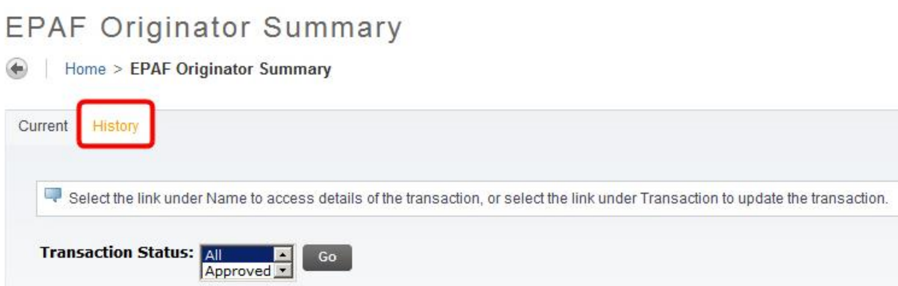
Step 11. Once you have double checked to make sure everything has been entered correctly, click “Submit”.

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



Step 13. To view the EPAF you just submitted, click “EPAF Originator Summary”, and click on the “History” tab. For definitions of each status see *EPAF Statuses.*





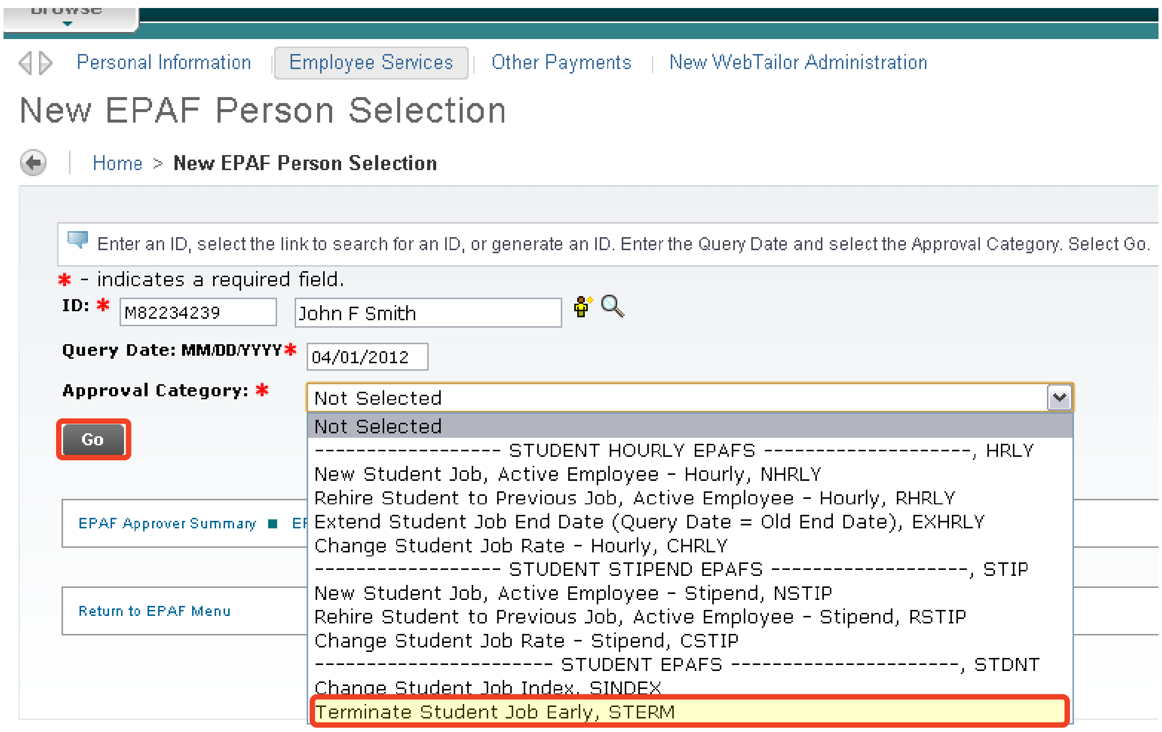
Option I: Ending a Student Job Early, STERM

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.

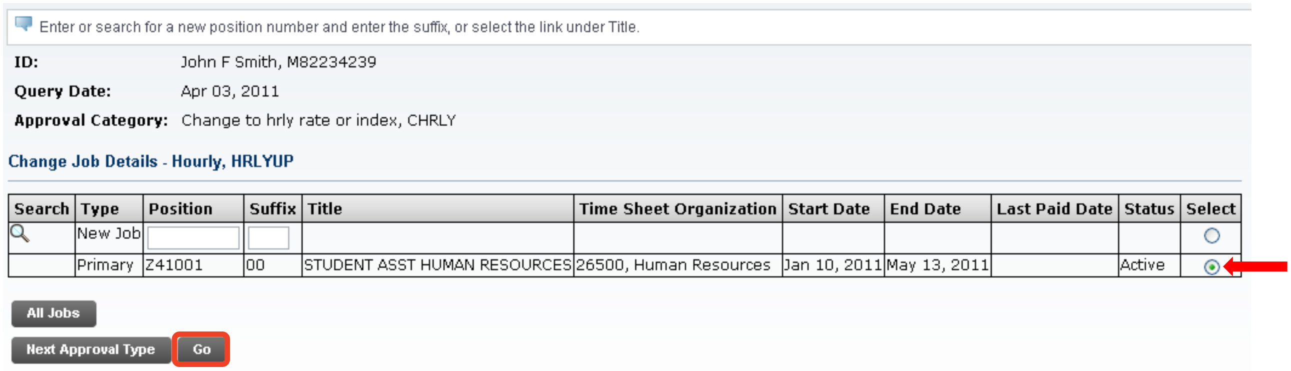
Step 2. Enter the employee's **Query Date** which is the effective date and must be greater than the last paid date. *(see Approval Category Definitions)*

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".



Step 5. Click "All Jobs". In the right edge of the *Change Job Details* section, select the job to end early and click "Go".



Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: John F Smith, M82234239

Query Date: Apr 03, 2011

Approval Category: Change to hrly rate or index, CHRLY

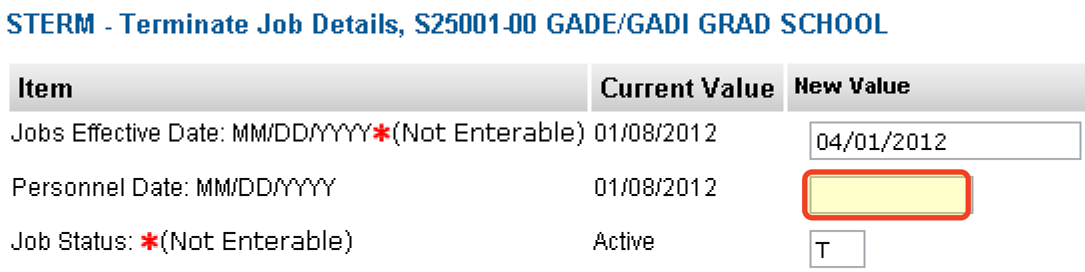
Change Job Details - Hourly, HRLYUP

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									
	Primary	Z41001	00	STUDENT ASST HUMAN RESOURCES	26500, Human Resources	Jan 10, 2011	May 13, 2011		Active	

All Jobs

Next Approval Type Go

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



STERM - Terminate Job Details, S25001-00 GADE/GADI GRAD SCHOOL

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)	01/08/2012	04/01/2012
Personnel Date: MM/DD/YYYY	01/08/2012	
Job Status: *(Not Enterable)	Active	T

Step 7. Complete the *Routing Queue* by choosing the **Approval Level**, inserting a **User Name**, and selecting a **Required Action** *(Approve or FYI)*.

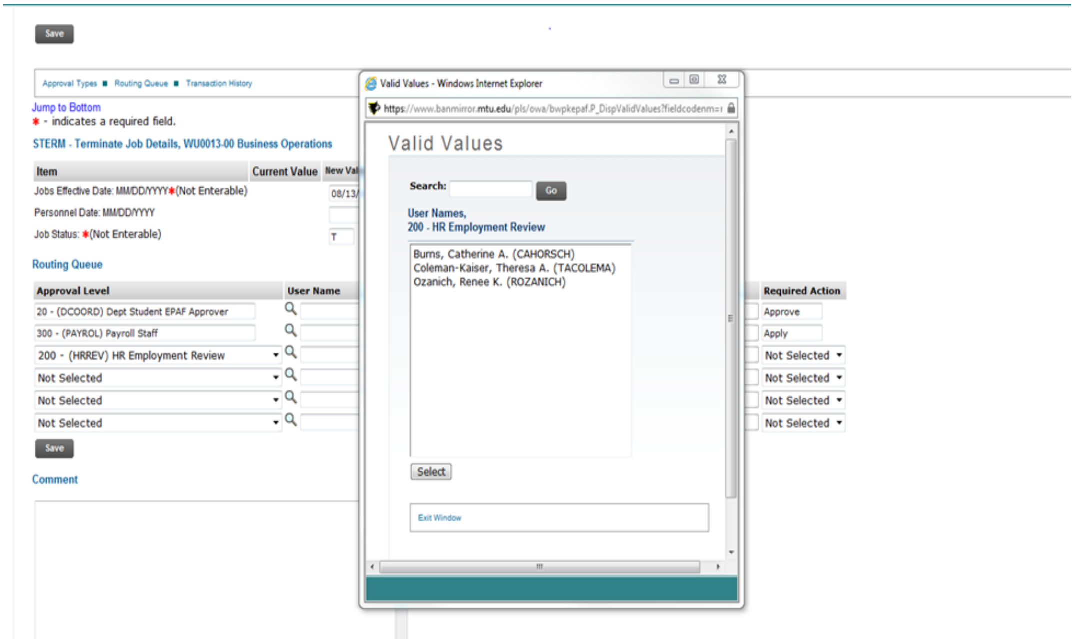
If the position is funded by a research account you will need to add the appropriate Approver in the Sponsored Programs office (Graduate or Undergraduate).

For HR Employment Review please select either

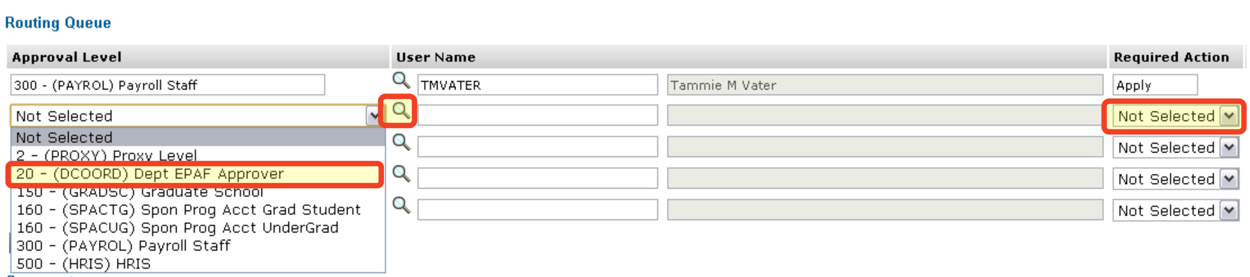
ROZANICH- for all faculty terminations

CAHORSCH- for represented and non-faculty temporary employees

TACOLEMA- for regular, benefit eligible employees (excluding faculty and represented employees)



Step 8. Click “Save”.



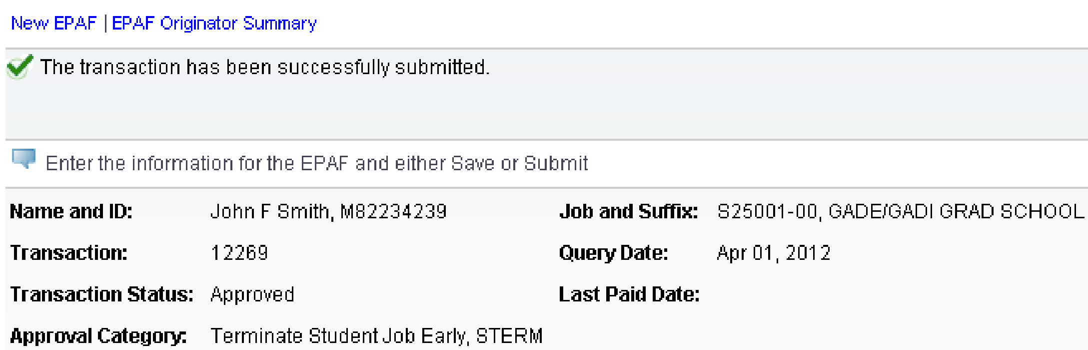
Step 9. Please give a detailed explanation of why the student is being terminated early.

Michigan Tech Best Practice: Copy and paste the email request for ending the student job early as a comment.

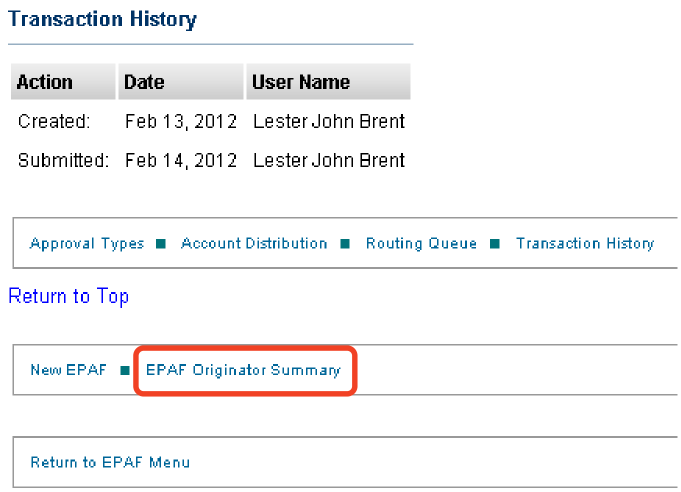
Step 10. Click “Save”.

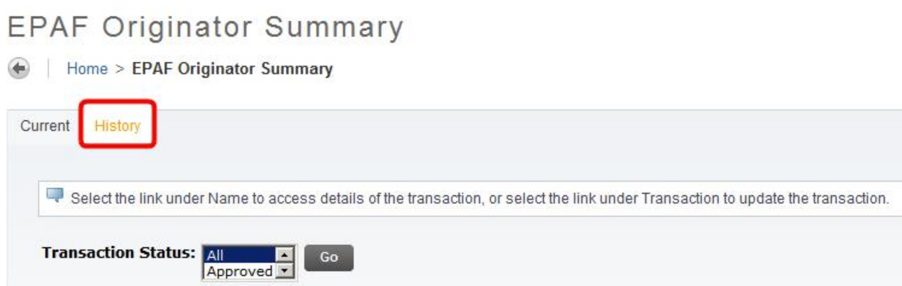
Step 11. Once you have double checked to make sure everything has been entered correctly, click “Submit”.

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



Step 13. To view the EPAF you just submitted, click “EPAF Originator Summary”, and click on the “History” tab. For definitions of each status see *EPAF Statuses.*


Transaction History
Action
Date
User Name
Created:
Feb 13, 2012
Lester John Brent
Submitted:
Feb 14, 2012
Lester John Brent
Approval Types
Account Distribution
Routing Queue
Transaction History
Return to Top
New EPAF
EPAF Originator Summary
Return to EPAF Menu


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
Approved
Go

Option J: Change Student Time Entry Information, CSTIME

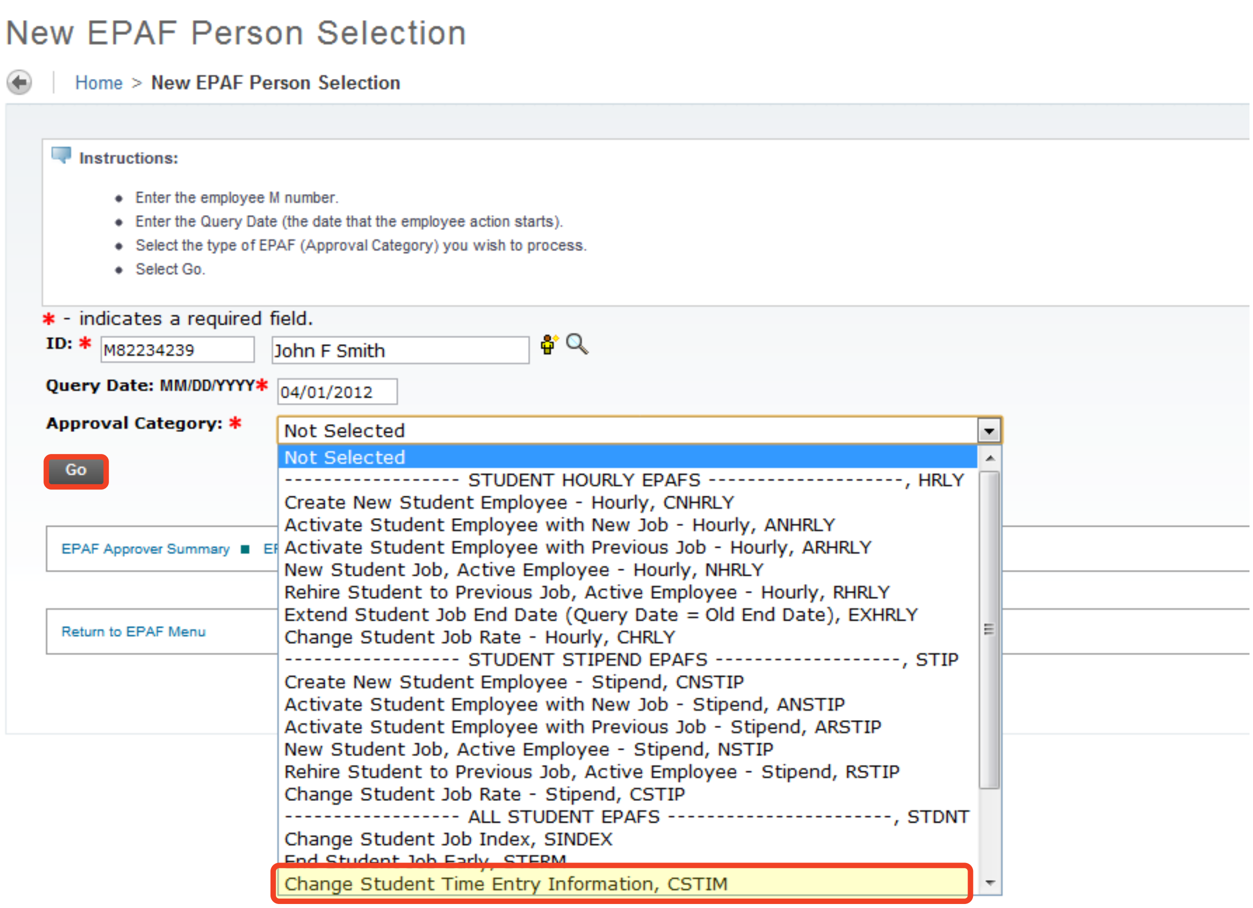
This option is used for updating time entry information for a current student employee. You must only use time entry methods currently available to your department. For more information on moving to Department Time Entry or Web Time Entry, please contact Payroll Services.

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.

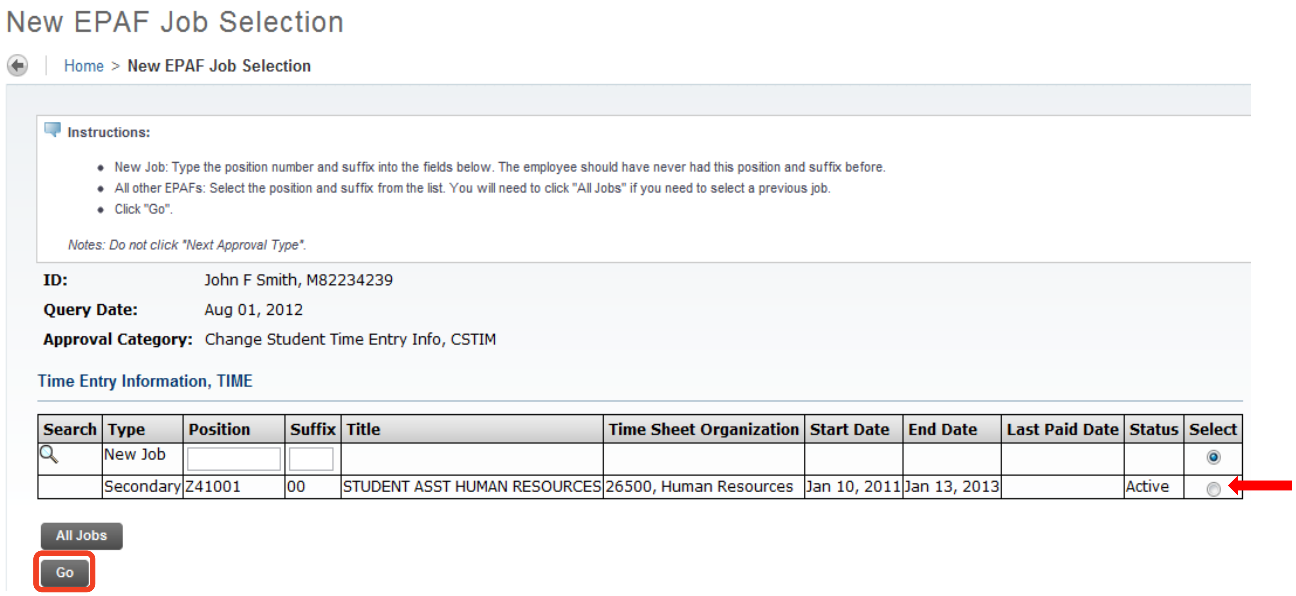
Step 2. Enter the employee's **Query Date** which is the effective date and must be greater than the last paid date. *(see Approval Category Definitions)*

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".



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



Step 6. Change the **Timesheet Orgn** field if necessary.

*Note: The **Timesheet Orgn** is a six digit number that may or may not be the same as your Home Org number. The **Timsheet Orgn** 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.

*****The below steps are for WEB TIME ENTRY ONLY******

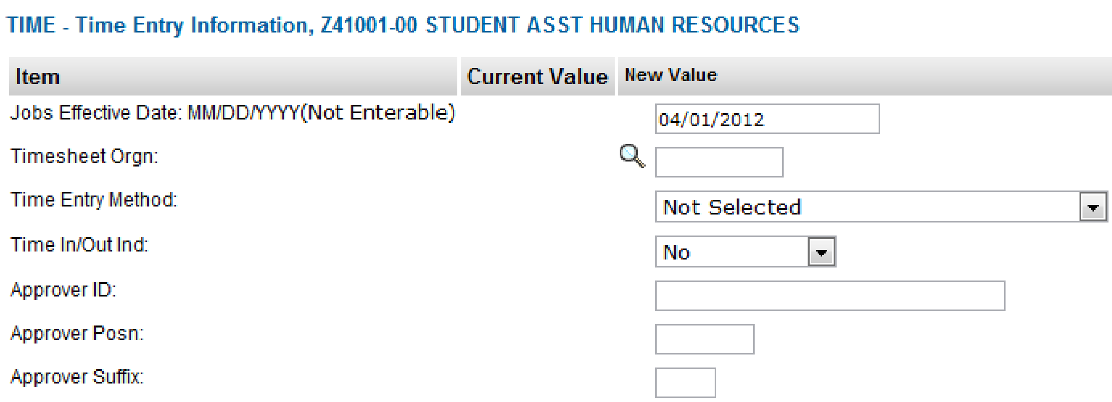
(Web Time Entry Only) Change the **Time In/Out Ind** to "Yes" if the employee will need to put in their start and end times onto their **Web Time Entry** timesheet instead of reporting hours worked in a day.

*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**.*

(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.
(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.

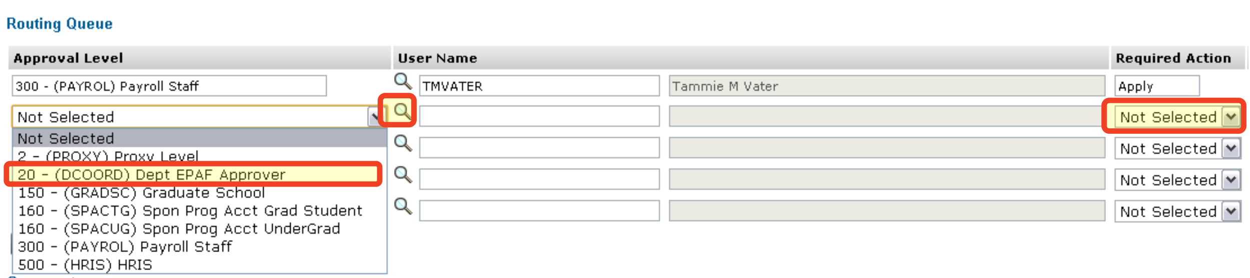
(Web Time Entry Only) Type the Position Suffix of the employee who will be approving the Web Time Entry timesheet of the employee into the *Approver Suffix* field.

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.



Step 8. Complete the *Routing Queue* by choosing the **Approval Level**, inserting a **User Name**, and selecting a **Required Action** *(Approve or FYI)*.

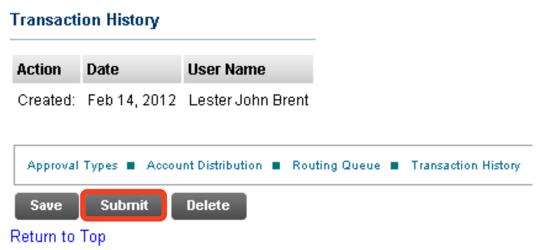
Step 9. Click “Save”.



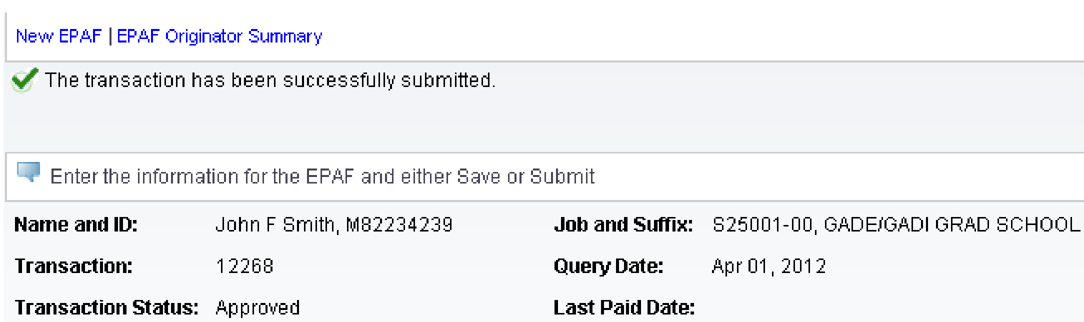
Step 10. Please give a detailed explanation of why a change is being made in the ***Comment Box***.

Step 11. Click “Save”.

Step 12. Once you have double checked to make sure everything has been entered correctly, click “Submit”.



Step 13. Verify at the top of the EPAF to see whether it was submitted successfully.



Option K: Create New Student Employee – Hourly, CNHRLY

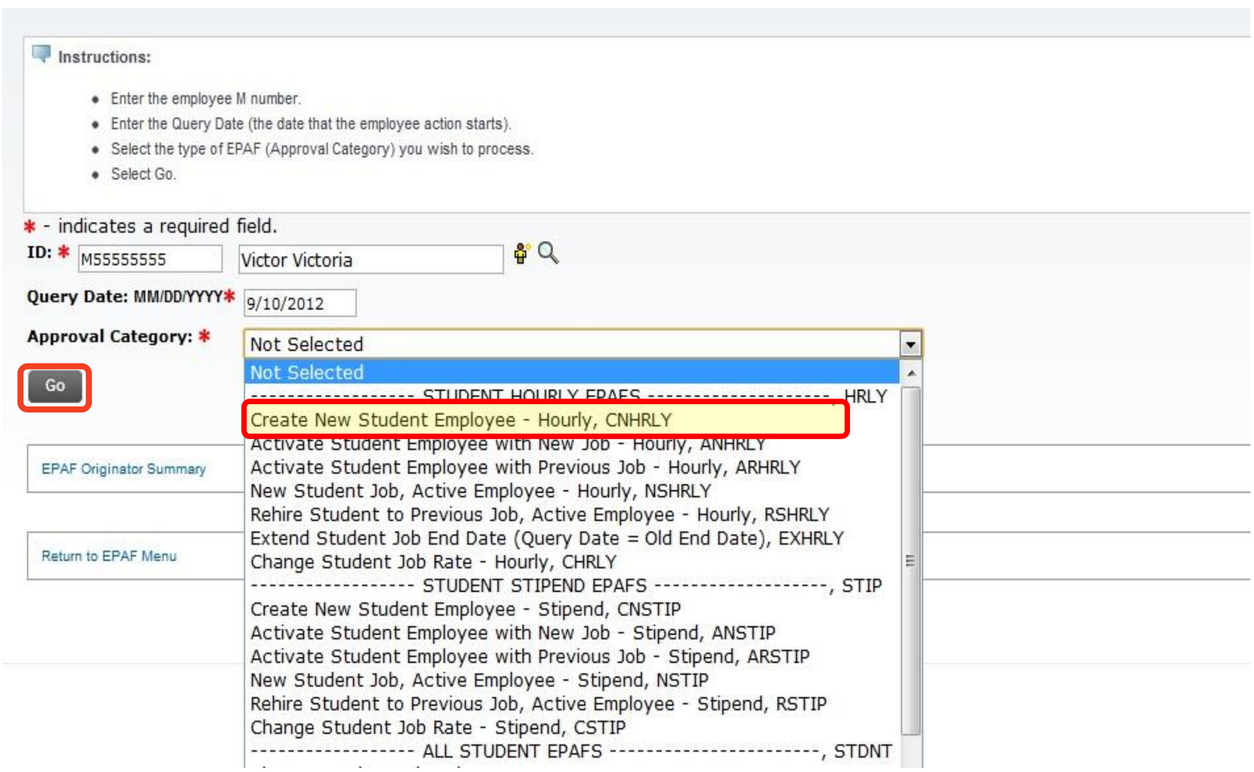
This option is used when you need to hire a student that has never worked for the University. This option will create their employment record and assign them an hourly position. The student will need to complete all the new hire paperwork and the paperwork received by Human Resources before they can begin work.

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 *(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".

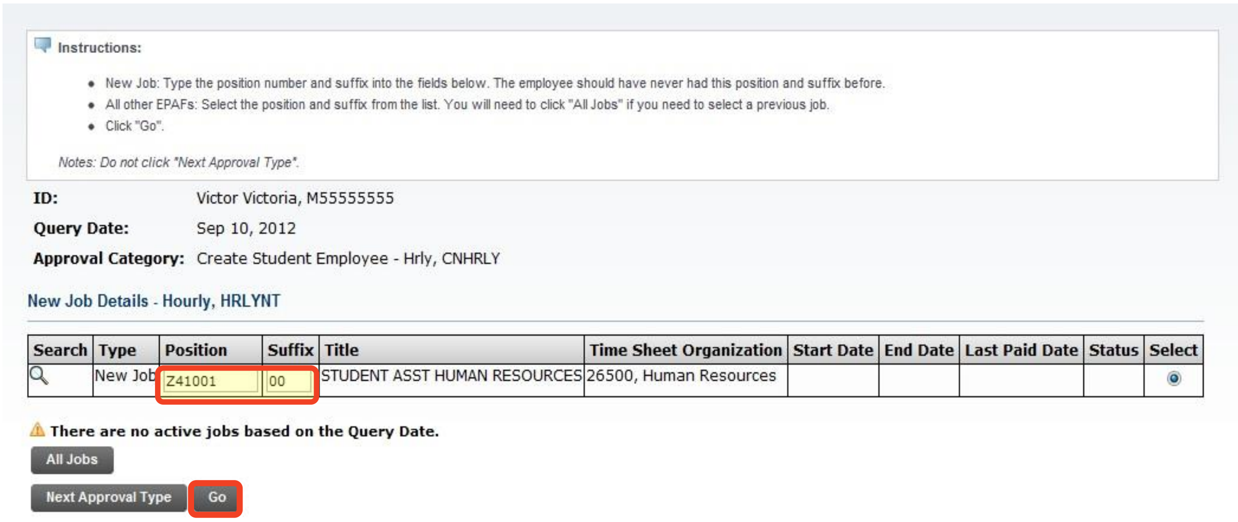


Step 5. Click "All Jobs" to verify that the employee has never worked at the University. If the employee has worked for Michigan Tech, you will need to start over and create an EPAF with one of the Activate Student Employee EPAFs.

Step 6. Enter the Departmental Position Number next to the New Job field.

Step 7. Enter 00 as the **Suffix**.

Step 8. Click “Go”.



Step 9. Verify the SSN number against the copy of the SSN card. If it is missing or incorrect, enter the new value in the **SSN/SIN/TIN** field.

Step 10. Verify the Birth Date. If it is missing or incorrect, enter the new value in the **Birth Date** field.

Step 11. Verify the employee’s sex. If it is missing or incorrect, enter the new value in the **Sex** field.

Step 12. Verify the employee’s citizenship status. If it is missing or incorrect, select the appropriate value from the **Citizenship** field.

Step 13. Enter your department’s home organization number in the **Home Organization** field. The Home Org number is the six digit number for your entire area. This could be different than your timesheet org number.

CHEMPL - Create Student Employee, Z41001-00 STUDENT ASST HUMAN RESOURCES

Item	Current Value	New Value
SSN/SIN/TIN:	111111111	
Birth Date: MM/DD/YYYY	11/11/1993	
Sex:	Not Available	Not Selected
Citizenship:		Not Selected
Employee Status: (Not Enterable)		A
Employee Class Code: (Not Enterable)		SH
Home COAS *(Not Enterable)		U
Home Organization: *		
Original Hire Date: MM/DD/YYYY(Not Enterable)		09/10/2012
Current Hire Date: MM/DD/YYYY(Not Enterable)		09/10/2012

Step 14. Fill in the *New Job Details* section.

*NOTE: Any field with a * next to it is required. However, the Job Begin Date and the Job Effective Date fields are not enterable and both default from the Query Date.*

***Title:** The **Title** field is only used when a student needs a non-default title to help differentiate timesheets in **Web Time Entry**. Leave this field blank (see Student Job Title Rules).*

HRLYNT - New Job Details - Hourly, Z41001-00 STUDENT ASST HUMAN RESOURCES

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)		09/10/2012
Contract Type: *(Not Enterable)		P
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		09/10/2012
Personnel Date: MM/DD/YYYY		
Hourly Rate: *		
Title:		
Timesheet Orgn: *		
Time Entry Method: *		Not Selected
Time In/Out Ind:		No
Approver ID:		
Approver Posn:		
Approver Suffix:		

Step 15. Select the **Time Entry Method** from one of the following options:

Option 1. **Payroll Time Entry** (Default) – Use this option if you submit time via a paper timesheet.

Option 2. **Employee Time Entry via Web** – Use this option if the employee submits time through Banweb/ESS.

Option 3. **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.

*****The below steps are for WEB TIME ENTRY only.*****

(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 only report the hours worked in a day. This field only applies to Web Time Entry.

(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.

(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.

(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.

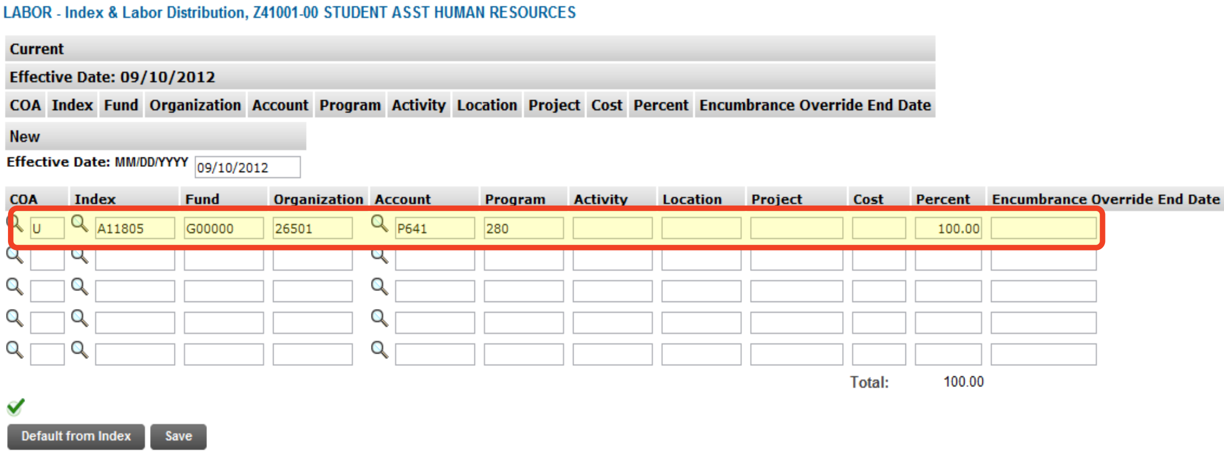
Note: You must specify the M#, Position Number and Suffix of the employee who will be approving the Web Time Entry timesheet of the employee. This information is on the payroll roster.

Step 16. Fill out the *Job End Date* Section.

HRLYT - Job End Date, Z41001-00 STUDENT ASST HUMAN RESOURCES

Item	Current Value	New Value
Job End Date: MM/DD/YYYY*		
Job Status: *(Not Enterable)		T

Step 17. Verify the *Index & Labor Distribution* for the job. The index and labor distribution will default from the position budget.



If no change is needed, click "Save" and continue to the *Routing Queue*.

If you need to change the Index, you have two options:

Option 1. Overwrite 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.

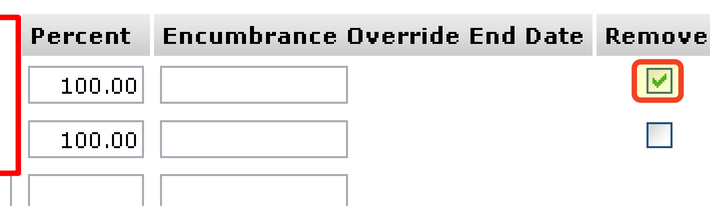
Enter the appropriate Account Code and click "Save".

Option 2. 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".

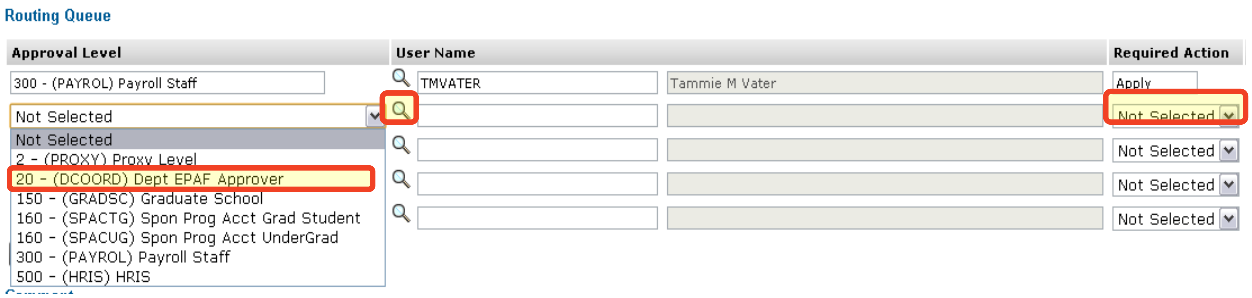
Note: Unless you save the EPAF at least once, the remove checkbox will not appear.



Step 18. 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 research account you will need to add the appropriate approver in the Sponsored Programs office (Graduate or Undergraduate).

Step 19. Click "Save".



Step 20. You may insert comments into the **Comment Box**, but be aware that all individuals who can view the EPAF will be able to see the comments you create.

Michigan Tech Best Practice: Copy and paste the email request for the student hire as a comment.

Step 21. Click “Save”.

Step 22. Once you have double checked to make sure everything has been entered correctly, click “Submit”.

Step 23. Verify at the top of the EPAF to see whether it has been 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:	Victor Victoria, M55555555		
Transaction:	13166	**Query Date:**	Sep 10, 2012
Transaction Status:	Approved		
Approval Category:	Create New Student Employee - Hourly, CNHRLY		

Option L: Activate Student Employee with New Job - Hourly, ANHRLY

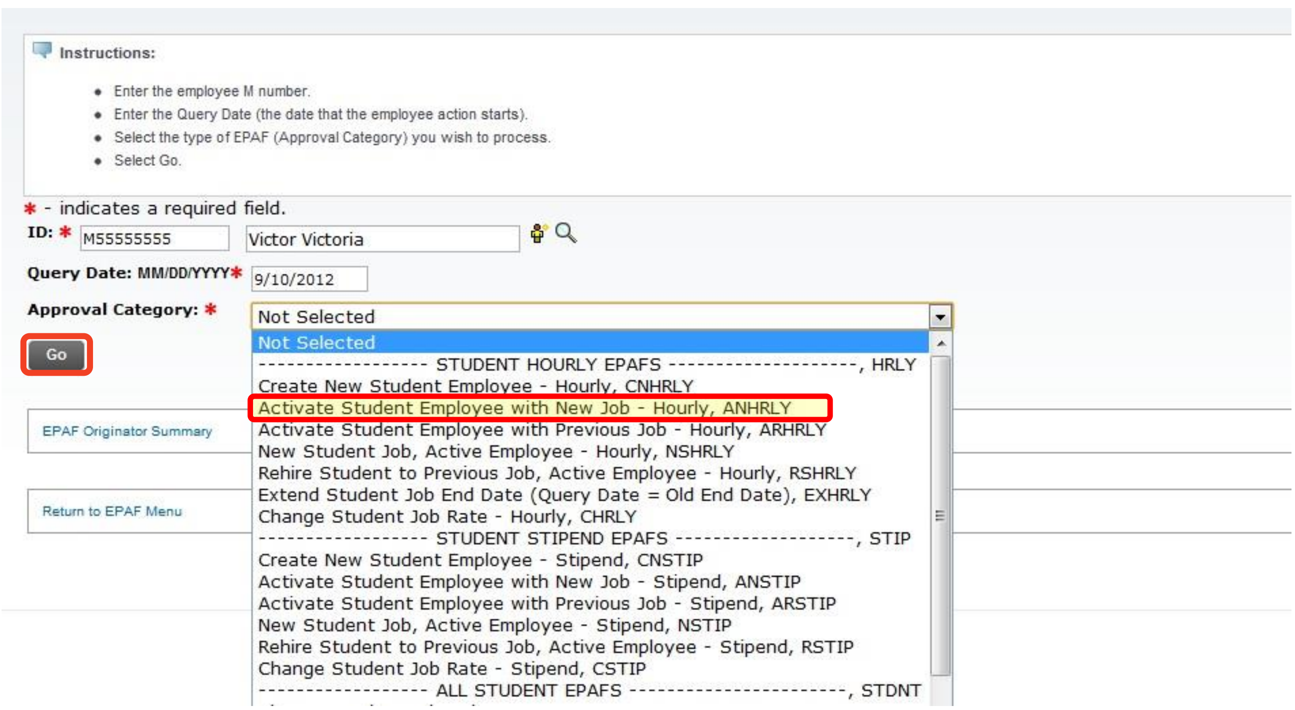
This option is used when you need to hire a student that has not worked at the University for over one year and will be working a new job in your department. This student will need an I-9 review. Please contact Payroll to find out if additional action is needed for this employee's I-9. This employee should fill out a new W-4, MI W-4, and Direct Deposit form or update that information through ESS (banweb.mtu.edu).

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 *(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".



Step 5. Click "All Jobs" to verify that the employee has never been employed in this departmental position. If the employee has previously held this position, you will need to start over and create an EPAF with the approval category *Activate Student Employee with Previous Job - Hourly.*

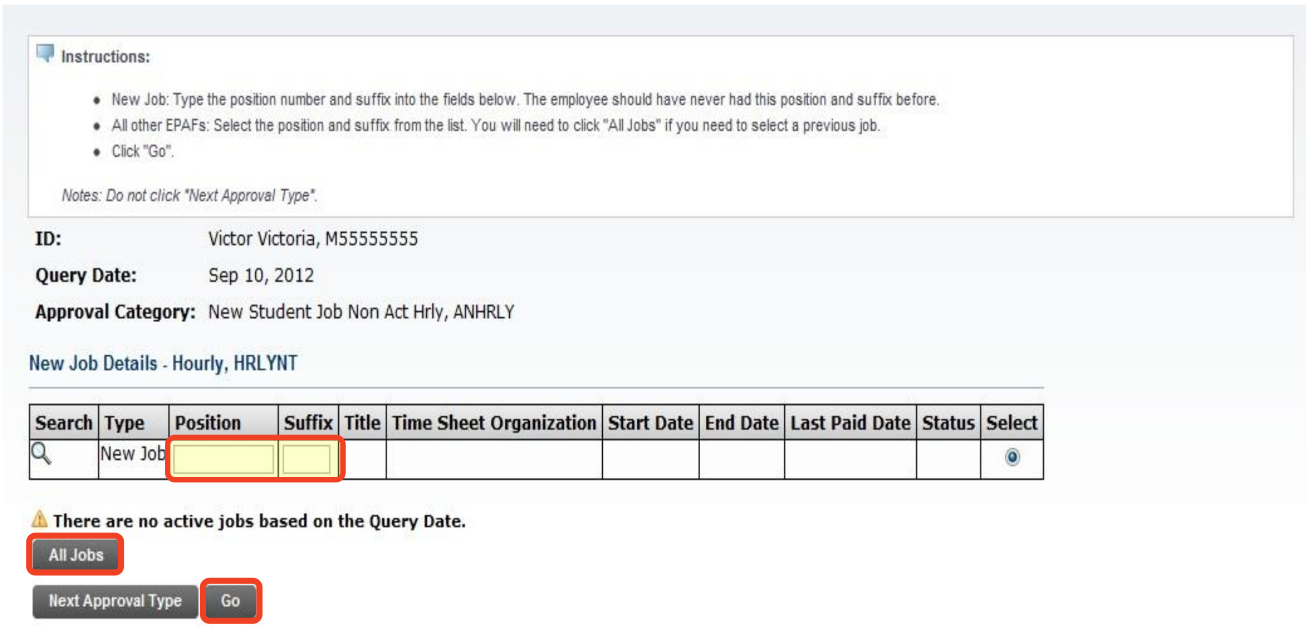
Step 6. Enter the Departmental Position Number next to the New Job field.

Step 7. Enter in the appropriate **Suffix**:

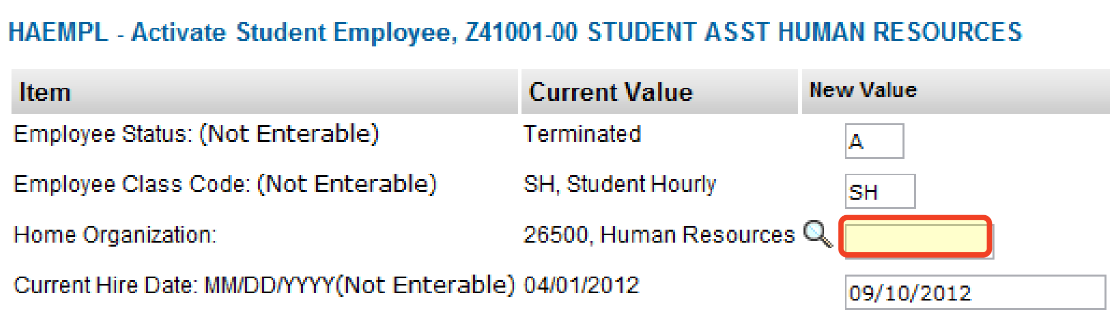
00 is the suffix if it is the first time the employee has been hired into your department.

Step 8. Make sure the position is selected on the right edge of the *New Job Details* area.

Step 9. Click “Go”.



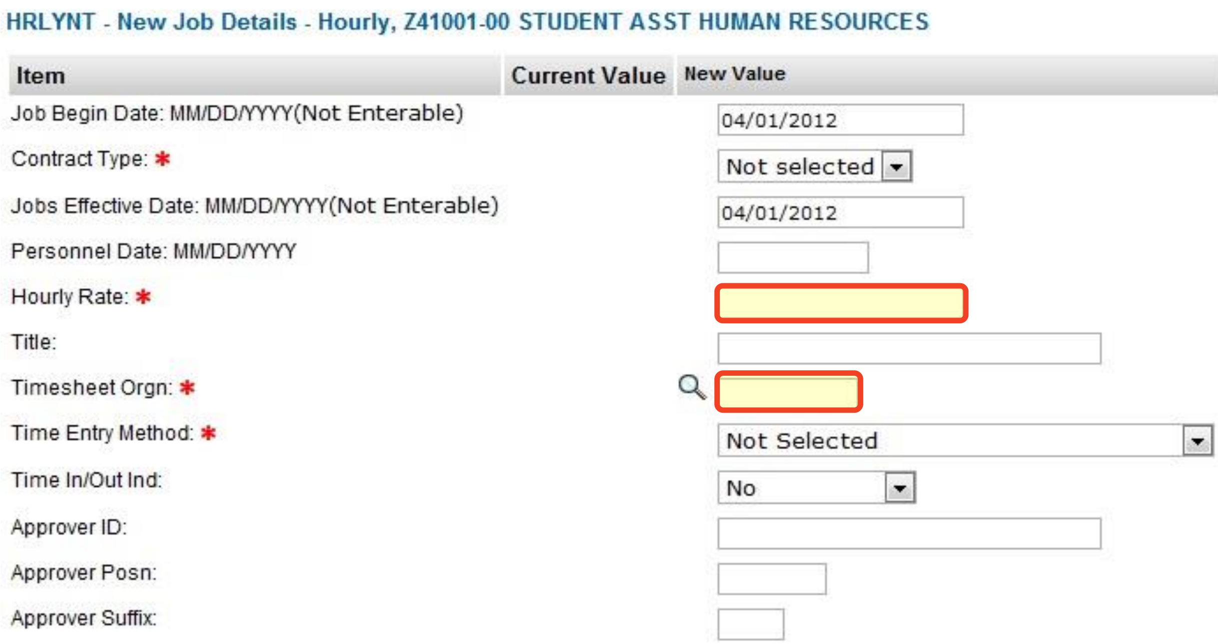
Step 10. Enter your department’s home organization number in the **Home Organization** field. The Home Org number is the six digit number for your entire area. This could be different than your timesheet org number.



Step 11. Fill in the *New Job Details* section.

*NOTE: Any field with a * next to it is required. However, the Job Begin Date and the Job Effective Date fields are not enterable and both default from the Query Date.*

Title: *The* ***Title*** *field is only used when a student needs a non-default title to help differentiate timesheets in* ***Web Time Entry****. Leave this field blank (see [Student Job Title Rules]).*



Step 12. Select the **Time Entry Method** from one of the following options:

Option 1. **Payroll Time Entry** (Default) – Use this option if you submit time via a paper timesheet.

Option 2. **Employee Time Entry via Web** – Use this option if the employee submits time through Banweb/ESS.

Option 3. **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.

*****The below steps are for WEB TIME ENTRY only.*****

(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 only report the hours worked in a day. This field only applies to Web Time Entry.

(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.

(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.

(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.

Step 13. Fill out the *Job End Date* Section.

HRLYT - Job End Date, Z41001-00 STUDENT ASST HUMAN RESOURCES

Item	Current Value	New Value
Job End Date: MM/DD/YYYY*		
Job Status: *(Not Enterable)		T

Step 14. Verify the *Index & Labor Distribution* for the job. The index and labor distribution will default from the position budget.

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

Current

Effective Date: 09/10/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date

New

Effective Date: MM/DD/YYYY 09/10/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
U	A11805	G00000	26501	P641	280					100.00	
									Total:	100.00	

Default from Index | Save

If no change is needed, click “Save” and continue to the *Routing Queue*.

If you need to change the Index, you have two options:

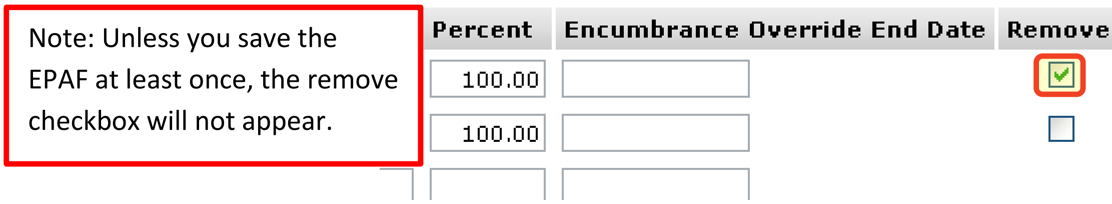
Option 1. Overwrite the Index in the Index field and click “Default from Index”. This will cause the Account code to disappear while the correct Fund, Org and Program codes populate.

Enter the appropriate Account Code and click "Save".

Option 2. 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".

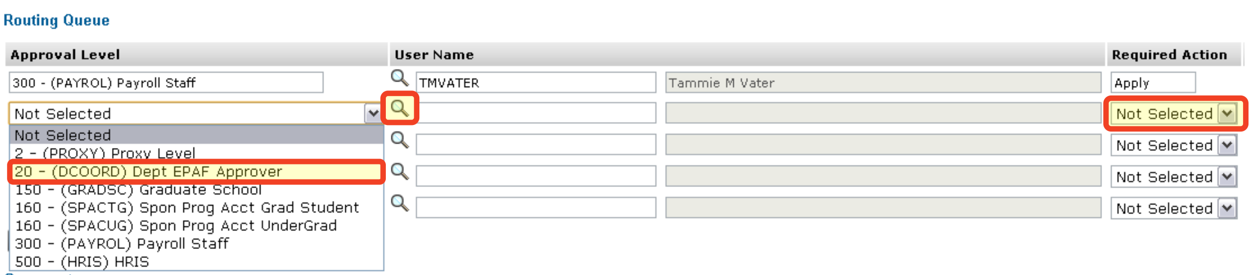
Scroll back down to the *Index & Labor Distribution* area. On the right side, a check box next to each distribution line can be seen. Select the Index you want to delete and click "Save".



Step 15. 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 research account you will need to add the appropriate approver in the Sponsored Programs office (Graduate or Undergraduate).

Step 16. Click "Save".



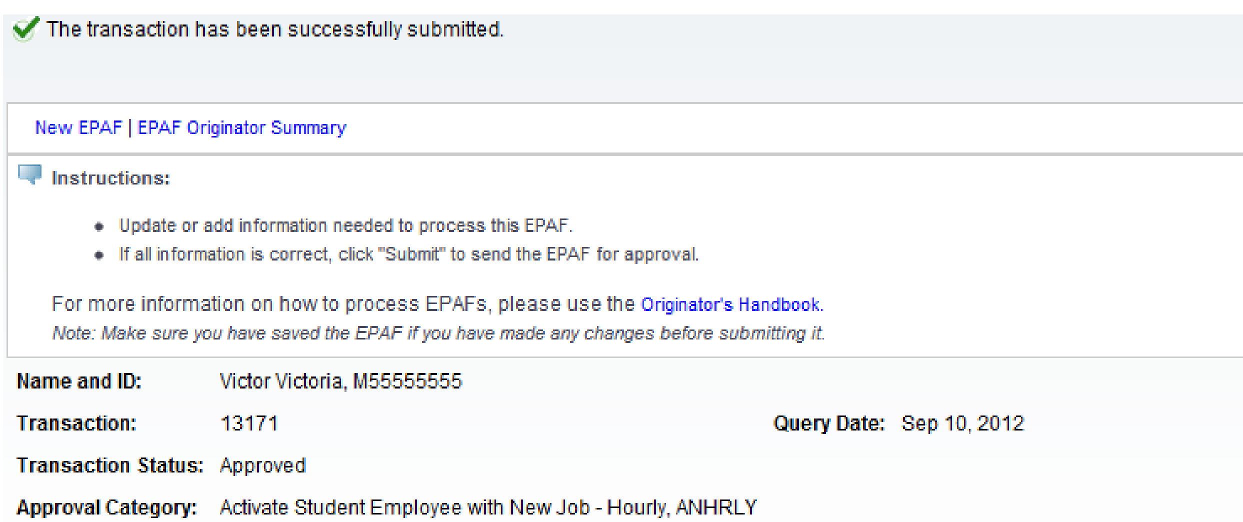
Step 17. You may insert comments into the **Comment Box**, but be aware that all individuals who can view the EPAF will be able to see the comments you create.

Michigan Tech Best Practice: Copy and paste the email request for the student hire as a comment.

Step 18. Click "Save".

Step 19. Once you have double checked to make sure everything has been entered correctly, click “Submit”.

Step 20. Verify at the top of the EPAF to see whether it has been submitted successfully.



Option M: Activate Student Employee with Previous Job – Hourly, ARHRLY

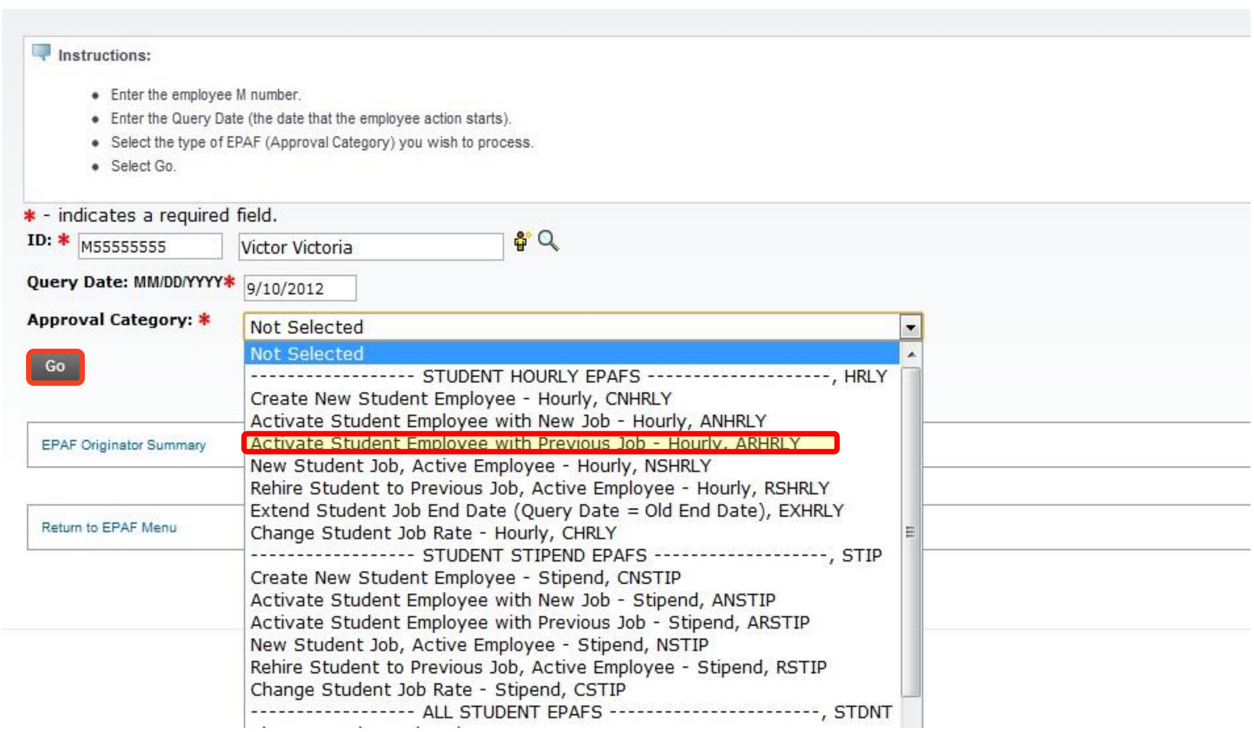
This option is used when you need to hire a student that has not worked at the University for over one year and will be working a new job in your department. This student will need an I-9 review. Please contact Payroll to find out if additional action is needed for this employee's I-9. This employee should fill out a new W-4, MI W-4, and Direct Deposit form or update that information through ESS (banweb.mtu.edu).

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 *(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".



Step 5. Click on the "All Jobs" button to locate the job you are rehiring the employee into. Make sure the job is selected on the right side of the screen. If the position and suffix is not listed, you will need to *Activate Student Employee with New Job – Hourly, ARHRLY*.

Step 6. 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: Victor Victoria, M55555555

Query Date: Sep 10, 2012

Approval Category: Create Student Employee - Hrly, CNHRLY

New Job Details - Hourly, HRLYNT

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									
	New Job	Z41001	00	STUDENT ASST HUMAN RESOURCES	26500, Human Resources	Apr 01, 2012	Apr 30, 2012		Terminated	

Active Jobs

Next Approval Type Go

Step 7. Enter your department’s home organization number in the **Home Organization** field. The Home Org number is the six digit number for your entire area. This could be different than your timesheet org number.

HAEMPL - Activate Student Employee, Z41001-00 STUDENT ASST HUMAN RESOURCES

Item	Current Value	New Value
Employee Status: (Not Enterable)	Terminated	A
Employee Class Code: (Not Enterable)	SH, Student Hourly	SH
Home Organization:	26500, Human Resources	
Current Hire Date: MM/DD/YYYY(Not Enterable)	04/01/2012	09/10/2012

Step 8. Complete the *Rehire Job Details* section.

NOTE: The Jobs Effective Date (defaults from the query date) and the Job Status cannot be changed. The Jobs Effective Date must be greater than the last paid date. All other fields may remain blank and will default from the current value column.

Personnel Date: *If the rehire date is before the last paid date, i.e. retroactive change; you must enter that date in the* ***Personnel Date*** *field.*

Title: *The* ***Title*** *field is only used when a student needs a non-default title to help differentiate timesheets in* ***Web Time Entry****. Leave this field blank (see* *Student Job Title Rules*).

HRLYRT - Rehire Job Details - Hourly, Z41001-00 STUDENT ASST HUMAN RESOURCES

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	04/30/2012	09/10/2012
Personnel Date: MM/DD/YYYY	04/30/2012	
Job Status: (Not Enterable)	Terminated	A
Hourly Rate:	12.5	
Title:	STUDENT ASST HUMAN RESOURCES	
Timesheet Orgn:	26500	
Time Entry Method: *	Department Time Entry with Approvals	
Time In/Out Ind:	No	
Approver ID:		
Approver Posn:		
Approver Suffix:		

Step 9. Select the **Time Entry Method** from one of the following options:

Option 1. **Payroll Time Entry** (Default) – Use this option if you submit time via a paper timesheet.

Option 2. **Employee Time Entry via Web** – Use this option if the employee submits time through Banweb/ESS.

Option 3. **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.

*****The below steps are for WEB TIME ENTRY only.*****

(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 only report the hours worked in a day. This field only applies to Web Time Entry.

(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.

(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.

(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.

Step 10. Fill out the *Job End Date* Section.

HRLYT - Job End Date, Z41001-00 STUDENT ASST HUMAN RESOURCES

Item	Current Value	New Value
Job End Date: MM/DD/YYYY*	04/30/2012	
Job Status: *(Not Enterable)	Terminated	T

Step 11. Verify the *Index & Labor Distribution* for the job. The index and labor distribution will default from the position budget.

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

Current

Effective Date: 04/01/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
U	A11805	G00000	26501	P641	280					100.00	

New

Effective Date: MM/DD/YYYY 06/01/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override Date
U	A11805	G00000	26501	P641	280					100.00	
									Total:	100.00	

Default from Index Save

If no change is needed, click "Save" and continue to the *Routing Queue*.

If you need to change the Index, you have two options:

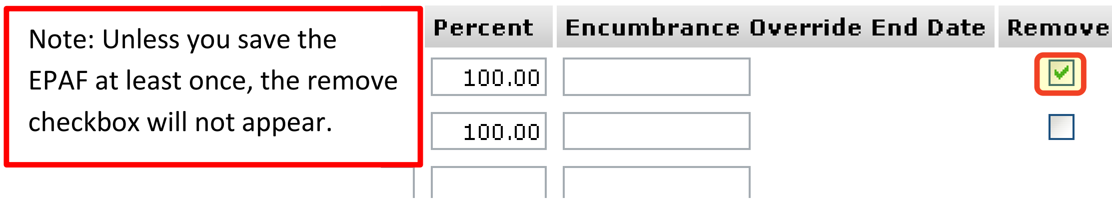
Option 1. Overwrite the Index in the Index field and click "Default from Index". This will cause the Account code to disappear while the correct Fund, Org and Program codes populate.

Enter the appropriate Account Code and click "Save".

Option 2. 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”.

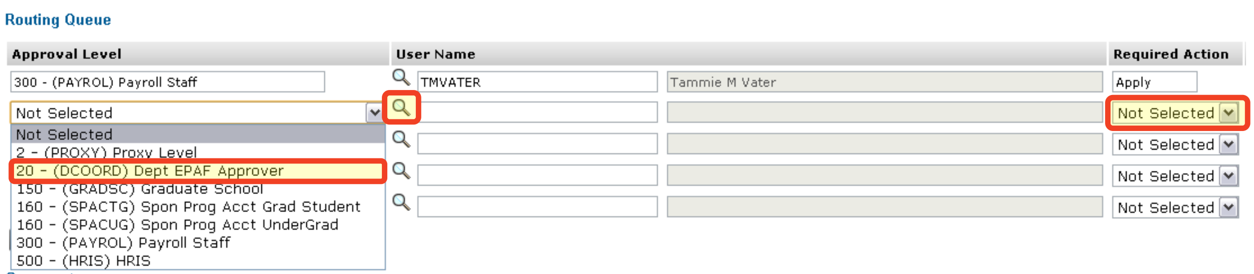
Scroll back down to the *Index & Labor Distribution* area. On the right side, a check box next to each distribution line can be seen. Select the Index you want to delete and click “Save”.



Step 12. 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 research account you will need to add the appropriate approver in the Sponsored Programs office (Graduate or Undergraduate).

Step 13. Click “Save”.

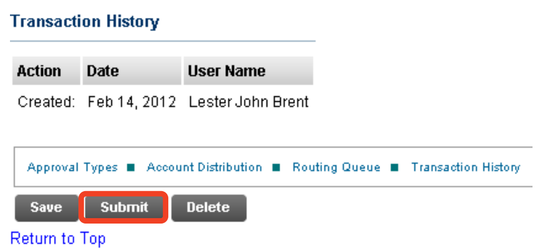


Step 14. You may insert comments into the **Comment Box**, but be aware that all individuals who can view the EPAF will be able to see the comments you create.

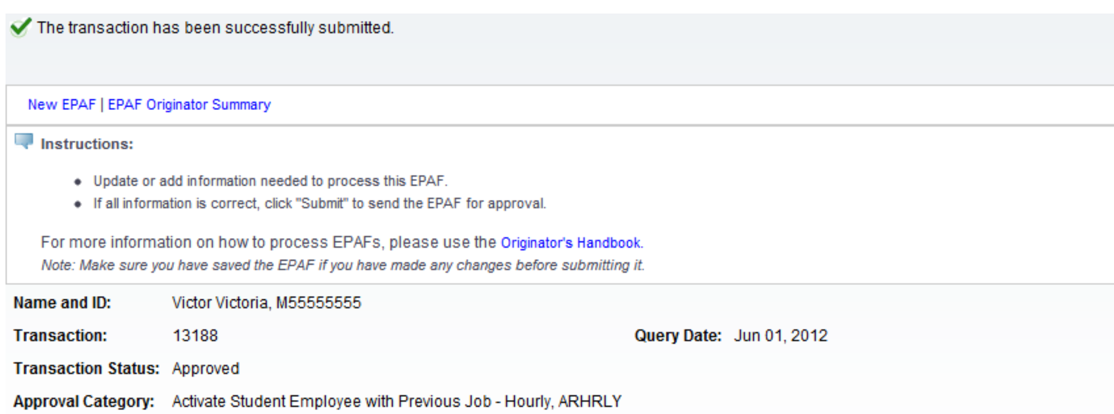
Michigan Tech Best Practice: Copy and paste the email request for the student hire as a comment.

Step 15. Click “Save”.

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



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



Option N: Create New Student Employee - Stipend, CNSTIP

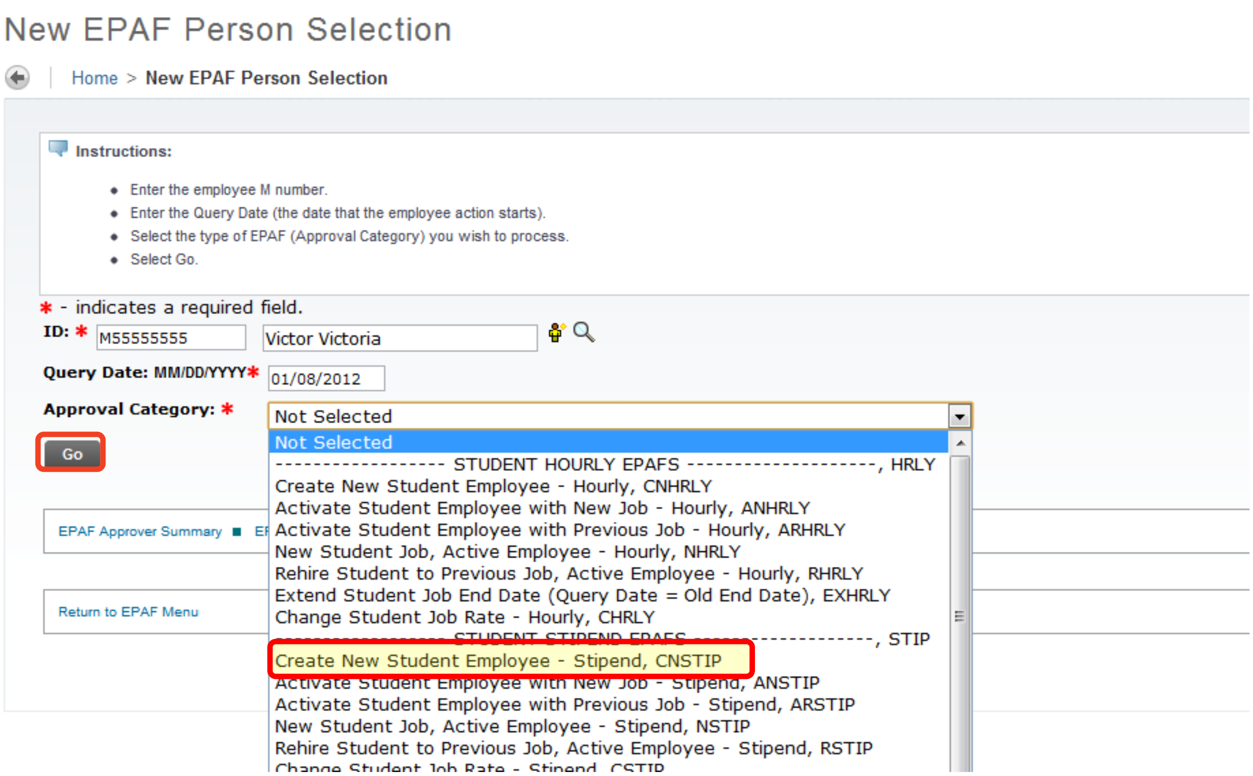
This option is used when you need to hire a student that has never worked for the University. This option will create their employment record and assign them a stipend position. The student will need to complete all the new hire paperwork and the paperwork received by Human Resources before they can begin work.

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 *(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".

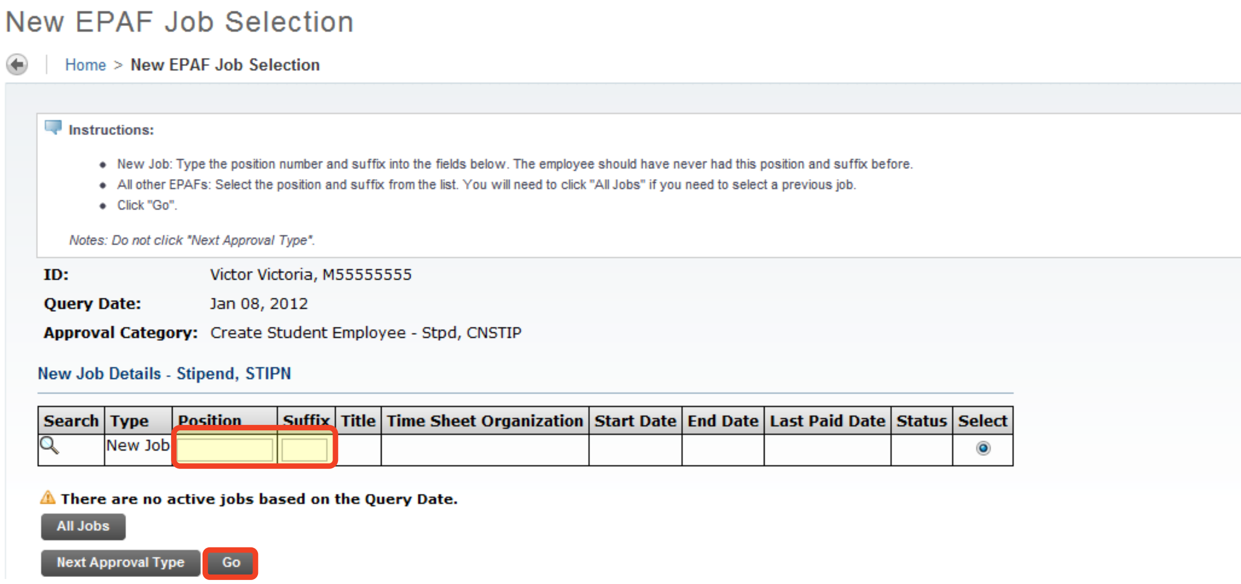


Step 5. Click "All Jobs" to verify that the employee has never worked at the University. If the employee has worked for Michigan Tech, you will need to start over and create an EPAF with one of the Activate Student Employee EPAFs.

Step 6. Enter the Departmental Position Number next to the New Job field.

Step 7. Enter 00 as the **Suffix**.

Step 8. Click “Go”.



Step 9. Verify the SSN number against the copy of the SSN card. If it is missing or incorrect, enter the new value in the **SSN/SIN/TIN** field.

Step 10. Verify the Birth Date. If it is missing or incorrect, enter the new value in the **Birth Date** field.

Step 11. Verify the employee’s sex. If it is missing or incorrect, enter the new value in the **Sex** field.

Step 12. Verify the employee’s citizenship status. If it is missing or incorrect, select the appropriate value from the **Citizenship** field.

Step 13. Enter your department’s home organization number in the **Home Organization** field. The Home Org number is the six digit number for your entire area. This could be different than your timesheet org number.

CHEMPL - Create Student Employee, S25001-00 GADE/GADI GRAD SCHOOL

Item	Current Value	New Value
SSN/SIN/TIN:	111111111	
Birth Date: MM/DD/YYYY	11/11/1993	
Sex:	Male	Not Selected
Citizenship:	Y, Citizen	Not Selected
Employee Status: (Not Enterable)		A
Employee Class Code: (Not Enterable)		SS
Home COAS: *(Not Enterable)		U
Home Organization: *		
Original Hire Date: MM/DD/YYYY(Not Enterable)		01/08/2012
Current Hire Date: MM/DD/YYYY(Not Enterable)		01/08/2012

Step 14. Complete the *New Job Details* and *Job End Date* sections.

*NOTE: Any field with a * next to it is required. However, the Job Begin Date and the Job Effective Date fields are not enterable and both default from the Query Date.*

The **Contract Type** will default to Secondary, only change this if the student has never had a position with the University or you receive an error on the EPAF requiring you to change this to Primary.

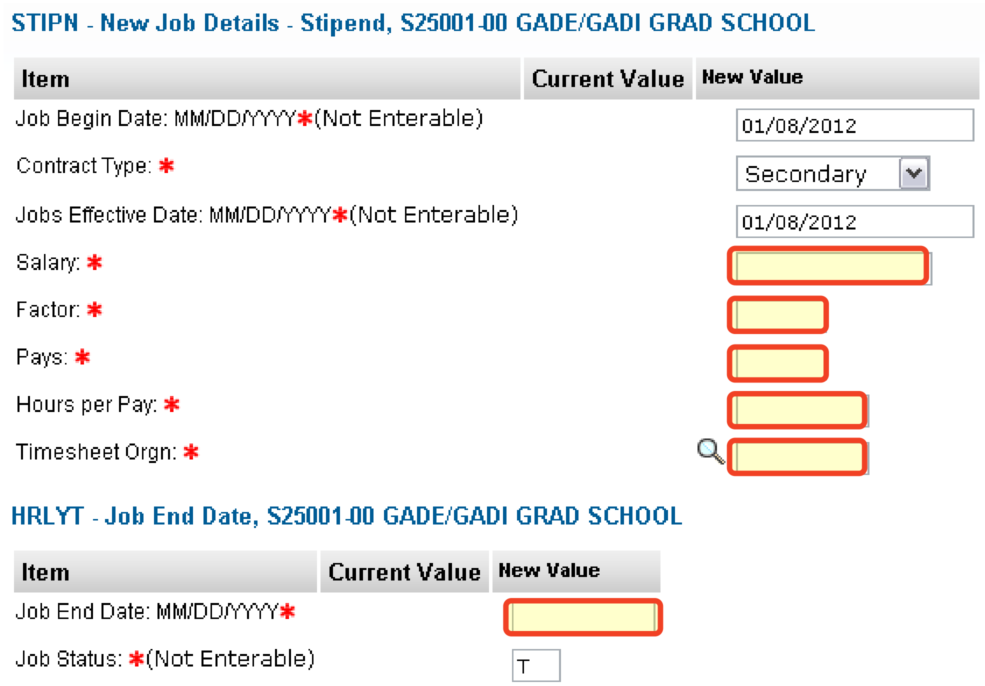
The **Annual Salary** is the Stipend Amount.

*****Factors and Pays are always equal for Stipends.*****

To calculate out the number of Pays, take the number of weeks of the length of the job and divide by 2.

Fractions of a Week/Pay: *Each work day (M, T, W, Th, F) is equal to 0.2 weeks. For example, if a job ends on a Wednesday, multiply 3 (M, T, W) by 0.2 to get a total of 0.6 weeks. Add this to the total number of full weeks and then divide by 2 for the number of pays.*

The **Hours per Pay** are based on the stipend; 40.00 for full stipend; 30.00 for ¾ stipend, 20.00 for ½ stipend, and 10.00 for ¼ stipend.



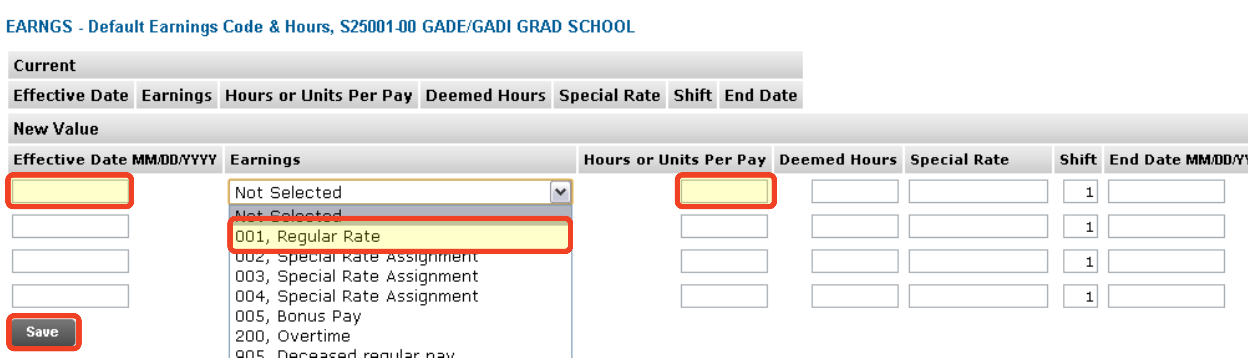
Step 15. Complete the *Default Earnings Code & Hours* section.

A. Use the Query Date as the Effective Date.

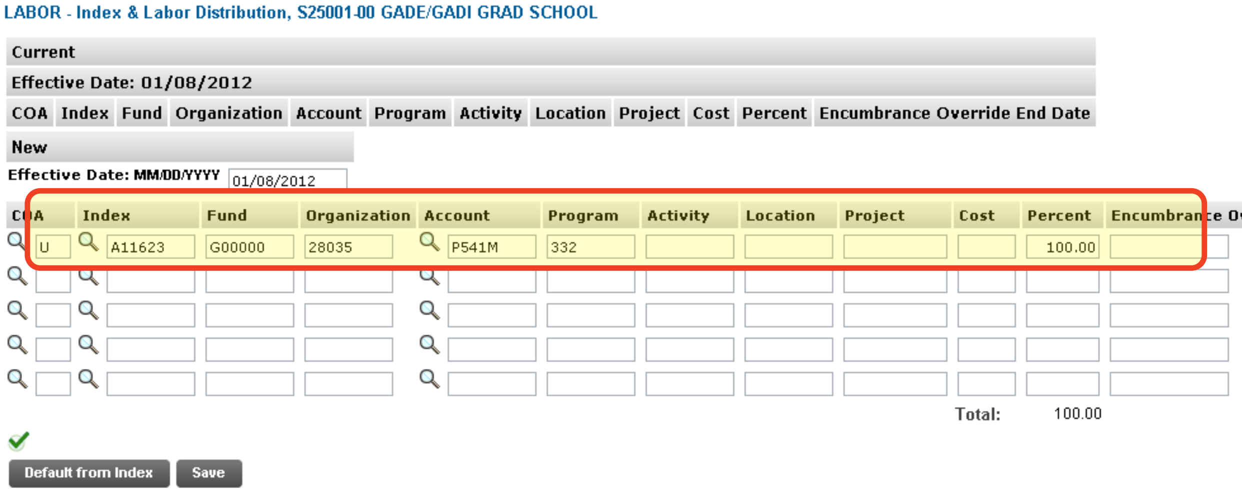
B. Select 001, Regular Rate for the Earnings Code.

C. Fill in the number of Hours per Pay. This will be the same number as the Hours Pay in the *New Job Details* section.

D. Click "Save".



Step 16. Verify the *Index & Labor Distribution* for the job. The Index and Labor Distribution will default from the position budget.



If no change is needed, click “Save” and continue to the *Routing Queue.*

If you need to change the Index, you have two options:

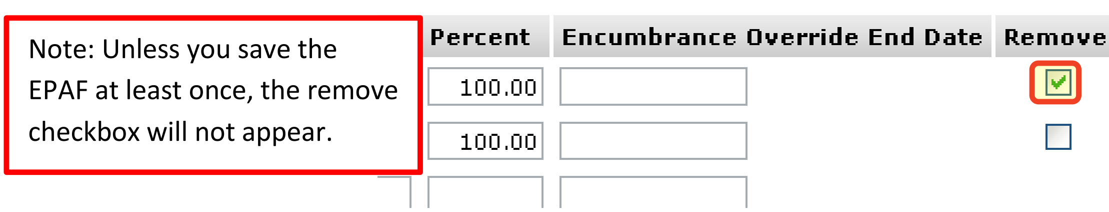
Option A. Overwrite the Index in the Index field and click “Default from Index”. This will cause the Account code to disappear while the correct Fund, Org and Program codes populate.

Enter the appropriate Account Code and click “Save”.

Option 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”.

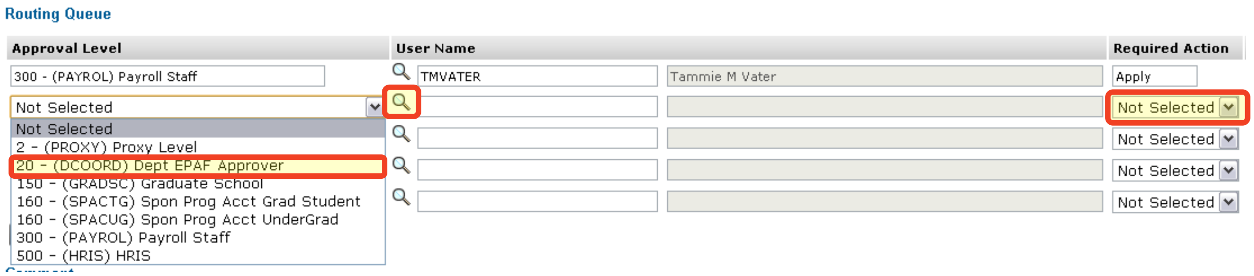
Scroll back down to the *Index & Labor Distribution* area. On the right hand side there is a check box next to each distribution line. Select the Index you want to delete and click “Save”.



Step 17. Complete the *Routing Queue* by choosing the **Approval Level**, inserting a **User Name**, and selecting a **Required Action** *(Approve or FYI)*.

NOTE: All Stipends must be routed to the Graduate School for approval. If the position is funded by a research account you will need to add the *appropriate Approver in the Sponsored Programs office (Graduate or Undergraduate).*

Step 18. Click "Save".



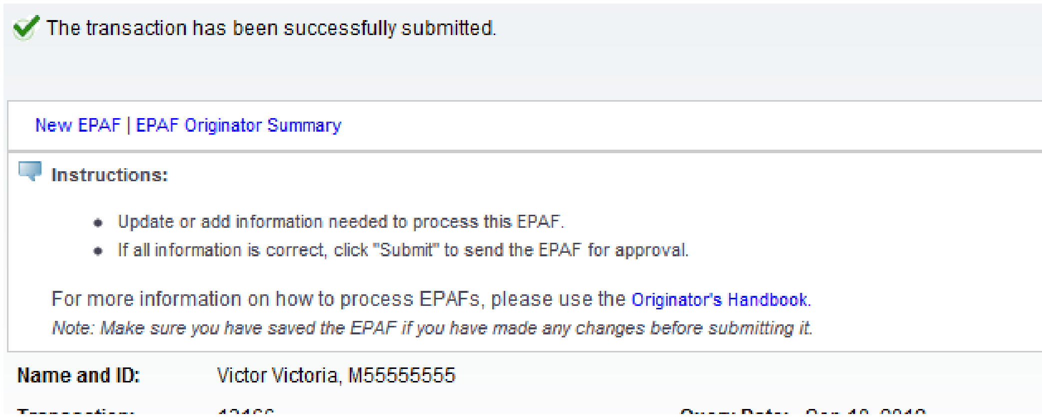
Step 19. You may insert comments into the ***Comment Box***, but be aware that all individuals who can view the EPAF will be able to see the comments you create.

Michigan Tech Best Practice: Copy and paste the email request for the student hire as a comment.

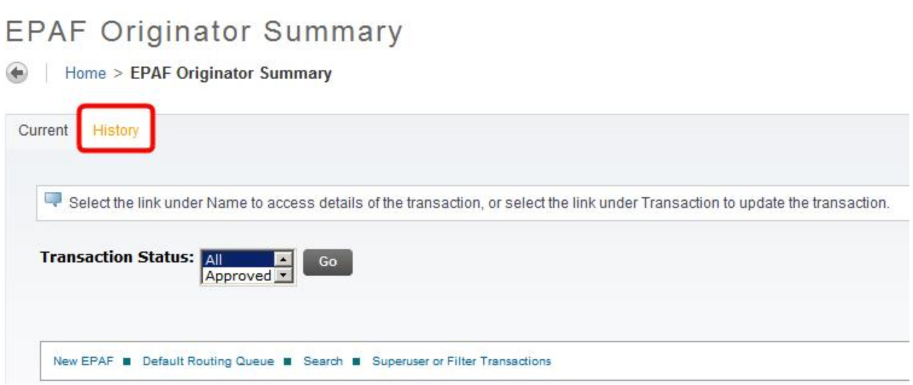
Step 20. Click "Save".

Step 21. Once you have double checked to make sure everything has been entered correctly, click "Submit".

Step 22. Verify at the top of the EPAF to see whether it was submitted successfully.



Step 23. To view the EPAF you just submitted, click "EPAF Originator Summary", and click on the "History" tab. For definitions of each status see *[EPAF Statuses.](#)*



Option O: Activate Student Employee with New Job - Stipend, ANSTIP

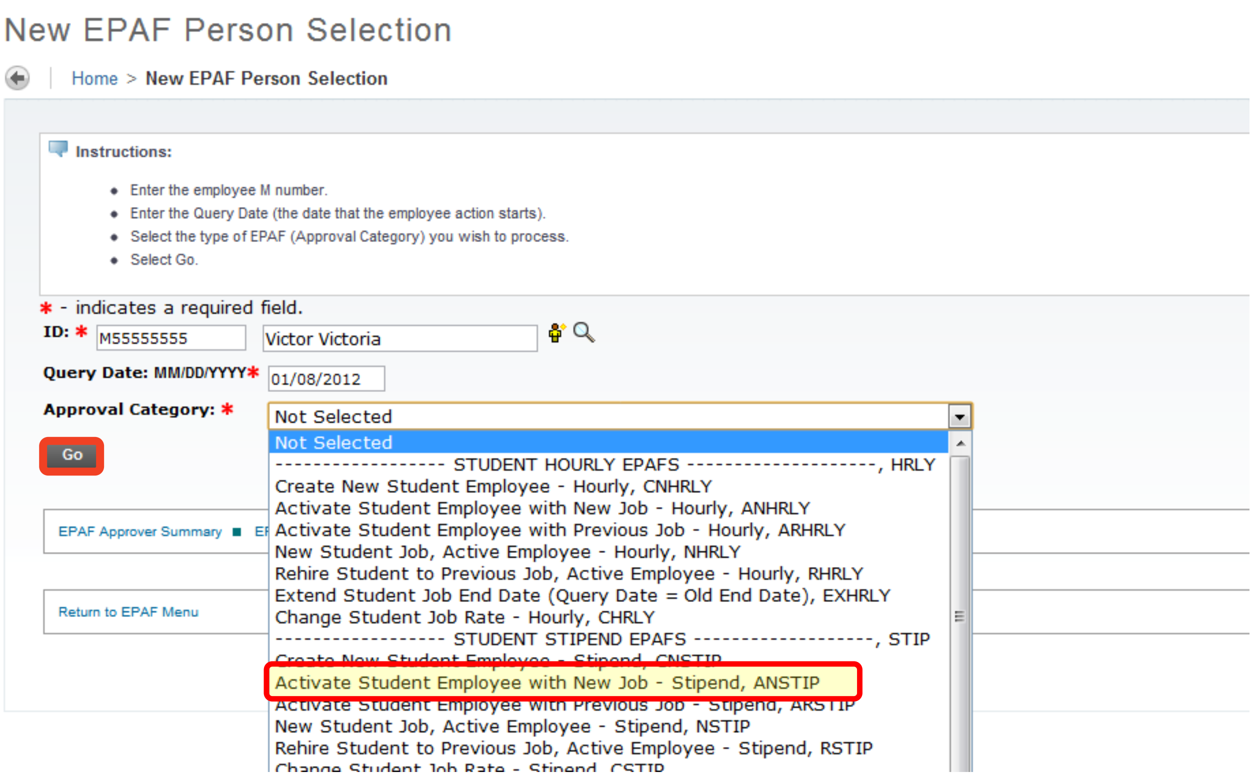
This option is used when you need to hire a student that has not worked at the University for over one year and will be working a new job in your department. This student will need an I-9 review. Please contact Payroll to find out if additional action is needed for this employee's I-9. This employee should fill out a new W-4, MI W-4, and Direct Deposit form or update that information through ESS (banweb.mtu.edu). .

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 *(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".



Step 5. Click "All Jobs" to verify that the employee has never been employed in this departmental position. If the employee has previously held this position, you will need to start over and create an EPAF with the approval category *Activate Student Employee with Previous Job – Stipend*.

Step 6. Enter the Departmental Position Number next to the New Job field.

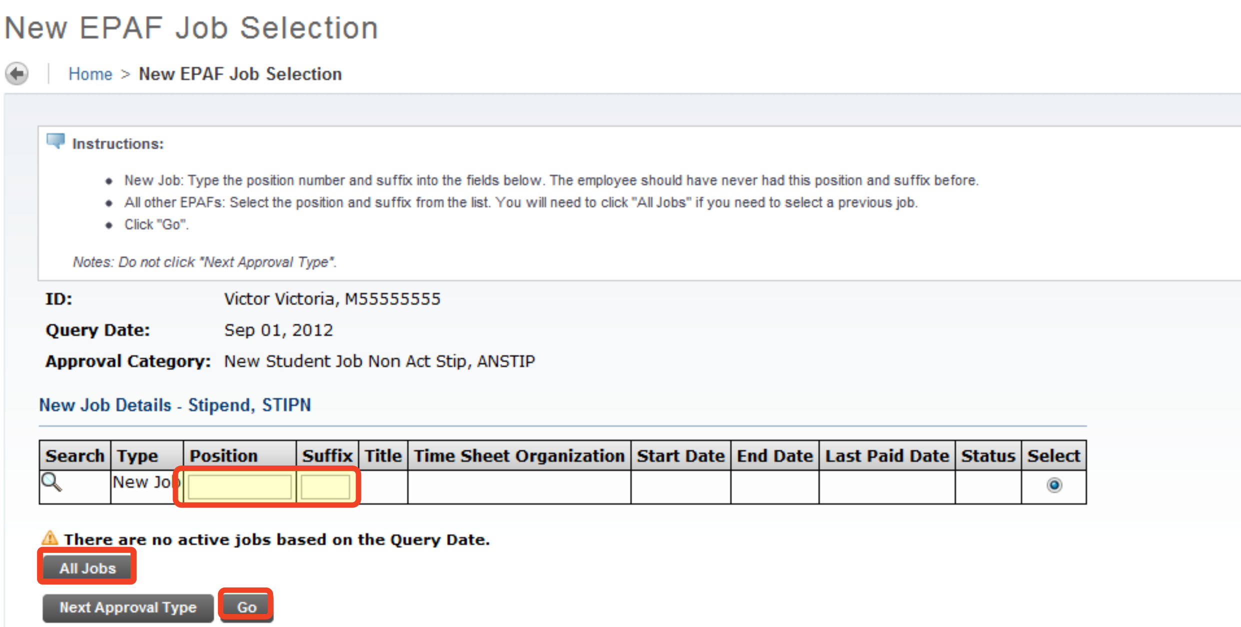
Step 7. Enter in the appropriate **Suffix**:

00 is the suffix if it is the first time the employee has been hired into your department.

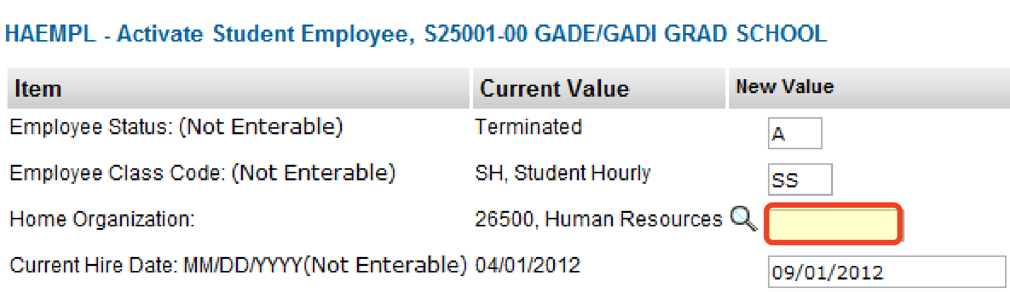
If the student has multiple jobs in your department, increase the suffix by one for each additional job. The new suffix needs to be different than any existing suffix on the current position.

Unique Identifier = M Number + Departmental Position Number + Suffix

Step 8. Click "Go".



Step 9. Enter your department's home organization number in the **Home Organization** field. The Home Org number is the six digit number for your entire area. This could be different than your timesheet org number.



Step 10. Complete the *New Job Details* and *Job End Date* sections.

NOTE: Any field with a ***** *next to it is required. However, the Job Begin Date and the Job Effective Date fields are not enterable and both default from the Query Date.*

The **Contract Type** will default to Secondary, only change this if the student has never had a position with the University or you receive an error on the EPAF requiring you to change this to Primary.

The **Annual Salary** is the Stipend Amount.

*****Factors and Pays are always equal for Stipends.*****

To calculate out the number of Pays, take the number of weeks of the length of the job and divide by 2.

Fractions of a Week/Pay: *Each work day (M, T, W, Th, F) is equal to 0.2 weeks. For example, if a job ends on a Wednesday, multiply 3 (M, T, W) by 0.2 to get a total of 0.6 weeks. Add this to the total number of full weeks and then divide by 2 for the number of pays.*

The **Hours per Pay** are based on the stipend; 40.00 for full stipend; 30.00 for ¾ stipend, 20.00 for ½ stipend, and 10.00 for ¼ stipend.

STIPN - New Job Details - Stipend, S25001-00 GADE/GADI GRAD SCHOOL

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*(Not Enterable)		09/01/2012
Contract Type: *		Primary
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)		09/01/2012
Salary: *		
Factor: *		
Pays: *		
Hours per Pay: *		
Timesheet Orgn: *		

HRLYT - Job End Date, S25001-00 GADE/GADI GRAD SCHOOL

Item	Current Value	New Value
Job End Date: MM/DD/YYYY*		
Job Status: *(Not Enterable)		T

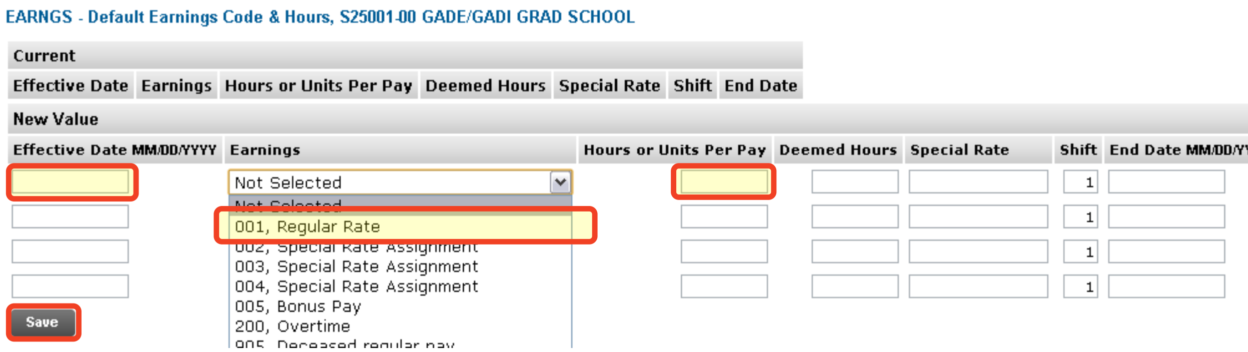
Step 11. Complete the *Default Earnings Code & Hours* section.

A. Use the Query Date as the Effective Date.

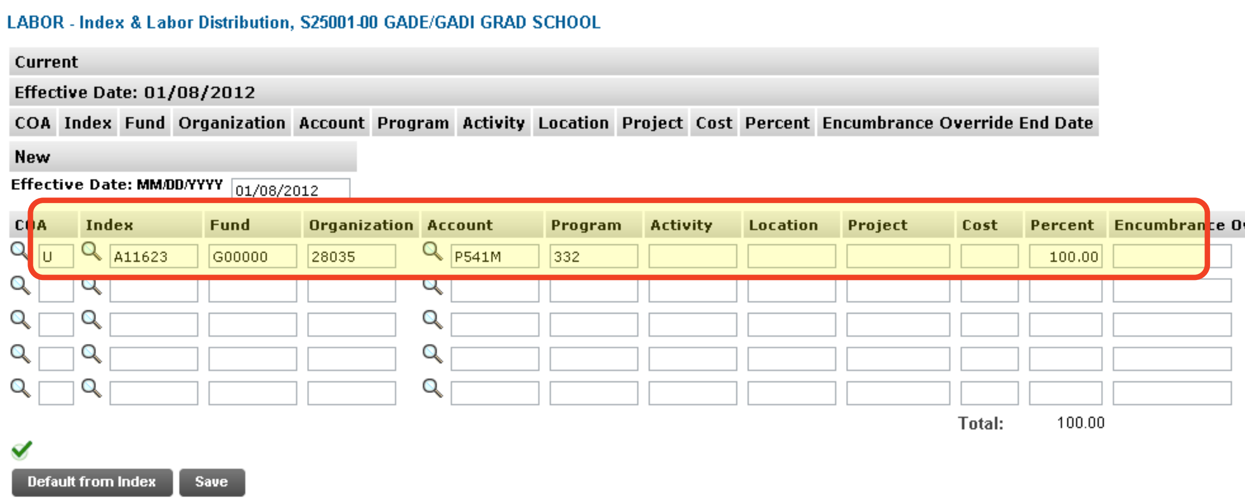
B. Select 001, Regular Rate for the Earnings Code.

C. Fill in the number of Hours per Pay. This will be the same number as the Hours Pay in the *New Job Details* section.

D. Click "Save".



Step 12. Verify the *Index & Labor Distribution* for the job. The Index and Labor Distribution will default from the position budget.



If no change is needed, click "Save" and continue to the *Routing Queue.*

If you need to change the Index, you have two options:

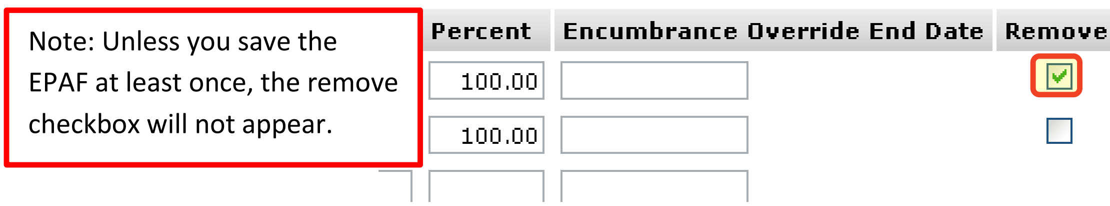
Option A. Overwrite the Index in the Index field and click "Default from Index". This will cause the Account code to disappear while the correct Fund, Org and Program codes populate.

Enter the appropriate Account Code and click “Save”.

Option 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 hand side there is a check box next to each distribution line. Select the Index you want to delete and click “Save”.

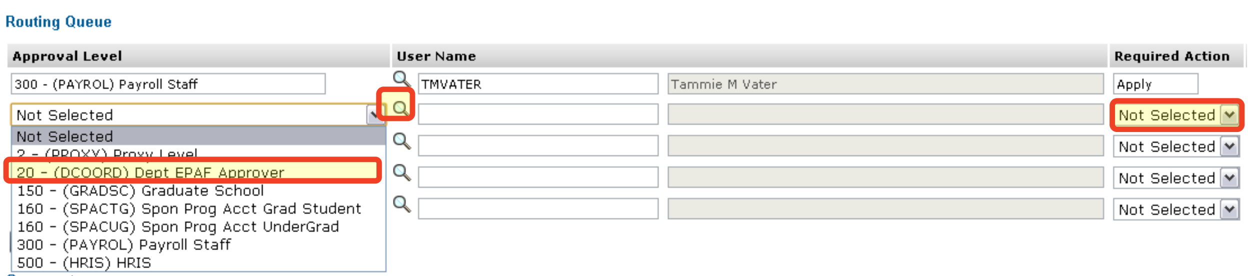


Step 13. Complete the *Routing Queue* by choosing the **Approval Level**, inserting a **User Name**, and selecting a **Required Action** *(Approve or FYI)*.

NOTE: All Stipends must be routed to the Graduate School for approval.

If the position is funded by a research account you will need to add the appropriate Approver in the Sponsored Programs office (Graduate or Undergraduate).

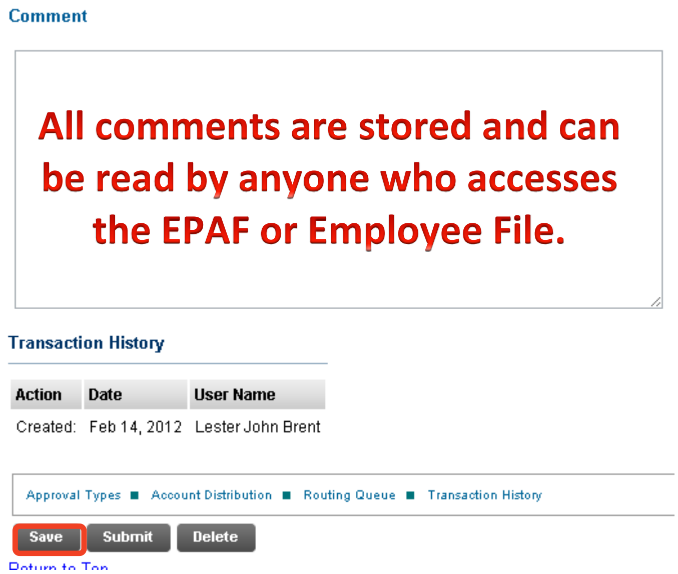
Step 14. Click “Save”.



Step 15. You may insert comments into the ***Comment Box***, but be aware that all individuals who can view the EPAF will be able to see the comments you create.

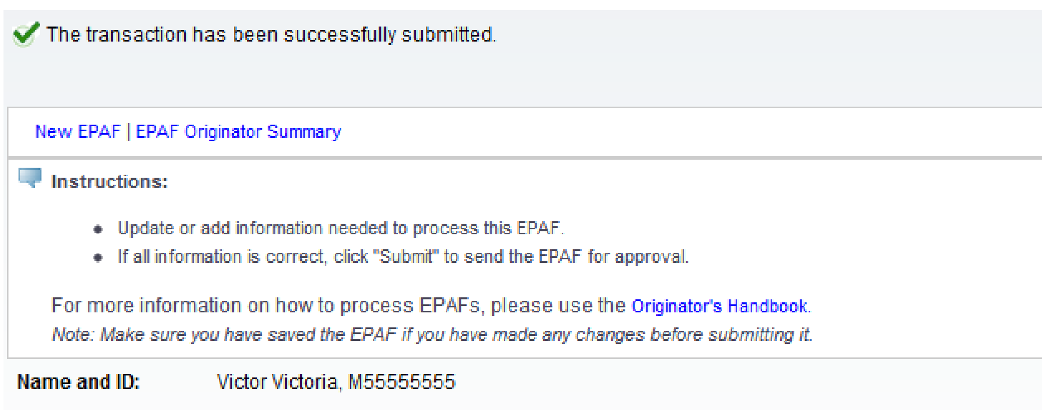
Michigan Tech Best Practice: Copy and paste the email request for the student hire as a comment.

Step 16. Click “Save”.



Step 17. Once you have double checked to make sure everything has been entered correctly, click “Submit”.

Step 18. Verify at the top of the EPAF to see whether it was submitted successfully.



Option P: Activate Student Employee with Previous Job - Stipend, ARSTIP

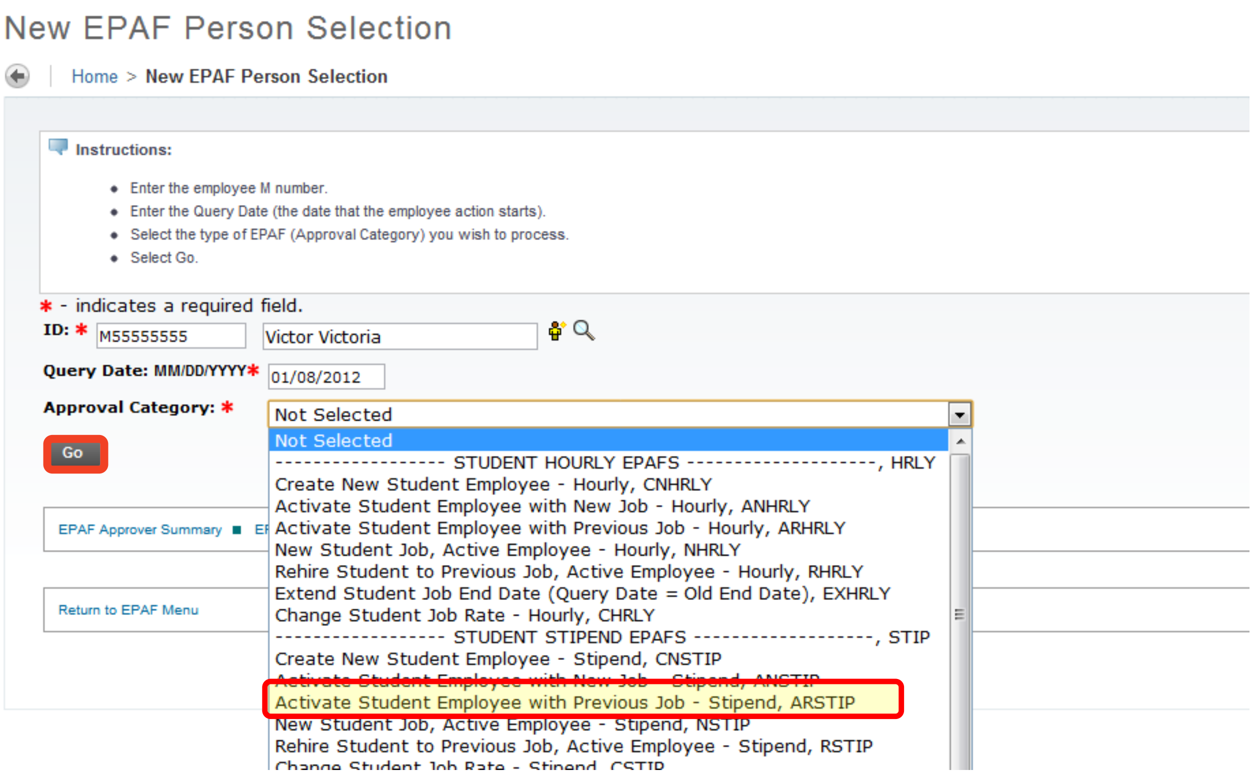
This option is used when you need to hire a student that has not worked at the University for over one year and will be working a new job in your department. This student will need an I-9 review. Please contact Payroll to find out if additional action is needed for this employee's I-9. This employee should fill out a new W-4, MI W-4, and Direct Deposit form or update that information through ESS (banweb.mtu.edu).

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 *(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".



Step 5. Click on the "All Jobs" button to locate the position you are rehiring the employee into. Make sure the job is selected on the right side of the screen. If the position and suffix is not listed, you will need to *Activate Student Employee with New Job – Stipend, ANSTIP.*

Step 6. 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: Victor Victoria, M55555555

Query Date: Sep 01, 2012

Approval Category: Rihire Student Job Non Act Sti, ARSTIP

Rehire Job Details - Stipend, STIPR

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									
	Primary	S25001	00	GADE/GADI GRAD SCHOOL	26500, Human Resources	Apr 01, 2012	Apr 30, 2012		Terminated	

Active Jobs

Next Approval Type Go

Step 7. Enter your department’s home organization number in the **Home Organization** field. The Home Org number is the six digit number for your entire area. This could be different than your timesheet org number.

HAEMPL - Activate Student Employee, S25001-00 GADE/GADI GRAD SCHOOL

Item	Current Value	New Value
Employee Status: (Not Enterable)	Terminated	A
Employee Class Code: (Not Enterable)	SH, Student Hourly	SS
Home Organization:	26500, Human Resources	
Current Hire Date: MM/DD/YYYY(Not Enterable)	04/01/2012	09/01/2012

Step 8. Complete the *Rehire Job Details* and *Job End Date* sections.

*NOTE: Any field with a * next to it is required. For all other fields, if no change is required from the previous time this employee had this position, you do not need to fill in the New Value.*

The **Personnel Date** is only used if this Rehire should have occurred before the “Last Paid Date”. This might happen if an employee’s job ended at the beginning of the pay period and you were rehiring the employee later in that pay period. If that occurs, the employee needs to be hired retroactively (earlier then the last paid date) during that payroll period.

The **Annual Salary** is the Stipend Amount.

The **Factor** and **Pays** are always equal. The **Factor** and **Pays** are equal to the amount of pay periods between the **Query Date** (or **Personnel Date** if retroactive) and the **Job End Date**.

To figure out the number of Pays, take the number of weeks of the length of the job and divide by 2.

Fractions of a Week/Pay: *Each work day (M, T, W, Th, F) is equal to 0.2 weeks. For example, if a job ends on a Wednesday, multiply 3 (M, T, W) by 0.2 to get a total of 0.6 weeks. Add this to the total number of full weeks and then divide by 2 for the number of pays.*

The **Hours per Pay** are based on the stipend; 40.00 for full stipend; 30.00 for ¾ stipend, 20.00 for ½ stipend, and 10.00 for ¼ stipend.

STIPR - Rehire Job Details - Stipend, S25001-00 GADE/GADI GRAD SCHOOL

Item	Current Value	New Value
Contract Type:	Primary	Primary
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	04/30/2012	09/01/2012
Personnel Date: MM/DD/YYYY	04/30/2012	
Job Status: (Not Enterable)	Terminated	A
Salary:	10400	
Factor:	26	
Pays:	26	
Hours per Pay:	40	
Timesheet Orgn:	26500	

HRLYT - Job End Date, S25001-00 GADE/GADI GRAD SCHOOL

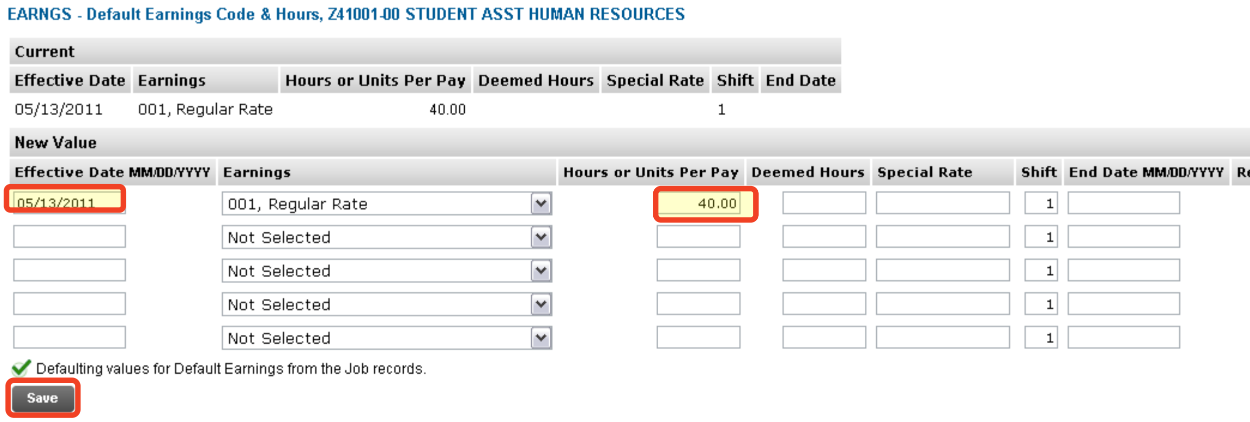
Item	Current Value	New Value
Job End Date: MM/DD/YYYY*	04/30/2012	
Job Status: *(Not Enterable)	Terminated	T

Step 8. Complete the *Default Earnings Code & Hours* section.

A. Use the Query Date as the Effective Date. You will have to over write the "New Value" Effective Date.

B. If you changed the Hours per Pay in the *Job Details* area, you must update the Hours per Pay field.

C. Click "Save".



EARNGS - Default Earnings Code & Hours, Z41001-00 STUDENT ASST HUMAN RESOURCES

Current

Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
05/13/2011	001, Regular Rate	40.00			1	

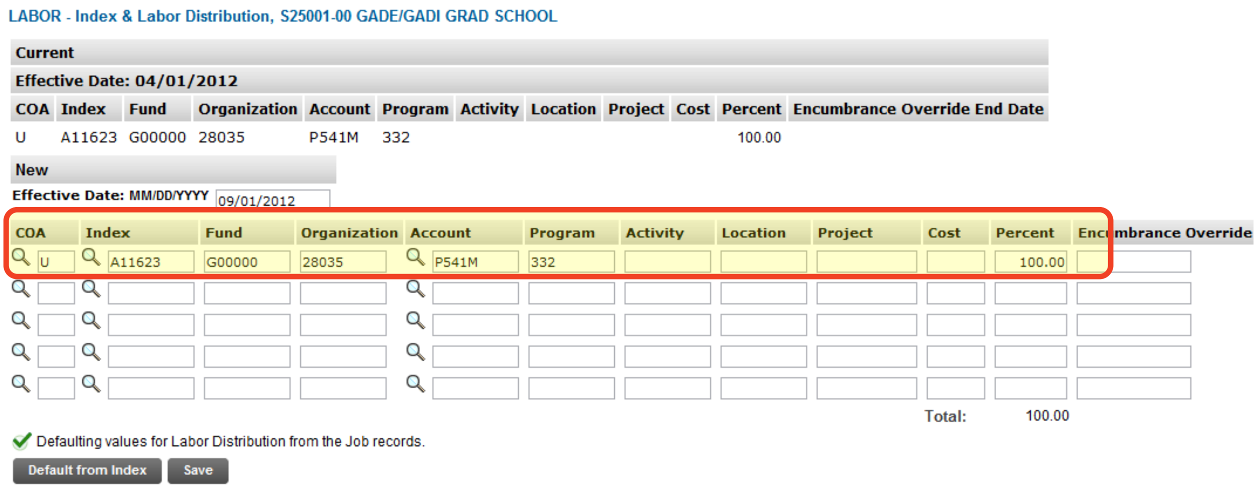
New Value

Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	Re
05/13/2011	001, Regular Rate	40.00			1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		

Defaulting values for Default Earnings from the Job records.

Save

Step 9. Verify the *Index & Labor Distribution* for the job. The Index and Labor Distribution will default from the position budget.



LABOR - Index & Labor Distribution, S25001-00 GADE/GADI GRAD SCHOOL

Current

Effective Date: 04/01/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
U	A11623	G00000	28035	P541M	332					100.00	

New

Effective Date: MM/DD/YYYY 09/01/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override
U	A11623	G00000	28035	P541M	332					100.00	
									Total:	100.00	

Defaulting values for Labor Distribution from the Job records.

Default from Index Save

If no change is needed, click “Save” and continue to the *Routing Queue.*

If you need to change the Index, you have two options:

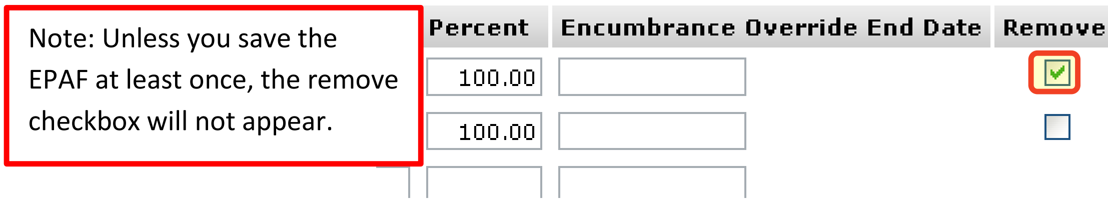
Option A. Overwrite the Index in the Index field and click “Default from Index”. This will cause the Account code to disappear while the correct Fund, Org and Program codes populate.

Enter the appropriate Account Code and click “Save”.

Option 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 hand side there is a check box next to each distribution line. Select the Index you want to delete and click "Save".

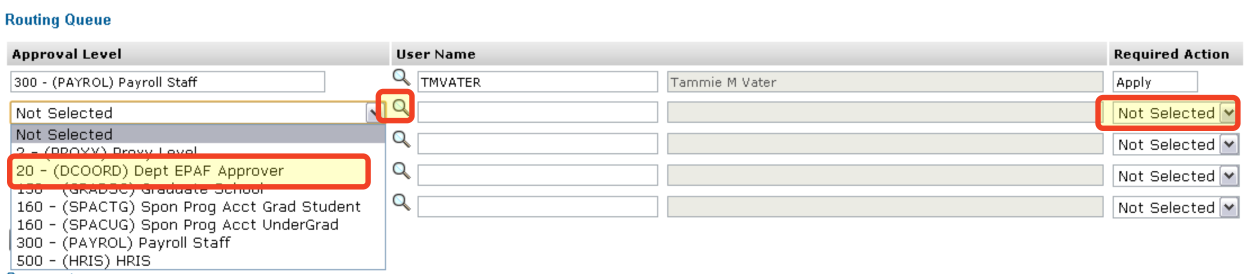


Step 10. Complete the *Routing Queue* by choosing the **Approval Level**, inserting a **User Name**, and selecting a **Required Action** *(Approve or FYI)*.

NOTE: All Stipends must be routed to the Graduate School for approval.

If the position is funded by a research account you will need to add the appropriate Approver in the Sponsored Programs office (Graduate or Undergraduate).

Step 11. Click "Save".



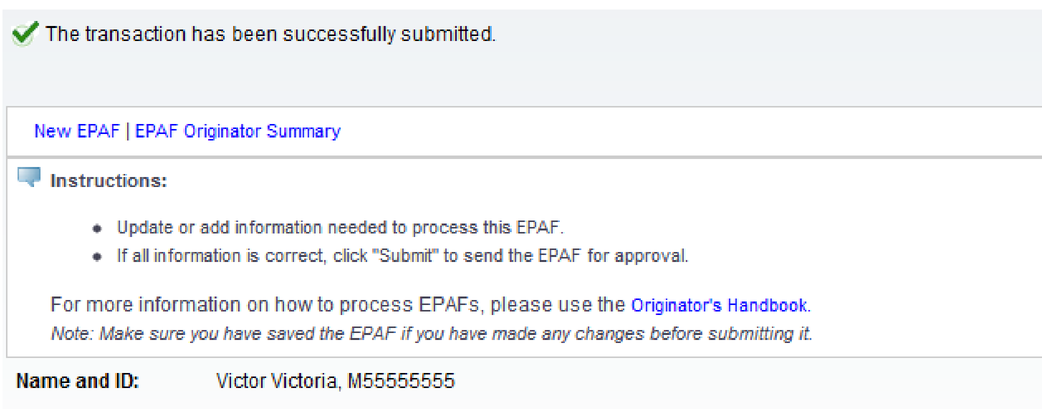
Step 12. You may insert comments into the ***Comment Box***, but be aware that all individuals who can view the EPAF will be able to see the comments you create.

Michigan Tech Best Practice: Copy and paste the email request for the student hire as a comment.

Step 13. Click "Save".

Step 14. Once you have double checked to make sure everything has been entered correctly, click “Submit”.

Step 15. Verify at the top of the EPAF to see whether it was submitted successfully.



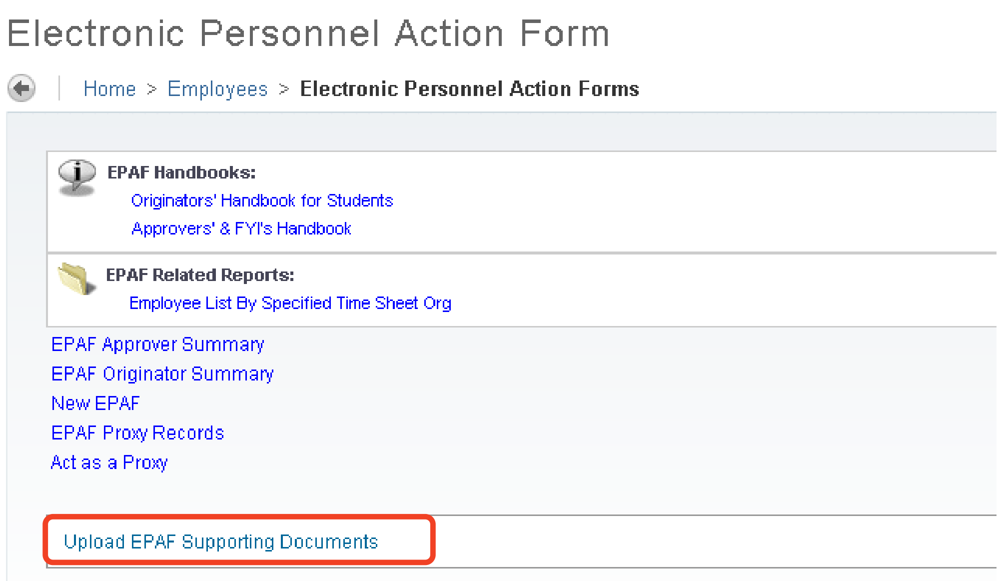
Uploading Supporting Documentation

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 an Employee Job" EPAF.

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

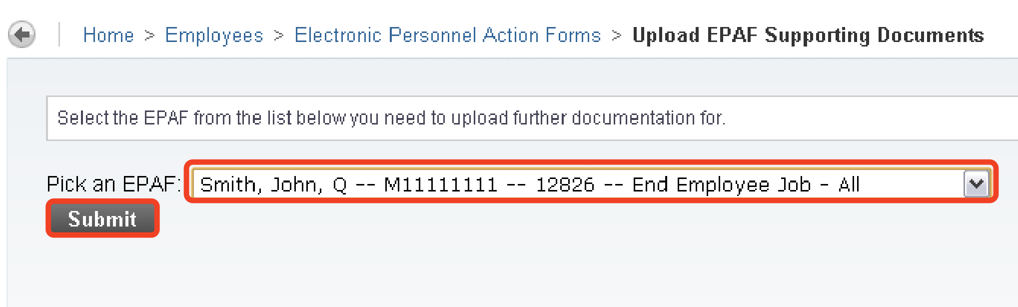
Note: Make sure the scans aligned correctly and are legible.

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



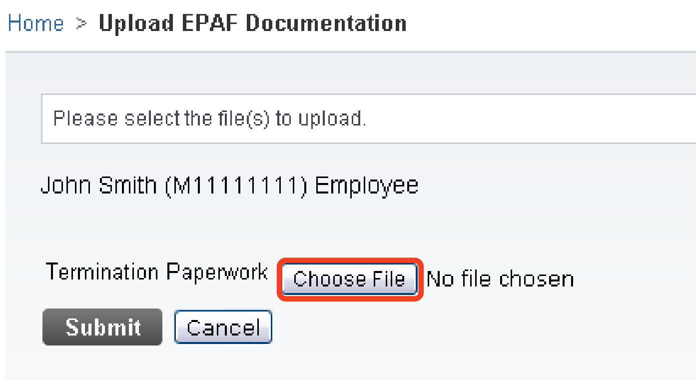
Step 3. Using the drop down box, select the EPAF for which you will be uploading supporting documentation and click "Submit".

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.

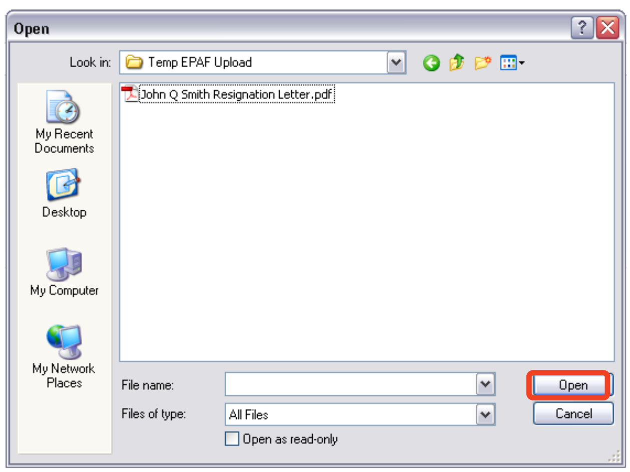


Step 4. Click the “Choose File” button next to the type of document you will be uploading.

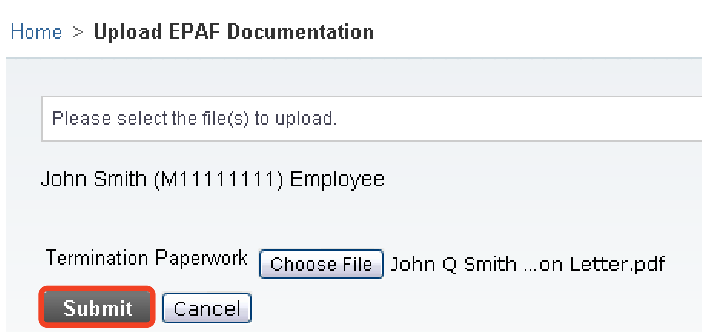
Note: You should only see options relevant to the type of EPAF you are processing.



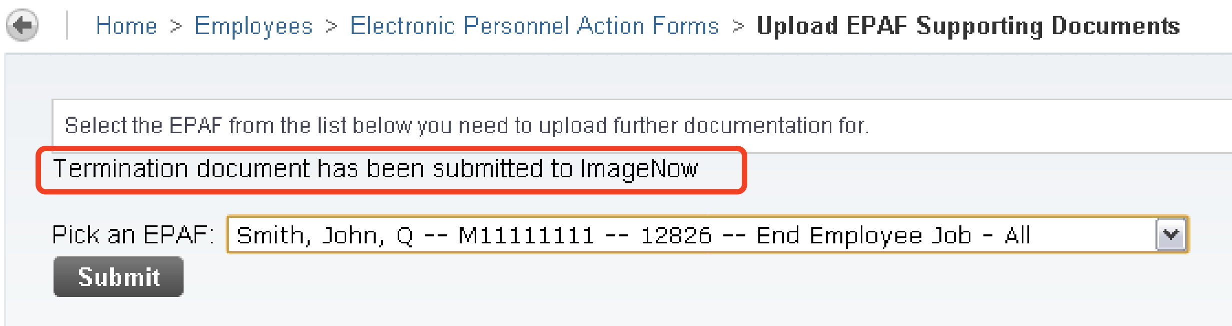
Step 5. Navigate to the location of the PDF. Highlight the PDF and click “Open”.



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



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



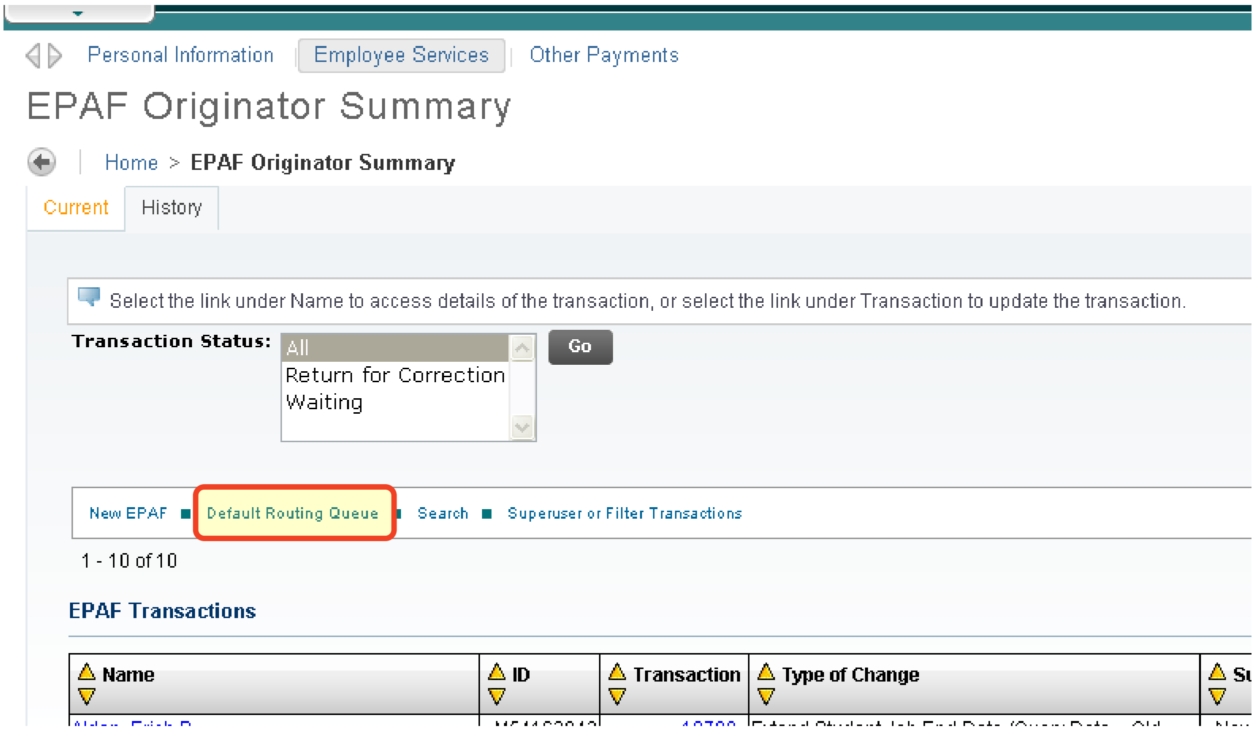
Step 8. Delete the temporary PDF file created for the upload.

Step 9. You will receive an email detailing your current EPAF transactions and status on the day following the EPAF submission. 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.

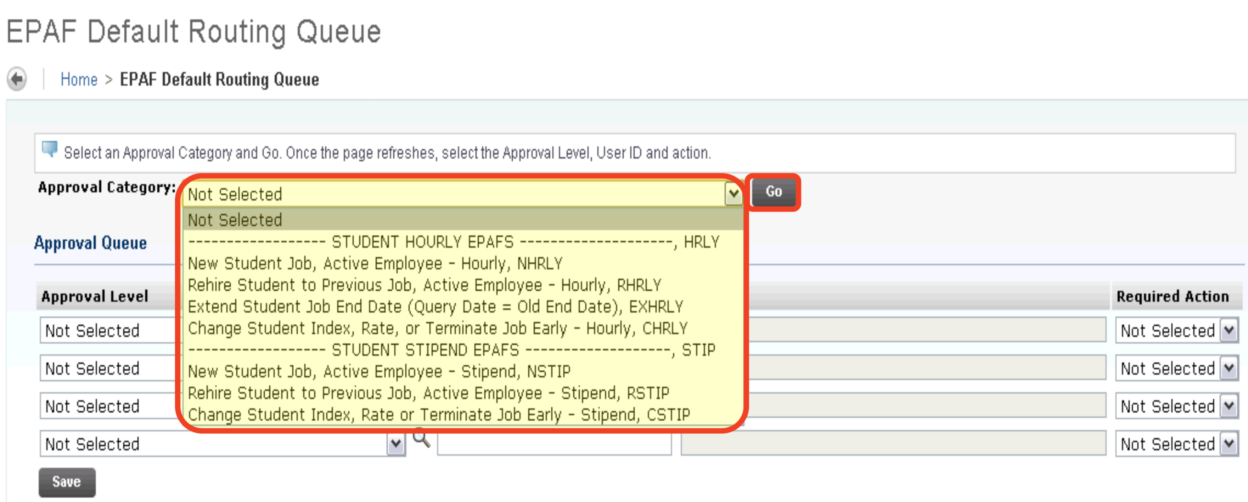
Setting a Default Routing Queue

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".*

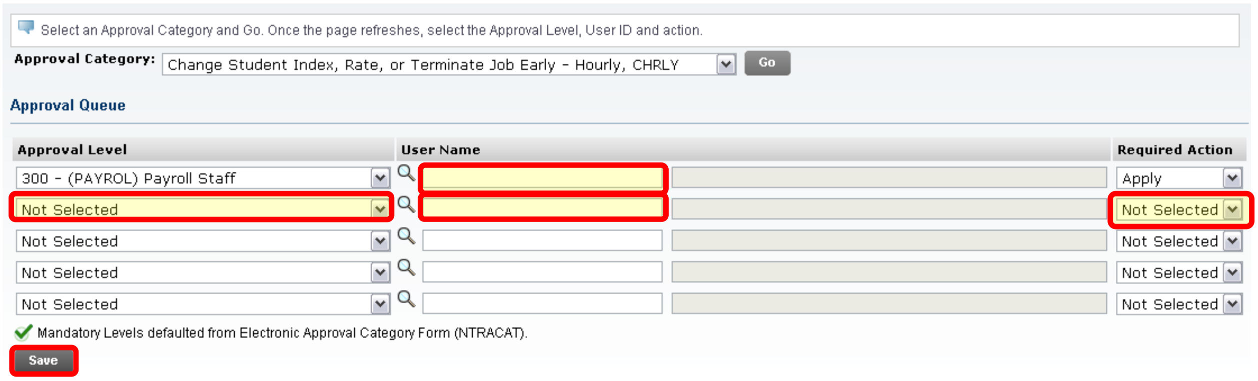


Step 2. Select an Approval Category and click "Go".

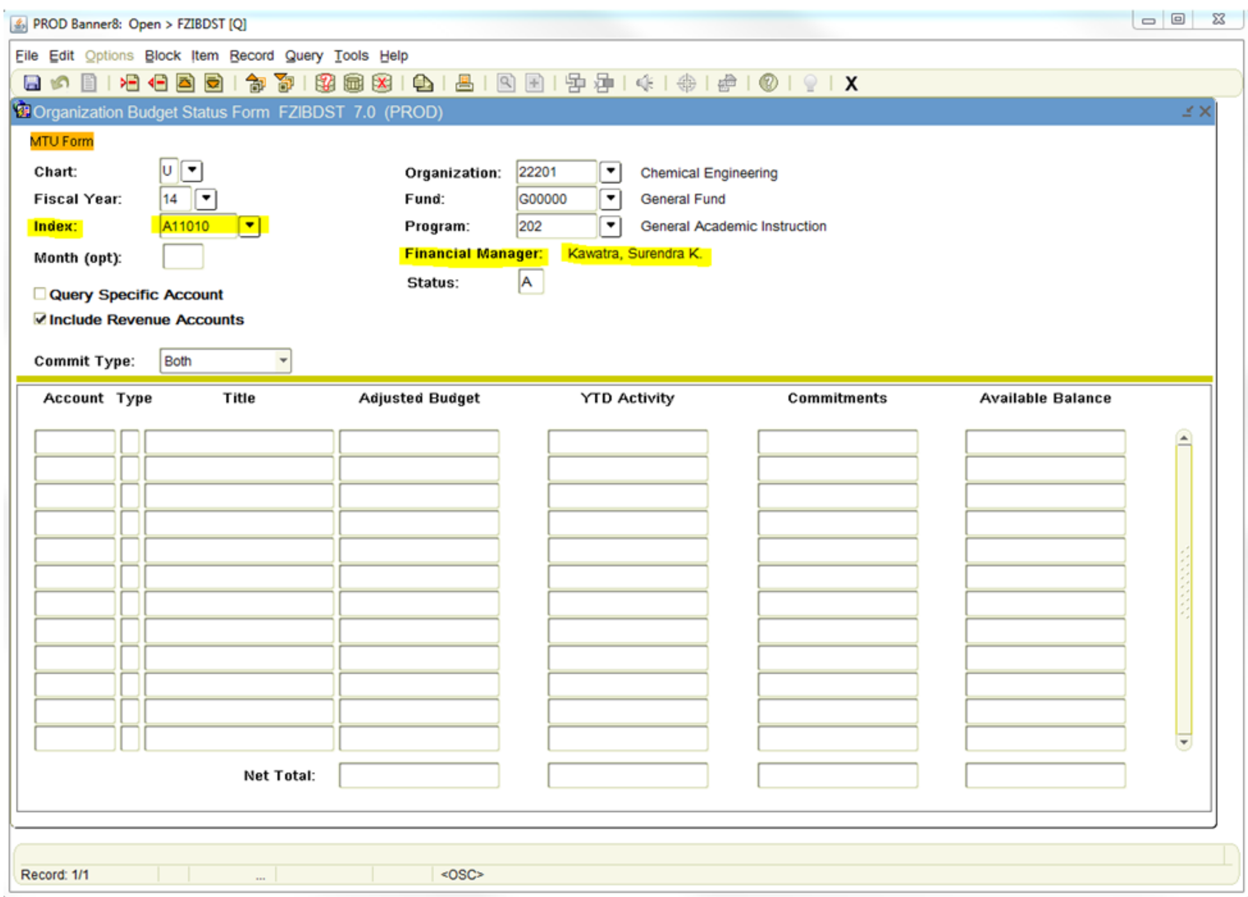


Step 3. Complete the *Routing Queue* by choosing the **Approval Level**, inserting a **User Name**, and selecting a **Required Action** *(Approve or FYI)*.

NOTE: All Stipends must be routed to the Graduate School for approval.



For List of Financial Managers, use Banner form FZIBDST (type in Index Number)



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 ('E4','E5'), ('E34','E35'), between 'E20'and 'E28', between 'E292' and E296'

Student Position Numbers

First and Second Digit of Hourly Position Numbers	
WU…. Workstudy Undergraduate (Hourly) **WG….** Workstudy Graduate (Hourly) **ZU….** Regular Hourly Undergraduate **XG….** Regular Hourly Graduate *Last 4 digits of position number from job categories* *Stipend positions see bottom right*	
0013	**Business Operations** Accounting Assistant Auditor Market Research Analyst
0015	**Computers & Math** Research in Computer Science or Math Math/Computer Technicians & Research Assts Computer Support Computer Programming Web Developer Math/Computer Science Lab Assistants
0017	**Engineering** Research in Engineering Engineering Technician & Research Assistants Engineering Lab Assistants
0019	**Sciences** Research in the Sciences Technicians & Research Assistants in Sciences Sciences Lab Assistants
0021	**Counselor/Mentor** OTLs Commuter/Transfer Assistants Student Outreach Summer Programs Counselors
0025	**Education, Library, Museum** Graders Learning Center Coaches & Tutors TAs Lab Instructors PE Course Instructors Library Specific – shelving books, archives, etc. Museum Specific – preparing displays, etc.
0027	**Arts, Sports, Media** Audio Video Equipment Technician Camera Operator – Television, Video Editor Graphic Designer Photographer Film and Video Editor Public Relations Sports Worker including Officials Writer
0029	**Athletic Trainer** Athletic Trainers

0033	**Lifeguard, Parking, Ski Patrol** Lifeguard Parking Enforcement Ski Patrol
0035	**Food Service** Bartender Dining Room/Cafeteria Assistant Dishwasher Food Preparation or Serving Concessions or Catering Worker
0037	**Grounds, Custodial, Landscape** Custodian Grounds Worker Landscape Worker/Gardening
0039	**Recreation, Guides, Costumes** Costume Design and Construction Lobby or Locker Room Attendant Recreation Attendants, Workers, Instructors Ticket Taker, Usher, Tour Guide
0041	**Sales, Cashier** Cashier Counter and Rental Clerk Retail Sales Worker
0043	**Office & Admin Support** Data Entry File, Mail, Stock Clerk Receptionist Dispatcher
0047	**Trades & Painting** Trades Helper Painting
0049	**Install/Main/Repair, Machinist** Computer Repair Electronics Maintenance Installer Machinist
0051	**Print Shop, Bakery** Print Shop Worker Bakery Assistant
0053	**Transportation** Bus/Shuttle Driver Motor Vehicle Operator

Stipend Only Position Numbers		
GTA/GTI	**All**	**TG0025**
GRA/ GA	Mathematical or Computer Science Engineering Sciences	**RG0015** **RG0017** **RG0019**
GADE **GADI**	doing mostly computer support doing mostly administrative support	**SG0015** **SG0043**

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	Personnel Date
A	New Student Job, Active Employee - Hourly	*A new hourly job or timesheet for a student in a department.*	The first day the employee worked	N/A
B	Rehire Student into Previous Job, Active Employee - Hourly	Rehiring a student into an hourly job they have previously held.	The day the employee is rehired or the Sunday before the next EPAF deadline, whichever is later	The day the employee is rehired
C	Extend Job End Date - Hourly	*Extending the job end date of an hourly student employee.*	The old job end date or the Sunday before the next EPAF deadline, whichever is later	The old job end date
D	Change Student Job Rate - Hourly	*Changing the hourly rate of a student employee.*	The first day of the new rate change or the Sunday before the next EPAF deadline, whichever is later	The first day of the new rate
K	Create New Student Employee - Hourly	*A new hourly job or timesheet for a student in a department.*	The first day the employee worked	N/A

L	Activate Student Employee with New Job -Hourly,	*A new hourly job or timesheet for a student in a department.*	The first day the employee worked	N/A
M	Activate Student Employee with Previous Job - Hourly	*Rehiring a student into an hourly job they have previously held.*	The first day the employee worked	N/A
E	New Position (Stipend), NSTIP	*A new stipend position for a student in a department.*	The first day the employee worked	N/A
F	Rehire into Previous Position (Stipend), RSTIP	*Rehiring a student into a stipend position they have previously held.*	The day the employee is rehired or the Sunday before the next EPAF deadline, whichever is later	The day the employee is rehired
G	Change Student Job Rate - Stipend	*Changing the stipend amount paid over a period of time.*	The first day of the new rate change or the Sunday before the next EPAF deadline, whichever is later	The first day of the new rate
N	Create New Student Employee (Stipend), CNSTIP	*A new stipend position for a student in a department.*	The first day the employee worked	N/A
O	Activate Student Employee with New Job (Stipend), ANSTIP	*A new stipend position for a student in a department.*	The first day the employee worked	N/A
P	Activate Student Employee with Previous Job (Stipend), ARSTIP	*Rehiring a student into an stipend position they have previously held.*	The first day the employee worked	N/A

H	Change Student Index – All Student Employees	*Changing the Index from which a student is paid.*	The Effective date of the Index change or the Sunday before the next EPAF deadline whichever is later.	N/A
I	End Student Job Early – All Student Employees	*Ending a student job before the current end date.*	The day the employee was terminated or the Sunday before the next EPAF deadline, whichever is later	The day the employee was terminated
J	Change Student Time Entry Information – All Student Employees	*Changing the Time Entry type, Time Entry Approver, or Time Sheet Org of an employee.*	The day the change should occur or the Sunday before the next EPAF deadline, whichever is later	N/A

HOURLY STUDENT EMPLOYEE ACTIONS
STIPEND STUDENT EMPLOYEE ACTIONS
ALL STUDENT EMPLOYEE ACTIONS

Payroll Account Codes For Student Employees

The following are account codes for student employees used in the *Index & Labor Distribution* section of an EPAF.

Graduate Students	P541D	Doctoral Students
	P541H	Graduate Students - Hourly
	P541M	Masters Student
	P543D	Doctoral Students – Summer Teaching
	P543H	Graduate Students Hourly – Summer Teaching
	P543M	Masters Students – Summer Teaching
	P547	Graduate Students – Federal Work Study
Undergraduate Students	P641	Undergraduate Students
	P643	Undergraduate Students – Summer Teaching
	P647	Undergraduate Students – Federal Work Study

Links to Useful Information

Human Resources

Human Resources Website: www.mtu.edu/hr

Banweb / Employee Self Service

Banweb / Employee Self Service: www.banweb.mtu.edu

EPAF Test Server: www.banmirror.mtu.edu

Documentation & Training

EPAF Resources:
http://www.mtu.edu/hr/supervisors-admins/epaf-resources/

Payroll & HR Calendar:
http://www.mtu.edu/hr/supervisors-admins/payroll/calendars/

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