[PROCESSING EMPLOYEES USING EPAF – APPROVERS & FYI HANDBOOK]

What you need before you start: EPAF Training, Complete Banner Access Form
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What is EPAF?
EPAF stands for Electronic Personnel Action Form. EPAFs allow users to process online personnel actions electronically through Employee Self Services (Banweb) through a defined approval queue with the final step of the action applied to the database.

Who can be processed through an EPAF?
Students who have an active employment record with the University. This means that they do not need a new I-9 or an I-9 review.

What actions can be processed through an EPAF?

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

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

All Student Jobs (Hourly & Stipend)
- Change Index on Student Job
- Terminate Student Job Early

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

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

EPAFs are processed through [Employee Self Service (ESS/Banweb)](https://www.banweb.mtu.edu/).

**Step 1.** Sign on to Employee Self Service (ESS): [https://www.banweb.mtu.edu/](https://www.banweb.mtu.edu/)

**Step 2.** Click on the Employee Service box.
Step 3. Click on the Electronic Personnel Action Forms box.

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

Note: This is the main EPAF Menu. You will not see any options other than Act as a Proxy until you have an EPAF to approve.
Step 5. Click on the name of the student employee to review the EPAF.

**APPROVER SUMMARY SCREEN NOTES:**

1. **EPAF Approver Summary Tabs**
   - **Current** - EPAFs you have to approve.
   - **In My Queue** – EPAFs that you will soon have to approve.
   - **History** – EPAFs that you have approved.

2. **Employee Name & Title** – Click on the name to review and approve the EPAF.
3. **Transaction Number** – This number is used to reference this specific transaction.
4. **Type of Change** – This is the type of EPAF being processed for this employee.
   See [What Actions Can Be Processed](#) for more information.
Reviewing an EPAF

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

Summary & Actions

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

EPAF Preview

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

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

Approval Types, AKA Job Details

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

Job Details
This is the collection of information to establish the record in banner for the employment action. If the action is a new hire, it will have the start date and rate of pay. A
termination will have the new end date. Below is a picture of the job details of a new job for a student employee, hourly.

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

<table>
<thead>
<tr>
<th>Enter Changes</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Begin Date:</td>
<td>04/01/2012</td>
<td></td>
</tr>
<tr>
<td>Contract Type:</td>
<td>*</td>
<td>Secondary</td>
</tr>
<tr>
<td>Jobs Effective Date:</td>
<td>04/01/2012</td>
<td></td>
</tr>
<tr>
<td>Personnel Date:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hourly Rate:</td>
<td>*</td>
<td>8.00</td>
</tr>
<tr>
<td>Timesheet Orgn:</td>
<td>*</td>
<td>26500</td>
</tr>
</tbody>
</table>

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

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

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

<table>
<thead>
<tr>
<th>Enter Changes</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Begin Date:</td>
<td>04/01/2012</td>
<td></td>
</tr>
<tr>
<td>Contract Type:</td>
<td>*</td>
<td>Secondary</td>
</tr>
<tr>
<td>Jobs Effective Date:</td>
<td>04/01/2012</td>
<td></td>
</tr>
<tr>
<td>Salary:</td>
<td>*</td>
<td>9000</td>
</tr>
<tr>
<td>Factor:</td>
<td>*</td>
<td>40</td>
</tr>
<tr>
<td>Pays:</td>
<td>*</td>
<td>26500</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Enter Changes</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job End Date:</td>
<td>08/04/2012</td>
<td>Terminated</td>
</tr>
</tbody>
</table>

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

Index & Labor Distribution
This section shows the Index and Labor Distribution. The areas of review are the Index field, the Account field, and the Percent field. The other fields on a labor distribution line are populated by the Index.
Comments
This section lists the comments on the EPAF. Comments are viewable by everyone. They are date and user stamped. If comments do not exist for this EPAF, there will not be a comments section.

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

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

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

HRU YUP - Change Job Details - Hourly, Z41001.00 STUDENT ASST HUMAN RESOURCES

<table>
<thead>
<tr>
<th>Column Changes</th>
<th>Current</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs Effective Date</td>
<td>01/01/2011</td>
<td>04/01/2011</td>
</tr>
<tr>
<td>Personnel Date</td>
<td>01/01/2011</td>
<td>04/01/2011</td>
</tr>
<tr>
<td>Job Status</td>
<td>Student</td>
<td>Student</td>
</tr>
<tr>
<td>Hourly Rate</td>
<td>7.4</td>
<td>8.40</td>
</tr>
<tr>
<td>Timesheet Over</td>
<td>28500</td>
<td></td>
</tr>
<tr>
<td>Job End Date</td>
<td>09/13/2011</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Current</th>
<th>Effective Date: 01/10/2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>CO</td>
<td>Index</td>
</tr>
<tr>
<td>U</td>
<td>A11805</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>New</th>
<th>Effective Date: 04/01/2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>CO</td>
<td>Index</td>
</tr>
<tr>
<td>U</td>
<td>A12345</td>
</tr>
</tbody>
</table>

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

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

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

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

| Approve | Disapprove | Return for Correction | More Info | Add Comment |

Option 1. Approve
Use this option to approve this EPAF and move it to the next person in the routing queue.

Option 2. Disapprove
Use this option if you do not approve this EPAF and it will move into everyone’s history as disapproved.

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

Option 3. Return For Correction
EPAFs can only be altered by the Originator. If you feel there is an error, you can return the EPAF to the Originator so they can correct the mistake.

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

Option 4. More Information
This option marks the EPAF status as More Info. This status is informational only and doesn’t affect the EPAF in any way. Don’t use this action unless you have a system in place in your department for this status.

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

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

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

Step 1. Click on “Add Comment”

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

Step 3. Click “Save”. You will see your comment displayed in the comment list.
Step 4.  Click “EPAF Preview” to return to the EPAF screen.
How do I Set up a Proxy?

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

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

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

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

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

Step 2. Click on the Employee Service box.

Welcome, to BANWEB!
Step 3. Click on the Electronic Personnel Action Forms box.

Step 4. Click on “Act as a Proxy”.

Step 5. Using the Proxy For drop down, locate the approver you will be acting as a proxy then click “Go”
Step 6. This will then take you to the EPAF Approver Summary page. Click on the name of the student employee to review and approve the EPAF.

APPROVER SUMMARY SCREEN NOTES:

5. EPAF Approver Summary Tabs
   - Current - EPAFs you have to approve.
   - In My Queue – EPAFs that you will soon have to approve.
   - History – EPAFs that you have approved.

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

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

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

Step 7. Review and take action on the EPAF. See Reviewing an EPAF and Taking Action on an EPAF for more information.