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)
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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](mailto: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 = HYOPAYG002E

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”.

Electronic Personnel Action Form

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.

\[ \text{Unique Identifier} = \text{M Number} + \text{Departmental Position Number} + \text{Suffix} \]

Step 8. Make sure the position is selected on the right edge of the \textit{New Job Details} area.

Step 9. Click "Go".

Step 10. Fill in the \textit{New Job Details} section.

\textbf{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.

\textbf{Title:} The \textbf{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 \textit{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**

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job End Date: MM/DD/YYYY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Status: <em>(Not Enterable)</em></td>
<td></td>
<td>T</td>
</tr>
</tbody>
</table>

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**

Effective Date: 04/01/2012

<table>
<thead>
<tr>
<th>COA</th>
<th>Index</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Project</th>
<th>Cost</th>
<th>Percent</th>
<th>Encumbrance Override</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: 100.00
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.

<table>
<thead>
<tr>
<th>Percent</th>
<th>Encumbrance Override</th>
<th>End Date</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>100.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>100.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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”.
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**).

Select the **Time Entry Method** from one of the following options if it needs to be changed:
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 7. Fill out the Job End Date Section.

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

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job End Date: MM/DD/YYYY*</td>
<td>04/01/2012</td>
<td></td>
</tr>
<tr>
<td>Job Status: *(Not Enterable) Terminated</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 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.

<table>
<thead>
<tr>
<th>Name and ID:</th>
<th>John F Smith, M2234235</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction:</td>
<td>11567</td>
</tr>
<tr>
<td>Query Date:</td>
<td>Apr 15, 2012</td>
</tr>
<tr>
<td>Transaction Status:</td>
<td>Pending</td>
</tr>
<tr>
<td>Approval Category:</td>
<td>Rehire Student to Previous Job, Active Employee - Hourly, RSHRLY</td>
</tr>
</tbody>
</table>
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”.

Note: The Query Date and the End Date are the same.
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.*

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs Effective Date: MM/DD/YYYY*</td>
<td>05/13/2011</td>
<td></td>
</tr>
<tr>
<td>Job Status: <em>(Not Enterable)</em></td>
<td>Terminated</td>
<td></td>
</tr>
<tr>
<td>Hourly Rate:</td>
<td>7.4</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job End Date: MM/DD/YYYY*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Status: <em>(Not Enterable)</em></td>
<td>Terminated</td>
<td></td>
</tr>
</tbody>
</table>

Step 7. 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 side, a check box next to each distribution line can be seen. Select the Index you want to delete and click “Save”.

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”.

Note: Unless you save the EPAF at least once, the remove checkbox will not appear.
All comments are stored and can be read by anyone who accesses the EPAF or Employee File.

Transaction History

<table>
<thead>
<tr>
<th>Action</th>
<th>Date</th>
<th>User Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created</td>
<td>Feb 14, 2012</td>
<td>Lester John Brent</td>
</tr>
</tbody>
</table>

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

Transaction History

<table>
<thead>
<tr>
<th>Action</th>
<th>Date</th>
<th>User Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created</td>
<td>Feb 14, 2012</td>
<td>Lester John Brent</td>
</tr>
</tbody>
</table>

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

The transaction has been successfully submitted.

Enter the information for the EAPF and either Save or Submit:

- **Name and ID:** John P Smith, W2234235
- **Transaction:** 11538
- **Query Date:** May 13, 2011
- **Transaction Status:** Pending
- **Approval Category:** Extend Student Job End Date (Query Date = Old End Date), EXHRLY
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”.

---

**New EPAF Person Selection**

**ID:** M82234239

**Query Date:** 04/05/2012

**Approval Category:**

- Not Selected
- Student Hourly EPAF
- Active Employee - Hourly, NHR
- New Student Job, Active Employee - Hourly, NHR
- Active Employee - Hourly, HRY
- Change Student Job Rate - Hourly, CHRLY
- Extend Student Job End Date (Query Date = Old End Date), CHRLY
- New Student Job, Active Employee - Stipend, NSTIP
- Active Employee - Stipend, NSTR
- Change Student Job Rate - Stipend, CSTIP
- Student Stipend EPAF
- Student Hourly EPAF
- Student Stipend EPAF
- Change Student Job Index, SINDEX
- terminate Student Job Early, STEM
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**

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

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”.

---

**ID:** John F Smith, M82234239  
**Query Date:** Apr 02, 2011  
**Approval Category:** Change to hourly rate or index, HRLY
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”.

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

---

**Note**: The screenshot includes a form with fields such as ID, Query Date, Approval Category, and a list of options for selecting a position. The form is designed to facilitate the rehiring process as described in the text.
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 than 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.
Step 7. Update the Default Earnings Code & Hours section.

A. Use the Query Date as the Effective Date. You will have to overwrite 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”.

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.

<table>
<thead>
<tr>
<th>Percent</th>
<th>Encumbrance Override End Date</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>100.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

EPAF Originator Summary

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

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”.

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

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.
The transaction has been successfully submitted.

Name and ID: John F Smith, M82234230
Transaction: 11647
Transaction Status: Approved
Approval Category: Change Student Index, Rate or Terminate Job Early - Stipend, CSTIP

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”.

New EPAF Person Selection

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

- **ID:** M2234239  John F Smith
- **Query Date:** 04/01/2012
- **Approval Category:** Not Selected

New Student Job, Active Employee - Hourly, NHRLY
New Student Job, Active Employee - Hourly, HRLY
Retire Student to Previous Job, Active Employee - Hourly, HRLY
Extend Student Job End Date (Query Date = Old End Date), EXHRLY
Change Student Job Rate - Hourly, CHRLY
-------------------------- STUDENT STIPEND EPAFS --------------------------, STIP
-------------------------- STUDENT EPAFS --------------------------, STONT
Change Student Job Index, SINEX
Terminate Student Job Early, STEM
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.

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

Step 10. Click “Save”.

---

**Comment**

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

---

**Transaction History**

*Created: Feb 14, 2012  Lester John Brent**

---

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

---

**Transaction History**

*Created: Feb 14, 2012  Lester John Brent**

---
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”.
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

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs Effective Date: MM/DD/YYYY <em>(Not Enterable)</em></td>
<td>01/08/2012</td>
<td>04/01/2012</td>
</tr>
<tr>
<td>Personnel Date: MM/DD/YYYY</td>
<td>01/08/2012</td>
<td></td>
</tr>
<tr>
<td>Job Status: <em>(Not Enterable)</em></td>
<td>Active</td>
<td>T</td>
</tr>
</tbody>
</table>

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**

<table>
<thead>
<tr>
<th>Action</th>
<th>Date</th>
<th>User Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created</td>
<td>Feb 13, 2012</td>
<td>Lester John Brent</td>
</tr>
<tr>
<td>Submitted</td>
<td>Feb 14, 2012</td>
<td>Lester John Brent</td>
</tr>
</tbody>
</table>

Approval Types: Account Distribution, Routing Queue, Transaction History

Return to Top

EPAF Originator Summary

[Home > EPAF Originator Summary]

---

**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]  [Pending]  [Completed]  [Approved]  [Rejected]  [Cancelled]  [In Progress]  [Back Ordered]  [Shipped]  [Shipped and Obsoleted]  [Obsoleted]  [Shipped and Obsoleted]

Return to EPAF Menu
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 **Timesheet 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**.*

---

<table>
<thead>
<tr>
<th>Search</th>
<th>Type</th>
<th>Position</th>
<th>Suffix</th>
<th>Title</th>
<th>Time Sheet Organization</th>
<th>Start Date</th>
<th>End Date</th>
<th>Last Paid Date</th>
<th>Status</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>New Job</td>
<td></td>
<td></td>
<td></td>
<td>Secondary</td>
<td>241001</td>
<td>00</td>
<td>STUDENT ASST HUMAN RESOURCES</td>
<td>265000 Human Resources</td>
<td>Jan 10, 2011</td>
</tr>
</tbody>
</table>
(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”.

TIME - Time Entry Information, Z41001.00 STUDENT ASST HUMAN RESOURCES

<table>
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<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs Effective Date: MMDD/YYYY (Not Enterable)</td>
<td></td>
<td>04/01/2012</td>
</tr>
<tr>
<td>Timesheet Otn:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time Entry Method:</td>
<td></td>
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</tr>
<tr>
<td>Time InOut Ind:</td>
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<td>No</td>
</tr>
<tr>
<td>Approver ID:</td>
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</table>

Routing Queue

<table>
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<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>300 (PAYROLL) Payroll Staff</td>
<td>THU - 0700</td>
<td>Not Selected</td>
</tr>
<tr>
<td>Not Selected</td>
<td>Tamika M. Water</td>
<td>Approve</td>
</tr>
<tr>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
</tr>
<tr>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
</tr>
<tr>
<td>150 (GRADSC) Graduate School</td>
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<td>Not Selected</td>
</tr>
<tr>
<td>160 (SPACTC) Spon Preg Acct Grad Student</td>
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</tr>
<tr>
<td>160 (SPACTC) Spon Preg Acct UnderGrad</td>
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<td>Not Selected</td>
</tr>
<tr>
<td>300 (PAYROLL) Payroll Staff</td>
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<td>Not Selected</td>
</tr>
<tr>
<td>300 (HRSS) HRSS</td>
<td>Not Selected</td>
<td>Not Selected</td>
</tr>
</tbody>
</table>
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.

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

---

**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.

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”.

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

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.

<table>
<thead>
<tr>
<th>Name and ID</th>
<th>Victor Victoria, M55555555</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction</td>
<td>13166</td>
</tr>
<tr>
<td>Query Date</td>
<td>Sep 10, 2012</td>
</tr>
<tr>
<td>Transaction Status</td>
<td>Approved</td>
</tr>
<tr>
<td>Approval Category</td>
<td>Create New Student Employee - Hourly, CNHRLY</td>
</tr>
</tbody>
</table>
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.

**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).

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

**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.

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job End Date: MM/DD/YYYY*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Status: # (Not Entarable)</td>
<td>T</td>
<td></td>
</tr>
</tbody>
</table>

Step 14. 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.

<table>
<thead>
<tr>
<th>Percent</th>
<th>Encumbrance Override End Date</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>100.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>100.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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”.

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, 741001.00 STUDENT ASST HUMAN RESOURCES**

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Status: (Not Enterable)</td>
<td>Terminated</td>
<td>A</td>
</tr>
<tr>
<td>Employee Class Code: (Not Enterable)</td>
<td>SH, Student Hourly</td>
<td>SM</td>
</tr>
<tr>
<td>Home Organization:</td>
<td>20500, Human Resources</td>
<td></td>
</tr>
<tr>
<td>Current Hire Date: MM/DD/YYYY (Not Enterable)</td>
<td>04/01/2012</td>
<td>09/10/2012</td>
</tr>
</tbody>
</table>

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**).
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.

Step 11. 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”.

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”.

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

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

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**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.
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”.

---

**EARNINGS - Default Earnings Code & Hours, S25001.00 GADE/GADI GRAD SCHOOL**

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Earnings</th>
<th>Hours or Units Per Pay</th>
<th>Deemed Hours</th>
<th>Special Rate</th>
<th>Shift</th>
<th>End Date</th>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td>002, Special Rate Assignment</td>
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<tr>
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<td>200, Overtime</td>
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<td>911, Regular Pay</td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Save**

---

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, S25001.00 GADE/GADI GRAD SCHOOL**

<table>
<thead>
<tr>
<th>Effective Date: 01/01/2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>COA</td>
</tr>
<tr>
<td>U</td>
</tr>
</tbody>
</table>

- **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”.

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

<table>
<thead>
<tr>
<th>Percent</th>
<th>Encumbrance</th>
<th>Override</th>
<th>End Date</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>100.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>100.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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”.

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

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.

The transaction has been successfully submitted.

Instructions:

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

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

Name and ID: Victor Victoria, M55555555

Transaction Date: 12/10/2013

Sign Date: 12/10/2013
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”.

New EPAF Person Selection

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”.

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.

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 than 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.

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

<table>
<thead>
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</tr>
</thead>
<tbody>
<tr>
<td>Contract Type:</td>
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<td>Primary</td>
</tr>
<tr>
<td>Jobs Effective Date: MM/DD/YYYY(Not Enterable)</td>
<td>04/30/2012</td>
<td>05/01/2012</td>
</tr>
<tr>
<td>Personnel Date: MM/DD/YYYY</td>
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</tr>
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<td>Salary:</td>
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</tr>
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</table>

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

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job End Date: MM/DD/YYYY</td>
<td>04/30/2012</td>
<td></td>
</tr>
<tr>
<td>Job Status: <em>(Not Enterable)</em></td>
<td>Terminated</td>
<td>T</td>
</tr>
</tbody>
</table>

---

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

A. Use the Query Date as the Effective Date. You will have to overwrite 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”.

---
Step 9. 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.

<table>
<thead>
<tr>
<th>Percent</th>
<th>Encumbrance Override End Date</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>100.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>100.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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”.

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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”.

Electronic Personnel Action Form

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”.

EPAF Default Routing Queue
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
- 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
- Electroncs Maintenance
- Installer
- Machinist

### 0051 Print Shop, Bakery
- Print Shop Worker
- Bakery Assistant

### 0053 Transportation
- Bus/Shuttle Driver
- Motor Vehicle Operator

### Stipend Only Position Numbers

<table>
<thead>
<tr>
<th>GTA/GTI</th>
<th>All</th>
<th>TG0025</th>
</tr>
</thead>
<tbody>
<tr>
<td>GRA/GA</td>
<td>Mathematical or Computer Science</td>
<td>RG0015</td>
</tr>
<tr>
<td>GA</td>
<td>Engineering</td>
<td>RG0017</td>
</tr>
<tr>
<td>Sciences</td>
<td>RG0019</td>
<td></td>
</tr>
<tr>
<td>GADE</td>
<td>doing mostly computer support</td>
<td>SG0015</td>
</tr>
<tr>
<td>GADI</td>
<td>doing mostly administrative support</td>
<td>SG0043</td>
</tr>
</tbody>
</table>
**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.

<table>
<thead>
<tr>
<th>EPAF Status</th>
<th>Definition and Action</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>The EPAF has been approved by all in the routing queue and is ready to be applied.</td>
<td>&quot;History&quot; tab of the Originator Summary</td>
</tr>
<tr>
<td>Completed</td>
<td>The EPAF has been applied to the database.</td>
<td>&quot;History&quot; tab of the Originator Summary</td>
</tr>
<tr>
<td>Disapproved</td>
<td>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.</td>
<td>&quot;History&quot; tab of the Originator Summary</td>
</tr>
<tr>
<td>More Information</td>
<td>The EPAF has been reviewed but the approver requires more information.</td>
<td>&quot;History&quot; tab of the Originator Summary</td>
</tr>
<tr>
<td>Pending</td>
<td>The EPAF has been submitted and is awaiting approval by someone in the routing queue.</td>
<td>&quot;History&quot; tab of the Originator Summary</td>
</tr>
<tr>
<td>Return for Correction</td>
<td>The EPAF has been returned; review the EPAF comments for clarification; click on Update to make corrections, then save and resubmit.</td>
<td>&quot;Current&quot; tab of the Originator Summary</td>
</tr>
<tr>
<td>Voided</td>
<td>The EPAF has been voided; it CANNOT be updated; review the EPAF comments for clarification.</td>
<td>&quot;History&quot; tab of the Originator Summary</td>
</tr>
<tr>
<td>Waiting</td>
<td>The EPAF has NOT been submitted.</td>
<td>&quot;Current&quot; tab of the Originator Summary</td>
</tr>
</tbody>
</table>
## 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.

<table>
<thead>
<tr>
<th>Option</th>
<th>Approval Category</th>
<th>Definition</th>
<th>Query Date</th>
<th>Personnel Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>New Student Job, Active Employee - Hourly</td>
<td>A new hourly job or timesheet for a student in a department.</td>
<td>The first day the employee worked</td>
<td>N/A</td>
</tr>
<tr>
<td>B</td>
<td>Rehire Student into Previous Job, Active Employee - Hourly</td>
<td>Rehiring a student into an hourly job they have previously held.</td>
<td>The day the employee is rehired or the Sunday before the next EPAF deadline, whichever is later</td>
<td>The day the employee is rehired</td>
</tr>
<tr>
<td>C</td>
<td>Extend Job End Date - Hourly</td>
<td>Extending the job end date of an hourly student employee.</td>
<td>The old job end date or the Sunday before the next EPAF deadline, whichever is later</td>
<td>The old job end date</td>
</tr>
<tr>
<td>D</td>
<td>Change Student Job Rate - Hourly</td>
<td>Changing the hourly rate of a student employee.</td>
<td>The first day of the new rate change or the Sunday before the next EPAF deadline, whichever is later</td>
<td>The first day of the new rate</td>
</tr>
<tr>
<td>K</td>
<td>Create New Student Employee - Hourly</td>
<td>A new hourly job or timesheet for a student in a department.</td>
<td>The first day the employee worked</td>
<td>N/A</td>
</tr>
<tr>
<td>Column</td>
<td>Action Description</td>
<td>Description</td>
<td>First Day</td>
<td>Employee Working Day</td>
</tr>
<tr>
<td>--------</td>
<td>--------------------</td>
<td>-------------</td>
<td>-----------</td>
<td>---------------------</td>
</tr>
<tr>
<td>L</td>
<td>Activate Student Employee with New Job - Hourly</td>
<td>A new hourly job or timesheet for a student in a department.</td>
<td>The first day the employee worked</td>
<td>N/A</td>
</tr>
<tr>
<td>M</td>
<td>Activate Student Employee with Previous Job - Hourly</td>
<td>Rehiring a student into an hourly job they have previously held.</td>
<td>The first day the employee worked</td>
<td>N/A</td>
</tr>
<tr>
<td>E</td>
<td>New Position (Stipend), NSTIP</td>
<td>A new stipend position for a student in a department.</td>
<td>The first day the employee worked</td>
<td>N/A</td>
</tr>
<tr>
<td>F</td>
<td>Rehire into Previous Position (Stipend), RSTIP</td>
<td>Rehiring a student into a stipend position they have previously held.</td>
<td>The first day the employee worked or the Sunday before the next EPAF deadline, whichever is later</td>
<td>The day the employee is rehired</td>
</tr>
<tr>
<td>G</td>
<td>Change Student Job Rate - Stipend</td>
<td>Changing the stipend amount paid over a period of time.</td>
<td>The first day of the new rate change or the Sunday before the next EPAF deadline, whichever is later</td>
<td>The first day of the new rate</td>
</tr>
<tr>
<td>N</td>
<td>Create New Student Employee (Stipend), CNSTIP</td>
<td>A new stipend position for a student in a department.</td>
<td>The first day the employee worked</td>
<td>N/A</td>
</tr>
<tr>
<td>O</td>
<td>Activate Student Employee with New Job (Stipend), ANSTIP</td>
<td>A new stipend position for a student in a department.</td>
<td>The first day the employee worked</td>
<td>N/A</td>
</tr>
<tr>
<td>P</td>
<td>Activate Student Employee with Previous Job (Stipend), ARSTIP</td>
<td>Rehiring a student into an stipend position they have previously held.</td>
<td>The first day the employee worked</td>
<td>N/A</td>
</tr>
<tr>
<td>H</td>
<td>Change Student Index – All Student Employees</td>
<td>Changing the Index from which a student is paid.</td>
<td>The Effective date of the Index change or the Sunday before the next EPAF deadline whichever is later</td>
<td>N/A</td>
</tr>
<tr>
<td>I</td>
<td>End Student Job Early – All Student Employees</td>
<td>Ending a student job before the current end date.</td>
<td>The day the employee was terminated or the Sunday before the next EPAF deadline whichever is later</td>
<td>The day the employee was terminated</td>
</tr>
<tr>
<td>J</td>
<td>Change Student Time Entry Information – All Student Employees</td>
<td>Changing the Time Entry type, Time Entry Approver, or Time Sheet Org of an employee.</td>
<td>The day the change should occur or the Sunday before the next EPAF deadline whichever is later</td>
<td>N/A</td>
</tr>
</tbody>
</table>
## Payroll Account Codes For Student Employees

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

<table>
<thead>
<tr>
<th>Graduate Students</th>
<th>P541D</th>
<th>Doctoral Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>P541H</td>
<td></td>
<td>Graduate Students - Hourly</td>
</tr>
<tr>
<td>P541M</td>
<td></td>
<td>Masters Student</td>
</tr>
<tr>
<td>P543D</td>
<td></td>
<td>Doctoral Students – Summer Teaching</td>
</tr>
<tr>
<td>P543H</td>
<td></td>
<td>Graduate Students Hourly – Summer Teaching</td>
</tr>
<tr>
<td>P543M</td>
<td></td>
<td>Masters Students – Summer Teaching</td>
</tr>
<tr>
<td>P547</td>
<td></td>
<td>Graduate Students – Federal Work Study</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Undergraduate Students</th>
<th>P641</th>
<th>Undergraduate Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>P643</td>
<td></td>
<td>Undergraduate Students – Summer Teaching</td>
</tr>
<tr>
<td>P647</td>
<td></td>
<td>Undergraduate Students – Federal Work Study</td>
</tr>
</tbody>
</table>
Links to Useful Information

**Human Resources**

Human Resources Website:  [www.mtu.edu/hr](http://www.mtu.edu/hr)

**Banweb / Employee Self Service**

Banweb / Employee Self Service:  [www.banweb.mtu.edu](http://www.banweb.mtu.edu)

EPAF Test Server:  [www.banmirror.mtu.edu](http://www.banmirror.mtu.edu)

**Documentation & Training**

EPAF Resources:  [http://www.mtu.edu/hr/supervisors-admins/epaf-resources/](http://www.mtu.edu/hr/supervisors-admins/epaf-resources/)

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

HR Training Calendar:  [www.mtu.edu/calendar/month.php?cal=HR+Events+Calendar&getdate](http://www.mtu.edu/calendar/month.php?cal=HR+Events+Calendar&getdate)