



ELECTRONIC PERSONNEL ACTION FORM (EPAF)

Student Job Assignment (Academic Year or Summer)

Accessing the EPAF

Log into ESTHER (<https://esther.rice.edu/>) using your Rice ID and password (PIN). Then, click Login.



Please enter your User Identification Number (your employee or student ID) and your Personal Identification Number (PIN). When finished, select Login.

To protect your privacy, please Exit and close your browser when you are finished.



For additional assistance, please contact:

- Undergraduate Applicants for Financial Aid: fna@rice.edu
- Student records: registrar@rice.edu
- Human resource/employee records: people@rice.edu

i NOTE: If you have forgotten your PIN please use the hint feature by entering your User ID and clicking the "Forgot PIN" button. You will then be prompted for your hint.

User ID:

PIN:

Esther Privacy
RELEASE: 8.8

Click on the Employee link at the main menu.



Employee



- View benefit information
- View paystubs
- Suppress Direct Deposit Stubs
- View W2 forms
- View W4 data
- View employee account information
- Enter an online payment on employee account
- View employee reimbursements
- Enter time sheet (non-exempt)
- View leave balances (non-exempt)
- Proxy Setup (Time sheet approvers)
- Labor Redistributions
- Security Dashboard

Click on the Electronic Personnel Action Form (EPAF) link at the Employee menu.



Electronic Personnel Action Form (EPAF)



- Electronic Personnel Action Form (EPAF)

Click on the New EPAF link.

Electronic Personnel Action Form



Useful Tools:

[EPAF Originator Dashboard by Department](#)

[EPAF Approver Dashboard by Department](#)

[Payroll Calendar](#)

[EPAF Documentation](#)

[EPAF Approver Summary](#)

[EPAF Originator Summary](#)

[New EPAF](#)



[EPAF Proxy Records](#)

[Act as a Proxy](#)

Note: The Payroll Calendar for the current year is available for review by clicking on the Payroll Calendar link. In addition, there is EPAF documentation available by clicking on the EPAF Documentation link.

Completing the EPAF


Enter the Banner ID (the E or the S is case-sensitive) and must include all appropriate zeros. Then, press Enter (or Submit).

New EPAF Person Selection


Enter an ID or click on the magnifying glass icon within the ID field to search for an ID. Enter the Query Date and select the Approval Category. Then click 'Submit'.

- The **Query Date** is the start date of the job assignment or the effective date of the labor distribution. The allowable dates for **Query Date** may only be **current** or **future** dates unless the approval category is 'Labor Distribution, LABOR'.



* - indicates a required field.

ID: * 

Query Date: MM/DD/YYYY *

Approval Category: * 

If the Banner ID is not known, click on the Magnifying Glass icon to search for an ID by name.

ID: *  

Enter the last name and/or first name; then, click on Go to retrieve a list. Click on the applicable ID number to select that individual.

Person Search

Check the box to limit the search to an Employee. Enter the Last Name and/or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

Search Criteria

Employee: ☐

Last Name:


First Name:


Or

ID:

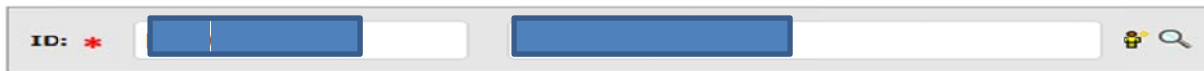
Or

SSN/SIN/TIN:

Records per Page: 25 



Once the appropriate individual appears in the ID field, press Enter.



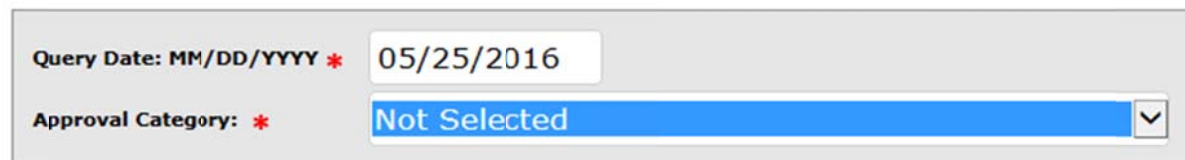
IMPORTANT: If the individual has not completed the I-9 requirement, an error will appear and users will not be able to complete the EPAF. **The employee must complete a Form I-9 with Payroll and must not work until this requirement is met; and the EPAF can be completed and submitted for departmental approval.**

New EPAF Person Selection

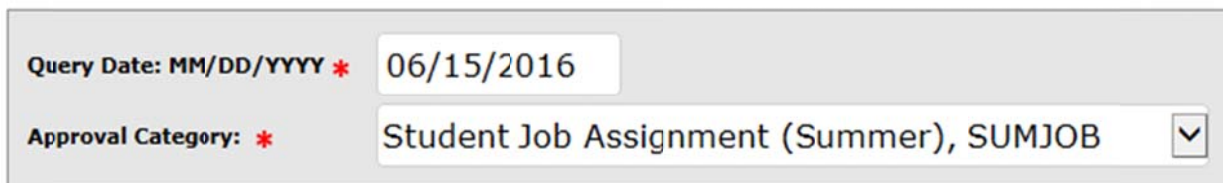
❗ Approval Category is a required field.
****ERROR** This employee does NOT have a valid I9 Verification.**
You cannot proceed and the student cannot start work until the I9 is valid.
Please contact the Payroll Office if you have any questions.

If the individual has met the I-9 requirement, users will be able to move beyond the initial EPAF screen and complete the EPAF.

Enter the Query Date (the start date of employment). The field will default to the current date; however the start date of employment may only be the **current or future dates**. When the query date is changed to a future date, make sure to use the MM/DD/YYYY format to avoid errors.



Select the appropriate Approval Category from the drop-down box: Student Job Assignment (Academic Year), STJOB for academic year positions or Summer Job Assignment (Summer), SUMJOB. **Note:** Academic Year and Summer employment dates will be shared with the campus by Payroll.



IMPORTANT: If the Query Date is changed to an earlier date, the following error will appear after clicking Submit when an academic or summer job assignment is selected.

New EPAF Person Selection

❗ **ERROR The allowable dates for Query Date may only be current or future dates.**
Please contact the Payroll Office if you have any questions.

Once the query date (start date of employment) and approval category are populated, the screen will appear as follows - depending on whether or not there are active job assignments.

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	S69500	00	TEST Intern	695020, Payroll	May 11, 2014	Jun 25, 2016	Aug 08, 2015	Active

All Jobs

Submit

⚠ There are no active jobs based on the Query Date.

All Jobs

Click the All Jobs tab to view all currently active and termed positions.

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	R69500	00	Payroll Student Assistant	695020, Payroll	Nov 10, 2013	Mar 05, 2016	Mar 05, 2016	Terminated
Secondary	S69500	00	TEST Intern	695020, Payroll	May 11, 2014	Jun 25, 2016	Aug 08, 2015	Active

Active Jobs

IMPORTANT: Verify that the query date (start date of employment) is after the end date(s) and/or last paid date(s) to avoid errors. If necessary, change the query date (start date of employment) to avoid errors and the need to void the new EPAF and then create another EPAF with a corrected query date (start date of employment).

Then, click Submit.

All Jobs

Next Approval Type

Submit

IMPORTANT: Click on All Jobs.

ID:
 Query Date: Jun 26, 2016
 Approval Category: Student Job Assignment, STJOB

Student Job Begin, STJB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job									<input checked="" type="radio"/>

⚠ There are no active jobs based on the Query Date.

All Jobs

Next Approval Type

Submit

Review the list of positions, if applicable. If student has not previously worked for Rice, no positions will appear.

ID:
 Query Date: Jun 14, 2016
 Approval Category: Student Job Assignment, STJOB

Student Job Begin, STJB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job									<input checked="" type="radio"/>
	Primary	R69500	00	Payroll Student Assistant	695020, Payroll	Nov 10, 2013	Mar 05, 2016	Mar 05, 2016	Terminated	<input type="radio"/>
	Secondary	S69500	00	Payroll Student Assistant	695020, Payroll	May 11, 2014	Jun 25, 2016	Aug 08, 2015	Terminated	<input type="radio"/>

Active Jobs

Next Approval Type

Submit

Create New Job

Create a new job by entering the position number and suffix. Hint: After entering the position number, allow the Title and Time Sheet Organization to appear before entering the suffix to avoid an error. If the time sheet organization field does not populate after entering the position and suffix (based on the information above), contact Payroll to request the creation of a new student position.

IMPORTANT: If any positions are listed, the type (primary or secondary) will need to be known for the next screen.

Student Job Begin, STJB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job	S21300	00	Student Assistant	213000, Office of Financial Aid					<input checked="" type="radio"/>
	Primary	R89500	00	Payroll Student Assistant	895020, Payroll	Nov 10, 2013	Mar 03, 2016	Mar 03, 2016	Terminated	<input type="radio"/>
	Secondary	S69500	00	Payroll Student Assistant	695020, Payroll	May 11, 2014	Jun 25, 2016	Aug 08, 2015	Terminated	<input type="radio"/>

Active Jobs

Next Approval Type

Position Number

Rice Work – The position number is S + first 3-digits of home org + 00 (zeros).

Work Study - The position number is R + first 3-digits of home org + 00 (zeros).

Suffix Number

Enter 00 (zeroes) unless there is a currently active position listed with the same position number and also has 00 as the suffix. In these cases, enter 01 or other sequential numbers. **IMPORTANT:** If the new EPAF has the same position number and same suffix as an active position, the EPAF will not be able to be submitted successfully to the department approval queue until this is corrected.

New EPAF Job Selection

Enter or search for a new position number. Enter the suffix. Then, click Submit.

ID:

Query Date: May 13, 2016

Approval Category: Student Job Assignment, STJOB

Student Job Begin, STJB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job	S69500	01	Student Assistant	695000, Controller's Office					<input checked="" type="radio"/>
	Secondary	S69500	00	Temp	695020, Payroll	Jan 01, 2011	May 14, 2016		Active	<input type="radio"/>

All Jobs

Next Approval Type

[Return to EPAF Main Menu](#)

IMPORTANT: If any positions are listed, the type (primary or secondary) will need to be known for the next screen.

Then, click Submit.

Use Existing Job

Select the applicable existing job from the list.

IMPORTANT: Verify that the query date (start date of employment) is after the end date(s) and/or last paid date(s) to avoid errors. If necessary, return back to the initial EPAF screen and change the query date (start date of employment) to avoid errors and the need to void the new EPAF and then create another EPAF with a corrected query date (start date of employment).

ID:
Query Date: Jun 26, 2016
Approval Category: Student Job Assignment, STJOB

Student Job Begin, STJB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job									<input type="radio"/>
	Primary	R69500	00	Payroll Student Assistant	695020, Payroll	Nov 10, 2013	Mar 05, 2016	Mar 05, 2016	Terminated	<input type="radio"/>
	Secondary	S69500	00	TEST Intern	695020, Payroll	May 11, 2014	Jun 25, 2016	Aug 08, 2015	Terminated	<input checked="" type="radio"/>

Active Jobs

Next Approval Type

Then, click on Submit.

On the next screen, scroll down to the job information.

Electronic Personnel Action Form

Be sure to 'Save' any changes before you 'Submit' otherwise you may lose your changes.
GRADUATE students and STUDENTS with SECONDARY contract types MUST HAVE the CURRENT VALUE entered in the Distribution and Home ORGANIZATION fields to prevent processing delays.
Select a CORRECT Departmental Approver in Routing Queue otherwise your EPAF application will be delayed.

[Return to EPAF Main Menu](#)

Name and ID:
Transaction: Query Date: Jun 15, 2016
Transaction Status:
Approval Category: Student Job Assignment (Academic Year), STJOB

[Jump to Bottom](#)

Enter all of the required information (indicated with * next to the field name) and any applicable optional information (indicated with Not Enterable absent from the field name).

* - indicates a required field.

Student Job Begin, S69500-02 Student Assistant

Item	Current Value	New Value
Contract Type: *		Primary <input type="button" value="v"/>
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		06/20/2016
Timesheet Orgn: *		<input type="text"/>
Regular Rate: *		<input type="text"/>
Job Status: (Not Enterable)		A
Timesheet COA: (Not Enterable)		1
Employee Class Code: (Not Enterable)	RT, Work Study Students	<input type="text"/>
Distribution Orgn:	695021 Payroll Student I-9 <input type="button" value="Q"/>	<input type="text"/>
Home Organization:	695021 Payroll Student I-9 <input type="button" value="Q"/>	<input type="text"/>
Job Change Reason:		NEWHI, New hire <input type="button" value="v"/>
Job Begin Date: MM/DD/YYYY		06/20/2016
Title: *		<input type="text"/>

Contract Type – Select Primary only if no other active job has Primary as the type from the previous screen; otherwise select Secondary from the drop-down box. **IMPORTANT:** If the new EPAF and an existing active position both have the Primary Contract Type, the user will not be able to submit the EPAF successfully until this is corrected. Refer to previous screen if necessary.

Job Effective Date – This will default as the query date (start of employment) from the previous screen.

Timesheet Orgn – Enter the Timesheet Org. This is required for WTE approval. The individual with the access to approve the timesheet org will be the one who can approve the time entry.

Regular Rate – Enter the hourly pay rate. The rate must be at least federal minimum wage (\$7.25/hour) and must not exceed \$20.00/hour. **IMPORTANT:** If the new EPAF is for a one-time event or special project (limited to a one-week period), the regular rate must not exceed \$50.00/hour and the end date must be within one-week of the start date of the EPAF. The new EPAF will be returned to the originator for correction if these criteria are not met.]

Employee Class Code – The current value indicates the type of student. This is for informational purposes only.

Distribution Orgn – Leave blank unless the current value is 695021, Payroll Student I-9. When the current value is 695021, Payroll Student I-9, enter the org that should be used for reporting (should be an org that the individual who should receive reports has appropriate HR security (orgs/employee class). **IMPORTANT:** This field should be left blank for graduate students (RS) or undergrad students (RT, RW) with a secondary position (indicated in the Contract Type field) to prevent EPAF processing delays.

Home Organization – Leave blank unless the current value is 695021, Payroll Student I-9. When the current value is 695021, Payroll Student I-9, enter the home org. **IMPORTANT:** This field should be left blank for graduate students (RS) or undergrad students (RT, RW) with a secondary position (indicated in the Contract Type field) to prevent EPAF processing delays.

Job Change Reason – Select from the drop down box or type NEWHI if a new hire or REHIR if a rehire.

Job Begin Date – This will default as the query date (start of employment) from the previous screen. If there is no date in the current value column, the default date is correct. **IMPORTANT:** The date must be either changed to the date in the current value column or removed entirely and left blank for students with a date in the current value. This step will need to be taken to avoid errors when submitting the EPAF to the departmental approval queue.

Title – Enter the job title. This will appear on Web Time Entry so please make sure the student knows his/her job title.

Factor: (Not Enterable)	
Pays: (Not Enterable)	
Hours per Day: (Not Enterable)	
Hours per Pay: (Not Enterable)	
Annual Salary: (Not Enterable)	
Assign Salary: (Not Enterable)	
Appointment Percent: (Not Enterable)	100
FTE: (Not Enterable)	1
Shift: (Not Enterable)	1
Step: (Not Enterable)	0

All of the above fields are not enterable.

Scroll down to the Job Labor Change information. The effective date will default to the employment start date of the EPAF. Leave this date as the default to avoid errors. Make any appropriate changes to the funding. If the fund, org, and accounts are entered, clicking on default from index will populate the program/activity codes. Make sure the percent is 100.

Job Labor Change, S69500-00 Payroll Student Assistant, Last Paid Date: Aug 08, 2015

Current											
Effective Date: 11/20/2014											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		A1	695020	60810	ADM1					100.00	

New	
Effective Date: MM/DD/YYYY	09/01/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
Q 1		Q A1	Q 695020	Q 60810	Q ADM1	Q	Q			100.00	
Q		Q	Q	Q	Q	Q	Q				
Q		Q	Q	Q	Q	Q	Q				
Q		Q	Q	Q	Q	Q	Q				
Q		Q	Q	Q	Q	Q	Q				
Total:										100.00	

✓ Defaulting values for Labor Distribution from the Job records.

Default from Index	Save and Add New Rows
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Scroll down to the Student Job End information. The end date will default to the end date for the academic year or summer employment period. For positions with an end date prior to the academic year or summer employment period, change the end date to reflect the correct end date (using the MM/DD/YYYY format). **IMPORTANT:** This is required for one-time events or special projects. The end date must be within one week of the employment start date in accordance to the student pay guidelines/procedures.

Student Job End, S21300-00 Student Assistant

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY *		05/13/2017
Job Status: (Not Enterable)		T
Job Change Reason: (Not Enterable)		ENDDT

Scroll down to the Routing Queue. Enter the Banner ID for the individual who is to approve the EPAF in the departmental queue. Confirm name appears in field next to the User Name field to avoid errors.

Routing Queue

Approval Level	UserName		Required Action
20 - (DEPT) Department	<input type="text"/>		Approve
30 - (SFS) Student Financial Services	<input type="text"/> JJBUCK	John Joseph Buck	Approve
40 - (RCA) Research & Cos! Accounting	<input type="text"/> CTARANTI	Charles Edward Tarantino	Approve
85 - (PAYROL) Payroll	<input type="text"/> KAP5	Kimberly A Parr	Apply
Not Selected <input type="button" value="v"/>	<input type="text"/>		Not Selected <input type="button" value="v"/>
Not Selected <input type="button" value="v"/>	<input type="text"/>		Not Selected <input type="button" value="v"/>
Not Selected <input type="button" value="v"/>	<input type="text"/>		Not Selected <input type="button" value="v"/>
Not Selected <input type="button" value="v"/>	<input type="text"/>		Not Selected <input type="button" value="v"/>

Save and Add New Rows

Department = NetID of department approver or select applicable NetID from list (by clicking on the magnifying glass)

SFS = JJBUCK

RCA = CTARANTI

Payroll = KAP5

If any information needs to be communicated to department approvers, SFS, RCA, Payroll, please add a comment.

Comment

Save

Click on Save.

Once the change is saved successfully and the “your change was saved successfully” alert appears, the EPAF can be submitted to the departmental approval queue. Click Submit.

Electronic Personnel Action Form

✓ Your change was saved successfully.

• Be sure to 'Save' any changes before you 'Submit' otherwise you may lose your changes.

“Once your transaction has been successfully submitted, the student is eligible to start employment and be added to the work/training schedule.”

[Return to EPAF Main Menu](#)

Name and ID: [Redacted]
Transaction: 15227 Query Date: Jun 20, 2016
Transaction Status: Waiting
Approval Category: Student Job Assignment (Academic Year), STJOB

Save **Submit** Delete

If there are any errors with the new EPAF, a “transaction was not submitted” alert will appear.

Electronic Personnel Action Form

Transaction was not submitted. Please review errors.

Scroll down to the Errors and Warning Messages (located under the student summary information).

Name and ID: [Redacted] Job and Suffix: See approval types below.
Transaction: 15126 Query Date: Jun 15, 2016
Transaction Status: Waiting Last Paid Date: Aug 08, 2015
Approval Category: Student Job Assignment (Academic Year), STJOB

Save Submit Delete

The warnings (shown below) are allowable and will appear since students do not follow the same guidelines for budgeting as faculty/staff.

Errors and Warning Messages

Type	Message Type	Description
Student Job Begin	ERROR	*ERROR* This employee already has a primary job.
Student Job Begin	WARNING	*WARNING* Encumbrance Method is Value Input and salary has changed.
Student Job Begin	WARNING	*WARNING* Total FTE for this position is greater than budgeted FTE.
Student Job Begin	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.

However, the errors will need to be corrected before the EPAF can be submitted to the approval queues. Refer below for common errors:

***ERROR* This employee already has a primary job.** This error appears when employees already have a primary job. Return back to the job information screen and change the contract type to Secondary. Then, verify that the Distribution Orgn and Home Organization are updated to the current values.

***ERROR* Begin Date must equal the first Jobs Detail Effective Date.** This error appears when the begin date for the current EPAF and the begin date for the initial job are different. Return back to the job information screen and change the job begin date to the current value or remove the date and leave the field blank.

***ERROR* New Effective Date must be after XX-XX-XX.** This error appears when the same suffix is used for a currently active position with the same position number and suffix. In this case, the EPAF will need to be deleted or voided. Then, either (1) a new EPAF with the same position but different suffix can be created and submitted for approval; or (2) send an email to payroll@rice.edu to request a change in the effective date of the already existing position in Banner.

***ERROR* New effective date must be greater than last date of XX-XX-XX.** This error appears when a position with the same position number and suffix already exists with an effective date or last pay date of XX-XX-XX. In this case, the EPAF will need to be deleted or voided. Then, either (1) a new EPAF with the same position but different suffix can be created and submitted for approval; or (2) send an email to payroll@rice.edu to request a change in the effective date of the already existing position in Banner.

***ERROR* The Fund (Organization, Account, Program, Activity, or Location) code is invalid. Please change.** This error appears when any part of the funding is invalid. Return back to the job information screen and update the funding under the Job Labor Change section.

***ERROR* First Labor Dist Effective Date must equal the Job Begin Date.** This error appears when the job labor change date has been changed. Refer to the Job Labor Change date and update it to match the Jobs Effective Date.

In some cases, the warnings will appear under the Electronic Personnel Action Form heading:

Electronic Personnel Action Form

 **User Id(s) must be entered for Routing Queue**

Action: Return back to the job information screen and scroll down to the Routing Queue section. Enter the appropriate Banner IDs for the departmental, SFS, RCA, Payroll queues.

Electronic Personnel Action Form

 **Job Labor Distribution Total Percentages must be exactly 100%.**

Action: Return back to the job information screen and scroll down to the Job Labor Change section. Update the percentage for funding and/or add additional funding.

Electronic Personnel Action Form

! Timesheet Orgn must be filled in for Approval Type, STJB.

Action: Return back to the job information screen and enter the timesheet org.

Electronic Personnel Action Form

! Regular Rate must be filled in for Approval Type, STJB.

Action: Return back to the job information screen and enter an hourly rate.

Electronic Personnel Action Form

! Distribution Orgn must be filled in for Approval Type, STJB.

Action: Return back to the job information screen and enter the distribution orgn. Leave blank unless the current value is 695021, Payroll Student I-9. When the current value is 695021, Payroll Student I-9, enter the org that should be used for reporting (should be an org that the individual who should receive reports has appropriate HR security (orgs/employee class). **IMPORTANT:** This field should be left blank for graduate students (RS) or undergrad students (RT, RW) with a secondary position (indicated in the Contract Type field) to prevent EPAF processing delays.

Electronic Personnel Action Form

! Home Organization must be filled in for Approval Type, STJB.

Action: Return back to the job information screen and enter the home organization. Leave blank unless the current value is 695021, Payroll Student I-9. When the current value is 695021, Payroll Student I-9, enter the home org. **IMPORTANT:** This field should be left blank for graduate students (RS) or undergrad students (RT, RW) with a secondary position (indicated in the Contract Type field) to prevent EPAF processing delays.

After all corrections to errors are made, click on Save. Then, click Submit.

When the “the transaction has been successfully submitted” alert appears, the EPAF has been submitted to the departmental queue. **At this time, the student may start employment or training.**

Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

• Be sure to **'Save'** any changes before you **'Submit'** otherwise you may lose your changes.

****Once your transaction has been successfully submitted, the student is eligible to start employment and be added to the work/training schedule.****

[Return to EPAF Main Menu](#)

Reviewing Status of EPAF – Originator

Initiators may click on the EPAF Originator Summary link to access the EPAF summary screen. This screen provides information related to where the EPAF is in the approval process. This screen also gives the initiator the capability to make changes to the EPAF before the departmental approver provides approval and moves the EPAF to the Student Financial Services queue.

Electronic Personnel Action Form



Useful Tools:

[EPAF Originator Dashboard by Department](#)
[EPAF Approver Dashboard by Department](#)
[Payroll Calendar](#)
[EPAF Documentation](#)

[EPAF Approver Summary](#)

[EPAF Originator Summary](#)

[New EPAF](#)

[EPAF Proxy Records](#)

[Act as a Proxy](#)



Click on the Current or History tab. Then, select the transaction status and click Go.

EPAF Originator Summary

Current

History

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

Transaction Status:

All

Go

No transactions found in your queue.

[Return to EPAF Main Menu](#)

Hint: Items listed within the Current tab require additional action by the originator. Items listed within the History tab will reflect previously submitted EPAFs to the approval queues. Once an EPAF entry is selected, initiators can click on the student employee's name link to detail into the entry. Then, if the department has not approved the EPAF, the originator can click Void or Return for Correction, if changes are needed. If return for correction is selected, the initiator can make the appropriate changes to the existing EPAF, save the entry, and then re-submit to the departmental approval queue.

EPAF Originator Summary

Current

History

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

Transaction Status:

All

Approved

Go

1 - 1 of 1
[Jump to Bottom](#)

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Payroll Student Assistant, R69500-00		9288	Student Job Assignment (Academic Year)	Jun 01, 2016	Jun 15, 2016	Approved	Comments

1 - 1 of 1
[Return to Top](#)

Once the EPAF has been submitted for approval by the originator, the transaction status will be useful to determine the status of the EPAF. The transaction status can be found within the 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

Approved

Go

1 - 1 of 1
Jump to Bottom

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Payroll Student Assistant, R69500-00		9288	Student Job Assignment (Academic Year)	Jun 01, 2016	Jun 15, 2016	Approved	Comments

1 - 1 of 1
[Return to Top](#)

The transaction status is also available within the detail of the EPAF (click on the employee name's link).

EPAF Preview

Name and ID:**Transaction:** 9010
Transaction Status: Approved
Approval Category: Student Job Assignment (Academic Year), STJOB

Job and Suffix: R69500-01, Payroll Assistant
Query Date: Mar 24, 2016
Last Paid Date:

Next

Return for Correction

Void

Add Comment

Pending – Awaiting approval by department. Changes can be made to EPAF by clicking Void or Return for Correction.

Approved – Department or other approval level has approved entry.

Disapproved – Department or other approval level has rejected entry. Originator will need to click Return for Correction then Update to make changes and/or resubmit.

Voided – Originator has voided the entry.

Completed – Entry has been approved at all levels and applied to Banner by Payroll.

For further information, refer to the queue status within the routing queue. This can be accessed by clicking on the employee's name link to detail into the entry and scrolling down to the routing queue.

Routing Queue

Approval Level	Name	Required Action	Queue Status	Action Date
Department, 20	Kimberly A Parr, KAPS	Approve	Approved	Jun 01, 2016 06:20:22 PM
Student Financial Services, 30	John Joseph Buck, JJBUCK	Approve	Pending	
Research & Cost Accounting, 40	Charles Edward Tarantino, CTARANTI	Approve	In the Queue	
Payroll, 85	Kimberly A Parr, KAPS	Apply	In the Queue	

Pending – Awaiting approval at approval level.

In the Queue – Entry is not currently in the approval queue. Approval from Department, Student Financial Services, and/or Research & Cost Accounting level(s) is needed before status changes to Pending.

Removed from Queue – Originator has voided the entry or entry has been returned to originator.

Approved – Department or other approval level has approved entry.

Disapproved – Department or other approval level has rejected entry.

Return for Correction – Department or other approval level has returned the entry for correction to the originator. Refer to the comments section for information related to the return. Originator will need to make changes to the entry, save, and resubmit.

Applied – Entry has been approved at all levels and applied to Banner by Payroll.

Initiators can also refer to the EPAF Originator Dashboard by Department by clicking on the link at the EPAF Main Menu.

Electronic Personnel Action Form



Useful Tools:

- [EPAF Originator Dashboard by Department](#)
- [EPAF Approver Dashboard by Department](#)
- [Payroll Calendar](#)
- [EPAF Documentation](#)

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

Then, enter the search criteria and click Submit.

EPAF Originator Dashboard by Department

****Tip: To optimize query response time, please minimize the Date Range.**

EPAF ACTIVITY DATE (mm/dd/yyyy)

Begin Date:

End Date:

- OR -

SEARCH BY EMPLOYEE

Employee ID:

Clear

Submit

EPAF Originator Dashboard by Department

Search Filter: [View ALL](#) [View NON-Completed Items](#) [Print Current Page](#) [Go to EPAF App](#)

****Note: For LARGE report, you may encounter SLOW response time for Table Sort or Search filter**

*****TIPS: (1) Click column header to sort; (2) Hold CTRL key to sort multiple columns; (3) Use Search filter to find items**

Trans No.	Trans Activity	Trans Status	Originator User ID	Employee ID	Employee Name	EPAF Category	Created On	Submitted By	Submitted On	Comments
15208	06/20/2016 09:56:50 am	In Progress [X] View Details	KAPS			CT306	06/20/2016	Not Yet Submitted		1 TEST dist/home orgs KAPS 06/20/2016 09:56:50 am
15207	06/20/2016 09:48:39 am	Pending [X] View Details	KAPS			ST308	06/20/2016	KAPS	06/20/2016	1 TEST dist/home orgs KAPS 06/20/2016 09:48:31 am
15206	06/20/2016 09:44:00 am	Pending [X] View Details	KAPS			ST308	06/20/2016	KAPS	06/20/2016	1 TEST dist/home org error message KAPS 06/20/2016 09:42:35 am 2 "WARNING" The person in this Student EPAF is a Graduate Student. Contact Payroll Office if you have any questions. BANOFER 06/20/2016 11:17:27 am
15188	06/17/2016 03:46:28 pm	Pending [X] (View Details Available for Originator Only)	IR0ACHE			ST308	06/17/2016	IR0ACHE	06/17/2016	"WARNING" User CANNOT change the DIST ORG for a SECONDARY contract type. This EPAF will not be approved by Payroll. Contact Payroll Office if you have any questions. BANOFER 06/17/2016 03:47:23 pm "WARNING" User CANNOT change the HOME ORG for a SECONDARY contract type. This EPAF will not be approved by Payroll. Contact Payroll Office if you have any questions. BANOFER 06/17/2016 03:47:23 pm

Approving the EPAF – Departmental Approver

Click on the EPAF Approver Summary link.

Electronic Personnel Action Form



Useful Tools:

[EPAF Originator Dashboard by Department](#)
[EPAF Approver Dashboard by Department](#)
[Payroll Calendar](#)
[EPAF Documentation](#)

[EPAF Approver Summary](#) ←

[EPAF Originator Summary](#)

[New EPAF](#)

[EPAF Proxy Records](#)

[Act as a Proxy](#)

Select Current or In My Queue tab; select the queue status. Then, click Go.

EPAF Approver Summary

Current

In My Queue

History



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

Queue Status:

All

Pending

Go

 ←

Select All

Reset

Save

1 - 18 of 18

Click on employee link with the Required Action “Approve”.

EPAF Approver Summary

Current In My Queue History

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

Queue Status: All Pending Go

Select All Reset Save

1 - 8 of 8
[Jump to Bottom](#)

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Student Assistant, S21300-00		15146	Student Job Assignment (Academic Year)	Jun 15, 2016	Jun 15, 2016	Approve	<input type="checkbox"/>	Comments Warnings

Click on Approve. For Disapprove and Return for Correction, click on Add Comment and indicate a comment to alert the originator to the reason for the particular action. Then, click on Disapprove or Return for Correction.

EPAF Preview

✓ This transaction must be updated on the Electronic Personnel Action Form, NOAEPAF.

Name and ID: [Redacted]

Transaction: 9288

Transaction Status: Pending

Approval Category: Student Job Assignment (Academic Year), STJOB

Job and Suffix: See approval types below.

Query Date: Jun 15, 2016

Last Paid Date: Dec 12, 2015

[Previous](#) [Next](#)

Approve Disapprove Return for Correction More Info

[Add Comment](#)

Repeat these steps as necessary to submit actions for all available entries.