EPAF (Electronic Personnel Action Form)  
Manual for Student Employment
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What is an EPAF?
An EPAF is an Electronic Personnel Action Form; an online form, originated by a department to submit data changes to a student employee’s Banner record.

The Student Employment EPAFs will allow you to:
- Hire a student employee
- Promote a student employee by both title and pay rate
- Terminate student employee (end job record)

Purpose
The purpose of the Student Employment EPAFS is to increase efficiency and accuracy in processing for student employee personnel actions. Supervisors will be able to enter, modify, and track their personnel requests.

Advantages
With an EPAF, you can quickly find where the process is in the approval queue, or if it is complete and entered into Banner.

Policy
- Student Employees will all be paid within the current pay steps
- Promotions will include new title, job description, and pay rate
- Do not share student information
Helpful Terms and Definitions

- **EPAF** – Electronic Personnel Action Form (EPAF), used to quickly change information in Banner. The departments will be able to enter desired changes using Banner instead of the traditional referral forms, and watch as the form flows through the approval queue.

- **Originator** – The designated department personnel authorized to create an EPAF. The Originator will correctly input the necessary information within the EPAF. This is a very important role as the Originator is the first step in making sure that an employee’s appointment is accurately set up and maintained within Banner.

- **Approver/Applicer** – Approvers are the individuals authorized to review and approve the information within an EPAF. Appliers are individuals who apply the approved EPAFs. For the purpose of student employment, the Student Employment and Communications Manager will be the only approver and applier.

- **EPAF Approval Category** – The reason for an update or change. There are three approval categories for student employment. Choosing the right EPAF Approval Category will help avoid Returns for Correction.
  - Hiring for Student Employee, SEHIRE
  - Promotion for Student Employee (Job Title and Hourly Rate), SEPROM
  - Termination for Student Employees, SETERM

- **Effective Date** - The date that the EPAF will take effect. This date must be after the last paid date; if not you will receive an error.

- **Warnings** – Potential problem with the information entered. A warning informs the originator and applier of potential issues, but will allow the EPAF to process.

- **Errors** – Will not allow the EPAF to progress to the approval levels. Errors must be corrected.

- **Approval Queue** – the sequence of approver/applier, in this case the Student Employment Manager

- **Last paid date** – the date payroll was last disbursed to the student. No changes can be made prior to this date as the payroll cycle has already passed.
How to Troubleshoot and Correct Errors

- Errors - will not allow the EPAF to progress to the approval levels. Errors must be corrected.
- Warnings - informs the originator of potential issues, but will allow the EPAF to process.

<table>
<thead>
<tr>
<th>Warning or Error Messages</th>
<th>Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>A duplicate transaction, xxxxx, for this person exists for this approval category at waiting status.</td>
<td>There is already a transaction started for this student for this position. Check the Originator Summary and delete, void, or update any existing waiting status transactions.</td>
</tr>
<tr>
<td><em>ERROR</em> First Name, SSN/SIN or Birth Date are incomplete, or Sex code is invalid. Valid Values M(ale), F(female), or N(not available).</td>
<td>The student has not been set up as an employee because of missing student employment paperwork. Direct the student to the Office of Financial Aid and Student Employment to complete these forms.</td>
</tr>
<tr>
<td><em>ERROR</em> A Primary Job has not been defined for this employee</td>
<td>The student does not have a primary job. You will need to change the contract type to Primary instead of Secondary.</td>
</tr>
<tr>
<td>This approval category does not allow the creation of a person record.</td>
<td>Student ID entered does not exist in the Banner System. Check that you have entered the correct number.</td>
</tr>
<tr>
<td>There are no active jobs based on the Query Date.</td>
<td>Student ID entered is a valid number, but they do not have an active job for the date entered.</td>
</tr>
<tr>
<td>No transactions found in your queue.</td>
<td>Confirm you are in the correct tab. The CURRENT tab will contain the transactions waiting for you to take an action. The HISTORY tab show all submitted transactions.</td>
</tr>
<tr>
<td><em>ERROR</em> Eff Date must be greater than Last Paid Date of DD-MMMYYYY.</td>
<td>You are trying to change a date that has already been processed for payroll. To correct the error you must enter a date greater than last paid date or date of submitted student employment paperwork. Contact the Office of Financial Aid if a retro payment is required.</td>
</tr>
<tr>
<td>User Id must be entered for Routing Queue</td>
<td>Refer back to the Set Up Approval Queue, as this step has not been completed for this approval queue type. This is a onetime set up. Unfortunately, banner will not recognize you have corrected the Approval Queue for any in progress. You will need to delete any in progress EPAFs and begin again.</td>
</tr>
<tr>
<td><em>ERROR</em> Begin Date must equal the first Jobs Detail Effective Date.</td>
<td>A transaction for the position already exits. You must delete/void the transaction and create a new transaction under the correct position or suffix</td>
</tr>
<tr>
<td><em>ERROR</em> The activity code must be filled in for approval type STLBR</td>
<td>In the Job Labor Distribution section you must enter INST under the activity field</td>
</tr>
<tr>
<td>Error Message</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><em>ERROR</em> First Labor Dist Effective Date must equal the Job Begin Date</td>
<td>The student was not set up as an employee by the date entered. The earliest you can set up the new position is stated as the current hire date. All dates must match to submit successfully.</td>
</tr>
<tr>
<td><em>ERROR</em> Current hire date must be later than original hire date.</td>
<td>The student was not set up as an employee by the date entered. The earliest you can set up the new position is stated as the current hire date.</td>
</tr>
<tr>
<td><em>ERROR</em> ID is not defined as employee.</td>
<td>The student has not been set up as an employee because of missing student employment paperwork. Direct the student to the Office of Financial Aid and Student Employment to complete these forms.</td>
</tr>
<tr>
<td><em>ERROR</em> Invalid Date for Current Hire Date. Format is MM/DD/YYYY</td>
<td>Date was not entered correctly. Return to incorrect date and reenter in the correct format of MM/DD/YYYY.</td>
</tr>
<tr>
<td><em>ERROR</em> Not a valid active position.</td>
<td>The position code entered does not exist or has been deactivated. Please contacted the Student Employment Manager at ext. 6908</td>
</tr>
<tr>
<td><em>ERROR</em> User cannot be listed more than once in same level with same required action indicator</td>
<td>There are two entries in the approval queue. Remove one of the entries. There should only be one name under each approval queue.</td>
</tr>
<tr>
<td><em>ERROR</em> First Labor Dist Effective Date must equal the Job Begin Date</td>
<td>The effective date entered for the Job Labor Dist section does not equal the Job Begin date entered for the position under the Job Record section</td>
</tr>
<tr>
<td><em>ERROR</em> This employee already has a primary job.</td>
<td>If the student already has a primary job set up in Banner no other job can be listed as primary. You must correct the contract type by selecting “Secondary”</td>
</tr>
<tr>
<td><em>ERROR</em> Base Job record must exist to create a new job.</td>
<td>DELETE or VOID the transaction. Return to the New EPAF screen and create a new EPAF transaction using your position code and the suffix 01 or the next consecutive suffix.</td>
</tr>
<tr>
<td><em>ERROR</em> Job Detail record must exist to create a new job.</td>
<td>DELETE or VOID the transaction. Return to the New EPAF screen and create a new EPAF transaction using your position code and the suffix 01 or the next consecutive suffix.</td>
</tr>
</tbody>
</table>
Set Up Approval Queue

Approval Queue set up is required in order to have the submitted EPAPFs sent to the Student Employment Manager for approval. **This is a onetime set up.**

1) Enter the Sign Into CC icon on the Colorado College main homepage
2) Once on the Sign Into CC page select the Banner (SSB)

3) On the next screen select the Employee link
4) Select the EPAF link

5) Select EPAF Originator Summary
6) In the next screen, you will see a review of all currently outstanding EPAF transactions. On the bottom of the screen, select “Default Routing Queue”. **If you have not completed an EPAF before you may not show any transactions.

7) This screen is where you will set up the approver of all submitted student employment EPAFs. Use the drop down option for Approval Category to select each EPAF then select Go:

The approval categories:

a. Hiring for Student Employee, SEHIRE
b. Promotion for Student Employee (Job Title & Hourly Rate), SEPROM
c. Termination for Student Employees, SETERM

You will need to use the drop down option to select and set up each approval category.
**EPAF Default Routing Queue**

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

<table>
<thead>
<tr>
<th>Approval Category</th>
<th>User Name</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Selected</td>
<td></td>
<td>Not Selected</td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
<td>Not Selected</td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
<td>Not Selected</td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
<td>Not Selected</td>
</tr>
</tbody>
</table>

Save and Add New Rows

**RELEASE: 8.8**

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8) Once the Go option is selected, the screen will appear as below. Select the magnifying glass icon under username. This will provide a list of approvers.

![Screen Image]

9) The box below will appear in which you will highlight Neutgens, Erica (ESHAFER) then click Select
10) Be sure that the Required Action section is set to “Apply” 
   a. Now that your approver has chosen then click the “Save and Add New Rows” button below the Approval Queue section.

11) Now that the selection has been saved you will receive the message shown below
12) You will need to do this for all three EPAFs ensuring that there is an approver selected. Otherwise, the completed EPAF will not go to anyone for approval. Using the Approval Category drop down arrow select the other categories of SETERM and SEPROM and select Go. This will bring you to a fresh page where you will set up the Approval Queue.
New Hire EPAF

1) Enter the Sign Into CC icon on the Colorado College main homepage

2) Once on the Sign Into CC page select the Banner (SSB)
3) On the next screen select the Employee link

4) Select the last link labeled EPAF
5) Select the link for New EPAF

<table>
<thead>
<tr>
<th>Personal Information</th>
<th>Student Services</th>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Go</td>
<td></td>
</tr>
</tbody>
</table>

Electronic Personnel Action Form

- EPAF Approver Summary
- EPAF Originator Summary
- New EPAF
- EPAF Proxy Records
- Act as a Proxy

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6) Find your student’s ID number.
   a. **If you know your student’s ID number skip to step 7**
   b. If you do not know the student’s ID number, click the ‘Search’ button at the far right of the ID field. **Do not** click the ‘Generate ID’ button. i. 

   "Generate ID’ button
   Do not click

   **Search for ID number**

   The following Person Search query screen will display:
   - Check the ‘Employee’ box
   - Enter the last name and/or first name
   - Click the ‘Go’ button
7) Input the student employee’s ID number, query date (Student’s first working day format MM/DD/YYYY), and approval category (Hiring for Student Employee, SEHIRE) a. Once the information is complete, select the GO button.

This is the student’s first working day
8) On the new screen that comes up there will be a field to enter your student’s position number and suffix. Then select the ‘Go’ button.
   a. Any positions that the student currently has will show up under Employee Job Assignments
   b. **Suffix** - the next sequential number
      i. **For Example:** If the student is being hired for a new position in the Financial Aid Office the position code is still CS0002 and but the suffix is now 01. If this were a new position outside of the currently held positions such as the Worner desk, the suffix would then be 00.

![Screenshot of the Self-Service BANNER](image)

- **Type in your department’s unique position number**
- **Enter the appropriate suffix**
9) The next screen of the EPAF will provide fields that are enterable and some that already have a default.

**Electronic Personnel Action Form**

- **Form Indicator Status Key**:
  - Has completed paperwork: T- temporary, R- received
  - Has not completed paperwork: Blank, Not received

**Confirm date of personnel action matches first working day**
**Confirm Dates (They should all be the same)**

**Enter job title**

**Specify Step (Step 1 = $12.00/hr, Step 2 = $12.40/hr)**

**Confirm timesheet org as this is where the timesheet will display**

**Contract Type:** identifies the primary and secondary position.
- **Primary Positions:** are the first active position. If there are no other active position then the position is primary.
- **Secondary Positions:** if student already holds a primary positions then all other held positions are secondary

**Type ‘INST’ under activity**

**Confirm Fund and Organization code**

---

**FOAP defaults from the entered position code**

a. Verify correct FOAP numbers before continuing
b. **Recommendation:** confirm these are the correct fund codes because this will determine the funding source of the student’s wages

**Ensure the routing queue is correctly designated. This tells the EPAF where to go for approvals.**

If these fields are blank, manually type in the information shown below. To have this information default automatically refer back to the Set Approval Queue instructions on page 7.
You are able to comment in the box that displays below the FOAP information. This is not a requirement and should only be used for pertinent information.
10) Click on Save button at bottom of screen
   a. Look for the message at the top of page 5 stating “The transaction has been successfully submitted”
   b. Click on Submit – If there are errors in the EPAF you will see them now. Refer to the troubleshooting section on page 5, correct your errors, then Save and Submit again.
   c. If the warnings below appear your transaction has successfully completed and these warnings can be ignored

11) When EPAF has been submitted correctly, your status should move from Waiting, to Pending or Approved. You have now successfully completed the new hire EPAF
Promotion EPAF

1) Enter the Sign Into CC icon on the Colorado College main homepage.

2) Once on the Sign Into CC page select the Banner (SSB)
3) On the next screen select the Employee link

4) Select the last link labeled EPAF
5) Select the link for New EPAF
6) Input your ID number, query date (date the action is to take effect), and the Approval Category.
   a. Approval Category Options (Select the action)
      i. Promotion for Student Employee (Job Title & Hourly Rate), SEPROM
   b. If you know your student’s ID number skip to step 7
   c. If you do not know the student’s ID number, click the ‘Search’ button at the far right of the ID field. Do not click the ‘Generate ID’ button.

   ID: * [Blank]
   [Blank] [Search for ID number]

   ‘Generate ID’ button
   Do not click

   The following Person Search query screen will display:
   □ Check the ‘Employee’ box.
   □ Enter the last name and/or first name or SSN if known.
   Click the ‘Go’ button.
7) Input the student employee’s ID number, query date (Student’s first working day format MM/DD/YYYY), and approval category (Promotion for Student Employee Job Title and Hourly Rate, SEPROM)

- Once the information is complete, select the GO button.

8) The next screen to appear will display all currently active jobs. Select the position you wish to promote by selecting the radio dial to the right of the position under Select. Then select Go.
9) On the next screen, you will have the option to change the title for this promotion. As there are only two pay bands, there is no other option than to promote to step 2. While on this screen, confirm/review the effective date.

a. For more information on the pay Step, please review the page on Helpful Terms and Definitions

b. Be sure the Routing Queue is set up as seen below
   i. Approval Level: 75-(FINAPP) FA Student Worker Apply
   ii. User Name: KClinton

You are able to comment in the box that displays below the Approval Level section. This is not a requirement and should only be used for pertinent information.
10) Then select the Save button first then the Submit button. Look for the message at the top of page stating “The transaction has been successfully submitted”

a. Click on Submit – If there are errors in the EPAF you will see them now. Refer to the trouble-shooting section on page, correct your errors, then Save and Submit again.

b. If only warnings appear your transaction has successfully completed and these warnings can be ignored
Termination EPAF

1) Enter the Sign Into CC icon on the Colorado College main homepage

2) Once on the Sign Into CC page select the Banner (SSB)
3) Enter your Self-Service Banner and select Employee link

4) Select the last link labeled EPAF
5) Select the link for New EPAF

![Electronic Personnel Action Form](image)

6) Input your ID number, query date (date the action is to take effect), and the Approval Category.
   - Approval Category Options (Select the action)
     - i. **Termination for Student Employees, SETERM**
     - If you know your student’s ID number skip to step 7
     - If you do not know the student’s ID number, click the ‘Search’ button at the far right of the ID field. **Do not** click the ‘Generate ID’ button. i.

   - [Search for ID number]

   - ‘Generate ID’ button
     - Do not click
7) Input the student employee’s ID number, query date (Student’s last working day format MM/DD/YYYY), and approval category (Termination for Student Employees, SETERM)
   - Once the information is complete, select the GO button.

The following Person Search query screen will display:
- Check the ‘Employee’ box.
- Enter the last name and/or first name or SSN if known.
- Click the ‘Go’ button.
8) The next screen to appear will display all currently active jobs. Select the position you wish to terminate by selecting the radio dial to the right of the position under Select. Then select Go.
9) On the next screen, you will have the option to enter the date for this termination. Use the format MM/DD/YYYY.

- Be sure the Routing Queue is set up as seen below
  - Approval Level: 75-(FINAPP) FA Student Worker Apply
  - User Name: KClinton

You are able to comment in the box that displays below the Approval Level section. This is not a requirement and should only be used for pertinent information.
10) Then select the Save button first then the Submit button. Look for the message at the top of page stating “The transaction has been successfully submitted”

- Click on Submit – If there are errors in the EPAF you will see them now. Refer to the trouble-shooting section on page 5, correct your errors, then Save and Submit again.
How do I know what I have submitted?

1) From the EPAF menu, you can click on the EPAF Originator Summary, or if you have just submitted an EPAF, you can click on the EPAF Originator Summary link at the bottom of the page.

2) You will see the following screen showing the current transactions pending approval or returned for correction.
3) To view transactions that have been approved
   a. Click on History Tab
   b. Then click on the Go button to continue
   c. The list will default to All. If you want to see a different status, then choose a different
      Transaction Status from the drop down and click on the Go button.

4) You will then be able to see for whom you created an EPAF, and the transaction number, type of
   EPAF, date you submitted the EPAF, date the EPAF will take effect, status of the EPAF, and if there
   are comments, warnings, errors, etc.
   a. If you see a Transaction Status of Completed, the form has been applied in Banner.

   ![EPAF Transactions Table]

   - If you see a link with the word Errors, (see example above), you can click on the word and see an
     error description.

   If you want detailed information, click on the employee’s name, and you will get a detailed list of all
   actions taken, error and warning messages, date the EPAF was submitted, and where the EPAF is in the
   routing queue.
## EPAF Transaction Status Chart

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waiting</td>
<td>Transaction has been created, but not submitted. A waiting status transaction can be deleted on the Originator Summary Page.</td>
</tr>
<tr>
<td>Pending</td>
<td>Waiting for Approver to take action.</td>
</tr>
<tr>
<td>Return for Correction</td>
<td>Allows the Approver/Applier to return a transaction to the Originator for correction. Be sure to check for comments. Originators will be emailed for notification of EPAF return.</td>
</tr>
<tr>
<td>Approved</td>
<td>The transaction has been approved and is waiting to be applied</td>
</tr>
<tr>
<td>Complete</td>
<td>The transaction has been approved and applied to the Banner database. The process is complete. No further action is necessary.</td>
</tr>
<tr>
<td>Disapproved</td>
<td>The approver disapproved the transaction</td>
</tr>
<tr>
<td>Void</td>
<td>It is no longer a valid transaction. Only the originator may void the transaction.</td>
</tr>
<tr>
<td>In the Queue</td>
<td>The transaction is waiting action. Transactions must be approved/applied. To correct this you will need to enter the EPAF and click Submit</td>
</tr>
</tbody>
</table>