

E P A F Frequently Asked Questions

EPAFs – General

1. What is an “EPAF”?

“EPAF” stands for “Electronic Personnel Action Form.” EPAFs are electronic forms in Banner used to create or update employee records. An EPAF will replace the following forms:

- Notice of Appointment (NOA) formerly found on FormBlaster (NOA)
- Faculty/Professional Notice of Change in Status/Compensation (P-3)
- Employee Requisition for Staff and Service Personnel Vacancies (Emp Req)
- Student Employment Authorization (SEA)

2. Where can I find EPAFs?

EPAFs will be found in Self Service Banner (SSB) under the “Employee” section.

3. Who would need to use an EPAF?

- An Originator in a school, department, or office
- An Approver – a supervisor/manager
- An Applier – in UHRS or Payroll

4. Why is FormBlaster going away?

Since FormBlaster was locally developed and customized, it’s not compatible with our new Banner system. Think of EPAFs as a shortcut to creating or updating information in Banner.

5. Does EPAF replace BSU@Work?

No. Self Service Banner (SSB) will allow you to obtain much of the same information you did through BSU@Work.

Creating EPAFs

6. How do I log in to EPAFs? What if my login fails?

If you attended EPAF training, you should be able to log in. You will use the same user ID and password that you use to access Outlook. If your logon fails, first check your user ID and password to be sure that you are using the correct one. If you are still experiencing difficulty logging in, contact the Technology Help Desk at **5-1517**.

7. How do I notify HR of a new non-student* employee?

For new non-student employees, follow these steps:

- From the BSU website, under FormFinder, choose *New Person Identity Form*.
- Complete online – the form can then be delivered electronically to UHRS.
- UHRS will notify you when your new employee is in Banner and give you the assigned ID# for that employee.
- You can then create a new job assignment by using the appropriate EPAF.

*Note: for student employees, the *New Person Identity Form* will not be used. Instead you will use the *Student Employment Hiring Form*, which is found in FormFinder under “Career Center” or call 5-1522 for information regarding using EPAFs for student employees.

8. UHRS just gave me an ID# for my new employee. Can I give it to my new employee right away so she/he can go to Registration to obtain a BSU ID badge?

No. The new employee will be able to obtain his/her ID badge AFTER the EPAF for the assignment has been approved by all the approvers you select in the EPAF as well as applied by UHRS to the Banner system. Applying EPAFs will be a top-priority process for UHRS, but the amount of time to process it will depend on the volume of EPAFs received.

9. What is the “Approval Category” in EPAF?

This is where you choose which EPAF you want to generate. The Approval Category, a required field, is a drop-down box that contains all EPAF options.

10. There are so many different EPAFs. How do I know which one to use?

The following table will help you choose the appropriate EPAF:

EPAF – Bi-Weekly Employees	USED FOR:
BWK 100 – New Job Assignment Ongoing	New job assignment with no end date for staff or service employees
BWK 101 – Casual Assignment Flat Amount	Casual employee receiving a <u>lump sum</u> payment
BWK 102 – Add a Stipend as a Secondary Job	Compensation for extra work paid as a total amount, or temporary events
BWK 103 – Add a Secondary Job Assignment	Adding a secondary job to temporary staff or part-time staff
BWK 110 – New Job Assignment with Termination Date	Temporary full-time staff, casual employee with an <u>hourly rate</u> , temporary staff, or a secondary job such as teaching.
BWK 201 – Change Base Pay	Changing the employee’s hourly rate
BWK 300 – Add Additional Earnings to Existing Job	Payment for additional duties outside assigned job duties or an allowance, i.e., cell phone
BWK 400 – End Job Assignment	Ending a job assignment for a current employee

EPAF – Monthly Employees	USED FOR:
MTH 100 – New Job Assignment Ongoing	<ul style="list-style-type: none"> ▪ Professional Continuing Contract ▪ Faculty (Tenure Track or Tenured)
MTH 101 – Limited Contract Assignment	A one-time assignment with no benefits and a start and end date (e.g., a temporary monthly professional employee or faculty)
MTH 110 – New Job Assignment with Termination Date	<ul style="list-style-type: none"> ▪ Professional Contract ▪ Contract Faculty
MTH 105 – Additional Compensation with New Labor* *Similar to, although occurs less frequently than, MTH 300 – Additional Earnings	Additional compensation in a <u>different</u> department and/or with <u>different</u> labor (e.g., a second teaching assignment such as an overload or an additional course(s), compensation for a professional employee with additional duties, stipends, honorariums/workshops, Inconvenience Factor, independent study/credit by exam, substitute teaching, Michigan City Pay, TV Class, Internet Class, Electronic Devices)
MTH 201 – Change Base Pay	Changing the employee’s salary
MTH 300 – Additional Earnings	Earnings <u>in addition to a primary job</u> (e.g., a second teaching assignment such as an overload or an additional course(s), compensation for a professional employee with additional duties, auto allowance, cell phone, stipends, honorariums/workshops, Inconvenience Factor, independent study/credit by exam, substitute teaching, Michigan City Pay, TV Class, Internet Class, Electronic Devices)
MTH 301 – Change in Labor	Changing the account being charged
MTH 400 – End Job Assignment	Ending a job assignment for a current employee

EPAF - General	USED FOR:
GEN 300 – General Title Change	Changing an employee’s title with or without a change in pay

EPAF – Student Employees	USED FOR:
STU 100 – New Hire	To hire any student employee paid on an <u>hourly</u> basis
STU 101 – New Hire Stipend (Paid on a lump sum basis or stipend)	To hire a new or returning graduate assistant, community or resident assistant, residence hall directors and honors college fellows
STU 200 – Reactivate	To rehire an hourly student employee
STU 201 – Change Base Pay	To change the base pay for a student employee, such as a longevity increase
STU 400 – End Job Assignment	To end a job assignment for a student employee

EPAF – Administrative	USED FOR:
ADM 100 – Admin Change Supervisor	Changing supervisor ID#
ADM 200 – Admin Org Change	Changing labor

11. Will my approvers automatically appear in the EPAF?

No. Once you create a particular EPAF (for example, *BWK100*) if you save the approvals in the routing queue as the default for that EPAF the system will remember the approver(s) you used for that EPAF. Each time you attempt to create an EPAF that you have not used before, you'll be asked to set up your approver(s). Just remember to save those approver(s) as the default for that EPAF.

12. How will my approver know there is an EPAF awaiting his/her approval?

There is no automatic notification when an EPAF is pending for an approver. You may want to call or email approvers to let him/her know an EPAF awaits approval.

13. Can an approver make changes to an EPAF?

No. The EPAF must be returned to the originator for corrections. The originator will make the changes, update the EPAF, and resubmit for approval.

14. If my approver wants to set me up as a Proxy - how do I do this?

- Your approver must go in under his/her login and choose "Create a Proxy." Here, the approver can designate you as a Proxy.
- Then, if you need to use your proxy rights, you will select "Act as a Proxy" from the main EPAF menu.

15. What's an "E-Class"?

This is an employee class or a type of employee. As in the previous system, employee types are designated as faculty, non-exempt staff, exempt staff, professional, service, temporaries, student employees and graduate assistants:

EMPLOYEE E-CLASS	
A1	Affiliated Service FT Benefits Eligible
B1	Bargaining Unit FT BE
B2	Bargaining Unit PT No Benefits
E1	Exempt Staff FT BE
E2	Exempt Staff PT NB
F1	Faculty Tenure or Tenure Track BE
F2	Faculty Contract PT BE No Retirement
F3	Faculty Contract FT BE No Retirement
F4	Faculty Semester PT NB
F5	Faculty Semester FT NB Rec Sick
LR	LTD Retiree Post Emp BE Varies
N1	Non Exempt Staff FT BE
N2	Non Exempt Staff Reg PT NB
P1	Professional FT Continuing Contract BE
P2	Professional PT Continuing Contract BE
P3	Professional FT Contract BE
P4	Professional PT Contract BE
P5	Professional FT 10 mth. BE
S1	Student-Under Grad Hourly
S2	Student-Under Grad Salary*
S3	Student-Graduate Asst Salary*
S4	Student-Graduate Asst Hourly
TB	All Temporary Bi-Weekly NB
TM	All Temporary Monthly NB

16. What happens to current employee position numbers?

A new position number will be assigned to each existing and new position by the Banner system.

17. How will position numbers be assigned to new positions after we go live?

Position numbers are assigned by the Banner system on a “one-up” basis. The Banner position number itself does not indicate the type of position it is or the type of employee to which it will be assigned. Instead the E-class and position class in which the position belongs indicate the type of position it is and the type of employee who will occupy that position.

18. What is a “Query Date”?

The Query Date is the date you are creating the EPAF, but you may want to change that date to the effective date of the action you want to take, because the Query Date defaults to all the other date fields in the EPAF.

19. I noticed there are three date fields in the NBAJOBS section of the EPAF (Job Begin Date, PAF Effective Date, and Personnel Date). What is the difference?

Typically, these dates will be the same, even if you are entering a retroactive assignment as long as that employee has not been paid. However, if the employee has already been paid and you need to initiate a retroactive personnel action such as a title change, the Personnel Date will reflect the actual date that the assignment should have gone into effect.

20. What does “Current Value” mean in the PEAEMPL section of the EPAF?

This is what the system reflects as the most current information for the employee.

21. In the PEAEMPL section, what is the difference between “Home Department” and “Distribution Orgn”?

They are usually the same, unless an employee is working in a location other than his/her home department.

22. What does “COA” mean?

“COA” means Chart of Accounts. For now, this is “1” university-wide.

23. What is the “Step” field?

This is only used for those employees in the bargaining unit or associated with the bargaining unit. Step 1 is the new hire or beginning rate for this type of employee. Step 2 is the 2 year rate for this type of employee and Step 3 is the 5 year rate.

24. What’s an Applier?

Only University Human Resource Services and Payroll function as appliers. This means that they actually move the information in the EPAFs into Banner. Payroll applies EPAFs for both undergraduate and graduate student employees and UHRS applies the EPAFs for all other types of employees.

25. Why would I need to complete the “Comments” section in an EPAF?

To provide information that might be helpful to approvers or appliers. For example:

- Specifying that this is a teaching assignment for the School of Extended Education (SEE).
- Specifying the number of faculty load hours for this teaching assignment.
- Specifying that the graduate assistantship is either full-time or half-time.
- Specifying that you are entering a retroactive action for an employee.
- Other general comments that you would typically place on an NOA. The more information provided, the more telephone calls can be eliminated.

26. In the “End a Job Assignment” section on an EPAF, does Job Status “Terminated” mean I’m terminating the employee?

No. You are only terminating, or ending, the employee’s job assignment. Only UHRS can perform the termination process of an employee in Banner.

27. I’m hiring someone in December and her/his assignment “ends” in June. How do I define her/his salary in the Salary field, since it needs to be prorated?

The amount you enter in the salary field is the full amount that the employee will be paid for this assignment. So, you must calculate this amount. If you have questions about how to do this, please call UHRS for assistance at 5-1834.

28. How do I pay someone from a grant?

Be sure you know the complete FOAPAL for the grant before you begin the EPAF. Then enter this FOAPAL in the labor distribution section of the EPAF.

29. If you are hiring a former graduate student as a contract faculty, will he/she keep his/her current BSU ID#?

Once an ID# has been assigned to an individual that number will be the same, regardless of the student's or employee's status at the university. **Do I need to fill out a New Person Identity Form?** No, but you will need to perform an EPAF to give the person the appropriate job assignment.

30. I know I’ve made mistakes, and I want to start over on my EPAF. Can I do that?

There are several stages where you may *delete*, *cancel* or *void* an EPAF:

- If you have not saved the EPAF, use your Back button to return to the main menu to start over.
- If you have saved your EPAF, the “Delete” option is presented. This will delete the EPAF from the system.
- If you have saved and submitted your EPAF and the approval has not been completed (i.e., status is “Approved”), the “Void” option is presented in the EPAF. You will still be able to view the voided EPAF in the EPAF Originator Summary.
- If your EPAF has been approved and is in “Completed” status, the “Cancel” option is presented. You will still be able to view the cancelled EPAF in the EPAF Originator Summary.

31. How do I see my history of EPAF transactions?

This is available on your EPAF Originator Summary or your Approver Summary if you are an Approver. You can sort by field of your choice.

EPAF Tips and Tricks

- **New Person Identity Form**
 - It's helpful to complete the New Person Identity Form with the new employee after he/she has accepted the offer of employment. This will allow you to quickly and accurately obtain the information requested in the "Biographical Information" section.
 - You should ask the new employee to call UHRS with his/her Social Security number.

- **Save your EPAF!**
 - You must save your EPAF before you break away from it to do another task.
 - You may want to submit your EPAF before you log out, but you may simply save it and come back later to submit it.
 - Your EPAF screen will time out after 90 minutes of inactivity.

- **In many of the EPAFs, you will be asked for the Supervisor's ID#**
 - At the beginning of the EPAF you can look up the supervisor's ID for the employee on which you are initiating an EPAF by clicking on the search icon next to the ID field. This way you will be prepared when you need to enter it later in the EPAF. You can write it down or copy and paste it.

- **The Date Field format is always MM/DD/YYYY.**

- **When entering salary or hourly wage information, don't include "\$" or ",".**

- **Use the wild card function when searching for names in an EPAF.**

It allows for a broader search – "%" is the wild card character. For example, if you want to look for all people whose names begin with "Joh", you can use "Joh%" to perform a search.

- **What do the red asterisks mean in the EPAF fields?**

A red asterisk indicates a required field in an EPAF.

- **When in doubt, ASK!**

If you're not sure what to do regarding non-student* EPAFs, contact Susan Schlensker in University Human Resource Services at 5-1834 or via email at slschlensker@bsu.edu.

***For questions regarding student employee EPAFs, contact the Career Center at 5-1522 for information.**