EPAF Tutorial

TABLE OF CONTENTS

Introduction..................................................................................................................Page 2
Definitions.................................................................................................................. Page 3
Dates.......................................................................................................................... Page 4
Accessing EPAF through MY INFO ..............................................................Page 5
Non work-study Student appointment...............................................................Page 8
Labor Distribution ............................................................................................... Page 13
Routing Queue.................................................................................................Page 15
EPAF Originator Summary .............................................................................Page 19
EPAF Approver Summary................................................................................Page 20
Default Routing Queue......................................................................................Page 21
EPAF Proxy..........................................................................................................Page 23
Activate termed employee in PEAEMPL....................................................Page 25
Frequently Asked Questions.............................................................................Page 27
EPAF TUTORIAL

Introduction:

- What is EPAF?
  - EPAF is an acronym for Electronic Personnel Action Form.
- How do I access EPAF?
  - With the appropriate security setup, EPAF can be accessed by clicking MYINFO from the MSU home web page at http://www.montana.edu/
- What can I do with EPAF?

EPAF must be used to appoint the following Employee types:

- Student employee (non workstudy)
- Short Term(temp/hourly) Appointment
- Graduate Assistants
- Classified Employees including temporary (fixed term) appointments
- Professional Hourly Appointments

EPAF must also be used for the following personnel actions:

- Terminate employees
- Future labor distribution funding changes
- Reactivate employees who were termed in PEAEMPL

DEFINITIONS

GID: General ID - Assigned by Banner to identify a unique person or entity instead of the Social Security Number.

AY: Academic Year (August - May)
FY: Fiscal Year (July- June)

POSITION: Number assigned to a specific department and/ or job type used to allocate a budget for jobs. A position number consists of a prefix followed by 4 digits. Certain job types have only one position number for each position other job types have “pooled positions”. A position number exists independently of the person holding that position.

POOLED POSITION: Position that can have more than one individual attached to the same number. Each department has a unique 4-digit number preceded by a prefix. (Used for students, graduate assistants, temp hourly employees and adjunct faculty)
POSITION PREFIX: Identifies the campus and type of position: 1st digit identifies the campus. Each EPAF category description includes the prefix
For example:
- Student Job -1 credits or more required 4S posn S1 suffix
- Classified Salaried (4M Position) 00 Suffix

JOB NUMBER: A position that has been assigned to an employee.

JOB SUFFIX: Further identifies the job. Most nonstudent jobs have a suffix of 00;
   S1, S2…- Non Work-study Students
   00, 01…- Work-Study Students
   00, 01…- Short Term hourly employees
The suffix is also used to create a unique active job for a student who may have two pay-rates within the same pooled position during the same pay period. Example 4S6635-S1 could be used for a rate of  8.00/hr and 4S6635-S2 for 8.50/hr.

LABOR DISTRIBUTION: Funding source for the salary on a job.
   Consists of COA =1 (chart of accounts) and Index and Account code which defaults to
   FOAPAL= fund, org, account, program, activity, location
   Non work-study students- use acct 61225
   Temp hourly use 61224
   See link below for frequently used payroll account codes
   http://www.montana.edu/hr/Payroll/Frequently Used Account Codes.doc

EPAF RECIPE: Quick reference for each EPAF category with specific instructions on data to be entered. Go here for EPAF recipes: http://www.montana.edu/hr/EPAF.htm

DATES

QUERY DATE: Determines which records you will find when searching EPAF. You will find all records with an effective date equal to or greater than the date entered. You can widen or narrow the results of a search with this date. With new EPAFS the query date will also default as the effective date on the job and labor distribution records.

EFFECTIVE DATE: This ‘drives’ the job record in BANNER. The effective date is the date the job record is recognized by Banner.
   Example: Student begins 8-15-07. Effective date entered as 08/15/2007 for active record) and 05/31/2007 for terminated record or prior date if known.

BEGIN DATE: For new hires and employees being assigned that job # for the first time, this is the same as the effective date Once assigned to that employee the begin date doesn’t change.
   Example: Student is assigned job number 4S6635 –S1 effective 08/01/2005 and terminates 05/31/2006. The student is hired into the department AY2007. You would use the same job number, but the begin date does not change. The effective date changes to reflect the new record.
Electronic Personnel Action Forms are accessed through MYINFO at [www.montana.edu](http://www.montana.edu) and selecting MYINFO or go to [https://atlas.montana.edu:9000/](https://atlas.montana.edu:9000/)

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Welcome to the MSU-Bozeman campus

You will need to use at least Netscape 4.0.7 or Internet Explorer 5.x to browse this web.
Please do not use Internet Explorer ver. 7 with Banner until further notice.

You must have cookies enabled on your browser.

Enter Secure Area
Apply for Admission
General Financial Aid
Campus Directory
Class Schedule
CORE Classes
Spring 2007 Registration/Advising Information
Fall 2007 Registration/Advising Information
Registration Timetable
Course Catalog
Transfer Equivalencies
Frequently Asked Questions

RELEASE: 7.3
Select Enter Secure Area and login:

User Login

Please enter your User Identification Number (ID) and your personal identification number (PIN). Your ID may be either your Social Security Number (without any dashes) or your Student/Employee ID with a preceeding dash (-ID). Your initial PIN is your birthdate entered as 6 digits MMDYYY or the last 6 digits of your Student/Employee ID. Change your PIN at your earliest convenience to protect your privacy and student records. To change your PIN, select Personal Information Menu. You have 5 tries to Login correctly. If unsuccessful, your PIN will be disabled. You must contact the Registrar's Office (employees should contact the Personnel and Payroll Office) to re-activate your PIN.

When you are finished, please Exit and close your browser to protect your privacy.

IMPORTANT INFORMATION: If you have forgotten your PIN, please enter your User ID and select the Forgot PIN button.

Students who require assistance may contact the Registrar's office, 994-0650. The Registrar staff is available to assist students with registration during regular business hours.

User ID: 

PIN: 

Login  Forgot PIN

RELEASE: 7.3

Welcome, Max A. Thompson, to the Montana State University - Bozeman Information System! Last web access on Jun 13, 2007 at 04:42 pm

Attention: Have you been to MyMSU Portal recently? Remember, you may receive personal announcement there anytime; it's recommended you visit at least twice a week. Log in and check out What's New in MyMSU!

Announcing MyMSU Portal
Check here for vital information about the enhanced Web Communications : nd collaboration services for Students, Faculty and Staff
Personal Information
View your address(es), phone number(s), e-mail address(es); Change your PIN.

Student Services
Apply for Admission, Register, View your academic records. View your Web & Enrollment Summary / Attendance Confirmation / Pay via Web
Electronic Billing and Payment
Review your most recent Electronic Billing Statement via QuillPay, make a $10 deposit on Account, Setup an Authorized Payee.
Financial Aid
View your Financial Aid Awards; Accept your Financial Aid awards; View docum. Verification requirements; View charges and payments
Access Federal Direct Loan Application
Communications
University Communications

Return to Homepage

RELEASE: 7.3

powered by SAGARIDHIGHEREDUCATION
This tutorial was designed to provide guidance on EPAF navigation. We will be appointing a student who is not work study funded. Please read the instructions on each page of the online EPAF or refer to the EPAF recipe tables (link above) for guidance on specific appointment types.
What EPAF category should I use to appoint a non work-study student?

- Proceed to EPAF
  - Is student enrolled in 1 credit or more?
    - YES: Use student EPAF 4S position S1 suffix
    - NO: Use Short Term EPAF 4T Position
  - NO: HR Set up
    - Send New-hire form, I-9 and W-4 to Human Resources
  - Is Student a current or past employee?
    - YES: Proceed to EPAF
    - NO: Send New-hire form, I-9 and W-4 to Human Resources
New EPAF Person Selection

- Approval Category is a required field.
  - 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.
  - * indicates a required field.

- Query Date: MM/DD/YYYY
  - * indicates a required field.

- Approval Category: * Not Selected
  - * indicates a required field.

- ID: 01790550, Mumford A Moose

- Query date should = or be prior to the effective date you enter on the next screen. Make sure to use correct date format.

Click here to select EPAF category

---

Not Selected
- Labor Distribution Change (OSP) sponsored program funded jobs, BZOSPF
- Labor distribution change for Grad Asst 4DPOSN, BZLDGD
- Labor distribution change - No Grant No 4DPOSN, BZLDCH
- *Correct error Effective Date cannot be after Empl Term Date, BZEMPL
- Change Grad Title-hrs (ex: GRA-8 GTA-10 ), BZGRTL
- Grad Assistant Job AY (4D position) 00 suffix - GRA, GTA, GSA, BZGRAD
- Summer Grad Assistant (4D position) 01 suffix GRA, GTA, GSA, BZGDMSM
- Student or Short term - Change Pay Rate (4S, 4T posn #), BZMDST
- Student Job -1 credits or more required 4S posn 51 suffix, BZJSBU
- Short Term (not more than 90 days) 4T position 00 suffix, BZTHJB
For student jobs, suffix numbers are used to identify regular student employees versus work-study students. S# (beginning with S1) is used to identify non work-study positions and 0# (00 or 01) is used to identify work-study positions.

Suffix numbers are also used to identify two unique jobs with the same position number.

Example: Mumfred has position 4S6635 with an S1 suffix which tells us he has a non-work study job with HR/P&P. If HR/P&P decided to hire Mumfred for a secondary job at a different rate during the same appointment period we would assign 4S6635 with an S2 suffix.

If Mumfred had 4S position with a 00 or 01 suffix we know we cannot use that position for a non work-study student appointment.

**New EPAF Job Selection**

- Select a job by clicking the button in the "Select" column (Click "All Jobs" to see inactive jobs) OR
- Select the "New Job" row and use the search function or enter the position number
- Enter the suffix (non-workstudy student = S1, other = 00)
- Select Go.

### Instructions:

- **ID:** Mumfred A Moose, 01790550
- **Query Date:** Feb 05, 2010
- **Approval Category:** Student job - 4S posn S1 suf, BZJBSU

### Job detail *date format- mm/dd/yyyy * do not use $ or ,, STADJR

<table>
<thead>
<tr>
<th>Search Type</th>
<th>Position</th>
<th>Suffix Title</th>
<th>Time Sheet Organization</th>
<th>Start Date</th>
<th>End Date</th>
<th>Last Paid Date</th>
<th>Status Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Job</td>
<td>4S6635</td>
<td>STU - Personnel &amp; Payroll</td>
<td>432300, Human Resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

There are no active jobs based on the Query Date.

If you don’t know the position number you may use the search feature.
Position Search

New Position Selection

Enter search criteria and select Go. Then select the link under Position to select it.

Search Criteria

Position Number: [Enter]
Employee Class: [All, 1H, Student Labor/Work Study]
COA: [All, 1, Montana State University]
Budget Organization: [432201, Parking Facility, 432300, Personnel & Payroll Services]

Hint: Type in the first digit of the home org for a quicker search

Return to EPAF Menu
For student jobs, suffix numbers are used to identify regular student employees versus work-study students. S # (beginning with S1) is used to identify non work-study positions and 0# (00 or 01) is used to identify work-study positions. Suffix numbers are also used to identify two unique jobs with the same position number.

Example: Mumfred has position 4S6635 with an S1 suffix which tells us he has a non-work study job with HR/P&P. If HR/P&P decided to hire Mumfred for a secondary job at a different rate during the same appointment period we would assign 4S6635 with an S2 suffix. If Mumfred had 4S position with a 00 or 01 suffix we know we cannot use that position for a non work-study student appointment.
Please read instructions for each section on the EPAF

Job detail *date format- mm/dd/yyyy *do not use $ or ,, 4S6635-S1 STU - Personnel & Payroll

Instructions:
1. Enter Job begin date. This should be the same as the “Current Value” or if no “Current Value” the same as the Effective Date
2. Enter Job Effective Date. This is the date of job change or addition (for Student jobs it is the 1st day of the pay period)
3. Select Contract Type - “Primary” or “Secondary” (1st or only job is “Primary”, all other jobs are “Secondary”)
4. Enter Regular Rate. This is the hourly wage
5. Enter Title. Non-student temp hourly jobs must match the classification chart
6. Enter Timesheet Orgn. This is the org number where the timesheet/card is delivered for this job
7. Select Job Change Reason from pull-down menu (New Hire, Rehire, Salary increase, etc.)

Activate or Change Employee Job

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Begin Date: mm/dd/yyyy</td>
<td></td>
<td>08/01/2007</td>
</tr>
<tr>
<td>Jobs Effective Date: mm/dd/yyyy</td>
<td></td>
<td>08/15/2007</td>
</tr>
<tr>
<td>Personnel Date: mm/dd/yyyy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract Type:</td>
<td>Not selected</td>
<td></td>
</tr>
<tr>
<td>Job Status: (Not Overrideable)</td>
<td>A</td>
<td></td>
</tr>
<tr>
<td>Title:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Change Reason:</td>
<td>Not Selected</td>
<td></td>
</tr>
<tr>
<td>Regular Rate:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timesheet Orgn:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time Entry Method: (Not Overrideable)</td>
<td>P</td>
<td></td>
</tr>
<tr>
<td>Time Entry Type: (Not Overrideable)</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>Employer Code: (Not Overrideable)</td>
<td></td>
<td>BZ</td>
</tr>
<tr>
<td>Payroll Id: (Not Overrideable)</td>
<td></td>
<td>4M</td>
</tr>
<tr>
<td>Leave Rept Pay ID: (Not Overrideable)</td>
<td></td>
<td>4M</td>
</tr>
<tr>
<td>Salary Group: (Not Overrideable)</td>
<td></td>
<td>2008</td>
</tr>
<tr>
<td>Factor: (Not Overrideable)</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Pays: (Not Overrideable)</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Step: (Not Overrideable)</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

See recipe card for help with field values

These are default values that cannot be changed

Sample Student “Recipe” card below:
Recipe for student job:

Begin Date: If student is new to the position this date is the same as the effective date. If student is being rehired or a change is being entered this date is the original begin date for this job. This can be found in the “Current Value” column or in Banner form NBAJOBS.

Effective Date: IMPORTANT: This date ‘drives’ Banner. It used by the system to determine the date the record becomes active or changes. The active (‘A’) record effective date should be the first of the pay period. For the term (‘T’) record the last day of the pay period should be used. (Student Summer appointments Active record effective 6/01 Term record effective 7/31, Student AY appointments active effective 8/01- term effective 5/31) NOTE: The effective date cannot be less than the first day of the current pay period.

Job Status: Cannot change; A= Active, T= Terminated

Contract Type: Employee must have one active primary job. All others are secondary. If employee has no other job then contract type should be primary.

Title: Student: Banner will default the title from the position if left blank. Always use ‘student’ in the title (e.g. Student – HR/PP)

Timesheet Orgn: This is the Z orgn used for Web time entry and corresponds with the employee’s department and supervisor.

Regular Rate: Hourly rate of pay

Job Change Reason: Leave at default unless a change in rate.

Comment: You must include a brief job description in the comment box.

Continue Labor Distribution
To change the default labor distribution, add a new index and account on the row below the default. Select “Save and Add New Rows” then remove the default row and press Save again. Banner will verify the FOAPAL and make you re-enter the account number.

You will get an error if there is a future dated labor distribution change in the record.

**IMPORTANT:** Enter a job description in the comment box and any other comments you wish to make.
NEXT: you must select a routing queue for specific users. The users are defined by categories. HR categories are required and should include each technician in your HR customer service team.

Your team name and members may be found at [www.montana.edu/pps](http://www.montana.edu/pps) and clicking on HR Customer Service teams.

NOTE: Your department/college may have its own approval requirements (see the section on default routing queues to set defaults for a specific EPAF type).
Tip: Save prior to submitting.
Electronic Personnel Action Form

Job Labor Distribution Total Percentages must be exactly 100%.

Enter the information for the EPAF and either Save or Submit

Name and ID: Mumfred A Moose, -01785644

Job and Suffix: 4S6633-s

Transaction: 35559

Query Date: Jun 18, 20

Transaction Status: Waiting

Last Paid Date:

Approval Category: Student summer job & credits or more, B2J6SU

Save | Submit | Delete

COA code is always 1

Error(s) occurred.

Enter the information for the EPAF and either Save or Submit

Name and ID: Mumfred A Moose, -01785644

Transaction: 35559

Query Date: Jun 18, 20

Transaction Status: Waiting

Approval Category: Student AY job -6 credits or more, BZSTJB

Save | Submit | Delete

Errors and warnings appear here. Errors must be corrected before submitting

Errors and Warning Messages

<table>
<thead>
<tr>
<th>Type</th>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Routing Queue</td>
<td>ERROR</td>
<td>Required Action must be entered.</td>
</tr>
<tr>
<td>Routing Queue</td>
<td>ERROR</td>
<td>Required Action must be entered.</td>
</tr>
</tbody>
</table>

NOTE: You may be asked to verify the account number after selecting submit. Retype and SAVE
You must correct errors before you can successfully submit. See EPAF Trouble Shooting Guide for help on common errors.

TIPS: Make sure to check the labor distribution date. If you enter a date greater than the job effective date for the labor distribution, the position default labor distribution will be effective until the effective date you entered.
Congratulations, you have successfully submitted an EPAF.

Let’s look at what we have done. Go to the links at the bottom of the EPAF.
**EPAF Originator Summary** allows you to view the EPAFs you have submitted and awaiting your approval.

Click on the name to review the EPAF.

As an approver you may approve, disapprove, or return the EPAF for correction. Be sure to add a comment if you are disapproving or returning the EPAF for correction.
As an approver, you can view the EPAF
Disapprove or return for correction
Add comments if appropriate

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

Queue Status: [AI] Go
Pending

New EPAF | Update Proxies | Search | Proxy or Supervisor or Filter Transactions

Select the name to view the EPAF

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Transaction</th>
<th>Type of Change</th>
<th>Submitted Date</th>
<th>Effective Date</th>
<th>Required Action</th>
<th>Action</th>
<th>Links</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moore, Humphrey A.</td>
<td>01708844</td>
<td>53339</td>
<td>Student AV job - 6 credits or more</td>
<td>Jun 14, 2007</td>
<td>Jun 14, 2007</td>
<td>Approve</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Comments Exist**
As an originator you may void the transaction removing it from the approval queue.

EPAF allows you to select a **default routing queue** for all the EPAFs you submit in that category.

The level number tells you the order of the approval queues. You may select more than one level with the same level.
# EPAF Default Routing Queue

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

## Approval Queue

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>95 - (BZPERT) Bozeman Personnel Technicians</td>
<td>BUSS</td>
<td>Approve</td>
</tr>
<tr>
<td>97 - (BZBENT) Bozeman Benefit Technicians</td>
<td>HARNABY</td>
<td>FYI</td>
</tr>
<tr>
<td>99 - (BZPAYT) Bozeman Payroll Technicians</td>
<td>KNATHERS</td>
<td>Apply</td>
</tr>
<tr>
<td>50 - (DEPTHD) Department Head/Director</td>
<td>MAN</td>
<td>Not Selected</td>
</tr>
<tr>
<td>95 - (OSP) Office of Sponsored Programs</td>
<td>CRIKE</td>
<td>Not Selected</td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Mandatory Levels defaulted from Electronic Approval Category Form (NTRACAT).

- [Save and Add New Rows]
- [Don't forget to save!]

EPAF Originator Summary

Return to EPAF Menu

RELEASE: 7.3.1.1
Be sure to refer to the “delegation of authority” policy before assigning a proxy.

MSU Policy and Procedures
http://www2.montana.edu/policy/
### EPAF Proxy Records

**Approval Level:** Department Head/Director, DEPTHD

<table>
<thead>
<tr>
<th>Name</th>
<th>Remove</th>
<th>Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Selected</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select the name of your proxy and save

Select to approve as a proxy for another user

### EPAF Approver Summary

**Queue Status:** All

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

<table>
<thead>
<tr>
<th>Queue Status</th>
<th>All</th>
<th>Go</th>
<th>Pending</th>
</tr>
</thead>
</table>

Select All | Reset | Save

<table>
<thead>
<tr>
<th>1 - 1 of 1</th>
<th>EPAF Transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td><strong>ID</strong></td>
</tr>
<tr>
<td>Mooze, Mumfried A.</td>
<td>-</td>
</tr>
</tbody>
</table>

New EPAF | Update Proxies | Search | Proxy or Superuser or Filter Transactions
In order for a person to be assigned a job an Employee record must be active in the Banner Form PEAEMPL. If an employee is returning to work at MSU after being terminated you may use EPAF to request the PEAMPL record be reactivated. Once active in PEAMPL the employee can be appointed using an Add/change job EPAF.
Use comments to let us know more details if needed.

The only field you need to enter is the home org of the employee and your HR team approvers.

If the appropriate employee information is not in BANNER you will receive errors. Please send an I9,W4 and NewHire Listserv form to HR.

After HR receives the appropriate forms and enters the information there is no need to submit this EPAF. (please delete)
FAQ

How do I know which users to put in my approval queue?

- Each college or department has slightly different routing procedures for forms. Please ask your supervisor or department head if you are unsure of your specific department’s procedure.
- You are required to route all grant funded appointments to OSP and all Ag or Extension funded EPAFs to AES or ES. The dropdown menu in the routing queue has a list of the approval category levels which contain the approvers.
- Each EPAF has a mandatory routing queue for Human Resources. Each department is assigned an HR/PP customer service team. Go to www.montana.edu/hr to find your departments team members.

There are several date fields on EPAF what dates do I use?
See the Recipe card in The Quick Reference Guide for the specific EPAF. Each card gives instruction or an explanation about what to enter in each field for a specified EPAF. The Definition section in this tutorial has general information about the dates.