

EPAF – ELECTRONIC PERSONNEL ACTION FORM IMPLEMENTATION

EFFECTIVE JULY 1, 2007



Table Of Contents

Subject	Page Number
1. Introduction to EPAF	
2. Explanation of Approval Categories	4
3. Creating an EPAF	
A. Labor Distribution/Redistribution	6
B. Reappointment of Faculty	16
C. Stipend Pay	25
D. Terminating an Employee	38
E. New Hire/Re-Hire	46
F. Summer Research Faculty	60
G. Faculty Overloads	71
H. Position Transfer	77
I. Position Title Change	93
J. Hours Change	100
K. Employee Leave	111
L. Employee Return from Leave	118
M. Salary Change	126
4. Submitting an EPAF	132
5. Taking an Action on a EPAF	134
6. Editing an EPAF	140
7. Taking an action as a PROXY	142
8. EPAF Status	150
9. Adding Comments to an EPAF	154
A. Appendices	
Appendix A: Frequently Asked Questions	

1. Introduction to EPAF

What is EPAF?

EPAF is designed to promote a more efficient process for handling personnel actions for Xavier University. EPAF will replace the paper Personnel Action form. EPAFs are both created *and* Approved in Banner.

The main difference with EPAF is that it is obviously paperless. Another difference is that the paper form requested the same information with no regard for the personnel action, but with EPAF only the information that is required to complete the Personnel action will be requested from the end-user.

EPAF is major change at Xavier, similar to the way that online Requisitions was a change when it was implemented. If you were at the University during that transition then you can probably remember that creating an online Requisition seemed quite difficult and not very efficient initially, but now that you are familiar with the process you see the great improvement. That is probably what your experience will be like with EPAF.

Effective July 1, 2008 paper personnel actions will not be accepted for any Faculty/Staff Personnel Actions. All Faculty/Staff Personnel actions should be submitted using EPAF.

If you have any questions/suggestions regarding EPAF please contact the Human Resources at extension 5282 or email dholmes@xula.edu.

2. Explanation of Approval Categories

EPAFs are “driven” by Approval Categories. Consider an Approval Category as a type of Personnel Action. Each employee’s position (which relates to a specific employee) has an Approval Category. Approval Category names are a combination of an employee’s position number and the personnel action.

For example, Jane Dough is an employee and has been assigned position number SP6319. The Approval Categories for Jane Doe’s position would be:

- 6319LD – Labor Distribution
- 6319RE – Faculty Reappointment
- 6319TM- Terminate Employee
- 6319ST – Stipend Pay

Each individual within your organization has an active Position Number that has been assigned by Human Resources. Each position has all appropriate Approval Categories created and ready for use in EPAF.

3. Creating an EPAF

Before you can create an EPAF for any Personnel Action, you should have the following data available:

- A. Employee's XULA ID**
- B. Employee's Position Number**

*****This information can be obtained from the EPAF Report that is available from BRIO. Detailed instructions on accessing the report can be found on the Human Resources site from the XULA web page.**

****Depending on the type of EPAF that you are creating, additional information maybe required.*

3. Creating an EPAF contd.

A. Labor Distribution/ Redistribution

A Labor Redistribution Personnel Action is required when there is a change in funding for an employee's position. Creating and submitting an EPAF to effect the Personnel Action is only a piece of the process for Labor Distribution/Redistribution, it is not the complete Labor Distribution process. For additional information on the complete Labor Distribution process please see the documentation posted on the HR homepage, which can be accessed from the University website.

Before you begin please make sure you have the following data available for the employee that you are creating the action:

A. Employee's XULA ID

B. Employee Position Number

To create the Labor Distribution Action using EPAF:

Step 1: Access the form NOAEPAF

Step 2: Complete the Employee Detail Portion of the form

A

B

D

C

Required Fields

Field Description

(A)ID

Enter XULA ID for the person you are creating the action. If you do not know the ID of the employee please reference the FAQ's "Searching for an employee's XULAID number".

(B)Transaction

Blank. Banner will assign a transaction number after the transaction is Saved).

(C)Query Date A date used by the system to determine what data to query for the display on the current values that appear on both the Transaction Tab & the Labor Distribution Tab.

The query date entered will be used by the system to display the data from the last change to the record prior to the date you entered.

(D)Approval Category Click the drop down box in the **Approval Category** field and Select the appropriate **Approval Category**. Remember that the Approval Category will consist of the last 4 digits of the employee's Position number and the abbreviation for the action.

It is very important that the correct Approval Category is selected because that is what defines how the EPAF will be routed. If an incorrect Approval Category is selected the EPAF will not be routed to the correct organization for Approval.

(E) Approval Type Leave blank. Approval Type will populate when the Approval Category is selected.

(F)Position & Suffix Enter the employee's Position number and Suffix assigned by Human Resources. The position number for an employee can be obtained from EPAF Departmental BRIO Report. Make sure the Suffix is entered exactly as it is reported to you.

Note: A suffix entered as '01' is not the same as '1'.

If the report is unavailable or position number is not known:

- Click the down arrow to the left of the Position field.
- From the menu, select **List of Employee's Jobs (NBIJLST)**,
- Double-Click Position the position that corresponds to the position you are trying to take an action on, and the position and suffix will automatically populate in the field on NOAEPAF.


In instances where a user is creating an EPAF for an employee with multiple positions, they must make sure that they are working with the position that they want to effect a personnel change.

It is very important that the numeric portion of the employee's position number be an exact match to the numeric portion of the Approval Category. The combination of the two fields (Approval Category and Position Number) is what drives how the EPAF will be routed for Approval. If the two fields are not an exact match the EPAF will not route properly.

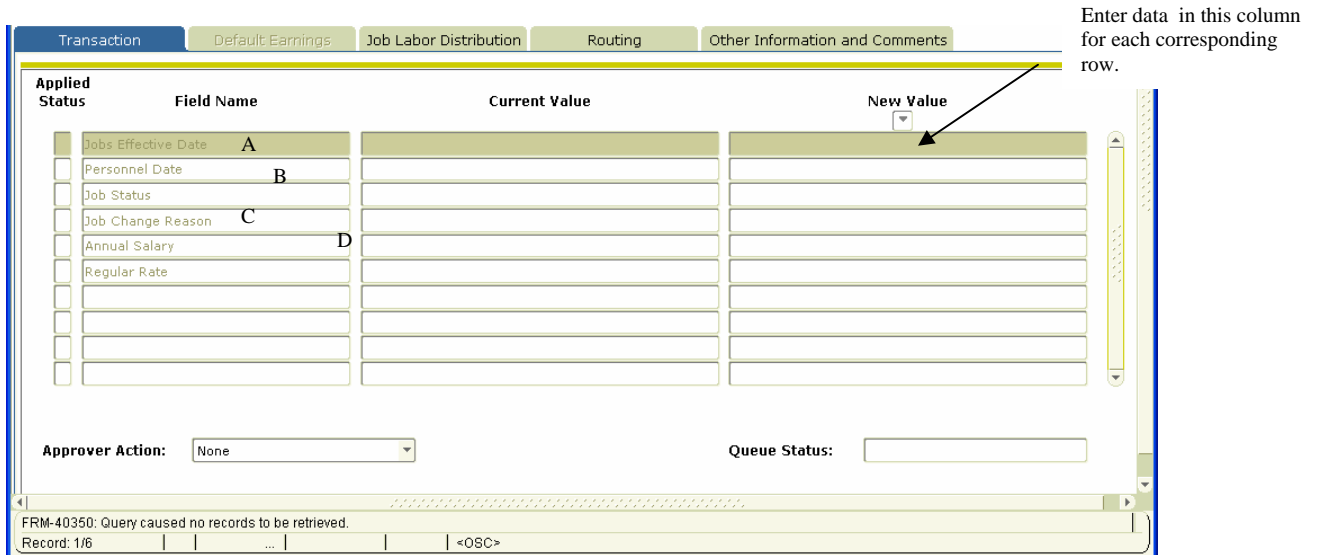
Stop here to verify that the numeric portion of the Approval Category and the numeric portion of the Position field are an exact match.

Continued on next page

HR will inspect each EPAF submitted to insure that the two fields match, if they should find that the two do not match they will return your EPAF and you will have to create a new EPAF using the correct Approval Category & Position number. If that should happen, please see the section entitled “Editing an EPAF”.

Step 3: Click “Next Block”  or CTRL+Pgdn to move to the Transaction Tab.

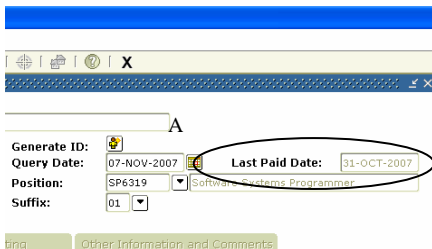
Step 4: Complete the fields under “New Value” on the Transaction Tab



**Required Field
(A)Jobs Effective
Date**

Field Description

Date the change should become effective. The Job Effective Date should always be a date after the date listed in the ^(A)“**Last Paid Date**” field (*the last paid date field will populate automatically once the employee’s position is selected*).



In the example above, if the employee is to be paid from a grant effective December 1, 2007 I would enter ‘12/01/2007’ in the field.

****Note: (1) The effective date for employees paid monthly is usually the first date of the month that you are trying to effect the change. For employees paid bi-weekly the effective date is usually the first day of the**

pay period that you are trying to effect the change.

(2) If you are trying to effect a Labor Distribution that should have been effective for a past pay period, please contact Human Resources for instructions on how to handle the transaction.

(B)Personnel Date Date the change should become effective.

Note: This field cannot be a “future date”. It can be the same as the effective date or a date that is prior to the effective date.

(C)Job Status The status of the job once the change has been made. The default is “A” – Active.

(D)Job Change Reason Reason the funding has to change. The default is “00015” Redistribution of funds.

(E)Annual Salary Required only if the employee’s salary is changing
AND
the employee is a Salaried/Exempt Employee.

(F)Regular Rate Required only if the employee’s salary is changing
AND
the employee is an Hourly/Non-Exempt Employee.

Step 5: Save the data that has been entered.

Data can be saved by clicking the diskette icon located on the tool bar or by pressing the ‘F10’ key (or clicking File, then Save.)

Step 6: Complete the Labor Distribution Tab

To access the tab, click “Next Block” on the tool bar  OR
Click Ctrl+ Pgdn

Continued on next page

Job Labor Distribution Tab

The screenshot shows the 'Job Labor Distribution Tab' interface. It features two main sections: 'Current Job Labor Distribution' and 'New Job Labor Distribution'. The 'Current' section includes a table with columns: COA, Index, Fund, Organization, Account, Program, Activity, Location, Project, Cost, Percent. The 'New' section includes a similar table with columns: BCQA, Index, Fund, Organization, Account, Program, Activity, Location, Project, Cost, Percent. The 'Effective Date' field is present in both sections. The 'New' section also includes a 'Total Percent' field at the bottom right. A note on the right side says 'Enter effective date from transaction tab here.'

The Job Labor Distribution Information Form Appears

The Labor Distribution attached to the position number will appear: This form is displayed in two parts the Current Job Labor Distribution and the New Job Labor Distribution. In the New Job Labor Distribution area enter the following data.

(A) Effective Date The first date the action will be charged to the account. This date should be the same as the “**Jobs Effective Date**” listed on the Transaction Tab.

Please note: the effective date field must be a date that is equal to or greater than the current date. If you need to make the funding information effective for a date in the past please contact Human Resources for instructions on handling that type of transaction.

(B)Fund The six (6) digit account number where the money is to be charged.

(C)Organization The four (4) digit department/organizational code to be charged.

(D)Account The four (4) digit account code identifying the type of compensation to be charged, i.e. faculty stipend-6402.

(E)Program The two (2) digit code for the type of expense categories to be charged such as 10 for teaching, and 20 for research.

(F)Percent The percentage of the salary that should be charged to the fund code.

Please note, the total percentage must equal **100 percent**.

Step 7: Save the data that has been entered.

Data can be saved by clicking the diskette icon located on the tool bar or by pressing the 'F10' key (or clicking File, then Save.)

Step 8: Click on the Routing tab

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1245	20	MLOUGHLI	Sr. Monica Loughlin, SBS	Approval	In Queue	
1090	20	MGIGUETTE	Dr. Marguerite S. Giguette	Approval	In Queue	
110000	20	JSANDIFER	Ms. Joyce M Sandifer	Approval	In Queue	
235678	20	DLABAT	Dr. Deidre D. Labat	Approval	In Queue	
245663	20	MAKUNDI	Dr. Murty A. Akundi	Approval	In Queue	
1235	20	MAKUNDI	Dr. Murty A. Akundi	Approval	In Queue	
BUDGET	998	SBMOSES	Mrs. Shirley B. Moses	Approval	In Queue	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

The Routing Tab Lists all of the individuals that are required to approve this transaction. This tab is predefined based on the position funding and organization.

If you do not see all of the individuals that you know should approve this transaction, please contact Human Resources at ext.5282 that can assist you with getting the routing information updated.

To complete the “Routing Tab” in the example above, the first level code is “1245”. Then click in the User ID field (it is currently blank)

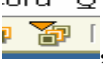
Continued on next page

- A. In the Level Code column click on the first Level Code.
- B. Tab to the blank field in the User ID Column. Click the User ID drop down. The user id for the individual responsible for approving for that level code will appear automatically.
- C. The Required Action field is automatically populated with the action the Approver is required to take: *Approval*, FYI or Apply.
- D. Complete each row in the Level Code column that is populated by moving the arrow down to the next level code and repeating A and B.

Click the save icon to save the changes that you have made to the Routing Tab (or clicking File, then Save.)

Step 9: Terminate the funding.

Just as you must start the funding you must end it by setting the date the funding should terminate. To set the date the funding must end:

- A. On the File Menu, click Options, then select “Next Action”.
- B. Click the Transaction Tab.
- C. Notice that the only field that changed was the Approval Type field. It changed from Labor to TERMJTB.
- D. Click “Next Block” on the toolbar , or Ctrl+PgDn to access the Transaction Tab.

Step 10: Complete the fields on the Transaction Tab.

Enter data in this column for each corresponding field.

Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date	01-NOV-2007	30-JUN-2008
P	Personnel Date	01-NOV-2007	07-NOV-2007
P	Job Status	A	T
P	Job Change Reason	00012	00017

Approver Action: Queue Status:

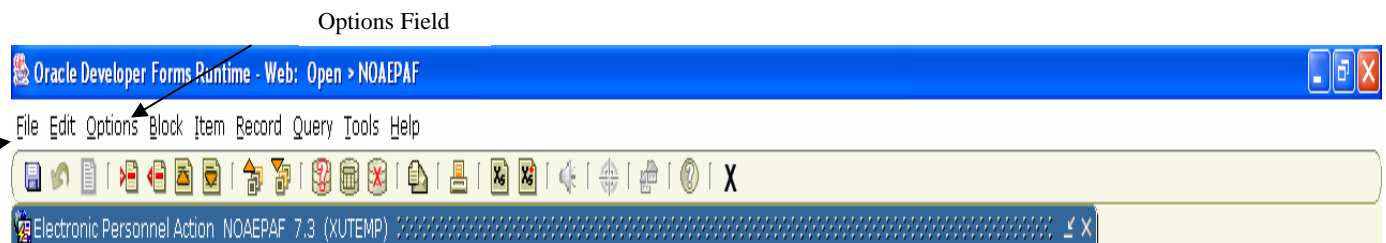
Required Field	Field Description
(A)Job Effective Date	Date the funding should end. This date should be a date that is later than the date that you wanted to start paying the employee from the fund. For example, if you started paying the employee from the fund on December 31, 2007, the effective date to end the funding should be January 1, 2008 or later.
(B)Personnel Date	Date the funding should end. It should be the same as the effective date or an earlier date. It cannot be a date that is later than the effective date.
(C)Job Status	System Default is “T”
(D) Job Change Reason	Reason the job record is being changed. System default is “00017” Funding Terminated.

Step 11: Save the data on the Transaction Tab.

Data can be saved by clicking the diskette icon located on the tool bar or by pressing the ‘F10’ key (or clicking File, then Save.)

Step 12: Submit the transaction.

Submitting an EPAF transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.

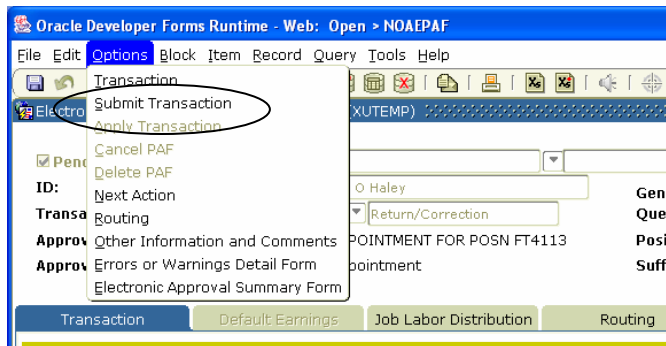


Transaction				Default Earnings	Job Labor Distribution	Routing	Other Information and Comments
Applied Status	Field Name	Current Value	New Value				
P	Jobs Effective Date	01-NOV-2007	30-JUN-2008				
P	Personnel Date	01-NOV-2007	07-NOV-2007				
P	Job Status	A	T				
P	Job Change Reason	00012	00017				

Approver Action:

Queue Status:

- A Click the Transaction Tab
- B On the file menu, click **Options**.
- C Select Submit Transaction.



If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.
 Select Submit Transaction.

Message Area

Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date	01-JUN-2007	01-MAR-2008
P	Personnel Date	04-JUN-2007	01-MAR-2008
P	Job Status	A	A
P	Job Change Reason		00015
P	Annual Salary	65000	
P	Regular Rate	31.250601	

Approver Action: Queue Status:

Transaction submitted.
Record: 1/6

If you are taken to the screen below, please note the errors listed and then check the Common Errors area of the FAQ's to resolve them. If you receive an error message that is not in the Common Errors section, contact the EPAF Administrator in Human Resources with the error message for further assistance.

Oracle Developer Forms Runtime - Web: Open > NOAEPAF - NOIEMSG

File Edit Options Block Item Record Query Tools Help

Electronic Approvals Error Message NOIEMSG 7.3 (XUTEMP)

Proxy For:

Transaction Number: ID: Mr. Kenneth Kirk

Originator:

Category: Errors Warnings

Approval Type	Error Type	Errors and Warnings Information

Creating an EPAF contd.

C. Reappointment of Faculty

This process is only applicable if the faculty member was an active employee the semester prior to the current semester. For example, the faculty member taught classes in the Fall semester, and will be reappointed for the Spring semester (of the same academic year). In the instance where the faculty member was not an active employee in the immediate past semester, that faculty member is considered a “Rehire” and you will need to adhere to a different process. Please contact HR for assistance with re-hiring a faculty member.

Before you begin please make sure you have the following data available for the employee that you are creating the action:

- A. Employee’s XULA ID
- C. Employee Position Number

Step 1: Access the form NOAEPAF.

Step 2: Complete the Employee Information portion of the form.

The screenshot shows the Oracle Developer Forms Runtime web browser displaying the NOAEPAF form. The form is titled "Electronic Personnel Action - NOAEPAF 7.3.0.1 (XUTEMP)". The form contains several fields: "ID" (900013933), "Transaction" (blank), "Approval Category" (1001RE), "Approval Type" (REAPPT), "Generate ID" (checked), "Query Date" (03-OCT-2008), "Last Paid Date" (30-SEP-2008), "Position" (FT1001), and "Suffix" (1). Arrows labeled (A) through (F) point to specific fields: (A) points to the ID field, (B) to the Transaction field, (D) to the Approval Type field, (C) to the Generate ID checkbox, and (F) to the Position field.

Required Fields

(A)ID

Field Description

Enter XULA ID for the person you are creating the action. If you do not know the ID of the employee please reference the FAQ’s “Searching for an employee’s XULAID number”.

(B):Transaction

Blank. Banner will assign a transaction number after the transaction is Saved for the first time.

(C)Query Date

A date used by the system to determine what data to query for the display on the current values that appear on both the Transaction Tab & the Labor Distribution Tab.

The query date entered will be used by the system to display the data from the last change to the record prior to the date you entered.

(D)Approval Category

Click the drop down box in the **Approval Category** field and Select the appropriate **Approval Category**. Remember that the Approval Category will consist of the last 4 digits of the employee's Position number and the abbreviation for the action. In the screen shot above, the employees Position Number is FT 1001. As a result the Approval Category is 1001RE.

It is very important that the correct Approval Category is selected because that is what defines how the EPAF will be routed. If an incorrect Approval Category is selected the EPAF will not be routed to the correct organization for Approval.

(E) Approval Type

Leave blank. Approval Type will populate when the Approval Category is selected.

(F)Position & Suffix

Enter the employee's Position number and Suffix as assigned by Human Resources. The position number for an employee can be obtained from EPAF Departmental BRIO Report. Make sure the Suffix is entered exactly how it is presented to you. A suffix entered as '01' is not the same as '1'.

If the report is unavailable or position number is not known:


- Click the down arrow to the left of the Position field.
- From the menu, select **List of Employee's Jobs (NBIJLST)**,
- Double-Click Position the position that corresponds to the position you are trying to take an action on, and the position and suffix will automatically populate in the field on NOAEPAF.

In instances where a user is creating an EPAF for an employee with multiple positions, they must make sure that they are working with the position that they want to effect a personnel change.

It is very important that the numeric portion of the employee's position number be an exact match to the numeric portion of the Approval Category. The combination of the two fields (Approval Category and Position Number) is what drives how the EPAF will be routed for Approval. If the two fields are not an exact match the PAF will not route properly.

Stop here to verify that the numeric portion of the Approval Category and the numeric portion of the Position field are an exact match.

HR will inspect each EPAF submitted to insure that the two fields match, if they should find that the two do not match they will return your EPAF and you will have to create a new EPAF using the correct Approval Category & Position number. If that should happen, please see the section entitled “Editing an EPAF”.

Step 3: Click “Next Block” on the toolbar  or CTRL+Pgdn to get to the Transaction Tab.

Step 4: Complete the field under “New Value” on the Transaction Tab.

Transaction | Default Earnings | Job Labor Distribution | Routing | Other Information and Comments

Enter changes for the corresponding row in each column

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Jobs Effective Date A	01-SEP-2007	01-JAN-2008
<input type="checkbox"/>	Personnel Date B	20-SEP-2007	01-JAN-2008
<input type="checkbox"/>	Job Status	A	A
<input type="checkbox"/>	Title D	Faculty, Pharmacy	
<input type="checkbox"/>	Job Change Reason	00011	REAPP
<input type="checkbox"/>	Factor	12	12
<input type="checkbox"/>	Pays F	12	
<input type="checkbox"/>	Regular Rate	60.09731	
<input type="checkbox"/>	Annual Salary	125000	
<input type="checkbox"/>			

Approver Action: Queue Status:

Enter new value.
record: 7/9 | ... | <OSC>

Required Field	Field Description
(A)Jobs Effective Date	Date the change should become effective. The Jobs Effective Date should be the first day of the pay period that you would like to the change to become effective. In the example listed above, if the employee is to be reappointed effective January 1, 2008, ‘01/01/2008’ should be entered in the field.

Please Note: The Jobs Effective Date should always be the first day of the pay period that you want the change to become effective. For employees paid monthly, this would be the first

day of the month. For employee's paid bi-weekly, it would be the first day of the pay period. If another date within the pay period needs to use please contact the EPAF Administrator at ext. 5282 for further assistance.

(B) Personnel Date

Date the change should become effective.

It should be the same as the effective date or an earlier date. It cannot be a date that is later than the effective date.

(C) Job Status

The status of the job once the change has been approved. The default is "A" – Active.

(D) Job Change Reason

Reason the job record is being changed. System default is "REAPP" Redistribution of funds.

(E) Factor

The number of pay periods the employee should be paid.

Depending on the type of employee, for Full-time faculty the factor should be 10; for Part-time faculty, the factor should be 4 or 5.

(F) Pays

The total number of times the employee should be paid.

Depending on the type of employee, for Full-time faculty the pays should be 10; for Part-time faculty, the pays should be 4 or 5.

(G) Annual Salary

Required **only** if the employee's salary is changing
AND

the employee is Salaried/Exempt Employee.

(H) Regular Rate

Required only if the employee's salary is changing
AND

the employee is an Hourly/Non-Exempt Employee.

Step 5: Save the data that has been entered.

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the 'F10' key (or clicking File, then Save.)

Step 6: Complete the Labor Distribution Tab

To access the tab, click “Next Block” on the toolbar



OR

Click Ctrl+ Pgd

Job Labor Distribution Tab

The Job Labor Distribution Information Form Appears

The Labor Distribution attached to the position number will appear: This form is displayed in two parts the Current Job Labor Distribution and the New Job Labor Distribution. In the New Job Labor Distribution area enter the following data.

Required Fields	Field Description
Effective Date	The first date the action will be charged to the account. This date should match the effective date entered on the Transaction Tab.
Fund	The six (6) digit account number where the money is to be charged.
Organization	The four (4) digit department/organizational code to be charged.
Account	The four (4) digit account code identifying the type of compensation to be charged, i.e. faculty stipend-6402.
Program	The two (2) digit code for the type of expense categories to be charged such as 10 for teaching, and 20 for research.

Percent The percentage of the salary that should be charged to the fund code.

Please note, the total percentage must equal **100 percent**.

Step 7: Save the data that has been entered.

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the 'F10' key (or clicking File, then Save.)

Step 8: Complete the Routing Tab

To access the tab, click "Next Block" on the toolbar



OR

Click Ctrl+ Pgd

Level Code
Column

Level Code	Level	User ID	Name	Action	Queue Status	Action Date
1245	20	MLOUGHLI	Sr. Monica Loughlin, SBS	Approval	In Queue	
1090	20	MGIGUETTE	Dr. Marguerite S. Giguette	Approval	In Queue	
110000	20	JSANDIFER	Ms. Joyce M Sandifer	Approval	In Queue	
235678	20	DLABAT	Dr. Deidre D. Labat	Approval	In Queue	
245663	20	MAKUNDI	Dr. Murty A. Akundi	Approval	In Queue	
1235	20	MAKUNDI	Dr. Murty A. Akundi	Approval	In Queue	
BUDGET	998	SBMOSES	Mrs. Shirley B. Moses	Approval	In Queue	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

The Routing Tab lists all of the individuals that are required to approve this transaction. This tab is predefined based on the positions funding and organization.

If you do not see all of the individuals that you know should approve this transaction, please contact Human Resources who can assist you with getting the routing information updated.

To complete the "Routing Tab" in the example above, the first level code is "1245". Then click in the User ID field (it is currently bank)

- A. In the Level Code column click on the first Level Code.
- B. Tab to the blank field in the User ID Column. Click the User ID drop down. The user id for the individual responsible for approving for that level code will appear automatically.
- C. The Required Action field is automatically populated with the action the Approver is required to take: **Approval**, FYI or Apply.
- D. Complete each row in the Level Code column that is populated by moving the arrow down to the next level code and repeating A and B.

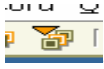
Step 9: Save the Routing.

Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the Routing Tab.

Step 10: End the Appointment

Just as a Faculty member’s contract start date has been entered, the date the contract/Appointment ends must also be entered.

A. From the **Routing Tab**, On the File Menu, click Options, then select “Next Action”.

B. Click “Next Block” from the toolbar , or Ctrl+Page Dn to access the Transaction Tab.

C. Notice that the only field that changed was the Approval Type field. It changed from Labor to TERMJTB.

Step 11: Complete the fields on the Transaction Tab.

Transaction			
Default Earnings			
Job Labor Distribution			
Routing			
Other Information and Comments			
Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date	01-AUG-2008	31-MAY-2009
P	Personnel Date	01-AUG-2008	31-MAY-2009
P	Job Status	A	T
P	Job Change Reason	REAPP	ENDCO

Required Fields

Field Description

(A)Jobs Effective Date

Date the contract is set to end. This date should be a date that is later than the date the contract started. For example, if the contract started on January 1, 2008 the effective date to end the contract should be January 1 or later.

(B)Personnel Date

Date the contract is set to end. It should be the same as the effective date or an earlier date. It cannot be a date that is later than the effective date.

Continued on Next Page

For example, the contract is set to end May 31, 2009.
The Personnel date should be May 31, 2009

(C)Job Status System Default is “T”

(D)Job Change Reason System Default is “ENDCO”. “ENDCO” is the code for “end of contract”.

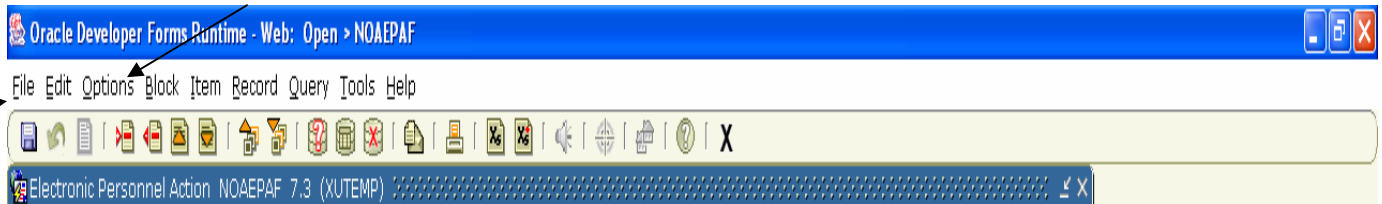
Step 12: Save the data on the Transaction Tab.

Data can be saved by clicking the diskette icon located on the tool bar or by pressing the ‘F10’ key (or clicking File, then Save.)

Step 13: Submit the transaction

Submitting an EPAF transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.

Options Field



Transaction Default Earnings Job Labor Distribution Routing Other Information and Comments

Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date	01-NOV-2007	30-JUN-2008
P	Personnel Date	01-NOV-2007	07-NOV-2007
P	Job Status	A	T
P	Job Change Reason	00012	00017

Approver Action: Queue Status:

A From the Routing Tab, on the file menu click Options
Continued on next page

- B** Select Submit Transaction.
 If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.
- C** If you are taken to the screen below, please note the errors listed and then check the Common Errors area of the FAQ’s to resolve them. If you receive an error message that is not in the Common Errors section, contact the EPAF Administrator in Human Resources at ext. 5282 with the error message for further assistance.

Oracle Developer Forms Runtime - Web: Open > NOAEPAF - NOIEMSG

File Edit Options Block Item Record Query Tools Help

Electronic Approvals Error Message NOIEMSG 7.3 (XUTEMP)

Proxy For:

Transaction Number: ID: 900015008 Mr. Kenneth Kirk

Originator: LSANDERS

Category: Errors Warnings

Approval Type	Error Type	Errors and Warnings Information

Transaction Number, press LIST for valid numbers.

Record: 1/1 | ... | <OSC>

3. Creating an EPAF

C. Stipend Pay

Before you begin please make sure you have the following data available for the employee that you are creating the action:

A. Employee's XULA ID

B. Employee Position Number

The screenshot shows the Oracle Developer Forms Runtime window for the NOAEPAF form. The form is titled "Electronic Personnel Action NOAEPAF 7.3.0.1 (XUTEMP)". The fields are as follows:

Proxy For:		
ID:	900028581	Beyonce Knowles
Transaction:		
Approval Category:	1003ST	STIPEND FOR POSN SP1003
Approval Type:	NEWJBE	Stipend/Supp existing job
Generate ID:	<input type="checkbox"/>	
Query Date:		
Position:	SP1003	Research Associate
Last Paid Date:		
Suffix:	01	

Step 1: Access the form NOAEPAF

Step 2: Complete the Employee Detail portion of the form

Required Field

Field Description

(A)ID

Enter XULA ID for the person you are creating the action.

If you do not know the ID of the employee, click on the drop down box in the ID field, from the **Option List** choose "**List for Employee**". Type the employee's **Last Name** and/or **First Name** then click **Execute Query**. A list of names will appear. Select correct employee name by double clicking in the ID field. The name will then appear in the EPAF Form.

(B)Transaction

Blank. Banner will assign a transaction number after the transaction is Saved.

(C) Query Date

A date used by the system to determine what data to query for the display on the current values that appear on both the Transaction Tab & the Labor Distribution Tab.

The query date entered will be used by the system to display the data from the last change to the record prior to the date you entered.

(E) Approval Type

Leave blank. Approval Type will populate when the Approval Category is selected.

Continued on the next page

(F) Position & Suffix

Enter the employee's Position number and Suffix assigned by Human Resources. The position number for an employee can be obtained from EPAF Departmental BRIO Report. Make sure the Suffix is entered exactly as it is reported to you. A suffix entered as '01' is not the same as '1'.

If the report is unavailable or position number is not known:

- Click the down arrow to the left of the Position field.
- From the menu, select **List of Employee's Jobs (NBIJLST)**,
- Double-Click Position the position that corresponds to the position you are trying to take an action on, and the position and suffix will automatically populate in the field on NOAEPAF.

In instances where a user is creating an EPAF for an employee with multiple positions, they must make sure that they are working with the position that they want to effect a personnel change.

It is very important that the numeric portion of the employee's position number be an exact match to the numeric portion of the Approval Category. The combination of the two fields (Approval Category and Position Number) is what drives how the EPAF will be routed for Approval. If the two fields are not an exact match the EPAF will not route properly.

Stop here to verify that the numeric portion of the Approval Category and the numeric portion of the Position field are an exact match.

HR will inspect each EPAF submitted to insure that the two fields match, if they should find that the two do not match they will return your EPAF and you will have to create a new EPAF using the correct Approval Category & Position number. If that should happen, please see the section entitled "Editing an EPAF".

Step 3: Complete the fields in the "New Value" on the Transaction Tab

Click "Next Block" from the toolbar  or CTRL+Pgdn to get to the Transaction Tab.

Continued on the next page

Enter changes for the corresponding field in each row.

Step 3 Cont'd

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Jobs Effective Date		
<input type="checkbox"/>	Personnel Date		
<input type="checkbox"/>	Job Status		A
<input type="checkbox"/>	Job Change Reason		
<input type="checkbox"/>	Factor		
<input type="checkbox"/>	Pays		
<input type="checkbox"/>	Annual Salary		
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Approver Action: Queue Status:

FRM-40350: Query caused no records to be retrieved.

(A) Job Effective Date Date the change should become effective. The Jobs Effective Date should always be a date after the date listed in the ^(A)“Last Paid Date” field (*the last paid date field will populate automatically once the employee’s position is selected*).

Generate ID:

Query Date: 07-NOV-2007 Last Paid Date: 31-OCT-2007

Position: SP6319 Software Systems Programmer

Suffix: 01

For example, with this Stipend, if I want the employee to begin being paid for it effective July 1, 2007 I would enter '01-Jul-2007' in the field.

(B) Personnel Date Date the change should become effective.

It should be the same as the effective date or an earlier date. It cannot be a date that is later than the effective date.

(C) Job Status The status of the job once the change has been approved. The default is “A” – Active.

(D) Job Change Reason the job record is being changed. Enter

Reason “00013”, which is the code for “Additional Funding”.

(E) Factor

The number of pay periods the employee should be paid.

If you are not sure what the factor should be, please contact Human Resources for instructions on how to handle the transaction.

(F) Pays

The total number of times the employee should be paid.

If you are not sure what the factor should be, please contact Human Resources for instructions on how to handle the transaction.

(G)Annual Salary Total amount of the stipend. *Example. 1000.00.*

Step 4: Complete the Default Earnings Tab.

To access Default Earnings, click “Next Block” on the tool bar



OR

Click Ctrl+ Pgdn

Transaction | **Default Earnings** | Job Labor Distribution | Routing | Other Information and Comments

Current Default Earnings

Effective Date	Earnings	Hours or Units	Deemed Hours	Special Rate	Shift	Ended as of Date

Enter the amount to be received

New Default Earnings

Effective Date	Earnings	Hours or Units	Deemed Hours	Special Rate	Shift	Ended as of Date
01-JUL-2007	STP Stipend	1.00		1,000.000000	1	31-JUL-2007

Enter the New Effective Date

Enter the last date that the stipend should be paid

Effective date.
Record: 1/1 | ... | <OSC>

Continued on next page

The Default Earnings Tab is split into two sections: Current Default Earnings and New Default Earnings. If the Default Earnings data will remain the same, simply copy the data in the Current Default Earnings Area to the New Default Earnings Area and change the end date.

Required Field


Description

- Effective Date Date the Stipend Pay should begin. The date should be the same date as the date entered on Transaction Tab.
- Earnings Enter “STP”.
- Hours or Units Enter “1”.
- Deemed Hours The **Deemed Hours** field should be left **blank**.
- Special Rate Enter the amount to be received **per month**.
For example if an employee should receive \$3,000.00 in three (3) installments enter \$1,000.00 in the Special Rate column.
- Shift System will Default a shift, depending on the position.
- End Date The last day in the pay period to receive the entire assigned amount.

If the stipend will be received in intervals (for example, every other month) the **Effective Date** should be the first date in the month amount will be received and the **End As Of** column should reflect

Note:

the last date in the month the amount will be received. Example if an employee is to receive \$1,000.00 in July, September, and November the dates would appear as follows: 070107 – 073107, 090107 - 093007, and 110107 – 113007 repeat the above steps.

Step 5: Save the data entered: Click the save icon  (or clicking File, then Save.)

Step 6: Complete the Labor Distribution Tab.


Job Labor Distribution Tab

The Job Labor Distribution Information Tab Appears

The Labor Distribution attached to the position number will appear: This form is displayed in two parts the Current Job Labor Distribution and the New Job Labor Distribution. In the New Job Labor Distribution area enter the following data.

Required Field	Field Description
(A)Effective Date	The first date the action will be charged to the account. This date should match the effective date entered on the Transaction Tab.
(B)Fund	The six (6) digit account number where the money is to be charged.
(C)Organization	The four (4) digit department/organizational code to be charged.
(D)Account	The four (4) digit account code identifying the type of compensation to be charged, i.e. faculty stipend-6402.
(E)Program	The two (2) digit code for the type of expense categories to be charged such as 10 for teaching, and 20 for research.
(F)Percent	The percentage of the salary that should be charged to the fund code.

Note: the total percentage must equal **100**.

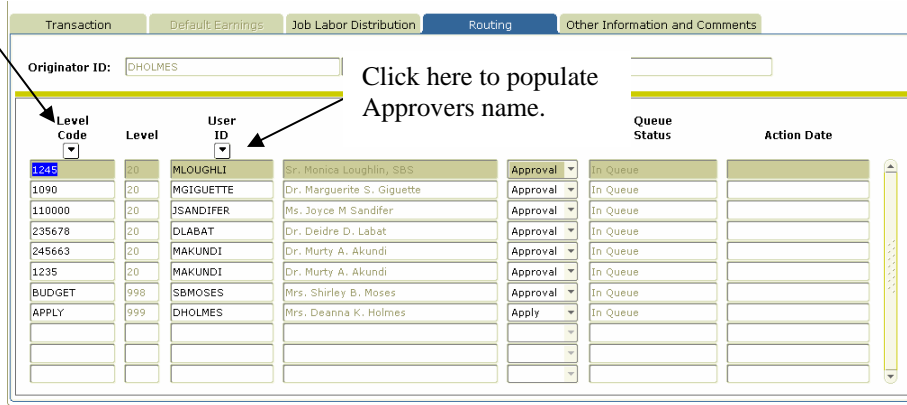
Step 7: Save the data. To save, click the save icon , or by press the 'F10' key.

Step 8: Complete the Routing Tab

To access the tab, click "Next Block" on the toolbar 

OR
Click Ctrl+ Pgd

Approval
Level Code



Level Code	Level	User ID	Name	Action	Queue Status	Action Date
1245	20	MLOUGHLI	Sr. Monica Loughlin, SBS	Approval	In Queue	
1090	20	MGIGUETTE	Dr. Marguerite S. Giguette	Approval	In Queue	
110000	20	JSANDIFER	Ms. Joyce M Sandifer	Approval	In Queue	
235678	20	DLABAT	Dr. Deidre D. Labat	Approval	In Queue	
245663	20	MAKUNDI	Dr. Murty A. Akundi	Approval	In Queue	
1235	20	MAKUNDI	Dr. Murty A. Akundi	Approval	In Queue	
BUDGET	998	SBMOSES	Mrs. Shirley B. Moses	Approval	In Queue	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

The Routing Tab lists all of the individuals that are required to approve this transaction. This tab is predefined based on the positions funding and organization.

If you do not see all of the individuals that you know should approve this transaction, please contact EPAF Administration of Human Resources and we can assist you with getting the routing information updated.

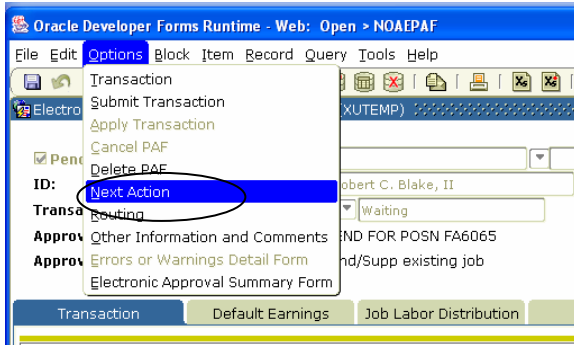
To complete the "Routing Tab" in the example above, the first level code is "1245". Then click in the User ID field (it is currently bank)

- A. In the Level Code column click on the first Level Code.
- B. Tab to the blank field in the User ID Column. Click the User ID drop down. The user id for the individual responsible for approving for that level code will appear automatically.
- C. The Required Action field is automatically populated with the action the Approver is required to take: **Approval**, FYI or Apply.
- D. Complete each row in the Level Code column that is populated by moving the arrow down to the next level code and repeating A and B.

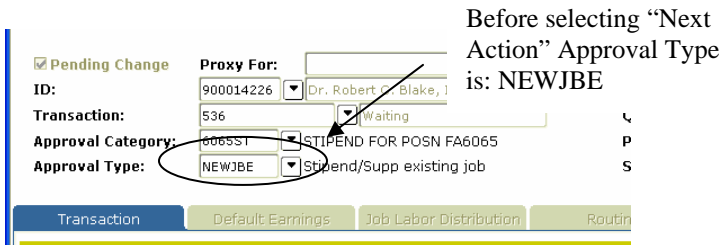
Continued on next page

Step 9: End the Funding for the Stipend

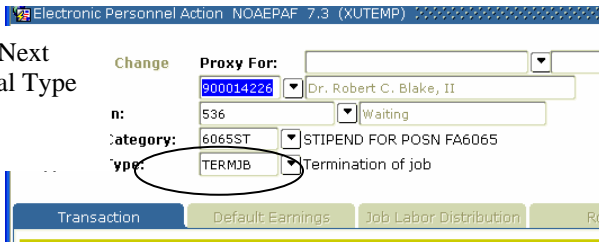
- A. On the File Menu, click Options, select “Next Action”.

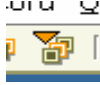


- B. Notice that the only field that changed was the Approval Type field. It changed from Labor to NEWJBE.



After Selecting “Next Action”, Approval Type is: TERMJB



- C. Click “Next Block on the tool bar , or Control+Page Down to access the Transaction Tab.

Step 10: Complete the fields on the Transaction Tab.

Continued on next page

Transaction					Default Earnings	Job Labor Distribution	Routing	Other Information and Comments
Applied Status	Field Name		Current Value	New Value				
P	Jobs Effective Date A		01-NOV-2007	30-JUN-2008				
P	Personnel Date B		01-NOV-2007	07-NOV-2007				
P	Job Status		A	T				
P	Job Change Reason C		00012	00017				
Approver Action:					<input type="text"/>			
					Queue Status: In the Queue			

Default Earnings Tab

Required Field

(A) Jobs Effective Date

Field Description

Date the funding for the stipend must end. This date should be a date that is later than the date the funding for the Stipend started. It be the date that was entered in the “**Ended as of Date**” field on the Default Earnings Tab.

(B) Personnel Date

It should be the same as the effective date or an earlier date. It cannot be a date that is later than the effective date.
For example, the contract is set to end December 21, 2007. The Personnel date should be December 21, 2007 or a date earlier.

(C) Job Status

System Default is “T”

(D) Job Change Reason

Reason the job record is being changed. Enter “00017”, which is the code for “Terminate funding”.

Step 13: Save the data entered on the Transaction Tab: click the save icon



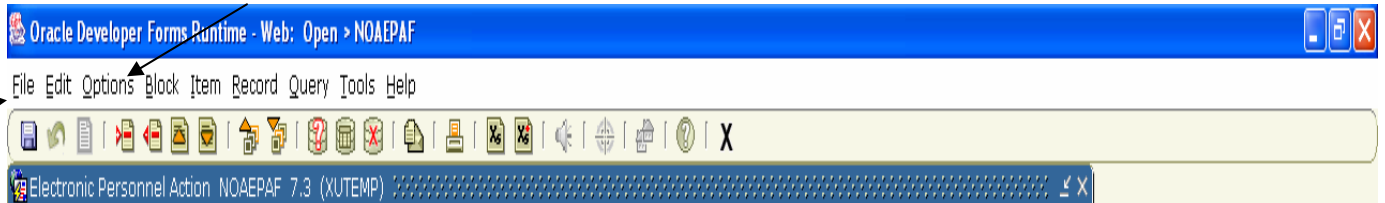
, or by press the ‘F10’ key.

Step 14: Submit the transaction

Submitting an EPAF transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.

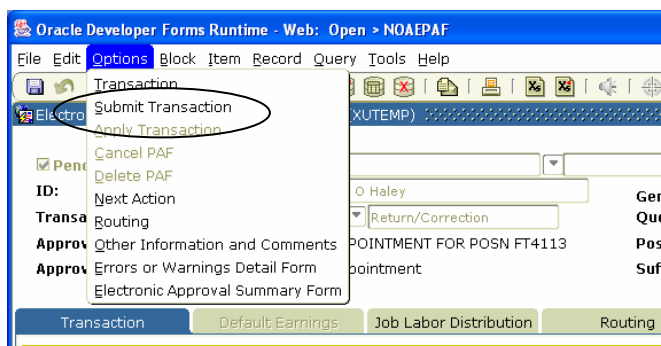
Continued on next page

Options Field



(1)File Menu

- A Click the Transaction Tab
- B On the file menu, click **Options**.
- C Select Submit Transaction.



If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.

Select Submit Transaction.

Message Area

Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date	01-JUN-2007	01-MAR-2008
P	Personnel Date	04-JUN-2007	01-MAR-2008
P	Job Status	A	A
P	Job Change Reason		00015
P	Annual Salary	65000	
P	Regular Rate	31.250601	

Approver Action: Queue Status:

Transaction submitted.
Record: 1/6

If you are taken to the screen below, please note the errors listed and then check the Common Errors area of the FAQ's to resolve them. If you receive an error message that is not in the Common Errors section, contact the EPAF Administrator in Human Resources with the error message for further assistance.

Continued on next page

Oracle Developer Forms Runtime - Web: Open > NOAEPAF - NOIEMSG

File Edit Options Block Item Record Query Tools Help

Electronic Approvals Error Message NOIEMSG 7.3 (XUTEMP)

Proxy For:

Transaction Number: ID: 900015008 Mr. Kenneth Kirk

Originator: LSANDERS

Category: 2390LD LABOR DIST FOR POSN FT2390 Errors Warnings

Approval Type	Error Type	Errors and Warnings Information

3. Creating an EPAF

D. Terminating an Employee

Terminating an employee from the University involves two steps:

- 1) Terminating the employee in his/her current position, and
- 2) Terminating (separating) the employee from the university as an employee.

Before you begin please make sure you have the following data available for the employee that you are creating the action:

A. Employee's XULA ID

B. Employee Position Number

A. Terminate the employee in his/her current position.

Step 1: Log into Banner and access the form NOAEPAF.

Step 2: Complete the information in the Employee Detail Portion of the form

The screenshot shows the 'Electronic Personnel Action - NOAEPAF 7.3.0.1 (XUTEMP)' form. It includes a 'Pending Change' checkbox and several input fields. The 'ID' field contains '900028581' and 'Beyonce Knowles'. The 'Transaction' field is empty. The 'Approval Category' is '6319TM' and 'TERMINATE POSN SP6319'. The 'Approval Type' is 'TERMJB' and 'Termination of Job'. The 'Proxy For' field is empty. The 'Generate ID' field has a button icon. The 'Query Date' field is empty. The 'Last Paid Date' field is empty. The 'Position' field is 'SP6319' and 'Software Systems Programmer'. The 'Suffix' field is empty. There are tabs at the bottom: 'Transaction', 'Default Employee', 'Tab Labor Distribution', 'Position', and 'Other Information and Comments'. Arrows labeled A, D, and C point to specific fields in the form.

Required Field

Field Description

(A)ID

Enter XULA ID for the person you are creating the action.

If you do not know the ID of the employee please see the Frequently Asked Question "How to search for an employee's XULA ID?"

Transaction

Blank. Banner will assign a transaction number after the transaction is Saved).

(C)Query Date

A date used by the system to determine what data to query for the display on the current values that appear on both the Transaction Tab & the Labor Distribution Tab.

The query date entered will be used by the system to display the data from the last change to the record prior to the date you entered.

(D)Approval Category

Click the drop down box in the **Approval Category** field and Select the appropriate **Approval Category**. Remember that the Approval Category will consist of the last 4 digits of the employee's Position number and the Abbreviation for the action.

Continued on next page.

It is very important that the correct Approval Category is selected because that is what defines how the EPAF will be routed. If an incorrect Approval Category is selected the EPAF will not be routed to the correct organization for Approval.

(E)Approval Type Leave blank. Approval Type will populate when the Approval Category is selected.

(F)Position & Suffix Enter the employee's Position number and Suffix assigned by Human Resources. The position number for an employee can be obtained from EPAF Departmental BRIO Report. Make sure the Suffix is entered exactly how it is presented to you. A suffix entered as '01' is not the same as '1'.

If the report is unavailable or position number is not known:

- Click the down arrow to the left of the Position field.
- From the menu, select **List of Employee's Jobs (NBIJLST)**,
- Double-Click Position the position that corresponds to the position you are trying to take an action on, and the position and suffix will automatically populate in the field on NOAEPAF.

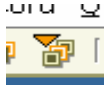
In instances where a user is creating an EPAF for an employee with multiple positions, they must make sure that they are working with the position that they want to effect a personnel change.

It is very important that the numeric portion of the employee's position number be an exact match to the numeric portion of the Approval Category. The combination of the two fields (Approval Category and Position Number) is what drives how the EPAF will be routed for Approval. If the two fields are not an exact match the EPAF will not route properly.

Stop here to verify that the numeric portion of the Approval Category and the numeric portion of the Position field are an exact match.

HR will inspect each EPAF submitted to insure that the two fields match, if they should find that the two do not match they will return your EPAF and you will have to create a new EPAF using the correct Approval Category & Position number. If that should happen, please see the section entitled "Editing an EPAF".

Step 3: Complete the fields in the "New Value" on the Transaction Tab

Click "Next Block" on the tool bar  or CTRL+Pgdn to get to the Transaction Tab.

Continued on next page

Step 3 Continued

Enter data here

Transaction				
Default Earnings		Job Labor Distribution		Routing
Other Information and Comments				
Applied Status	Field Name	Current Value	New Value	
P	Jobs Effective Date A	31-MAR-2007	01-APR-2007	
P	Personnel Date B	03-MAY-2006	04-MAY-2007	
P	Job Status	T	T	
P	Job Change Reason	00017	RESIG	

Required Fields

(A)Jobs Effective Date

Fields Description

Date the Termination becomes effective.

(B)Personnel Date

Date the Termination is effective.

It should be the same as the effective date or an earlier date. It cannot be a date that is later than the effective date.

For example, the employee is scheduled to terminate employment on April 1, 2007, then the personnel date should be April 1, 2007, or a date earlier.

Job Status

System Default is "T"

(C)Job Change Reason

Other Information and Comments	
New Value	
01-JAN-2008	
01-JAN-2008	
A	
REAPP	
12	

The reason the employee is separating from the University.


You must select from a list of pre-defined reasons. To select:

- 1)click in the "Job Change Reason" field (it is currently blank).
- 2) Click arrow under "New Value".
- 3) You are taken to the Change Reason field form.
- 4) Double click on the reason code that identifies the reason that the employee is separating from the

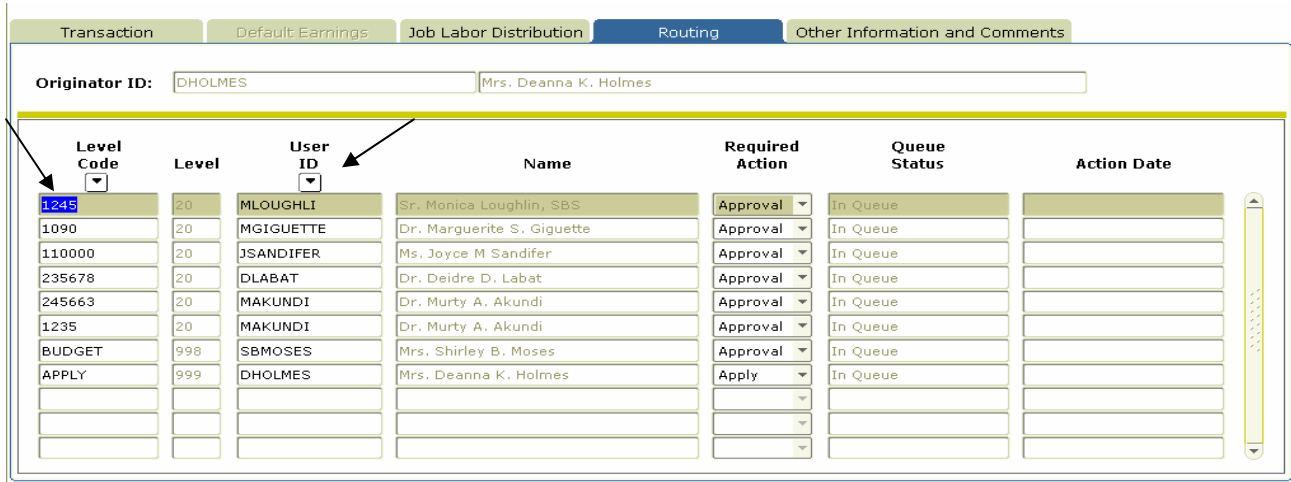
University.

- 5) Once you double click, the reason will populate in the Job Change Reason field on NOAEPAF.

Continued on the next page

Step 4: Save the data on the Transaction Tab: click the save icon  on the toolbar, or press the 'F10' key (or clicking File, then Save.)

Step 5: Complete the Routing Tab.



Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1245	20	MLOUGHLI	Sr. Monica Loughlin, SBS	Approval	In Queue	
1090	20	MGIGUETTE	Dr. Marguerite S. Giguette	Approval	In Queue	
110000	20	JSANDIFER	Ms. Joyce M Sandifer	Approval	In Queue	
235678	20	DLABAT	Dr. Deidre D. Labat	Approval	In Queue	
245663	20	MAKUNDI	Dr. Murty A. Akundi	Approval	In Queue	
1235	20	MAKUNDI	Dr. Murty A. Akundi	Approval	In Queue	
BUDGET	998	SBMOSES	Mrs. Shirley B. Moses	Approval	In Queue	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

The Routing tab lists all of the individuals that are required to approve this transaction. This tab is predefined based on the positions funding and organization.

If you do not see all of the individuals that you know should approve this transaction, please contact Human Resources who can assist you with getting the routing information updated.

To complete the “Routing Tab” for the example above, the first level code is “1245”. Then click in the User ID field (it is currently blank)

- A. In the Level Code column click on the first Level Code.
- B. Tab to the blank field in the User ID Column. Click the User ID drop down. The user id for the individual responsible for approving for that level code will appear automatically.

Continued on next page

The Required Action field is automatically populated with the action the Approver is required to take: **Approval**, FYI or Apply.

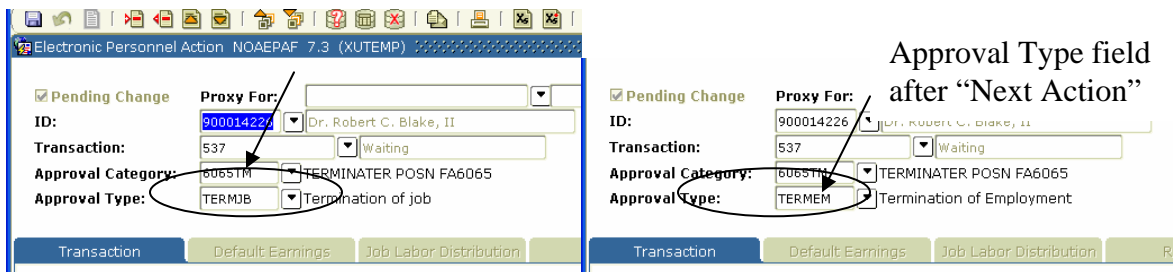
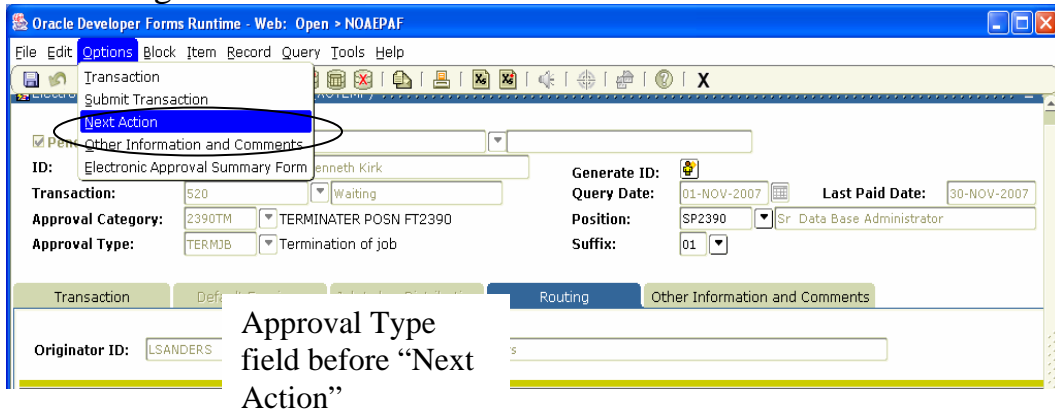
- D. Complete each row in the Level Code column that is populated by moving the arrow down to the next level code and repeating A and B.



Step 6: Click the save icon (clicking File, then Save), to save the changes that you have made to Transaction Tab.

B. Terminate (separate) the employee from the University.

Step 7: From the Option Menu, select “Next Action”. Notice the Approval Type field changes after the selection.



Step 8: Click Next Block , or CTRL + PAGE DOWN to access the Transaction Tab.

Continued on the next page

Step 9: Complete the fields in “*New Value*” column.

Required Fields

- Last Work Date
- Employee Status
- Term Reason Code

Fields Description

- Last day employee is scheduled to report to work
- System default is “T”
- The system code that describes the reason for the employee’s termination.

To view a list of valid termination reasons, click the drop down box under the *New Value* column. The Termination Reason Form will appear. Double click the reason that is closest to the reason that the employee is terminating. If you require assistance with selecting a reason, please contact Human Resources. Last day employee actually worked

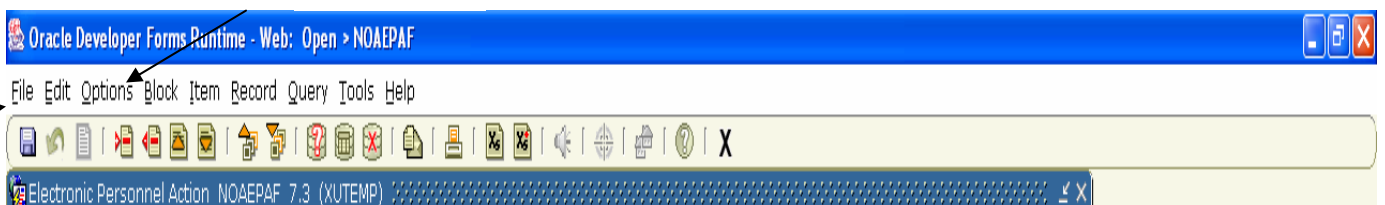
Termination Date

Step 10: Click the save icon, or F10 (click File, then Save), to save the data entered on the transaction tab.

Step 11: Submit the transaction

Submitting an EPAF transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.

Options Field

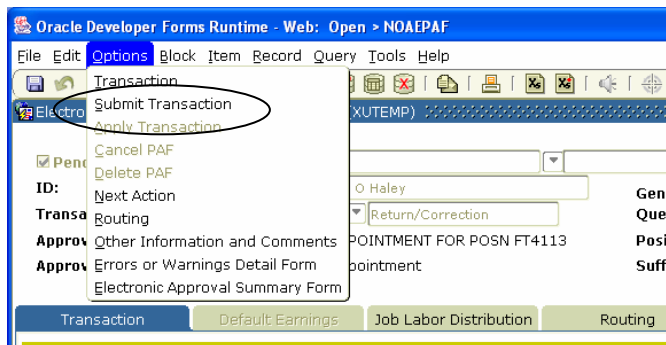


(1)File Menu

Transaction					Default Earnings	Job Labor Distribution	Routing	Other Information and Comments
Applied Status	Field Name	Current Value	New Value					
P	Jobs Effective Date	01-NOV-2007	30-JUN-2008					
P	Personnel Date	01-NOV-2007	07-NOV-2007					
P	Job Status	A	T					
P	Job Change Reason	00012	00017					

Approver Action: Queue Status:

- A Click the Transaction Tab
- B On the file menu, click **Options**.
- C Select Submit Transaction.



If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.

Continued on next page

If you are taken to the screen below, please note the errors listed and then check the Common Errors area of the FAQ's to resolve them. If you receive an error message that is not in the Common Errors section, contact the EPAF Administrator in Human Resources with the error message for further assistance.

Oracle Developer Forms Runtime - Web: Open > NOAEPAF - NOIEMSG

File Edit Options Block Item Record Query Tools Help

Electronic Approvals Error Message - NOIEMSG 7.3 (XUTEMP)

Proxy For:

Transaction Number: ID: 900015008 Mr. Kenneth Kirk

Originator: LSANDERS

Category: 2390LD LABOR DIST FOR POSN FT2390 Errors Warnings

Approval Type	Error Type	Errors and Warnings Information

3. Creating an EPAF

D. New Hire Staff/Faculty

New Hire- New Staff/Faculty member who has not been previously employed at the University.

Re-Hire – A Staff/Faculty member rehired after a break in service.

This documentation will apply to: New Hire Exempt Employees (University Funded Only), New Hire Exempt Employees (University/Grant Funded), New Hire Non-Exempt Employees (University Funded Only), New Hire Non-Exempt Employees (University/Grant Funded) and Re-Hires

Please Note: If the new employee is filling a new position that has never existed with the University, an alternate process must be followed (Please contact Human Resources for the process.).

- ❖ *Non-Exempt/Hourly Employee (University Funding): Follow Steps 1 – 8 and Step 15.*
- ❖ *Exempt/Salaried Employee (University Funding): Follow Steps 1 – 11 and Step 15.*
- ❖ *Non-Exempt/Hourly Employee (University/Grant Funding): Follow Steps 1 – 9, and Steps 12 – 15.*
- ❖ *Exempt/Salaried Employee (University/Grant Funding): Follow Steps 1 – 9, Steps 10 – 11 and Steps 12 – 15.*

Before you begin, please make sure that you have the following information available:

This information will be provided to the Supervisor once the New Hire package has been completed in the Human Resources Office

- New Employee's XULA ID
- Employee Position Number and Suffix
- Approval Category
- Supervisor XULA ID
- Supervisor's Position and Suffix

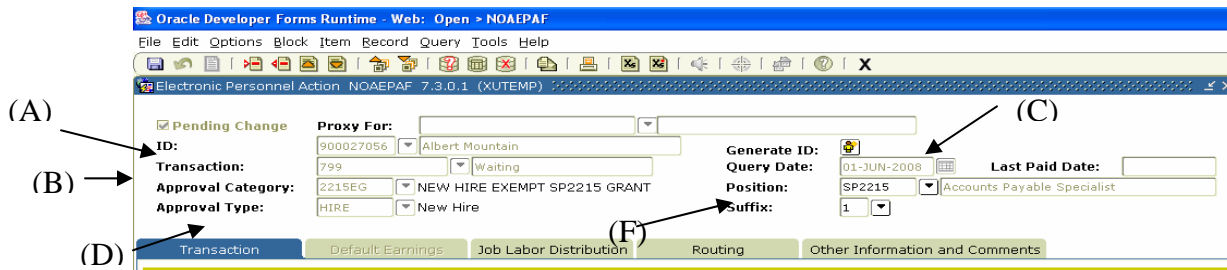
Continued on next page

This information will be provided to the Supervisor once the “New Hire” Paperwork has been completed and returned to the Human Resources Office.

To create the New Hire Action using EPAF: (Log into Banner)

Step 1: Access the form **NOAEPAF**.

Step 2: Complete the Employee Information portion of the form.



Required Fields

Field Description

- (A) ID Enter XULA ID for the person you are creating the action.
- (B) Transaction Blank. Banner will assign a transaction number after the transaction is Saved for the first time.
- (C) Query Date Query Date for a New Hire is the effective date of the hire.

Example: A New Hire start date is effective June 1, 2008 the Query Date should be 06/01/08.
- (D) Approval Category Enter the approval category provided by Human Resources.

This information can be obtained from the EPAF Report that is available from BRIO. Detailed instructions on accessing the report can be found on the Human Resources site from the XULA web page.
- (E) Approval Type Blank. Approval Type will populate when the Approval Category is selected.

(F) Position & Suffix Enter the employee's Position number and Suffix as assigned by Human Resources.

Make sure the Suffix is entered exactly how it is presented to you. A suffix entered as '01' is not the same as '1'.

It is very important that the numeric portion of the employee's position number be an exact match to the numeric portion of the Approval Category.

The combination of the two fields (Approval Category and Position Number) is what drives how the EPAF will be routed for Approval. If the two fields are not an exact match the PAF will not route properly.

Stop here to verify that the numeric portion of the Approval Category and the numeric portion of the Position field are an exact match.

HR will inspect each EPAF submitted to insure that the two fields match, if they should find that the two do not match they will return your EPAF and you will have to create a new EPAF using the correct Approval Category & Position number. If that should happen, please see the section entitled "Editing an EPAF".

Step 3: Click "Next Block" on the toolbar  or CTRL+Pgdn to get to the Transaction Tab.

Step 4: Complete the field under "New Value" on the Transaction Tab.

Continued on next page

Enter data for the corresponding row in each column

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Job Begin Date		01-JUN-2008
<input type="checkbox"/>	Jobs Effective Date		01-JUN-2008
<input type="checkbox"/>	Contract Type		P
<input type="checkbox"/>	Annual Salary		50000
<input type="checkbox"/>	Regular Rate		
<input type="checkbox"/>	Step		0
<input type="checkbox"/>	Personnel Date		01-JUN-2008
<input type="checkbox"/>	Factor		12
<input type="checkbox"/>	Pays		12
<input type="checkbox"/>	Title		Accounts Payable Specialist

Approver Action: Queue Status:

- | Required Field | Field Description |
|------------------------|---|
| (E) Job Begin Date | The <i>Day</i> the Job was created. If you do not know the day the Job was created please contact the <i>Employment Specialist</i> in Human Resources. |
| (F) Job Effective Date | Date the New Hire should become effective.

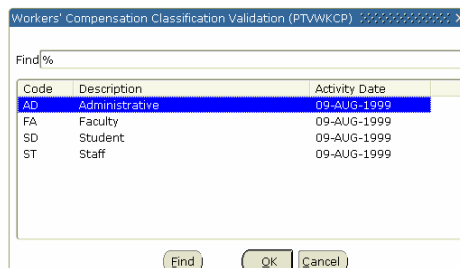
For example, with this New Hire, the action is effective June 1, 2008 therefore I would enter "06/01/08 in the field. |
| (G) Contract Type | Skip Step the value default for this field is "P" (Primary Position). |
| (H) Annual Salary | Required only if the employee is Salaried/Exempt Employee. |
| (I) Regular Rate | Required only if the employee is an Hourly/Non-Exempt Employee. |
| (J) Step | Skip Step the value default for this field is "0" |
| (K) Personnel Date | Date the New Hire should become effective. It should be the same as the effective date or the effective date of the action. |

Continued on the next page

- (L) Factor
- The number of pay periods the employee should be paid.
For employees paid **MONTHLY** the Factor is usually **12**.
For employees paid **BI-WEEKLY** the factor is usually **26**.
For Faculty members the factor is usually **10** or **12**.
If you are not sure what the factor should be, please contact Human Resources for instructions on how to handle the transaction.
- (M) Pays
- The total number of times the employee should be paid.
For employees paid **MONTHLY** the Factor is usually **12**.
For employees paid **BI-WEEKLY** the factor is usually **26**.
For Faculty members the pays is usually **10** or **12**.
If you are not sure what the factor should be, please contact Human Resources for instructions on how to handle the transaction.
- (N) Job Title
- Type the Job Title as it appears in the position description on the top of the page (*should you have any questions regarding the job title please contact the Employment Specialist in Human Resources*).
- (O) Appointment Percent
- Enter the Appointment Percent – the percentage of time an employee will work.
For example: An employee who is full-time the appointment percent is 100 percent. For an employee who is half time the percentage would be 50 percent. Please do not use the percentage sign when completing this field.

Continued on next page

- (P) Hours Per Pay Enter the Hour per Pay – the total number of hours worked per pay period.
- (Q) Hours Per Day Enter the Hour per Day – the total number of hours worked per pay day.
- (R) Job Status Skip Step the value default for this field is “A” (Active).
- (S) Supervisor ID Enter the position’s Supervisor ID. The Supervisor ID is required for all New Hires. If you do not have the Supervisor’s ID, please [click here](#) for instruction on how to search for Supervisor’s ID.
- (T) Supervisor Position Enter the Supervisor’s Position Number. If you do not have the Supervisor’s position number, please [click here](#) for instructions on how to search for Supervisor’s position number.
- (U) Supervisor Suffix Enter the Supervisor Suffix field from the position search.
- (V) Workers Comp Code Enter the Workers Comp Code. To select from a list, click on the New Value drop down and select the appropriate Workers comp An explanation of the codes is as follows:



Continued on next page


(W) Job Location Enter the appropriate Job Location. The Job Location is for KRONOS purposes only. To select from a list, click on the New Value drop down and select the appropriate Workers comp

<i>E60</i>	<i>Exempt 60 min break</i>
<i>N7-60</i>	<i>Non-Exempt 7 hour 60 min break</i>
<i>N7-30</i>	<i>Non-Exempt 7 hour 30 min break</i>
<i>N8-60</i>	<i>Non-Exempt 8 hour 60 min break</i>
<i>N8-30</i>	<i>Non-Exempt 8 hour 30 min break</i>
<i>CWI</i>	<i>Student CWI</i>
<i>CWS</i>	<i>Student CWS</i>

Step 5: Save the data that you have entered.

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the 'F10' key(or clicking File, then Save.)

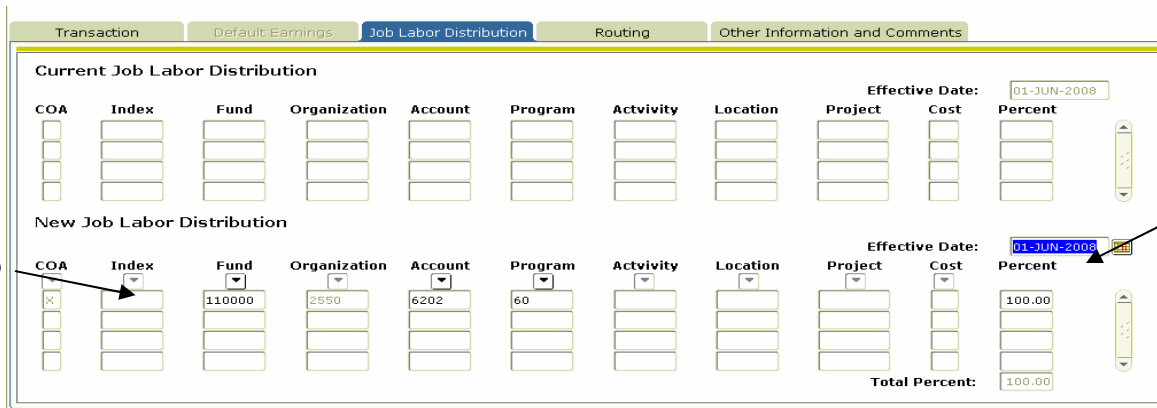
Step 6: Complete the Labor Distribution Tab

To access the tab, click "Next Block" on the toolbar 

OR

Click Ctrl+ Pgd

Job Labor Distribution Tab



The screenshot shows a software interface with several tabs: Transaction, Default Earnings, Job Labor Distribution (selected), Routing, and Other Information and Comments. Below the tabs are two main sections: "Current Job Labor Distribution" and "New Job Labor Distribution". Each section has a grid of input fields for various categories: COA, Index, Fund, Organization, Account, Program, Activity, Location, Project, Cost, and Percent. The "Effective Date" is set to 01-JUN-2008. In the "New Job Labor Distribution" section, the Fund field contains "110000", Organization contains "2550", Account contains "6202", and Program contains "60". The Percent field is set to "100.00". A "Total Percent" field at the bottom right also shows "100.00". Annotations with arrows point to the Effective Date field (labeled "Enter new effective date here") and the COA field in the New section (labeled "Enter new funding info here").

The Job Labor Distribution Information Form Appears

Continued on next page

The Labor Distribution attached to the position number will appear: This form is displayed in two parts the Current Job Labor Distribution and the New Job Labor Distribution. In the New Job Labor Distribution area enter the following data.

Required Fields

Field Description

- a. Effective Date** The first date the action will be charged to the account. This date should match the effective date entered on the Transaction Tab.
- b. Fund** The six (6) digit account number where the position’s salary is to be charged.
- c. Organization** The four (4) digit department/organizational code to be charged.
- d. Account** The four (4) digit account code identifying the type of compensation to be charged, i.e. Admin Support– 6204.
- e. Program** The two (2) digit code for the type of expense categories to be charged such as 10 for teaching, and 20 for research.
- f. Percent** The percentage of the salary that should be charged to the fund code. Please note, the total percentage must equal **100 percent**.

Step 7: Save the data that has been entered.

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the ‘F10’ key (or clicking File, then Save.)

Step 8: Complete the Routing Tab

To access the tab, click “Next Block” on the toolbar



OR

Click Ctrl+ Pgd

Level Code Column

Click here to populate Approvers name.

Originator ID: Mrs. Deanna K. Holmes

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1090	20	MGIGUETT	Dr. Marquerite S. Giguette	Approval	In Queue	
110000	20	JSANDIFE	Ms. Joyce M Sandifer	Approval	In Queue	
235676	20	GDAMOUR	Dr. Gene A. D'Amour	Approval	In Queue	
1245	20	AEDWARDS	Dr. Andrea M. Edwards	Approval	In Queue	
BUDGET	998	SBMOSES	Mrs. Shirley B. Moses	Apply	In Queue	

Continued on next page

The Routing Tab lists all of the individuals that are required to approve this transaction. This tab is predefined based on the positions funding and organization.

If you do not see all of the individuals that you know should approve this transaction, please contact Human Resources who can assist you with getting the routing information updated.

To complete the “Routing Tab” in the example above, the first level code is “1090”. Then click in the User ID field (it is currently blank)

- A. In the Level Code column click on the first Level Code.
- B. Tab to the blank field in the User ID Column. Click the User ID drop down. The user id for the individual responsible for approving for that level code will appear automatically.
- C. The Required Action field is automatically populated with the action the Approver is required to take: **Approval**, FYI or Apply.
- D. Complete each row in the Level Code column that is populated by moving the arrow down to the next level code and repeating A and B.

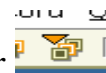
Step 9: Save the Routing.

Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the Routing Tab.

Step 10: Complete the Default Earnings Tab

The Default Earnings Tab is applicable to Salaried (Exempt) employees only.

To access the tab, click “Options Next Action” on the toolbar



OR

Click Ctrl+ Pgd

Column Name Column Description

- a. Effective Date** Skip Effective Date it will default in (the date should be the same date as the date entered on the Transaction Tab).
- b. Earnings** Enter “REG” – Regular Earnings.
- c. Hours or Units** Hours or Units – this field is applicable to Salaried Exempt Employees only. *Example: If the employee is full time the Hours or Units should reflect 173.33. If the employee is half time the Hours or Units should reflect 86.67.*
- d. Deemed Hours** The **Deemed Hours** field should be left **blank**.
- e. Special Rate** The Special Rate field should be left blank.
- f. Shift** System will Default a shift, depending on the position.
- g. End Date** The end date should be left blank.

Step 11: Save the data entered: Click the save icon  (or clicking File, then Save.)

Step 12: Funding Ending for the New Hire (*The Funding Ending is applicable to Grant Funded positions only.*)

Just as the information to start paying the employee’s salary from a grant must be entered, the information to end the grant funding for the employee’s salary must also be entered.

Continued on next page

Oracle Developer Forms Runtime - Web: Open - NOAAPSM - NOAEPAF

File Edit Options Block Item Record Query Tools Help

Transaction Submit Transaction

Electro 1 (XUTEMP)

Other Information and Comments

Electronic Approval Summary Form

ID: Dr. Murty A. Akundi

Transaction:

Approval Category: OVERLOAD EXISTING POSN FT1153

Approval Type: Additional Funding Existing Pos

Generate ID:

Query Date: Last Paid Date:

Position: Faculty, Overload

Suffix:

Transaction Default Earnings Job Labor Distribution **Routing** Other Information and Comments

Originator ID: Mrs. Deanna K. Holmes

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1025	20	LSANDERS	Mrs. Latoya Sanders	Approval	In Queue	
1090	20	MGIGUETT	Dr. Marguerite S. Giguette	Approval	In Queue	
110000	20	SBRUNO	Mr Shane Marcel Bruno	Approval	In Queue	
1235	20	MAKUNDI	Dr. Murty A. Akundi	Approval	In Queue	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

A. From the **Routing Tab**, On the File Menu, click Options, then select “Next Action”.

B. Click “Next Block” from the toolbar , or Ctrl+Page Dn to access the Transaction Tab.

C. Notice that the only field that changed was the Approval Type field. It changed from Default Earning to TERMJB.

Oracle Developer Forms Runtime - Web: Open - NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 7.3.0.1 (XUTEMP)

Pending Change

Proxy For:

ID: Dr. Murty A. Akundi

Transaction:

Approval Category: OVERLOAD EXISTING POSN FT1153

Approval Type: Termination of job

Generate ID:

Query Date: Last Paid Date:

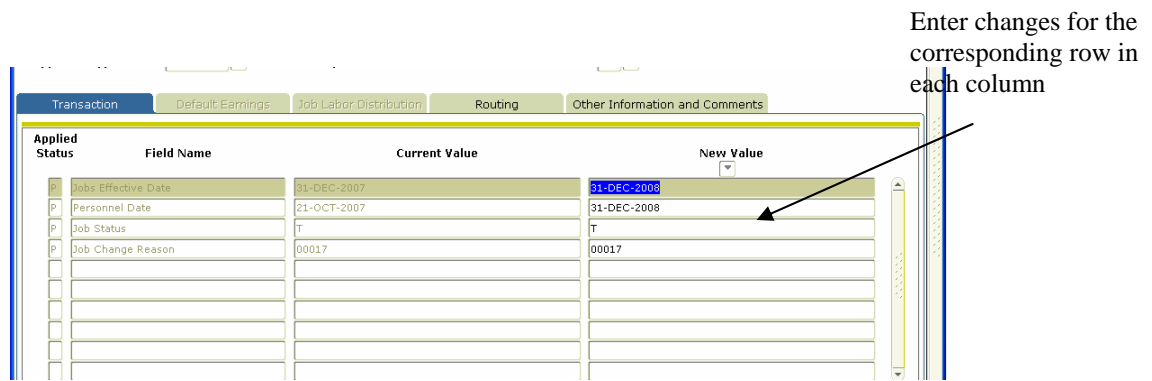
Position: Faculty, Overload

Suffix:

Transaction **Default Earnings** Job Labor Distribution Routing Other Information and Comments

Step 13: Complete the fields on the Transaction Tab.

Continued on next page



Required Fields

Field Description

(A) Jobs Effective Date

Enter the date the funding for the position should end. This date should be the last day in which funding is available for the position.

(B) Personnel Date

Date the Grant Funding ends. It should be the same as the effective date.

(C) Job Status

System Default is “T” Funding Terminated.

Continued on next page

(D) Job Change Reason

Enter the appropriate Job Change Reason
Example: “00017” “Funding Terminated” is the code for “end of contract”.

Step 14: Save the data on the Transaction Tab.

Data can be saved by clicking the diskette icon located on the tool bar or by pressing the ‘F10’ key (or clicking File, then Save.)

Step 15: Submit the transaction

Submitting an EPAF transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.



Transaction | Default Earnings | Job Labor Distribution | **Routing** | Other Information and Comments

Originator ID: Mrs. Deanna K. Holmes

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1025	20	LSANDERS	Mrs. Letoya Sanders	Approval	In Queue	
110000	20	SBRUNO	Mr. Shane Marcel Bruno	Approval	In Queue	
4610	20	KSTCHARL	Dr. Kenneth Anthony St Charles	Approval	In Queue	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

- A** From the Routing Tab, on the file menu click Options
 - B** Select Submit Transaction.
- If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.

Transaction | Default Earnings | Job Labor Distribution | **Routing** | Other Information and Comments

Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date		30-JUN-2009
P	Personnel Date		30-JUN-2009
P	Job Status		T
P	Job Change Reason		00001

Approver Action: Queue Status:

Transaction submitted.
Record: 1/4 | ... | <OSC>

- C** If you are taken to the screen below, please note the errors listed and then check the Common Errors area of the FAQ’s to resolve them. If you receive an error message that is not in the Common Errors section, contact the EPAF Administrator in Human Resources at ext. 5282 with the error message for further assistance.

Oracle Developer Forms Runtime - Web: Open > NOAEPAF - NOIEMSG

File Edit Options Block Item Record Query Tools Help

Electronic Approvals Error Message NOIEMSG 7.3 (XUTEMP)

Proxy For:

Transaction Number: ID: 900015008 Mr. Kenneth Kirk

Originator: LSANDERS

Category: 2390LD LABOR DIST FOR POSN FT2390 Errors

Approval Type	Error Type	Errors and Warnings Information

Transaction Number, press LIST for valid numbers.

Record: 1/1 | ... | <OSC>

1. Creating an EPAF contd.

F. Summer/Research Salaries for Faculty

The period for Summer pay is considered the time period after the last week of class until the date faculty is required to return for Faculty Institute, which is their official date to return to work. During this period a faculty member can earn 1/9th of their annual salary during the summer months (per month). The amount they are eligible to earn is calculated as follows:

If an employee earns \$53,500.00 a year he/she can earn up to 5,944.44 per month during the summer. Since the month of May is never calculated as a full month the number of days worked doing summer is divided by the number of days worked during that month, which is then multiplied by the assigned amount they can earn.

For Example: If the month of May has 22 work days and an employee worked 15 of those days, the amount earned for the month would be $15/22 = 0.6818181 \times 5,944.44 = \$4,053.027$, which would be the amount he/she can earn for the month of May. The months of June and July would be paid at the assigned amount of \$5,944.44. The month of August would be calculated according to the number of work days and the days worked during that month.

NOTE: Calculate the salary for the months of May, June through July and August. Originate an EPAF effective May 1st – May 31st for May's salary, June 1st through July 31st for June and July's salary, and August 1st through August 31st for August salary.

Before you begin please make sure you have the following data available for the employee that you are creating the action.

A. Employee's XULA ID

C. Employee Position Number

Step 1: Access the form *NOAEPAF*.

Step 2: Complete the Employee Information portion of the form.

(A) → Proxy For:

(B) → ID: 900013933 Dr. Britney A. Spears

(C) → Generate ID:

(D) → Transaction

(F) → Job Labor Distribution

Transaction:

Approval Category: 404SSE FACULTY SUMMER EXISTING SP4045

Approval Type: ADDFUD Additional Funding Existing Po

Query Date: 01-JUN-2008 Last Paid Date: 31-AUG-2007

Position: SP4045 Physics, Summer

Suffix: 1

Continued on next page

Required Fields	Field Description
(A)ID	<p>Enter XULA ID for the person you are creating the action.</p> <p>If you do not know the ID of the employee please reference the FAQ's "Searching for an employee's XULAID number".</p>
(B) Transaction	<p>Blank. Banner will assign a transaction number after the transaction is Saved for the first time.</p>
(C)Query Date	<p>A date used by the system to determine what data to query for the display on the current values that appear on both the Transaction Tab & the Labor Distribution Tab.</p>
(D)Approval Category	<p>The query date entered will be used by the system to display the data from the last change to the record prior to the date you entered.</p> <p>Click the drop down box in the Approval Category field and Select the appropriate Approval Category. Remember that the Approval Category will consist of the last 4 digits of the employee's Position number and the abbreviation for the action. In the screen shot above, the employees Position Number is SP4045. As a result the Approval Category is 4045SE.</p> <p>It is very important that the correct Approval Category is selected because that is what defines how the EPAF will be routed. If an incorrect Approval Category is selected the EPAF will not be routed to the correct organization for Approval.</p>
(E) Approval Type	<p>Leave blank. Approval Type will populate when the Approval Category is selected.</p>
(F)Position & Suffix	<p>Enter the employee's Position number and Suffix assigned by Human Resources. The position number for an employee can be obtained from EPAF Departmental BRIO Report. Make sure the Suffix is entered exactly how it is presented to you. A suffix entered as '01' is not the same as '1'.</p> <p>If the report is unavailable or position number is not known:</p> <ul style="list-style-type: none"> • Click the down arrow to the left of the Position field.

Continued on next page

- From the menu, select **List of Employee's Jobs (NBIJLST)**,
- Double-Click Position the position that corresponds to the position you are trying to take an action on, and the position and suffix will automatically populate in the field on NOAEPAF.

In instances where a user is creating an EPAF for an employee with multiple positions, they must make sure that they are working with the position that they want to effect a personnel change.

It is very important that the numeric portion of the employee's position number be an exact match to the numeric portion of the Approval Category.

The combination of the two fields (Approval Category and Position Number) is what drives how the EPAF will be routed for Approval. If the two fields are not an exact match the PAF will not route properly.

Stop here to verify that the numeric portion of the Approval Category and the numeric portion of the Position field are an exact match.

HR will inspect each EPAF submitted to insure that the two fields match, if they should find that the two do not match they will return your EPAF and you will have to create a new EPAF using the correct Approval Category & Position number. If that should happen, please see the section entitled "Editing an EPAF".

Step 3: Click "Next Block" on the toolbar  or CTRL+Pgdn to get to the Transaction Tab.

Step 4: Complete the field under "New Value" on the Transaction Tab.

Continued on next page

Enter changes for the corresponding row in each column

Applied	Field Name	Current Value	New Value
A	Jobs Effective Date	31-AUG-2007	01-MAY-2008
C	Personnel Date	23-AUG-2007	14-MAY-2008
	Job Status	T	A
	Job Change Reason	00017	00013
E	Factor	1	1
	Pays	1	1
	Annual	8555.56	1000

Approver Action: None Queue Status:

Required Field

Field Description

(A) Jobs Effective Date

The first day of the payroll.

The Jobs Effective Date should be the first day of the pay period that you would like the change to be processed.

For example, with this Faculty Summer Pay, if I want the employee to be paid for the May 31, 2008 payroll I would enter “05/01/08” in the field.

Please Note: The Jobs Effective Date should always be the first day of the pay period that you want the change to become effective. For employees paid monthly, this would be the first day of the month.

(B) Personnel Date

Date the change should become effective.

It should be the same as the effective date or the effective date of the action.

For example, with this Faculty Summer Pay, the action is effective May 14, 2008 therefore I would enter “05/14/08 in the field.

(C) Job Status

The status of the job once the change has been approved. The default is “A” – Active

(D) Job Change Reason

Reason the job record is being changed. System default is “00013” Additional Funding.

(E) Factor

The number of pay periods the employee should be paid.

(F) Pays

The total number of times the employee should be paid.

(G) Annual Salary

Total amount to be paid for each action.

Continued on next page

Step 5: Save the data that has been entered.

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the ‘F10’ key (or clicking File, then Save.)

Step 6: Complete the Default Earnings Tab

To access the tab, click “Options Next Block” on the toolbar




OR
Click Ctrl+ Pgd


Required Fields

Description

- (a) effective Date The first day of the payroll in which the Summer Pay Should be effective
- (b) Earnings Enter “**FSP**” – Faculty Summer (Teaching) or “**FSR**” – Faculty Summer (Non – Teaching).
- (c) Hours or Units Hours or Units – Type in the number **1**.
- (d) Deemed Hours The **Deemed Hours** field should be left **blank**.
- (e) Special Rate Enter the total dollar amount to be received **per month**.
- (f) Shift System will Default a shift, depending on the position.
- (g) End Date The End Date should reflect the last day of the month in which the faculty member should receive the summer pay.

Step 7: Save the data entered: Click the save icon  (or clicking File, then Save.)

Step 8: Complete the Labor Distribution Tab

To access the tab, click “Next Block” on the toolbar 

OR
Click Ctrl+ Pgdn

Job Labor Distribution Tab

The Job Labor Distribution Information Form Appears

The Labor Distribution attached to the position number will appear: This form is displayed in two parts the Current Job Labor Distribution and the New Job Labor Distribution. In the New Job Labor Distribution area enter the following data.

Required Fields

Field Description

- Effective Date The first date the action will be charged to the account.
This date should match the effective date entered on the Transaction Tab.
- Fund The six (6) digit account number where the money is to be charged.
- Organization The four (4) digit department/organizational code to be charged.

Continued on next page

- Account The four (4) digit account code identifying the type of compensation to be charged, i.e. faculty – summer (teaching) 6105 or faculty – summer (non teaching) 6107.
- Program The two (2) digit code for the type of expense categories to be charged such as 10 for teaching, and 20 for research.
- Percent The percentage of the salary that should be charged to the fund code.

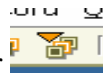
Please note, the total percentage must equal **100 percent**.

Step 9: Save the data that has been entered.

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the ‘F10’ key (or clicking File, then Save.)

Step 10: Complete the Routing Tab

To access the tab, click “Next Block” on the toolbar



OR

Click Ctrl+ Pgd

Level Code Column



Transaction		Default: Earnings		Job Labor Distribution		Routing		Other Information and Comments	
Originator ID: DHOLMES									
Click here to populate Approver's name.									
Level Code	Level	Level Code	Level	Required Action	Queue Status	Action Date			
1025	20	REGRE	Mr. Calvin S. Tregre	Approval	In Queue				
235678	20	MAKUNDI	Dr. Murty A. Akundi	Approval	In Queue				
1235	20	MAKUNDI	Dr. Murty A. Akundi	Approval	In Queue				
1245	20	AEDWARDS	Dr. Andrea M. Edwards	Approval	In Queue				
BUDGET	998	SBMOSES	Mrs. Shirley B. Moses	Approval	In Queue				
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue				

The Routing Tab lists all of the individuals that are required to approve this transaction. This tab is predefined based on the positions funding and organization.

If you do not see all of the individuals that you know should approve this transaction, please contact Human Resources who can assist you with getting the routing information updated.

To complete the “Routing Tab” in the example above, the first level code is “1025”. Then click in the User ID field (it is currently bank)

- A. In the Level Code column click on the first Level Code.

Continued on next page

- B. Tab to the blank field in the User ID Column. Click the User ID drop down. The user id for the individual responsible for approving for that level code will appear automatically.
- C. The Required Action field is automatically populated with the action the Approver is required to take: **Approval**, FYI or Apply.
- D. Complete each row in the Level Code column that is populated by moving the arrow down to the next level code and repeating A and B.

Step 11 Save the Routing.

Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the Routing Tab.

Step 12: End the Appointment

Just as a Faculty member’s Summer Salary start date has been entered, the date the Summer Salary ends must also be entered.

- A From the **Routing Tab**, On the File Menu, click Options, then select “Next Action”.

The screenshot shows the Oracle Developer Forms Runtime interface. The 'Routing' tab is active, displaying a table with the following data:

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1025	20	LSANDERS	Mrs. Latoya Sanders	Approval	In Queue	
1090	20	MGIGUETT	Dr. Marguerite S. Giguette	Approval	In Queue	
110000	20	SBRUNO	Mr Shane Marcel Bruno	Approval	In Queue	
1245	20	AEDWARDS	Dr. Andrea M. Edwards	Approval	In Queue	
211444	20	CKLEIN	Dr. Cheryl L. Stevens	Approval	In Queue	
BUDGET	998	LSANDERS	Mrs. Latoya Sanders	Approval	In Queue	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

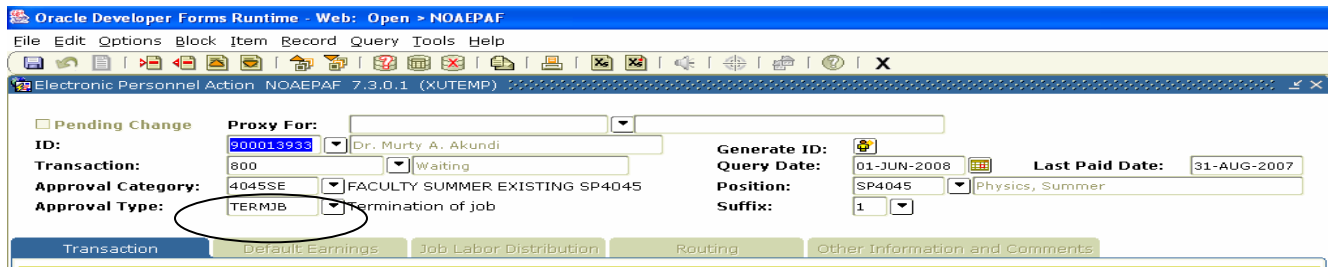
Continued on next page

Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date	31-AUG-2007	31-MAY-2008
P	Personnel Date	23-AUG-2007	31-MAY-2008
P	Job Status	T	T
P	Job Change Reason	00017	00017

Approver Action: Queue Status: In the Queue

B Click “Next Block” from the toolbar , or Ctrl+Page Dn to access the Transaction Tab.

C Notice that the only field that changed was the Approval Type field. It changed from Labor to TERMJB.



Oracle Developer Forms Runtime - Web: Open > NOAEPAF
 File Edit Options Block Item Record Query Tools Help
 Electronic Personnel Action NOAEPAF 7.3.0.1 (XUTEMP)
 Pending Change Proxy For:
 ID: 000013933 Dr. Murty A. Akundi
 Transaction: 800 Waiting
 Approval Category: 4045SE FACULTY SUMMER EXISTING SP4045
 Approval Type: TERMJB Termination of job
 Generate ID:
 Query Date: 01-JUN-2008 Last Paid Date: 31-AUG-2007
 Position: SP4045 Physics, Summer
 Suffix: 1

Step 13: Complete the fields on the Transaction Tab.

Required Fields

Field Description

- (A)Jobs Effective Date Date the Summer Salary is set to end. This date should be the last day of the month that the Summer Salary started.
For example, if the Summer Salary is effective for the May 31, 2008 payroll, the effective date to end the Summer Salary should be May 31, 2008.
- (B)Personnel Date Date the Summer Salary should end. It should be the same as the effective date.
For example, the Summer Salary is set to end May 31, 2008. The Personnel date should be May 31, 2008 or a date earlier.
- (C)Job Status System Default is “T”
- (D)Job Change Reason Enter “00017”. “Funding Terminated” is the code for “end of contract”.

Continued on next page

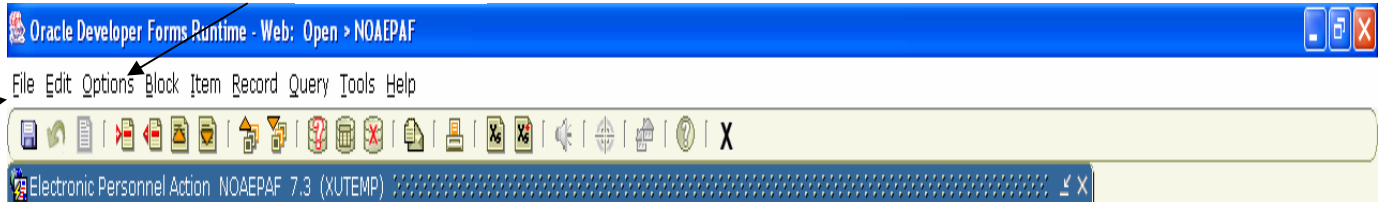
Step 14: Save the data on the Transaction Tab.

Data can be saved by clicking the diskette icon located on the tool bar or by pressing the 'F10' key (or clicking File, then Save.)

Step 15: Submit the transaction

Submitting an EPAF transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.

Options Field



A

From the Routing Tab, on the file menu click Options

B

Select Submit Transaction.

If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.

Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date	31-AUG-2007	31-MAY-2008
P	Personnel Date	23-AUG-2007	31-MAY-2008
P	Job Status	T	T
P	Job Change Reason	00017	00017

Approver Action: Queue Status:

Transaction submitted.
Record: 1/4

Continued on next page

C

If you are taken to the screen below, please note the errors listed and then check the Common Errors area of the FAQ's to resolve them. If you receive an error message that is not in the Common Errors section, contact the EPAF Administrator in Human Resources at ext. 5282 with the error message for further assistance.

Oracle Developer Forms Runtime - Web: Open > NOAEPAF - NOIEMSG

File Edit Options Block Item Record Query Tools Help

Electronic Approvals Error Message NOIEMSG 7.3 (XUTEMP)

Proxy For: []

Transaction Number: 518 ID: 900015008 Mr. Kenneth Kirk

Originator: LSANDERS

Category: 2390LD LABOR DIST FOR POSN FT2390

Errors Warnings

Approval Type	Error Type	Errors and Warnings Information

Transaction Number; press LIST for valid numbers.

Record: 1/1 | ... | <OSC>

3. Creating an EPAF contd.

G. Faculty Overloads — Payments for additional teaching services or, a project outside of the contracted instructional duties.

Example: Teaching an additional class.

Note: Use the Faculty Member’s “P” – Primary Position when processing an Overload EPAF.

Before you begin please make sure you have the following data available for the employee that you are creating the action.

A. Employee’s XULA ID

- **Employee Position Number**

Step 1: Access the form NOAEPAF.

Step 2: Complete the Employee Information portion of the form.

Required Fields

Field Description

- | | |
|-----------------------|---|
| (A) ID | Enter XULA ID for the person you are creating the action. If you do not know the ID of the employee please reference the FAQ’s “Searching for an employee’s XULAID number”. |
| (B) Transaction | Blank. Banner will assign a transaction number after the transaction is Saved for the first time. |
| (C) Query Date | A date used by the system to determine what data to query for the display on the current values that appear on both the Transaction Tab & the Labor Distribution Tab. The query date entered will be used by the system to display the data from the last change to the record prior to the date you entered. |
| (D) Approval Category | Click the drop down box in the Approval Category field and Select the appropriate Approval Category . Remember that the |

Approval Category will consist of the last 4 digits of the employee's Position number and the abbreviation for the action. In the screen shot above, the employees Position Number is FT1038. As a result the Approval Category is 1038OL.

It is very important that the correct Approval Category is selected because that is what defines how the EPAF will be routed. If an incorrect Approval Category is selected the EPAF will not be routed to the correct organization for Approval.

(E) Approval Type

Leave blank. Approval Type will populate when the Approval Category is selected.

(F) Position & Suffix

Enter the employee's Position number and Suffix assigned by Human Resources. The position number for an employee can be obtained from EPAF Departmental BRIO Report. Make sure the Suffix is entered exactly how it is presented to you. A suffix entered as '01' is not the same as '1'.

If the report is unavailable or position number is not known:

- Click the down arrow to the left of the Position field.
- From the menu, select **List of Employee's Jobs (NBIJLST)**,
- Double-Click Position the position that corresponds to the position you are trying to take an action on, and the position and suffix will automatically populate in the field on NOAEPAF.

In instances where a user is creating an EPAF for an employee with multiple positions, they must make sure that they are working with the position that they want to effect a personnel change.

It is very important that the numeric portion of the employee's position number be an exact match to the numeric portion of the Approval Category.


Continued on next page

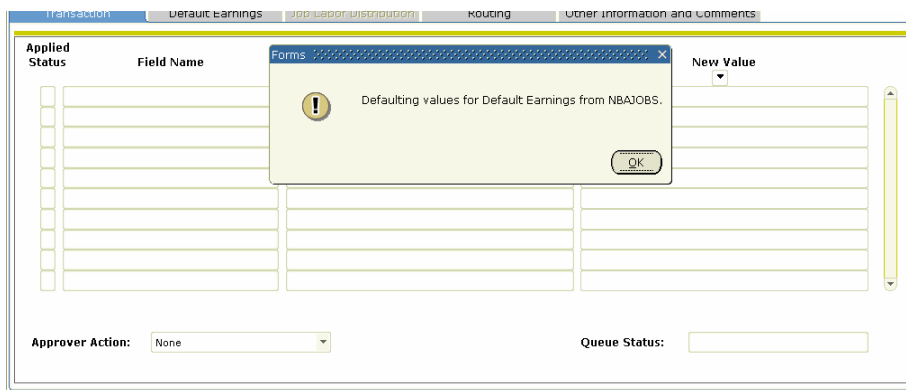
The combination of the two fields (Approval Category and

Position Number) is what drives how the EPAF will be routed for Approval. If the two fields are not an exact match the PAF will not route properly.

Stop here to verify that the numeric portion of the Approval Category and the numeric portion of the Position field are an exact match.

HR will inspect each EPAF submitted to insure that the two fields match, if they should find that the two do not match they will return your EPAF and you will have to create a new EPAF using the correct Approval Category & Position number. If that should happen, please see the section entitled “Editing an EPAF”.

Step 3: Click “Next Block” on the toolbar  or CTRL+Pgdn to get to the Default Earnings Tab. The following screen appears click OK.



Step 4: Complete the Default Earnings Tab.

Continued on next page

The Effective Date will Default

- | Required Field | Description |
|--------------------------|--|
| a. Effective Date | The first day of the payroll in which the Overload Pay Should be effective. |
| b. Earnings | Enter “ OVL ” – Faculty - Overload. |
| c. Hours or Units | Hours or Units – Type in the number 1 . |
| d. Deemed Hours | The Deemed Hours field should be left blank . |
| e. Special Rate | Enter the total dollar amount to be received per month . |
| f. Shift | System will Default a shift, depending on the position. |
| g. End Date | The End Date should reflect the last day of the month in which the faculty member should receive the Overload pay. |

Step 5: Save the data that has been entered.

Data can be saved by clicking the diskette icon locate on the tool bar, or by pressing the “F10” key (or clicking File, the Save).

Step 6: Complete the Routing Tab

To access the tab, click “Next Block” on the toolbar



OR

Click Ctrl+ Pgd

Continued on next page

Transaction Defa Click here to populate Approvers name. Other Information and Comments

Originator ID: DHOLMES

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1025	20	CTREGRE	Mr. Calvin S. Tregre	Approval	In Queue	
110000	20	JSANDIFE	Ms. Joyce M. Sandifer	Approval	In Queue	
1235	20	MAKUNDI	Dr. Murty A. Akundi	Approval	In Queue	
1245	20	AEDWARDS	Dr. Andrea M. Edwards	Approval	In Queue	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

The Routing Tab lists all of the individuals that are required to approve this transaction. This tab is predefined based on the positions funding and organization. **If you do not see all of the individuals that you know should approve this transaction, please contact Human Resources who can assist you with getting the routing information updated.**

To complete the “Routing Tab” in the example above, the first level code is “1025”. Then click in the User ID field (it is currently bank)

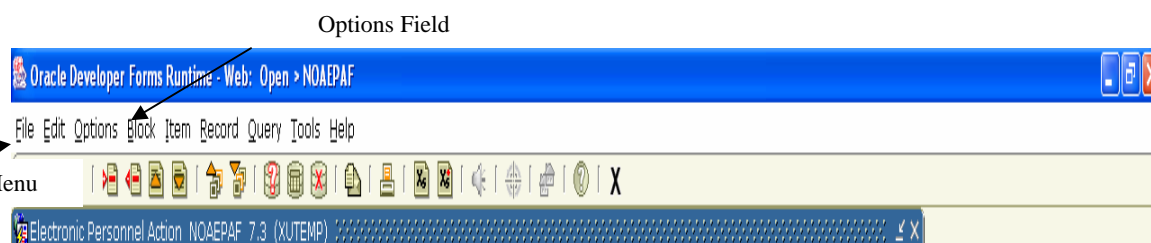
- A. In the Level Code column click on the first Level Code.
- B. Tab to the blank field in the User ID Column. Click the User ID drop down. The user id for the individual responsible for approving for that level code will appear automatically.
- C. The Required Action field is automatically populated with the action the Approver is required to take: *Approval*, FYI or Apply.
- D. Complete each row in the Level Code column that is populated by moving the arrow down to the next level code and repeating A and B.

Step 7: Save the Routing.

Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the Routing Tab.

Step 8: Submit the transaction

Submitting an EPAF transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.



Continued on next page

The screenshot shows the Oracle Developer Forms Runtime interface. The 'Options' menu is open, and 'Submit Transaction' is selected. The form displays the following information:

- Name:** Britney A. Spears
- Query Date:** 01-JUN-2008
- Position:** Faculty, Education
- Suffix:** 1

The 'New Default Earnings' section contains the following data:

Effective Date	Earnings	Hours or Units	Deemed Hours	Special Rate	Shift	Ended as of Date
01-JUN-2008	OVL Faculty Overload	1.00		5,000.000000	1	30-JUN-2008

- A From the Routing Tab, on the file menu click Options
 - B Select Submit Transaction.
- If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.

3. Creating an EPAF

H. Position Transfer Part 1:

A Position Transfer EPAF must be submitted when an employee:

- Is promoted within the same department.
- Changes departments but remains in the same position.
- Is promoted to a position in another department.

For Example: Bobbie Brown works in Housing as a Hall Advisor. He is being promoted to an Engineer Helper in the Central Plant Department. The employee's current position must end the last day in which he will work in Housing.

NOTE: If the employee is changing departments the department in which the employee is departing must originate the EPAF to end the existing position. This action must be completed prior Central Plant processing the EPAF to place him in his new position.

Before you begin please make sure you have the following data available for the employee that you are creating the action.

A. Employee's XULA ID

B. Employee Position Number

Step 1: Access the form NOAEPAF.

Step 2: Complete the Employee Information portion of the form.

Required Fields

(A) ID

Field Description

Enter XULA ID for the person you are creating the action. If you do not know the ID of the employee please reference the FAQ's "Searching for an employee's XULAID number".

(B) Transaction

Blank. Banner will assign a transaction number after the transaction is Saved for the first time.

Continued on next page

(C)Query Date A date used by the system to determine what data to query for the display on the current values that appear on both the Transaction Tab & the Labor Distribution Tab.

The query date entered will be used by the system to display the data from the last change to the record prior to the date you entered.

(D)Approval Category Click the drop down box in the **Approval Category** field and Select the appropriate **Approval Category**. Remember that the Approval Category will consist of the last 4 digits of the employee's Position number and the abbreviation for the action. In the screen shot above, the employees Position Number is SC3000. As a result the Approval Category is 3000PE.

It is very important that the correct Approval Category is selected because that is what defines how the EPAF will be routed. If an incorrect Approval Category is selected the EPAF will not be routed to the correct organization for Approval.

(E) Approval Type Leave blank. Approval Type will populate when the Approval Category is selected.

(F)Position & Suffix Enter the employee's Position number and Suffix assigned by Human Resources. Make sure the Suffix is entered exactly how it is presented to you. A suffix entered as '01' is not the same as '1'.

It is very important that the numeric portion of the employee's position number be an exact match to the numeric portion of the Approval Category.

The combination of the two fields (Approval Category and Position Number) is what drives how the EPAF will be routed for Approval. If the two fields are not an exact match the PAF will not route properly.

Stop here to verify that the numeric portion of the Approval Category and the numeric portion of the Position field are an exact match.

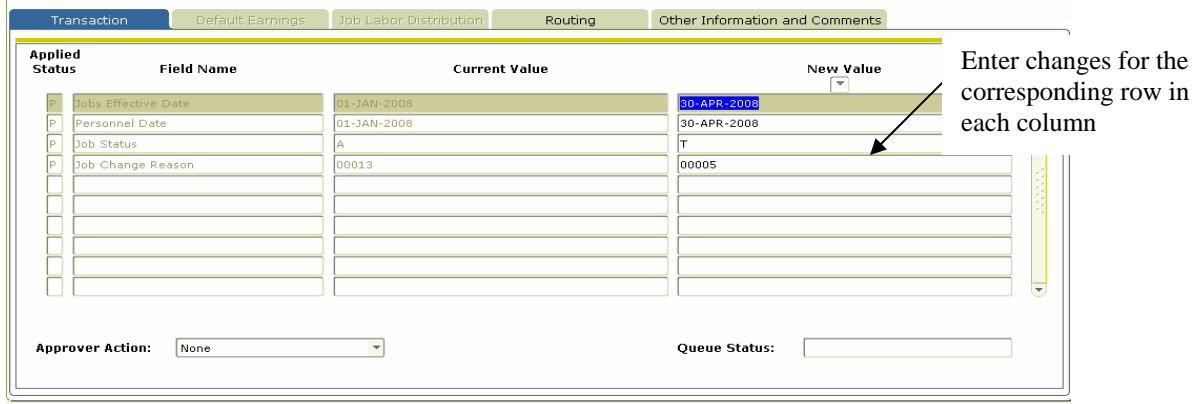
Continued on next page

HR will inspect each EPAF submitted to insure that the two

fields match, if they should find that the two do not match they will return your EPAF and you will have to create a new EPAF using the correct Approval Category & Position number. If that should happen, please see the section entitled “Editing an EPAF”.

Step 3: Click “Next Block” on the toolbar  or CTRL+Pgdn to get to the Transaction Tab.

Step 4: Complete the field under “New Value” on the Transaction Tab.



Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date	01-JAN-2008	30-APR-2008
P	Personnel Date	01-JAN-2008	30-APR-2008
P	Job Status	A	T
P	Job Change Reason	00013	00005

Enter changes for the corresponding row in each column

Required Field

(A) Jobs Effective Date

Field Description

Date the change should become effective. The Jobs Effective Date should always be a date after the date listed in the ^(A)“**Last Paid Date**” field (*the last paid date field will populate automatically once the employee’s position is selected*).

For example, with this Employee Position Change, if the employee promotion is effective May 1, 2008 I would enter ‘04/30/2008’ in the field.

****Note:** (1) The effective date for employees paid monthly is usually the last date of the month. For employees paid bi-weekly the effective date is usually the last day of the pay period.

(2) If you are trying to effect a Employee Job Change that should have been effective for a past pay period, please contact Human Resources for instructions on how to handle the transaction.

(B) Personnel Date

Date the change should become effective.

Continued on next page

It should be the same as the effective date or the effective date of the action.

For example, with this Employee Job Change, the action is effective April 30, 2008 therefore I would enter “04/30/08” in the field

(C) Job Status System Default is “T”

(D) Job Change Reason Select the appropriate job change reason. Example: “00005” – Promotion

Step 5: Save the Data

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the ‘F10’ key (or clicking File, then Save).

Step 6: Complete the Routing Tab

To access the tab, click “Next Block” on the toolbar



OR

Click Ctrl+ Pgdn

Level Code
Column

Click here to populate Approver's name.

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1025	20	CTREGRE	Mr. Calvin S Tregre	Approval	In Queue	
110000	20	JSANDIFE	Ms. Joyce M Sandifer	Approval	In Queue	
4610	20	KSTCHARL	Dr. Kenneth Anthony St Charles	Approval	In Queue	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

The Routing Tab lists all of the individuals that are required to approve this transaction. This tab is predefined based on the positions funding and organization.

If you do not see all of the individuals that you know should approve this transaction, please contact Human Resources who can assist you with getting the routing information updated.

Continued on next page

To complete the “Routing Tab” in the example above, the first level code is “1025”. Then click in the User ID field (it is currently blank)

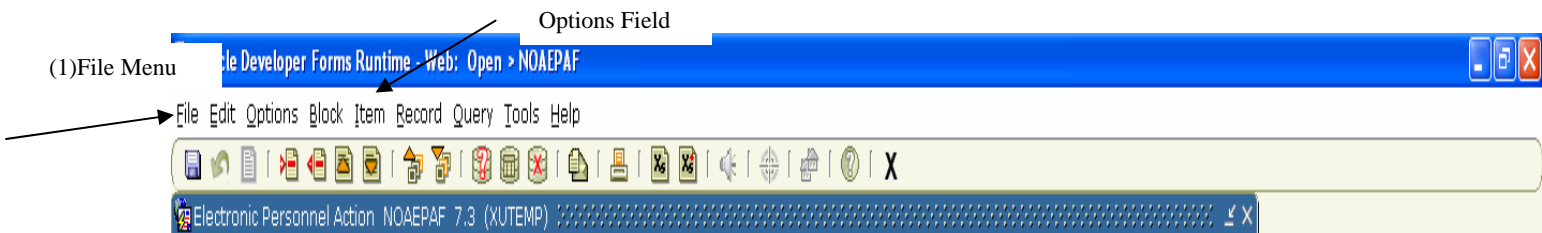
- A. In the Level Code column click on the first Level Code.
- B. Tab to the blank field in the User ID Column. Click the User ID drop down. The user id for the individual responsible for approving for that level code will appear automatically.
- C. The Required Action field is automatically populated with the action the Approver is required to take: *Approval*, FYI or Apply.
- D. Complete each row in the Level Code column that is populated by moving the arrow down to the next level code and repeating A and B.

Step 7: Save the Routing.

Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the Routing Tab.

Step 8: Submit the transaction.

Submitting an EPAF transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.



- A From the Routing Tab, on the file menu click Options

- C If you are taken to the screen below, please note the errors listed and then check the Common Errors area of the FAQ’s to resolve them. If you receive an error message that is not in the Common Errors section, contact the EPAF Administrator in Human Resources at ext. 5282 with the error message for further assistance.

Position Transfer Part 2:

3. Creating an EPAF contd.

B. Employee Position Change

An employee job change is required when an employee is promoted within the same department, a lateral department change, or the employee is having a promotion with a department change.

For Example: Barbara Johnson is in the Business Department. She is promoted from an Administrative assistant to a Business Analyst. An Employee Job Change is required.

NOTE: If an employee is having a job change due to a department transfer the receiving department must originate an EPAF to create the new position.

Before you begin please make sure you have the following data available for the employee that you are creating the action.

A. Employee's XULA ID

B. Employee Position Number

Step 1: Access the form NOAEPAF.

Step 2: Complete the Employee Information portion of the form.

Required Fields

(A) ID

Field Description

Enter XULA ID for the person you are creating the action. If you do not know the ID of the employee please reference the FAQ's "Searching for an employee's XULAID number".

(B) Transaction

Blank. Banner will assign a transaction number after the transaction is Saved for the first time.

Continued on Next Page

(C) Query Date

A date used by the system to determine what data to query for

the display on the current values that appear on both the Transaction Tab & the Labor Distribution Tab. ***Please note: For this action the Query Date must reflect the effective date of the action***

The query date entered will be used by the system to display the data from the last change to the record prior to the date you entered.

(D) Approval Category

Click the drop down box in the **Approval Category** field and Select the appropriate **Approval Category**. Remember that the Approval Category will consist of the last 4 digits of the employee's Position number and the abbreviation for the action. In the screen shot above, the employees Position Number is SP2215. As a result the Approval Category is 2215JC.

It is very important that the correct Approval Category is selected because that is what defines how the EPAF will be routed. If an incorrect Approval Category is selected the EPAF will not be routed to the correct organization for Approval.

(E) Approval Type

Leave blank. Approval Type will populate when the Approval Category is selected.

(F) Position & Suffix

Enter the employee's Position number and Suffix assigned by Human Resources. Make sure the Suffix is entered exactly how it is presented to you. A suffix entered as '01' is not the same as '1'.

It is very important that the numeric portion of the employee's position number be an exact match to the numeric portion of the Approval Category.

The combination of the two fields (Approval Category and Position Number) is what drives how the EPAF will be routed for Approval. If the two fields are not an exact match the PAF will not route properly.

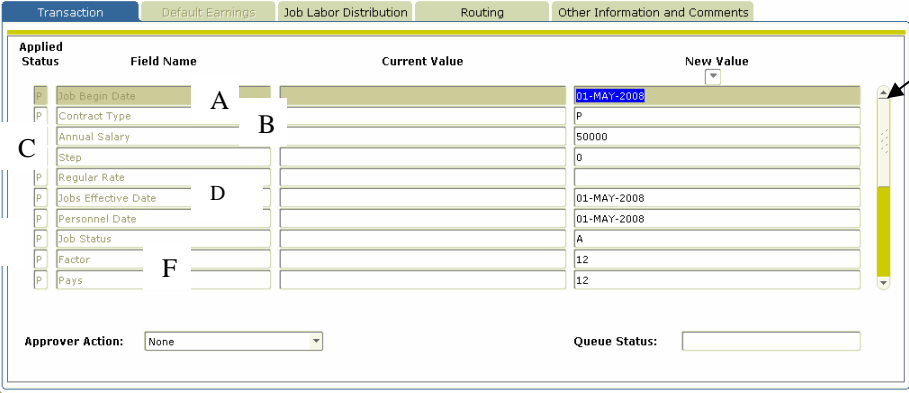
Stop here to verify that the numeric portion of the Approval Category and the numeric portion of the Position field are an exact match.

Continued on Next Page

HR will inspect each EPAF submitted to insure that the two fields match, if they should find that the two do not match they will return your EPAF and you will have to create a new EPAF using the correct Approval Category & Position number. If that should happen, please see the section entitled “Editing an EPAF”.

Step 3: Click “Next Block” on the toolbar  or CTRL+Pgdn to get to the Transaction Tab.

Step 4: Complete the field under “New Value” on the Transaction Tab.



Applied Status	Field Name	Current Value	New Value
P	Job Begin Date (A)		01-MAY-2008
P	Contract Type (B)		P
C	Annual Salary		50000
P	Step (D)		0
P	Regular Rate (E)		
P	Jobs Effective Date (F)		01-MAY-2008
P	Personnel Date		01-MAY-2008
P	Job Status		A
P	Factor		12
P	Pays		12

Approver Action: Queue Status:

- | Required Field | Field Description |
|--------------------------------|---|
| (A) Job Begin Date | Date the change should become effective. |
| (B) Contract Type | Indicates the type of job The default is “P” for Primary position. |
| (C) Annual Salary | Required only if the employee is Salaried/Exempt Employee. |
| (D) Step | Skip Step, the value default for this field is “0”. |
| (E) Regular Rate | Required only if the employee is an Hourly/Non-Exempt Employee. |
| (F) Jobs Effective Date | Date the change should become effective. The Jobs Effective Date should always be a date after the date listed in the ^(A) “ Last Paid Date ” field (the last paid date field will populate automatically once the employee’s position is selected).
For example, with this Employee Job Change, if I want the employee change to be effective for the |

May 1, 2008 payroll I would enter '05/01/2008' in the field.

****Note: (1) The effective date for employees paid monthly is usually the first date of the month that you are trying to effect the change. For employees paid bi-weekly the effective date is usually the first day of the pay period that you are trying to effect the change.**

(2) If you are trying to effect a Employee Job Change that should have been effective for a past pay period, please contact Human Resources for instructions on how to handle the transaction.

(G)Personnel Date

Date the change should become effective.

It should be the same as the effective date or the effective date of the action.

For example, with this Employee Job Change, the action is effective May 1, 2008 therefore I would enter "05/01/08 in the field

(H)Job Status

The status of the job once the change has been approved. The default is "A" – Active (add Default field)

(I)Job Change Reason

Reason Code for a Position Change.

(J)Factor

The number of pay periods the employee should be paid. *For employees paid monthly the Factor is usually 12. For employees paid bi-weekly the factor is usually 26.If you are not sure what the factor should be, please contact Human Resources for instructions on how to handle the transaction.*

(K)Pays

The total number of times the employee should be paid. *For employees paid monthly the Factor is usually 12. For employees paid bi-weekly the factor is usually 26.If you are not sure what the factor should be, please contact Human Resources for instructions on how to handle the*

transaction.

(L)Supervisor ID

The Supervisor ID is required if the employees is having a change in supervisor. *Searching for a Supervisor XULA ID Number.*

- a. Click on the New Value drop down next to Supervisor ID.*
- b. Type Last Name in the Last Name Field.*
- c. Type the First Name in the First Name Field.*
- d. From the Menu, Select Query Execute*
- e. The Supervisor ID will appear. Double Click the 900 or 9000 number.*
- f. The ID will populate in the field.*

(M)Supervisor Position

The Supervisor Position is required only if the employee is having a change in supervisor. *Searching for Supervisor Position and Suffix.*

- 1. Click on the New Value drop down next to Supervisor ID.*
- 2. Type in the Supervisor XULA ID.*
- 3. From the Menu, Select Block, Next.*
- 4. The Supervisor Position and Suffix will appear on the form.*
- 5. Double Click the Supervisor position number (Please note the suffix so that you can put it in the Supervisor suffix field). The position number will populate in the Supervisor field.*

(N)Supervisor Suffix

The Supervisor Suffix is required only if the employee is having a change in supervisor.

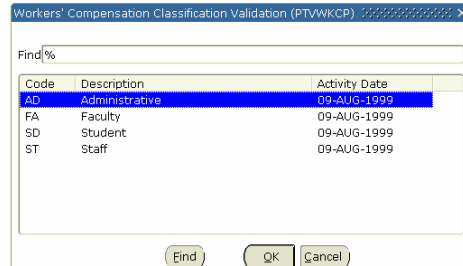
- 1. Type in the Supervisor Suffix field from the position search.*

**(O)Workers Comp.
Code**

Enter the appropriate Workers Comp Code.

To select from a list, click on the New Value drop down and select the appropriate Workers comp

An explanation of the codes is as follows:



(P)Job Location

Select the appropriate Job Location. The Job Location is for KRONOS purposes only.

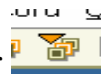
<i>E60</i>	<i>Exempt 60 min break</i>
<i>N7-60</i>	<i>Non-Exempt 7 hour 60 min break</i>
<i>N7-30</i>	<i>Non-Exempt 7 hour 30 min break</i>
<i>N8-60</i>	<i>Non-Exempt 8 hour 60 min break</i>
<i>N8-30</i>	<i>Non-Exempt 8 hour 30 min break</i>
<i>CWI</i>	<i>Student CWI</i>
<i>CWS</i>	<i>Student CWS</i>

Step 5: Save the data that has been entered.

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the 'F10' key (or clicking File, then Save.)

Step 6: Complete the Labor Distribution Tab

To access the tab, click "Next Block" on the toolbar



OR

Click Ctrl+ Pgd

Continued on next page

Job Labor Distribution

Enter new funding info here.

Enter new effective date here

Transaction Default Earnings **Job Labor Distribution** Routing Other Information and Comments

Current Job Labor Distribution

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Effective Date: 01-MAY-2008
<input type="checkbox"/>											
<input type="checkbox"/>											
<input type="checkbox"/>											

New Job Labor Distribution

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Effective Date: 01-MAY-2008
<input checked="" type="checkbox"/>		110000	2550	6202	60					100.00	
<input type="checkbox"/>											
<input type="checkbox"/>											
<input type="checkbox"/>											
Total Percent:										100.00	

Tab

The Job Labor Distribution Information Form Appears

The Labor Distribution attached to the position number will appear: This form is displayed in two parts the Current Job Labor Distribution and the New Job Labor Distribution. In the New Job Labor Distribution area enter the following data.

Required Fields

Field Description

Effective Date	The first date the action will be charged to the account. This date should match the effective date entered on the Transaction Tab.
Fund	The six (6) digit account number where the money is to be charged.
Organization	The four (4) digit department/organizational code to be charged.
Account	The four (4) digit account code identifying the type of compensation to be charged, i.e. faculty – overload 6103.
Program	The two (2) digit code for the type of expense categories to be charged such as 10 for teaching, and 20 for research.
Percent	The percentage of the salary that should be charged to the fund code.

Please note, the total percentage must equal **100 percent**.

Step 7: Save the data that has been entered.

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the 'F10' key(or clicking File, then Save).

Step 8: Complete the Routing Tab

To access the tab, click "Next Block" on the toolbar



OR

Click Ctrl+ Pgd

Level Code
Column

Transaction: DE

Routing Tab: Click here to populate Approvers name.

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1025	20	CTREGRE	Mr. Calvin S Tregre	Approval	In Queue	
110000	20	JSANDIFE	Ms. Joyce M Sandifer	Approval	In Queue	
4610	20	KSTCHARL	Dr. Kenneth Anthony St Charles	Approval	In Queue	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

The Routing Tab lists all of the individuals that are required to approve this transaction. This tab is predefined based on the positions funding and organization.

If you do not see all of the individuals that you know should approve this transaction, please contact Human Resources who can assist you with getting the routing information updated.

To complete the "Routing Tab" in the example above, the first level code is "1025". Then click in the User ID field (it is currently bank)

- A. In the Level Code column click on the first Level Code.
- B. Tab to the blank field in the User ID Column. Click the User ID drop down. The user id for the individual responsible for approving for that level code will appear automatically.
- C. The Required Action field is automatically populated with the action the Approver is required to take: *Approval*, FYI or Apply.
- D. Complete each row in the Level Code column that is populated by moving the arrow down to the next level code and repeating A and B.

Continued on Next Page


Step 9: Save the Routing.

Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the **Routing Tab**.

Step 10: Complete the **Transaction Tab**.

Step 11: From the Option Menu, select “Next Action”. Notice the Approval Type field changes after the selection.

Applied Status	Field Name	Current Value	New Value
P	Employee Class Code	02	02
P	Benefit Category	F1	F1
P	FT/PT Status	F	F
P	Home Organization	4610	2550
P	Distribution Orgn	4610	2550
P	Distribution COA	X	X

Step 12: Click Next Block , or CTRL + PAGE DOWN to access the Transaction Tab.

Employee Class Code Each employee at the university has been assigned an employee class depending on the job type assigned such as 19 – Skilled 7 Hour, 03 – Clerical 8 Hour, and 02 - Professional etc.

Benefit Category Select the appropriate Benefits Category
FI– Full Time Employees
IN- Ineligible for Benefits
NT- Non-Taxable Employees
PI – Part Time Employees.
The Benefit Category determines the types of benefits an employee will be eligible to receive .

Continued on Next Page

FT/PT Status Enter FT/PT Status – (P) represents part time and (F) represents full time.

The FT/PT status will change if an employee is changing status from full-time to part-time or part-time to full-time..

Home Org. Enter the employee’s home organization code.

Distribution Org. Enter the employee’s home organization code.

Home COAS The default is “X

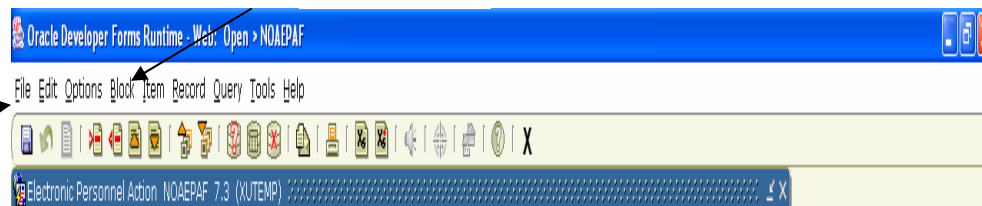
Step 13: Save the *Transaction* Tab.

Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the TRANSACTION Tab.

Step 14: Submit the transaction.

Submitting an EPAP transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.

Options Field



(1) File Menu

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1025	20	CTREGRE	Mr. Calvin S Tregre	Approval	In Queue	
110000	20	JSANDIFE	Ms. Joyce M Sandifer	Approval	In Queue	
4610	20	KSTCHARL	Dr. Kenneth Anthony St Charles	Approval	In Queue	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

A From the Routing Tab, on the file menu click Options

Continued on Next Page

- B** Select Submit Transaction.
If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.

Status	Field Name	Current Value	New Value
P	Employee Class Code	02	02
P	Benefit Category	F1	F1
P	FT/PT Status	F	F
P	Home Organization	4610	2550
P	Distribution Orgh	4610	2550
P	Distribution COA	X	X

Press LIST for valid codes.

Approver Action:

Queue Status:

Transaction Submitted.
Record 1/6

3. Creating an EPAF contd.

I. Position Title Change

Used when an employee's position title changes.

A. Employee's XULA ID

B. Employee Position Number

Step 1: Access the form NOAEPAF.

Step 2: Complete the Employee Information portion of the form.

Required Fields

Field Description

(A)ID

Enter XULA ID for the person you are creating the action.

If you do not know the ID of the employee please reference the FAQ's "Searching for an employee's XULAID number".

(B):Transaction

Blank. Banner will assign a transaction number after the transaction is Saved for the first time.

(C)Query Date

Date used by the system to determine what data to query for display on the current values that appear on both the Transaction Tab & the Labor Distribution Tab.

The query date entered will be used by the system to display the data from the last change to the record prior to the date you entered.

(D)Approval Category

Click the drop down box in the **Approval Category** field and Select the appropriate **Approval Category**. Remember that the Approval Category will consist of the last 4 digits of the employee's Position number and the abbreviation for the action. In the screen shot *Continued on Next Page*

above, the employees Position Number is FT9048. As a result the Approval Category is 9048TC.

It is very important that the correct Approval Category is selected because that is what defines how the EPAF will be routed. If an incorrect Approval Category is selected the EPAF will not be routed to the correct organization for Approval.

(E) Approval Type
(F) Position & Suffix

Leave blank. Approval Type will populate when the Approval Category is selected.

Enter the employee's Position number and Suffix assigned by Human Resources. Make sure the Suffix is entered exactly how it is presented to you. A suffix entered as '01' is not the same as '1'.

It is very important that the numeric portion of the employee's position number be an exact match to the numeric portion of the Approval Category.

The combination of the two fields (Approval Category and Position Number) is what drives how the EPAF will be routed for Approval. If the two fields are not an exact match the PAF will not route properly.

Stop here to verify that the numeric portion of the Approval Category and the numeric portion of the Position field are an exact match.

HR will inspect each EPAF submitted to insure that the two fields match, if they should find that the two do not match they will return your EPAF and you will have to create a new EPAF using the correct Approval Category & Position number. If that should happen, please see the section entitled "Editing an EPAF".

Step 3: Click "Next Block" on the toolbar  or CTRL+Pgdn to get to the Transaction Tab.

Continued on Next Page

Step 4: Complete the field under “New Value” on the Transaction Tab.

Enter changes for the corresponding row in each column

Applied Status	File	Current Value	New Value
P	Jobs Eff	01-AUG-2007	01-APR-2008
P	Person	01-AUG-2007	01-APR-2008
P	Title	Faculty, Summer	Faculty Full Time
P	Job Change I	00013	00008

Required Field

(A) Jobs Effective Date

Field Description

Date the change should become effective. The Jobs Effective Date should always be a date after the date listed in the ^(A)“**Last Paid Date**” field (*the last paid date field will populate automatically once the employee’s position is selected*).

For example, with this Employee Title Change, if the employee Title Change is effective April 1, 2008 I would enter ‘04/01/2008’ in the field.

****Note: (1)** The effective date for employees paid monthly is usually the first date of the month. For employees paid bi-weekly the effective date is usually the first day of the pay period.

(B) Personnel Date

Date the change should become effective. It should be the same as the effective date or the effective date of the action.

For example, with this Employee Title Change, the action is effective April 1, 2008 therefore I would enter “04/01/08 in the field

(C) Title

Type the new job title.

Continued on Next Page

(D) Job Change

Reason Code for a Title Change. The default is

Reason

“00008” Title Change.

Step 5: Save the Data.

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the ‘F10’ key (or clicking File, then Save.)

Step 6: Complete the Routing Tab

To access the tab, click “Next Block” on the toolbar



OR

Click Ctrl+ Pgd

Level Code
Column

Transaction Default: Earnings Job Labor Dis on and Comments

Originator ID: DHOLMES Mrs. Click here to populate Approvers name.

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1025	20	CTREGRE	Mr. Calvin S. Tregre	Approval	Pending	
1090	20	MGIGUETT	Dr. Marguerite S. Giguette	Approval	Pending	
110000	20	JSANDIFE	Mrs. Joyce M Sandifer	Approval	Pending	
1235	20	MAKUNDI	Dr. Murty A. Akundi	Approval	Pending	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

The Routing Tab lists all of the individuals that are required to approve this transaction. This tab is predefined based on the positions funding and organization. **If you do not see all of the individuals that you know should approve this transaction, please contact Human Resources who can assist you with getting the routing information updated.**

To complete the “Routing Tab” in the example above, the first level code is “1025”. Then click in the User ID field (it is currently bank)

- A. In the Level Code column click on the first Level Code.
- B. Tab to the blank field in the User ID Column. Click the User ID drop down. The user id for the individual responsible for approving for that level code will appear automatically.
- C. The Required Action field is automatically populated with the action the Approver is required to take: *Approval*, FYI or Apply.

Continued on Next Page

- D. Complete each row in the Level Code column that is populated by moving the arrow down to the next level

code and repeating A and B.

Step 7: Save the Routing.

Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the Routing Tab.

Step 8: Submit the transaction

Submitting an EPAF transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.

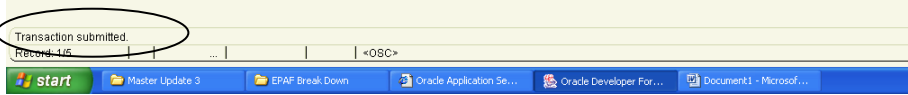


A From the Routing Tab, on the file menu click Options

B Select Submit Transaction.

If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1025	20	CTREGRE	Mr. Calvin S. Tregre	Approval	Pending	
1090	20	MGIGUETT	Dr. Marguerite S. Giguette	Approval	Pending	
110000	20	JSANDIFE	Ms. Joyce M Sandifer	Approval	Pending	
1235	20	MAKUNDI	Dr. Murty A. Akundi	Approval	Pending	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	



C If you are taken to the screen below, please note the errors listed and then check the Common Errors area of the FAQ’s to resolve them. If you receive an error message that is not in the Common Errors section, contact the EPAF Administrator in Human Resources at ext. 5282 with

3. Creating an EPAF contd.

J. Hours Change

When an employees job percentage change to less than 100 percent their salary and benefits are affected.

For Example: James Brown is a part-time bi-weekly employee in the Library who works 32 hours per week. He request to his supervisor that his work hours be reduced to 24 hours a week. The supervisor approves the action. The originator for the Library must submit an Hours Change EPAF.

Before you begin please make sure you have the following data available for the employee that you are creating the action.

A. Employee's XULA ID

B. Employee Position Number

Step 1: Access the form *NOAEPAF*.

Step 2: Complete the Employee Information portion of the form.

Required Fields

Field Description

(A) ID

Enter XULA ID for the person you are creating the action. If you do not know the ID of the employee please reference the FAQ's "Searching for an employee's XULAID number".

(B) Transaction

Blank. Banner will assign a transaction number after the transaction is Saved for the first time.

(C) Query Date

A date used by the system to determine what data to query for display on the current values that appear on both the Transaction Tab & the Labor Distribution Tab.

The query date entered will be used by the system to display the *Continued on Next Page*

data from the last change to the record prior to the date you entered.

(D) Approval Category

Click the drop down box in the **Approval Category** field and Select the appropriate **Approval Category**. Remember that the Approval Category

will consist of the last 4 digits of the employee's Position number and the abbreviation for the action. In the screen shot above, the employees Position Number is SP2104. As a result the Approval Category is 2104HC.

It is very important that the correct Approval Category is selected because that is what defines how the EPAF will be routed. If an incorrect Approval Category is selected the EPAF will not be routed to the correct organization for Approval.

(E) Approval Type

Leave blank. Approval Type will populate when the Approval Category is selected.

(F) Position & Suffix

Enter the employee's Position number and Suffix assigned by Human Resources. Make sure the Suffix is entered exactly how it is presented to you. A suffix entered as '01' is not the same as '1'.

It is very important that the numeric portion of the employee's position number be an exact match to the numeric portion of the Approval Category.

The combination of the two fields (Approval Category and Position Number) is what drives how the EPAF will be routed for Approval. If the two fields are not an exact match the PAF will not route properly.

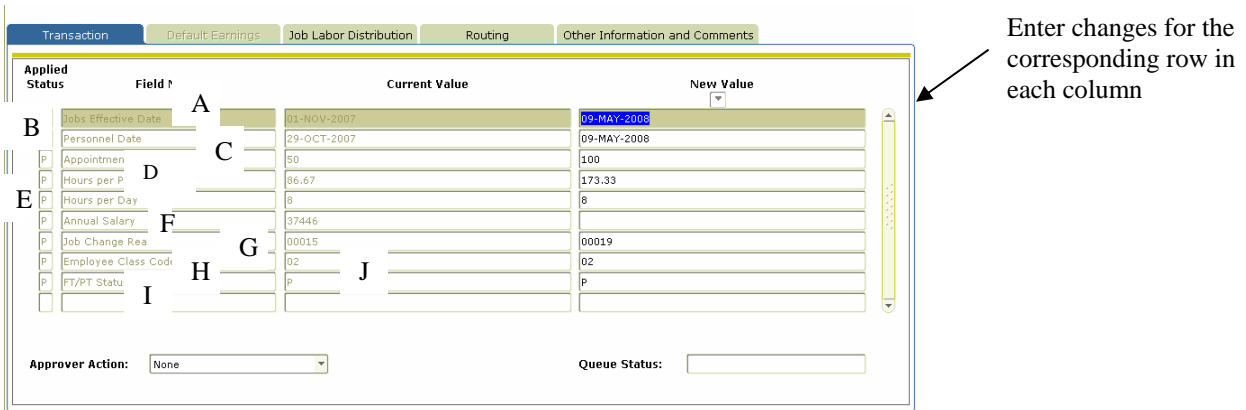
Stop here to verify that the numeric portion of the Approval Category and the numeric portion of the Position field are an exact match.

Continued on Next Page

HR will inspect each EPAF submitted to insure that the two fields match, if they should find that the two do not match they will return your EPAF and you will have to create a new EPAF using the correct Approval Category & Position number. If that should happen, please see the section entitled “Editing an EPAF”.

Step 3: Click “Next Block” on the toolbar  or CTRL+Pgdn to get to the Transaction Tab.

Step 4: Complete the field under “New Value” on the Transaction Tab.



Applied Status	Field	Current Value	New Value
B	A Jobs Effective Date	03-NOV-2007	09-MAY-2008
	B Personnel Date	29-OCT-2007	09-MAY-2008
P	C Appointment	50	100
P	D Hours per P	86.67	173.33
P	E Hours per Day	8	8
P	F Annual Salary	37446	
P	G Job Change Rea	00015	00019
P	H Employee Class Code	02	02
P	I FT/PT Status	P	P
	J		

Approver Action: Queue Status:

Required Field
(A) Jobs Effective Date

Field Description
Date the change should become effective. The Jobs Effective Date should always be a date after the date listed in the ^(A)“Last Paid Date” field (the last paid date field will populate automatically once the employee’s position is selected).

For example, with this Employee Hours Change, if I want the employee change to be effective for the May 9, 2008 payroll I would enter ‘05/09/2008’ in the field.

****Note: (1) The effective date for employees paid monthly is usually the first date of the month that you are trying to effect the change.**

Continued on Next Page

For employees paid bi-weekly the effective date is usually the first day of the pay period that you are trying to effect the change.

(2) If you are trying to effect a Employee Job Change that should have been effective for a past pay period, please contact Human Resources for instructions on how to handle the transaction.

(B)Personnel Date

Date the change should become effective.

It should be the same as the effective date or the effective date of the action.

For example, with this Employee's Hours Change, the action is effective May 9, 2008 therefore I would enter "05/09/08 in the field

(C)Appointment Perc.

The percentage of time an employee will work. For example an employee going from half time to full time the percentage would be 100 percent. Please do not use the percentage sign when completing this field.

(D)Hours Per Pay

The total number of hours worked per pay period (Leave Blank).

(E)Hours Per Day

The number of hours each day.

(F)Annual Salary

The Current Value amount represents the Current Annual Salary LEAVE THIS FIELD BLANK. Banner will compute the salary from the percentage amount entered.

(G)Job Change Reason.

Reason the position is being changed. The default is "00019" Hours Change.

(H)Employee Class

Each employee at the university has been assigned an employee class depending on the job type assigned such as Skilled, Clerical, and Professional etc.

Continued on Next Page

(I)FT/PT Status

Enter FT/PT Status – (P) represents pat time and

(F) represents full time.

Step 5: Save the data that has been entered.

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the 'F10' key (or clicking File, then Save).

Step 6: Complete the Labor Distribution Tab. To access the tab, click "Next Block"

Job Labor Distribution Tab

The Job Labor Distribution Information Form Appears

The Labor Distribution attached to the position number will appear: This form is displayed in two parts the Current Job Labor Distribution and the New Job Labor Distribution. In the New Job Labor Distribution area enter the following data.

Required Fields

Field Description

Effective Date

The first date the action will be charged to the account.
This date should match the effective date entered on the Transaction Tab.

Fund

The six (6) digit account number where the money is to be charged.

Organization

The four (4) digit department/organizational code to be charged.

Account

The four (4) digit account code identifying the type of compensation to be charged, i.e. Admin Support

Continued on Next Page

Staff - 6204.

Program The two (2) digit code for the type of expense categories to be charged such as 10 for teaching, and 20 for research.

Percent The percentage of the salary that should be charged to the fund code.

Please note, the total percentage must equal **100 percent**.

Step 7: Save the data that has been entered.

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the 'F10' key (or clicking File, then Save).

Step 8: Complete the Routing Tab

To access the tab, click "Next Block" on the toolbar



OR

Click Ctrl+ Pgd

Level Code Column

Level Code	Level	User ID	Name	Action	Queue Status	Action Date
1025	20	CTREGRE	Mr. Calvin S. Tregre	Approval	In Queue	
1403	20	GDAMOUR	Dr. Gene A. D'Amour	Approval	In Queue	
24A827	20	AREINE	Dr. Alden H. Reine, SR	Approval	In Queue	
BUDGET	998	SBMOSES	Mrs. Shirley B. Moses	Approval	In Queue	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

The Routing Tab lists all of the individuals that are required to approve this transaction. This tab is predefined based on the positions funding and organization.

Continued on Next Page

If you do not see all of the individuals that you know should approve this transaction, please contact Human Resources who can assist you with getting the routing information updated.

To complete the “Routing Tab” in the example above, the first level code is “1025”. Then click in the User ID field (it is currently blank)

- A. In the Level Code column click on the first Level Code.
- B. Tab to the blank field in the User ID Column. Click the User ID drop down. The user id for the individual responsible for approving for that level code will appear automatically.
- C. The Required Action field is automatically populated with the action the Approver is required to take: *Approval*, FYI or Apply.
- D. Complete each row in the Level Code column that is populated by moving the arrow down to the next level code and repeating A and B.

Step 9: Save the Routing.

Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the Routing Tab.

Step 10: Complete the Default Earnings Tab

To access the tab, click “Options Next Action” on the toolbar 

OR
Click Ctrl+ Pgd

Column Name **Column Description**
Effective Date Skip Effective Date it will default in (the date should be the same date as the date entered on the Transaction Tab).

Earnings Enter “REG” – Regular Earnings.

Continued on Next Page


Hours or Units Hours or Units – this field is applicable to Salaried Exempt Employees only. *Example: If the employee is full time the Hours or Units should reflect 173.33. If the employee is half time the Hours or Units should reflect 86.67.*

Deemed Hours The **Deemed Hours** field should be left blank.

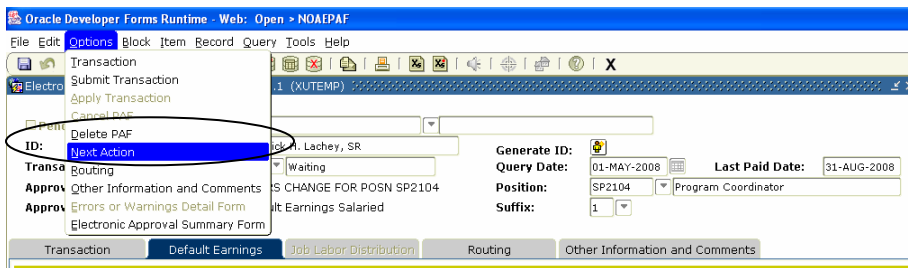
Special Rate The Special Rate field should be left blank.

Shift System will Default a shift, depending on the position.

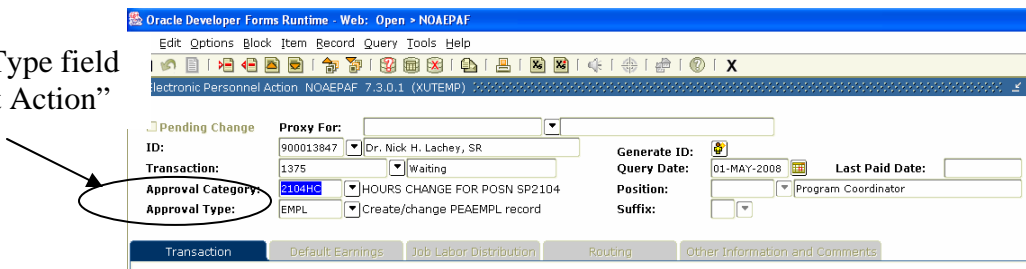
End Date The end date should be left blank.


Step 11: Save the data entered: Click the save icon  (or clicking File, then Save.)

Step 12: From the Option Menu, select “Next Action”. Notice the Approval Type field changes after the selection.



Approval Type field after “Next Action”



Step 13: Click Next Block , or CTRL + PAGE DOWN to access the Transaction Tab.

Continued on Next Page

Step 14: Complete the *Transaction* Tab

Applied Status	Field Name	Current Value	New Value
P	Employee Class Code	02	02
P	Benefit Category	P1	F1
P	FT/PT Status	P	F
P	Home Organization	1403	1403
P	Distribution Orgn	1403	1403
P	Distribution COA	X	X

Press LIST for valid codes.

Employee Class Code Each employee at the university has been assigned an employee class depending on the job type assigned such as 19 – Skilled 7 Hour, 03 – Clerical 8 Hour, and 02 - Professional etc. If you are not sure about the Employee Class Code please contact Human Resources.

Benefits Category Select the appropriate Benefits Category *F1 – Full Time Employees, IN Ineligible for Benefits, NT Non-Taxable Employees and P1 – Part Time Employees. The Benefits Category determines how an employee accrue his/her benefits.*

FT/PT Status Enter FT/PT Status – (P) represents part time and (F) represents full time. *The FT/PT status will change if an employee is changing status from full-time to part-time or part-time to full-time.*

Home Org. Enter the employee’s home organization code.

Distribution Org. Enter the employee’s home organization code.

Home The default is “X” COAS

Step 15: Save the TRANSACTION Tab.

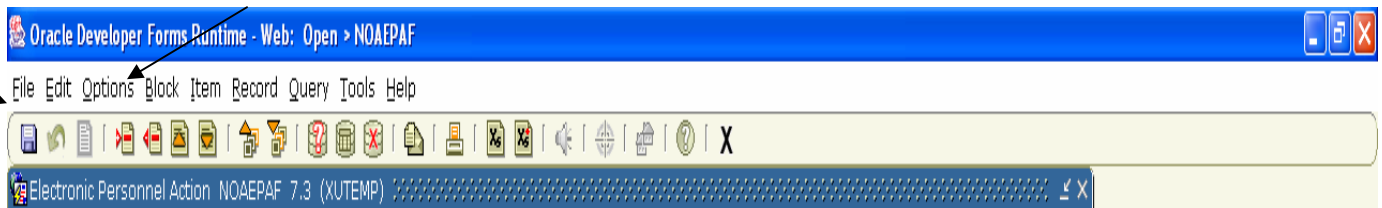
Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the TRANSACTION Tab.

Continued on Next Page

Submitting an EPAF transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.

Options Field

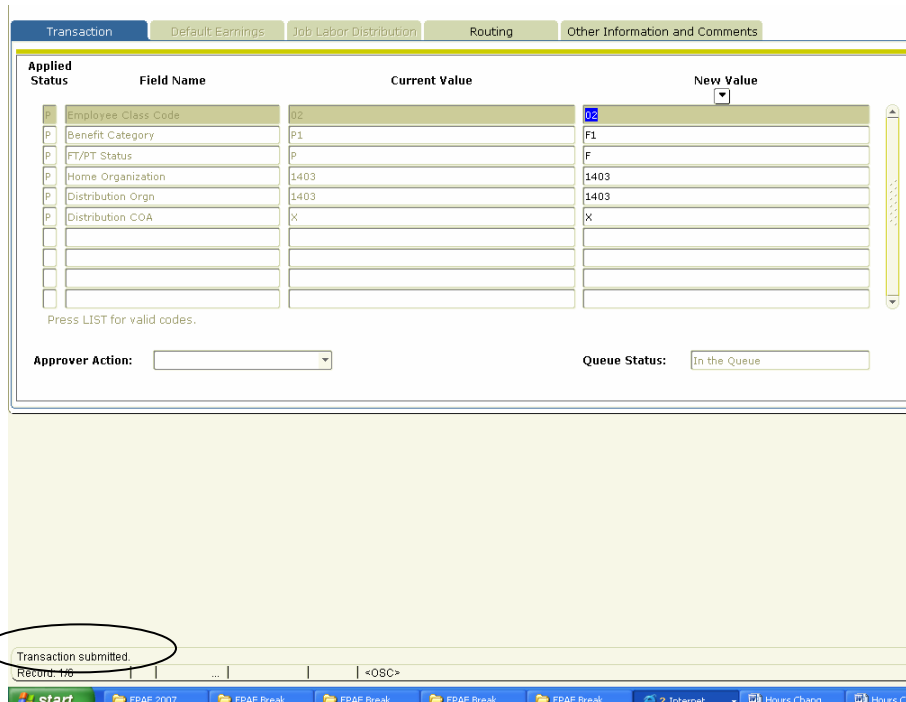
(1)File Menu



A From the Routing Tab, on the file menu click Options

B Select Submit Transaction.

If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.



C If you are taken to the screen below, please note the errors listed and then check the Common Errors area of the FAQ’s to resolve them. If you receive an error message that is not in the Common Errors section, contact the EPAF Administrator in Human Resources at ext. 5282 with the error message for further assistance.

Continued on Next Page

Oracle Developer Forms Runtime - Web: Open > NOAEPAF - NOIEMSG

File Edit Options Block Item Record Query Tools Help

Electronic Approvals Error Message NOIEMSG 7.3 (XUTEMP)

Proxy For:

Transaction Number: ID: 900015008 Mr. Kenneth Kirk

Originator: LSANDERS

Category: 2390LD LABOR DIST FOR POSN FT2390 Errors Warnings

Approval Type	Error Type	Errors and Warnings Information

3. Creating an EPAF

K. Employee Leave

It is the policy of Xavier University of Louisiana to grant Leave to eligible full and part time employees for Sabbatical, Leave Of Absence, Military and Family Medical Leave.

Before you begin please make sure you have the following data available for the employee that you are creating the action.

A. Employee's XULA ID

B. Employee Position Number

Step 1: Access the form NOAEPAF.

Step 2: Complete the Employee Information portion of the form.

Required Fields

Field Description

(A) ID

Enter XULA ID for the person you are creating the action.

If you do not know the ID of the employee please reference the FAQ's "Searching for an employee's XULAID number".

(B) Transaction

Blank. Banner will assign a transaction number after the transaction is Saved for the first time.

(C) Query Date

A date used by the system to determine what data to query for display on the current values, which appear on both the Transaction Tab & the Labor Distribution Tab.

The query date entered will be used by the

Continued on Next Page

system to display the data from the last change to the record prior to the date you entered.

- (D) Approval Category** Click the drop down box in the **Approval Category** field and Select the appropriate **Approval Category**. Remember that the Approval Category will consist of

Continued on Next Page

the last 4 digits of the employee's Position number and the abbreviation for the action. In the screen shot above, the employees Position Number is FT3520. As a result the Approval Category is 3520LE.

It is very important that the correct Approval Category is selected because that is what defines how the EPAF will be routed. If an incorrect Approval Category is selected the EPAF will not be routed to the correct organization for Approval.

- (E) Approval Type** Leave blank. Approval Type will populate when the Approval Category is selected.

- (F) Position & Suffix** Enter the employee's Position number and Suffix assigned by Human Resources. Make sure the Suffix is entered exactly how it is presented to you. A suffix entered as '01' is not the same as '1'.

It is very important that the numeric portion of the employee's position number be an exact match to the numeric portion of the Approval Category.

The combination of the two fields (Approval Category and Position Number) is what drives how the EPAF will be routed for Approval. If the two fields are not an exact match the PAF will not route properly.

Continued on Next Page

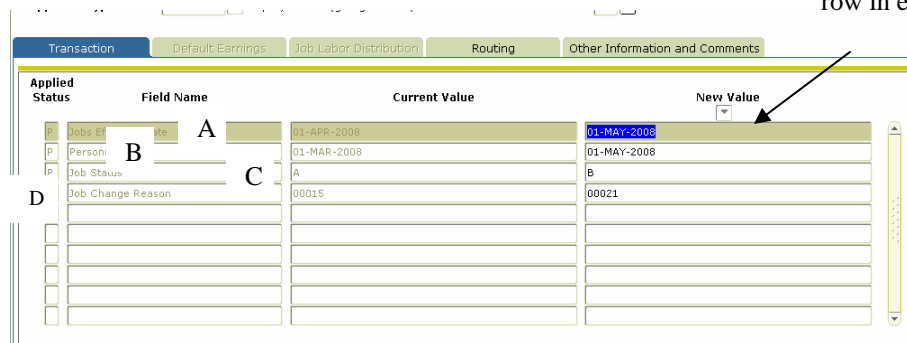
Stop here to verify that the numeric portion of the Approval Category and the numeric portion of the Position field are an exact match.

HR will inspect each EPAF submitted to insure that the two fields match, if they should find that the two do not match they will return your EPAF and you will have to create a new EPAF using the correct Approval Category & Position number. If that should happen, please see the section entitled “Editing an EPAF”.

Step 3: Click “Next Block” on the toolbar  or CTRL+Pgdn to get to the Transaction Tab.

Step 4: Complete the field under “New Value” on the Transaction Tab.

Enter changes for the corresponding row in each column



Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date A	01-APR-2008	01-MAY-2008
P	Person B	01-MAR-2008	01-MAY-2008
IP	Job Status C	A	B
D	Job Change Reason	00015	00021

**Required Field
(A)Jobs Effective
Date**

Field Description

Date the change should become effective. The Jobs Effective Date should always be a date after the date listed in the ^(A)“Last Paid Date” field **(the last paid date field will populate automatically once the employee’s position is selected).**

For example, with this Employee Leave, if I want the employee change to be effective for the May 1, 2008 payroll, I would enter ‘05/01/2008’ in the field.

Continued on Next Page

If you are trying to affect a Leave that should have been effective for a past pay period, please contact Human Resources for instructions on how to handle the transaction.

(B)Personnel Date

Date the change should become effective.

It should be the same as the effective date or the effective date of the action.

For example, with this Employee Job Change, the action is effective May 1, 2008 therefore I would enter “05/01/08 in the field

(C)Job Status

Job Status – Enter the employee’s status

A – Active	T -Terminated
L -on Leave without pay and without Benefits,	B -On leave without pay and with Benefits
F – On leave with Full Pay and Benefits	


(D)Job Change Reason

The default is “00021” Job Change Reason.

Step 5: Save the data that has been entered.

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the ‘F10’ key (or clicking File, then Save.)

Step 6: Complete the Routing Tab

To access the tab, click “Next Block” on the toolbar  OR Click Ctrl+ Pgdn

Continued on Next Page

Level Code Column

Transaction Defa Click here to populate Approver's name. Other Information and Comments

Originator ID: DHOLMES

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1025	20	CTREGRE	Mr. Calvin S. Tregre	Approval	In Queue	
110000	20	JSANDIFE	Ms. Joyce M. Sandifer	Approval	In Queue	
1234	20	GDIAL	Dr. Gurdial Arora	Approval	In Queue	
1090	20	MGIGUETT	Dr. Marguerite S. Giguette	Approval	In Queue	
1245	20	AEDWARDS	Dr. Andrea M. Edwards	Approval	In Queue	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

The Routing Tab lists all of the individuals that are required to approve this transaction. This tab is predefined based on the positions funding and organization.

If you do not see all of the individuals that you know should approve this transaction, please contact Human Resources who can assist you with getting the routing information updated.

To complete the “Routing Tab” in the example above, the first level code is “1025”. Then click in the User ID field (it is currently bank)

- A. In the Level Code column click on the first Level Code.
- B. Tab to the blank field in the User ID Column. Click the User ID drop down. The user id for the individual responsible for approving for that level code will appear automatically.
- C. The Required Action field is automatically populated with the action the Approver is required to take: **Approval**, FYI or Apply.
- D. Complete each row in the Level Code column that is populated by moving the arrow down to the next level code and repeating A and B.

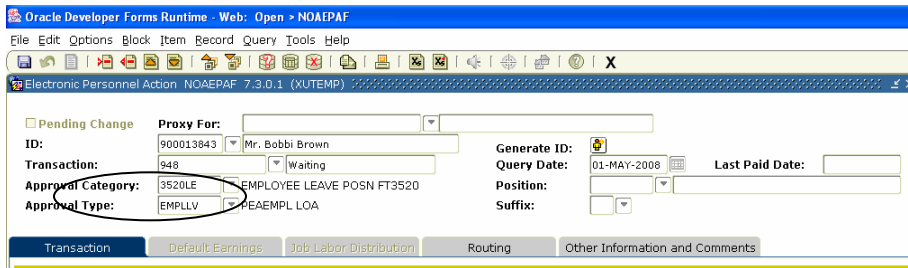
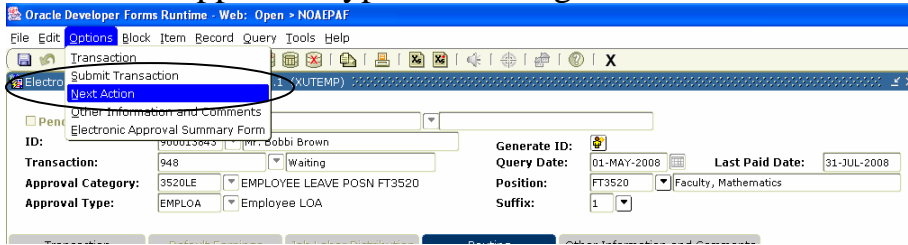
Step 7: Save the Routing.

Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the Routing Tab.

Step 8: From the Option Menu, select “Next Action”.

Continued on Next Page

Notice the Approval Type field changes after the selection.



Step 9: Click Next Block , or CTRL + PAGE DOWN to access the Transaction Tab.

Step 10: Complete the TRANSACTION Tab

Employee Status

Job Status – indicate the employee status

A – Active	T -Terminated
L -on Leave without pay and without Benefits,	B -On leave without pay and with Benefits
F – On leave with Full Pay and Benefits	

Leave Begin Date

Leave Begin Date.

Leave Cat. Code

Leave this field blank.

Leave End Date

Only use this field when the employee is returning from leave.

Leave Reason Code

Reason the employee is going or returning from leave (*see below*).

Continued on Next Page

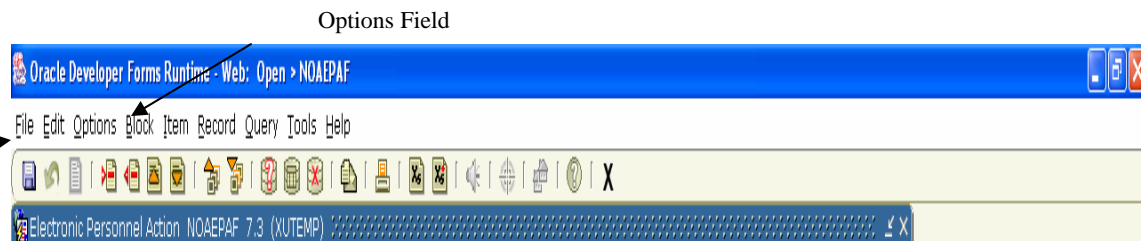
Reason Code	Description	Employee Status	COBRA Eligible	Return to Work	Sabbatical Leave	Tracked on Faculty Form	Commitment Fulfillment	Associated Approval Category	Activity Date
AD	Administrative	Leave with Pay, with Benefit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		12-APR-1999
BL	Bereavement	Leave with Pay, with Benefit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		27-JAN-1999
DS	Disciplinary Leave	Leave without Pay, with Benefit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		27-JAN-1999
ED	Educational Leave	Leave without Pay, with Benefit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		03-AUG-1995
EL	Educational Leave	Leave with Partial Pay, with Benefit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		27-JAN-1999
FL	Family Medical Leave Act FMLA	Leave with Pay, with Benefit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		29-DEC-1999
FM	Family Medical Leave Act FMLA	Leave without Pay, with Benefit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		29-DEC-1999
JU	Jury Duty	Leave with Pay, with Benefit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		06-MAY-1999
LB	Leave Without Pay	Leave without Pay, with Benefit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		22-DEC-1999
MI	Military Leave	Leave without Pay, without Benefit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		22-JAN-2003
OL	Official Leave	Leave without Pay, with Benefit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		10-DEC-1999
SA	Sabbatical	Leave with Pay, with Benefit	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		06-MAY-1999
SB	Sabbatical	Leave with Partial Pay, with Benefit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		06-MAY-1999
SC	Sabbatical	Leave without Pay, without Benefit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		03-AUG-2000
SK	Sick	Leave with Pay, with Benefit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		27-JAN-1999
VA	Vacation	Leave with Pay, with Benefit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		27-JAN-1999
WC	Workers Compensation	Leave without Pay, with Benefit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		06-JUL-2001
WN	Workers Compensation	Leave without Pay, without Benefit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		06-JUL-2001
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Step 11: Save the data entered on the Transaction Tab.

Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the TRANSACTION Tab.

Step 12: Submit the transaction

Submitting an EPAF transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.



- A** From the Routing Tab, on the file menu click Options
- B** Select Submit Transaction.
If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.

Continued on Next Page

Transaction | Default Earnings | Job Labor Distribution | Routing | Other Information and Comments

Applied Status	Field Name	Current Value	New Value
P	Employee Status	A	
P	Leave Begin Date		01-MAY-2008
P	Leave Category Code	F1	
P	Leave End Date		
P	Leave Reason Code		SA

Select (A, B, L, F, P, T). See Dynamic Help for more info.

Approver Action: Queue Status:

Transaction submitted.
Record 415

C If you are taken to the screen below, please note the errors listed and then check the Common Errors area of the FAQ's to resolve them. If you receive an error message that is not in the Common Errors section, contact the EPAF Administrator in Human Resources at ext. 5282 with the error message for further assistance.

Oracle Developer Forms Runtime - Web: Open > NOAEPAF - NOIEMSG

File Edit Options Block Item Record Query Tools Help

Electronic Approvals Error Message NOIEMSG 7.3 (XUTEMP)

Proxy For:

Transaction Number: ID: 900015008 Mr. Kenneth Kirk

Originator: LSANDERS

Category: 2390LD LABOR DIST FOR POSN FT2390 Errors

Approval Type	Error Type	Errors and Warnings Information

3. Creating an EPAF

L. Returning an Employee from Leave

An employee who is on Leave must give his or her supervisor two weeks notice prior to returning from Leave. If the employee is on FMLA leave because of his or her own serious health condition, the employee must obtain a physician's letter authorizing the employee to return to work.

Before you begin please make sure you have the following data available for the employee that you are creating the action.

A. Employee's XULA ID

B. Employee Position Number

Step 1: Access the form NOAEPAF.

Step 2: Complete the Employee Information portion of the form.

Required Fields

(A)ID

Field Description

Enter XULA ID for the person you are creating the action.

If you do not know the ID of the employee please reference the FAQ's "Searching for an employee's XULAID number".

(B):Transaction

Blank. Banner will assign a transaction number after the transaction is Saved for the first time.

(C)Query Date

A date used by the system to determine what data to query for the display on the current values that appear on both the Transaction Tab & the Labor Distribution Tab.

The query date entered will be used by the system to display the data from the last change

to the record prior to the date you entered.

(D) Approval Category

Click the drop down box in the **Approval Category** field and Select the appropriate **Approval Category**. Remember that the Approval Category will consist of the last 4 digits of the employee's Position number and the abbreviation for the action. In the screen shot above, the employees Position Number is FT3520. As a result the Approval Category is 3520RT.

It is very important that the correct Approval Category is selected because that is what defines how the EPAF will be routed. If an incorrect Approval Category is selected the EPAF will not be routed to the correct organization for Approval.

(E) Approval Type

Leave blank. Approval Type will populate when the Approval Category is selected.

(F) Position & Suffix

Enter the employee's Position number and Suffix assigned by Human Resources. Make sure the Suffix is entered exactly how it is presented to you. A suffix entered as '01' is not the same as '1'.

It is very important that the numeric portion of the employee's position number be an exact match to the numeric portion of the Approval Category.

The combination of the two fields (Approval Category and Position Number) is what drives how the EPAF will be routed for Approval. If the two fields are not an exact match the PAF will not route properly.

Stop here to verify that the numeric portion of the Approval Category and the numeric portion

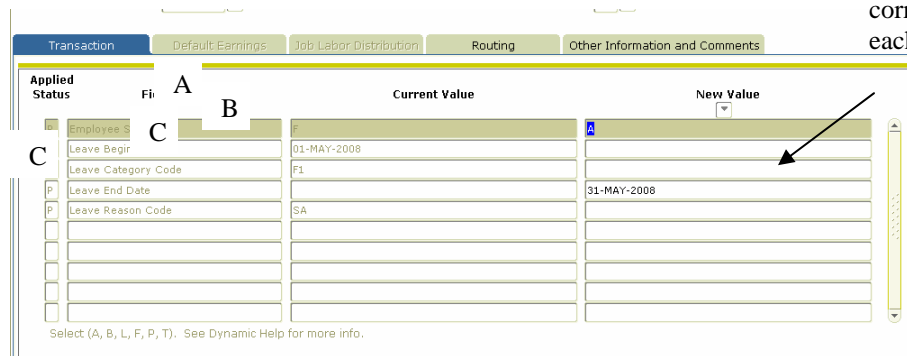
of the Position field are an exact match.

HR will inspect each EPAF submitted to insure that the two fields match, if they should find that the two do not match they will return your EPAF and you will have to create a new EPAF using the correct Approval Category & Position number. If that should happen, please see the section entitled “Editing an EPAF”.

Step 3: Click “Next Block” on the toolbar  or CTRL+Pgdn to get to the Transaction Tab.

Step 4: Complete the field under “New Value” on the Transaction Tab.

Enter changes for the corresponding row in each column



Applied Status	Fi	A	B	Current Value	New Value
Employee S	C				
Leave Begin				01-MAY-2008	
Leave Category Code				F1	
Leave End Date					31-MAY-2008
Leave Reason Code				SA	

Select (A, B, L, F, P, T). See Dynamic Help for more info.

Step 5: Complete the TRANSACTION Tab

Employee Status Job Status – Enter “A”, which indicates “Active”.

Leave Begin Date Leave this field blank.

Leave Cat. Code Leave this field blank.

Leave End Date The effective end date of the Leave.


Leave Reason Code Leave this field blank

Continued on next page

Step 6: Save the data on the Transaction Tab.

Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the TRANSACTION Tab.

Step 7: Complete the Routing Tab

To access the tab, click “Next Block” on the toolbar 

OR
Click Ctrl+ Pgdn

Level Code Column

Click here to populate Approvers name.



Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1025	20	CTREGRE	Mr. Calvin S. Tregre	Approval	In Queue	
1090	20	MGIGUETT	Dr. Marguerite S. Giguette	Approval	In Queue	
110000	20	JSANDIFE	Ms. Joyce M Sandifer	Approval	In Queue	
1234	20	GDIAL	Dr. Gurdiel Arora	Approval	In Queue	
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue	

The Routing Tab lists all of the individuals that are required to approve this transaction. This tab is predefined based on the positions funding and organization.

If you do not see all of the individuals that you know should approve this transaction, please contact Human Resources who can assist you with getting the routing information updated.

To complete the “Routing Tab” in the example above, the first level code is “1025”. Then click in the User ID field (it is currently bank)

- A** In the Level Code column click on the first Level Code.
- B** Tab to the blank field in the User ID Column. Click the User ID drop down. The user id for the individual responsible for approving for that

Continued on Next Page

level code will appear automatically.

The Required Action field is automatically populated with the action the Approver is required to take: *Approval*, FYI or Apply.

C

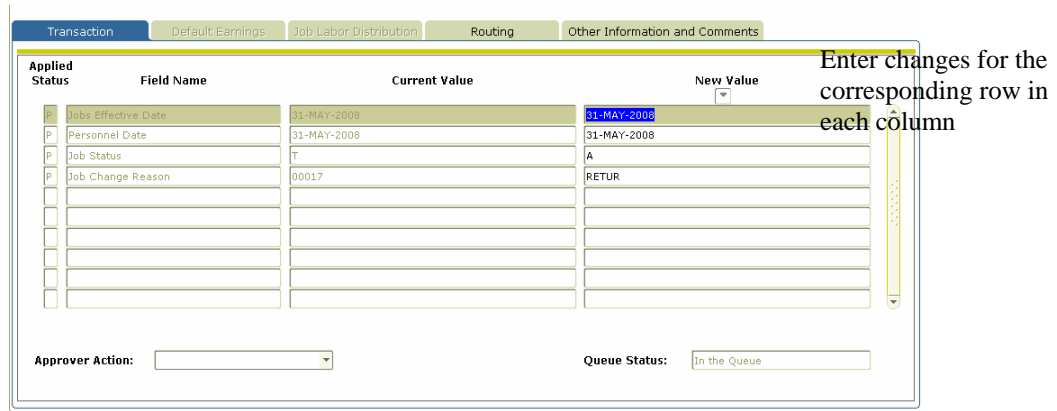
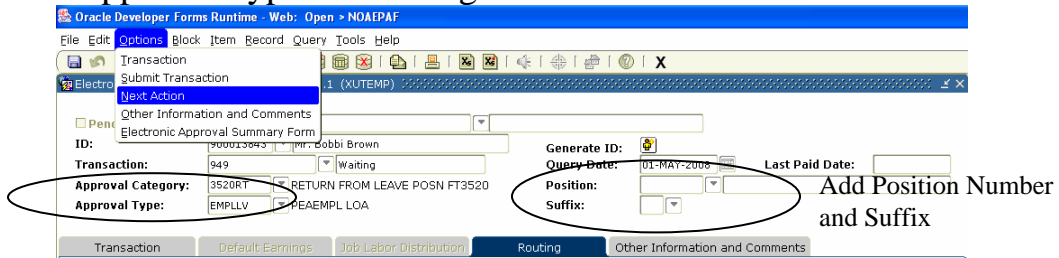
D Complete each row in the Level Code column that is populated by moving the arrow down to the next level code and repeating A and B.

Step 8: Save the Routing.

Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the Routing Tab.

Approval Type field after “Next Action”

From the Option Menu, select “Next Action”.
The Approval Type field changes after the selection.



Step 10: Click Next Block , or CTRL + PAGE DOWN to access the Transaction Tab.

Continued on Next Page

Required Field

Field Description

(A)Jobs Effective Date

Date the change should become effective. The Jobs Effective Date should always be a date after the date listed in the ^(A)“**Last Paid Date**” field **(the last paid date field will populate automatically once the employee’s position is selected).**

For example, with this Employee Return from Leave, if I want the employee change to be effective for the April 30, 2008 payroll I would enter ‘04/30/2008’ in the field.

If you are trying to affect a Leave that should have been effective for a past pay period, please contact Human Resources for instructions on how to handle the transaction.

(B)Personnel Date

Date the change should become effective.

It should be the same as the effective date or the effective date of the action.

For example, with this Employee Job Change, the action is effective April 30, 2008 therefore I would enter “04/30/08 in the field

C)Job Status

Job Status – Enter “A” which indicate that the employee job status is “Active”.

(D)Job Change Reason

Job Change Reason default “**RETUR**”.

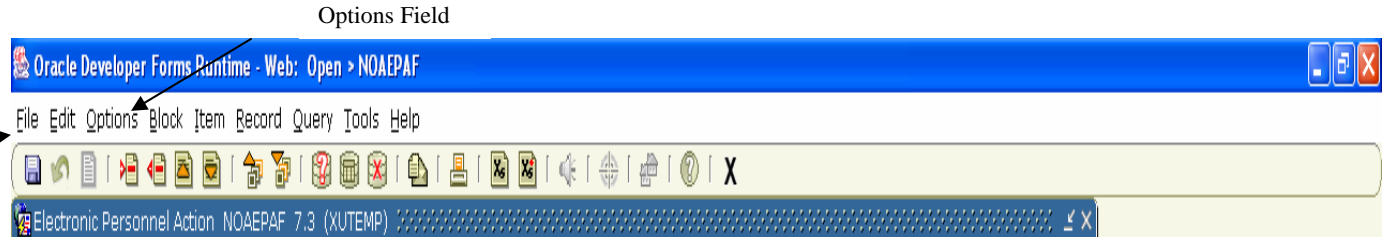
Continued on next page

Step 11: Save the data that has been entered.

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the 'F10' key (or clicking File, then Save.)

Step 12: Submit the transaction

Submitting an EPAF transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.



A From the Routing Tab, on the file menu click Options

B Select Submit Transaction.

If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.

Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date	31-MAY-2008	31-MAY-2008
P	Personnel Date	31-MAY-2008	31-MAY-2008
P	Job Status	T	A
P	Job Change Reason	00017	RETUR

Approver Action: Queue Status:

Transaction submitted.
Record 1/4

Continued on next page

3. Creating an EPAF contd.

A. Salary Change (University Funds Only)

Used when the employee stays in the same position and receives an increase or decrease in salary outside of the Annual Employee Review period.

A. Employee's XULA ID

C. Employee Position Number

Step 1: Access the form NOAEPAF.

Step 2: Complete the Employee Information portion of the form.

Required Fields

Field Description

(A)ID

Enter XULA ID for the person you are creating the action. If you do not know the ID of the employee, please reference the FAQ's "Searching for an employee's XULAID number".

(B):Transaction

Blank. Banner will assign a transaction number after the transaction is Saved for the first time.

(C)Query Date

A date used by the system to determine what data to query for the display on the current values that appear on both the Transaction Tab & the Labor Distribution Tab. The query date entered will be used by the system to display the data from the last change to the record prior to the date you entered.

(D)Approval Category

Click the drop down box in the **Approval Category** field and Select the appropriate **Approval Category**. Remember that the Approval Category will consist of the last 4 digits of the employee's Position number and the abbreviation for the action.

In the screen shot above, the employees Position Number is SP1238. As a result the Approval Category is 1238SI.

It is very important that the correct Approval Category is selected because that is what defines how the EPAF will be routed. If an incorrect Approval Category is selected the EPAF will not be routed to the correct organization for Approval.

(E) Approval
Type

Leave blank. Approval Type will populate when the Approval Category is selected.

(F) Position &
Suffix

Enter the employee's Position number and Suffix assigned by Human Resources. Make sure the Suffix is entered exactly how it is presented to you. A suffix entered as '01' is not the same as '1'.

It is very important that the numeric portion of the employee's position number be an exact match to the numeric portion of the Approval Category.

The combination of the two fields (Approval Category and Position Number) is what drives how the EPAF will be routed for Approval. If the two fields are not an exact match the PAF will not route properly.

Stop here to verify that the numeric portion of the Approval Category and the numeric portion of the Position field are an exact match.

HR will inspect each EPAF submitted to insure that the two fields match, if they should find that the two do not match they will return your EPAF and you will have to create a new EPAF using the correct Approval Category & Position number. If that should happen, please see the section entitled "Editing an EPAF".

Step 3: Click "Next Block" on the toolbar  or CTRL+Pgdn to get to the Transaction Tab.

Continued on next page

Transaction		Default Earnings	Job Labor Distribution	Routing	Other Information and Comments
Applied Status	Field Name	Current Value		New Value	
P	Jobs Effective Date	01-JUL-2007		01-APR-2008	
P	Personnel Date	13-JUL-2007		01-APR-2008	
P	Job Status	A		A	
P	Job Change Reason			00012	
P	Annual Salary	35000		50000	
P	Regular Rate	16.827247			

Enter changes for the corresponding row in each column

Step 4: Complete the field under “New Value” on the Transaction Tab.

Required Field

Field Description

(A)Jobs Effective Date Date the change should become effective. The Jobs Effective Date should always be a date after the date listed in the ^(A)“**Last Paid Date**” field (*the last paid date field will populate automatically once the employee’s position is selected*).

For example, with this Employee Salary Change, if the employee Salary Change is effective May 1, 2008 I would enter ‘05/01/2008’ in the field.

****Note: (1) The effective date for employees paid monthly is usually the first date of the month. For employees paid bi-weekly the effective date is usually the first day of the pay period.**

(2) If you are trying to effect a Employee Job Change that should have been effective for a past pay period, please contact Human Resources for instructions on how to handle the transaction.

(C)Personnel Date Date the change should become effective.

It should be the same as the effective date or the effective date of the action.

For example, with this Employee Salary Change, the action is effective May 1, 2008 therefore I would enter “05/01/08 in the field

(D)Job Status The status of the job once the change has been made. The default is “A” - Active

(E)Annual Salary Required only if the employee is a Salaried/Exempt Employee.

(F)Regular Rate Required only if the employee is an Hourly/Non-

Exempt Employee.

Data can be saved by clicking the diskette icon located on the tool bar, or by pressing the 'F10' key (or clicking File, then Save.)

Step 5: Complete the Routing Tab

To access the tab, click "Next Block" on the toolbar



OR

Click Ctrl+Pgdn

Level Code
Column

Transaction | Default Earnings | Job Labor Distribution | **Routing** | Other Information and Comments

Originator ID: DHOLMES Click here to populate
Approvers name.

Level Code	Level	User ID		Queue Status	Action Date
1245	20	MLOUGHLI	Sr. Monica Loughlin, SBS	Approval	In Queue
1090	20	MGIGUETTE	Dr. Marguerite S. Giguette	Approval	In Queue
110000	20	JSANDIFER	Ms. Joyce M Sandifer	Approval	In Queue
235678	20	DLABAT	Dr. Deidre D. Labat	Approval	In Queue
245663	20	MAKUNDI	Dr. Murty A. Akundi	Approval	In Queue
1235	20	MAKUNDI	Dr. Murty A. Akundi	Approval	In Queue
BUDGET	998	SBMOSES	Mrs. Shirley B. Moses	Approval	In Queue
APPLY	999	DHOLMES	Mrs. Deanna K. Holmes	Apply	In Queue

The Routing Tab lists all of the individuals that are required to approve this transaction. This tab is predefined based on the positions funding and organization.

If you do not see all of the individuals that you know should approve this transaction, please contact Human Resources who can assist you with getting the routing information updated.

To complete the "Routing Tab" in the example above, the first level code is "1025". Then click in the User ID field (it is currently blank)

- In the Level Code column click on the first Level Code.
- Tab to the blank field in the User ID Column. Click the User ID drop down. The user id for the individual responsible for approving for that level code will appear automatically.
- The Required Action field is automatically populated with the action the Approver is required to take: **Approval**, FYI or Apply.
- Complete each row in the Level Code column that is populated by

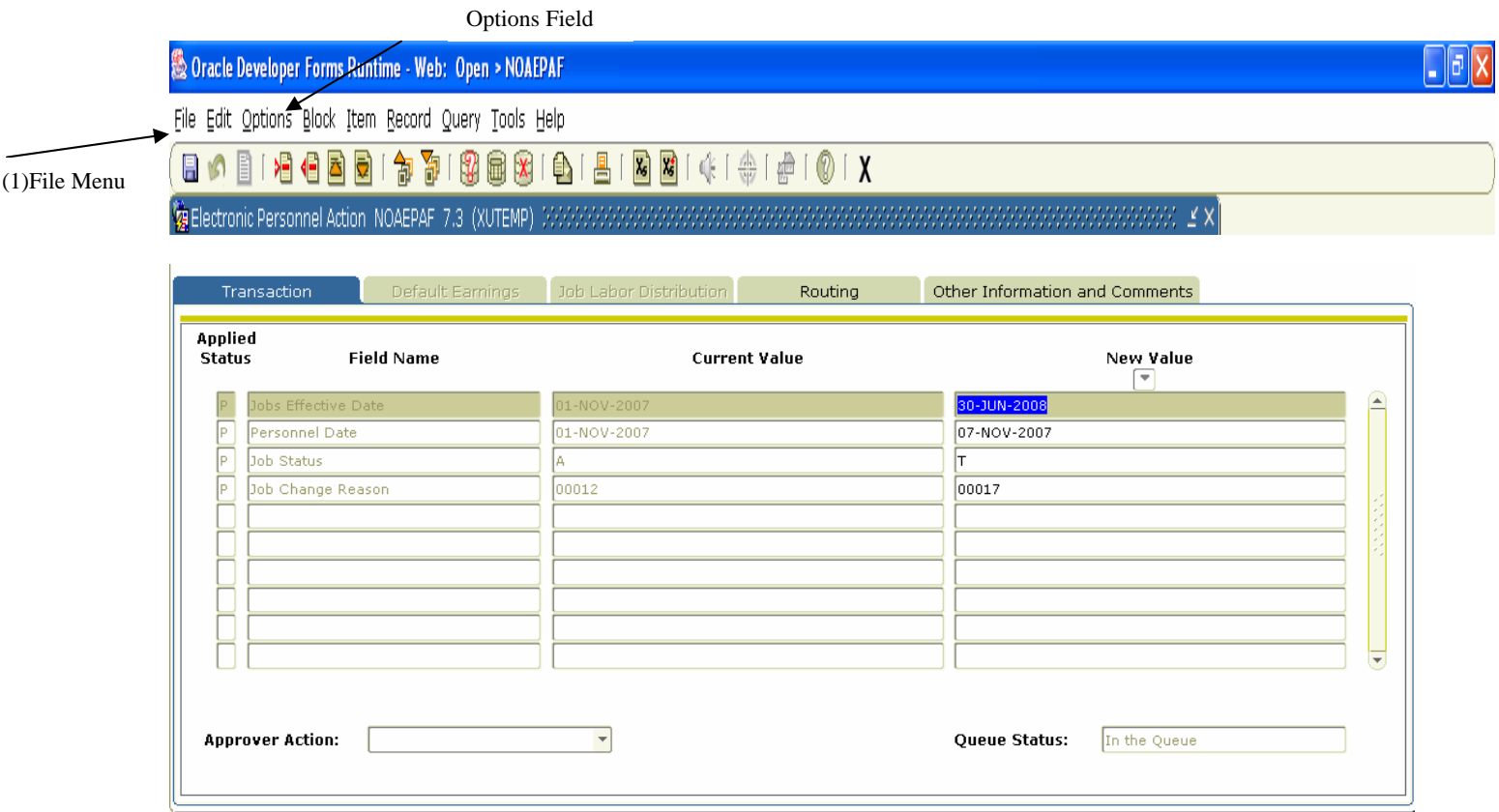
moving the arrow down to the next level code and repeating A and B.

Step 6: Save the Routing.

Click the Save Icon, or F10 (clicking File, then Save) to save the changes to the Routing Tab.

Step 7: Submit the transaction

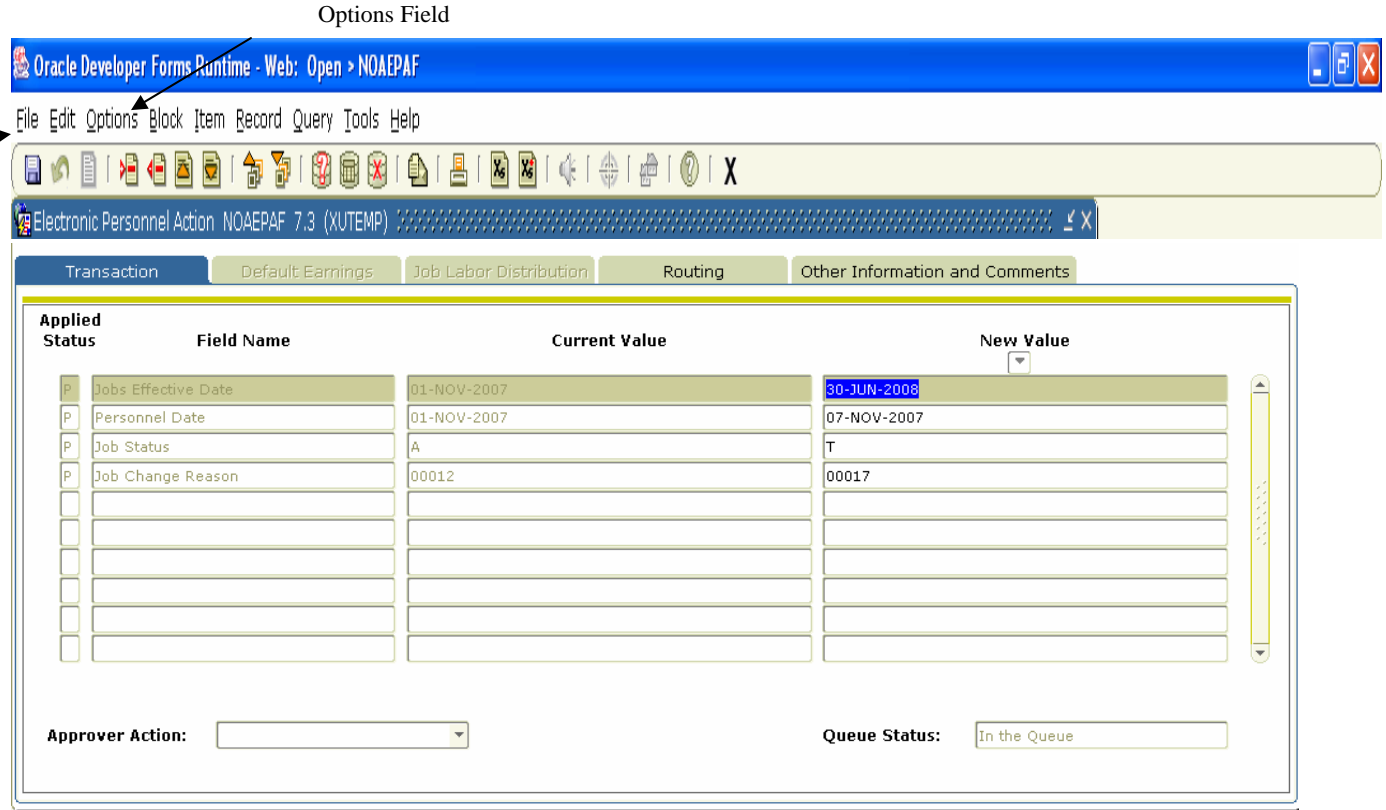
Submitting an EPAF transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.



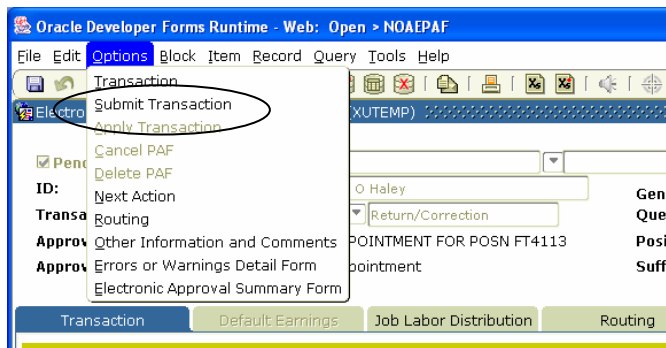
- A** From the Routing Tab, on the file menu click Options
- B** Select Submit Transaction.
If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.
- C** If you are taken to the screen below, please note the errors listed and then

4. Submitting an EPAF Transaction for approval.

Submitting an EPAF transaction for approval routing is the final step in creating a transaction. Detailed below are the steps that are required to submit a transaction.



- A Click the Transaction Tab
- B On the file menu, click **Options**.
- C Select Submit Transaction.



Continued on the next page

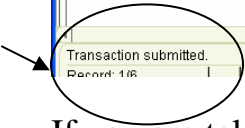
If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.
 Select Submit Transaction.

Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date	01-JUN-2007	01-MAR-2008
P	Personnel Date	04-JUN-2007	01-MAR-2008
P	Job Status	A	A
P	Job Change Reason		00015
P	Annual Salary	65000	
P	Regular Rate	\$1.250601	

Approver Action: Queue Status: Pending

Transaction submitted.
 Report 1/6

Message Area



If you are taken to the screen below, please note the errors listed and then check the Common Errors area of the FAQ’s to resolve them. If you receive an error message that is not in the Common Errors section, contact the EPAF Administrator in Human Resources with the error message for further assistance.

Oracle Developer Forms Runtime - Web: Open > NOAEPAF - NOIEMSG

File Edit Options Block Item Record Query Tools Help

Electronic Approvals Error Message: NOIEMSG 7.3 (XUTEMP)

Proxy For:

Transaction Number: 518 ID: 900015008 Mr. Kenneth Kirk

Originator: LSANDERS


Category: 2390LD LABOR DIST FOR POSN FT2390


Errors Warnings

Approval Type	Error Type	Errors and Warnings Information

Electronic Approval Summary NOAAPSM 7.2 (XUTEMP)

User ID: Enter a date to search by a date range.

Submitted From Date: 

Submitted To Date: 

Proxy For:

Transaction Status:

Queue Status:

Set these fields to "pending" to see only the transactions that require action from you.

Required Fields

Description

User ID

Populated with the user id of the person that is currently logged into Banner

Proxy For

If you are acting as a proxy Approver, enter the username of the person that you are Approving the action for.

Submitted From Date (Optional Field)

Enter the first date of the period for which submitted transactions are to be approved

Submitted To Date (Optional Field)

Enter the last date of the period for which submitted transactions are to be approved

Transaction Status

Status of the transaction overall.

Queue Status

Status of the transaction in your queue.

***If you would like to see only the transactions that you can actually take action on (Approve), using the drop down box next to queue change status to "Pending". Then using the drop down next to the Transaction Status set the field to "Pending". In order to take action on a transaction it must be pending in the queue and the transaction status must be "pending".

Continued on Next page

Transaction Information			Other Information and Comments			
ID	Name	Approval Category	Description	Queue Status	Required Action Indicator	Approver Action
900013920	Mrs. Cathy R. Brimmer	6321TM	TERMINATER POSN SP	Pending	Approval	None
900079745	Gene O Haley	4113RE	REAPPOINTMENT FOR F	Pending	Approval	
900079745	Gene O Haley	4113RE	REAPPOINTMENT FOR F	Pending	Approval	
900079745	Gene O Haley	4113RE	REAPPOINTMENT FOR F	Pending	Approval	
900152585	Dr. Betty Cecile Brookover	2118ST	STIPEND FOR POSN SP	Pending	Approval	
900013920	Mrs. Cathy R. Brimmer	6321TM	TERMINATER POSN SP	Pending	Approval	
900079745	Gene O Haley	4113RE	REAPPOINTMENT FOR F	Pending	Approval	
900079745	Gene O Haley	4113RE	REAPPOINTMENT FOR F	Pending	Approval	
900013920	Mi	6321TM	TERMINATER POSN SP	Pending	Approval	
900079745	Gi	4113RE	REAPPOINTMENT FOR F	Pending	Approval	
900079745	Gi	4113RE	REAPPOINTMENT FOR F	Pending	Approval	
900110202	Mi	2389LD	LABOR DIST FOR POSM	Pending	Approval	
900150347	Mi	4454LD	LABOR DIST FOR POSM	Pending	Approval	

Id number.

Step 3: Control page+ Down, or next block  to access the transaction tab.

Step 4: If you know the name or XULA ID of the employee for whom the action was created, select the employee's ID.

If the only the transaction number is known, in the center of the tab click the right arrow which will allow you to scroll to the transaction number column

Comments			
Queue Status	Required Action Indicator	Transaction Number	Transa Create
	Approval	120	30-AUG-11
	Approval	121	30-AUG-11
	Approval	122	30-AUG-11
	Approval	123	30-AUG-11
	Approval	124	30-AUG-11
	Approval	125	30-AUG-11
	Approval	126	30-AUG-11
	Approval	127	31-AUG-11
	Approval	129	31-AUG-11
	Approval	130	31-AUG-11
	Approval	173	03-OCT-11
	Approval	194	18-OCT-11
	Approval	195	18-OCT-11

Click on the transaction number that you want to take Action on.

Continued on next page

Step 5: Approve the transaction

Queue Status	Required Action Indicator	Approver Action
Pending	Approval	None
Pending	Approval	Acknowledge
Pending	Approval	Approve
Pending	Approval	Disapprove
Pending	Approval	More Info
Pending	Approval	Return/Correction
Pending	Approval	Void
Pending	Approval	
Pending	Approval	
Pending	Approval	
Pending	Approval	
Pending	Approval	
Pending	Approval	
Pending	Approval	
Pending	Approval	
Pending	Approval	

Based on the Required Action column, an Approver can select the action that he/she would like to take in the Approver Action Column. To do so Click the drop down and select the Action that you would like to take. Then click the “Save” icon on the toolbar or press F10 or click File, then Save.

Explanation of Actions that can be taken:

Approve
Acknowledge

The approver has approved the action
Action may be taken by a person in the approval queue with a Required Action of “FYI”

Disapprove
More Info

The approver has disapproved the action
The approver would like more information before taking a positive action.

Return/Correction

The approver would like to return the EPAF to the originator of the transaction.

Void

Indicates the transaction has been voided. This action can only be taken by the originator or the Applier.

If you would like to see the details of the action and you are on the form NOAAPSM, on the tool bar, click options, EPAF Detail Information. You will then be taken to the NOAEPAF form where you will see all of the pertinent information about the EPAF. ***Continued on the next page***

File Edit Options Block Item Record Query Tools Help

Transaction Information
Apply Changes
PAF Detail Information
Queue or Routing Information
Other Information and Comments

User ID: []
Submitted From Date: []
Submitted To Date: []

Proxy For: []
Transaction Status: Pending
Queue Status: Pending

Transaction Information | Other Information and Comments

ID	Name	Approval Category	Description	Queue Status	Required Action Indicator	Approver Action
900013920	Mrs. Cathy R. Brimmer	6321TM	TERMINATER POSN SP	Pending	Approval	None
900079745	Gene O Haley	4113RE	REAPPOINTMENT FOR	Pending	Approval	

To return to NOAAPSM click on the 'exit' button on the tool bar on NOAEPAF.

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 7.3.0.1 (XUTEMP)

Pending Change

Proxy For: []

ID: 900028581 | Beyonce Knowles

Transaction: []

Approval Category: 6319TM | TERMINATER POSN SP6319

Approval Type: TERM0B | Termination of job

Generate ID: []

Query Date: 01-JUL-2008

Last Paid Date: []

Position: SP6319 | Software Systems Programmer

Suffix: 01

Transaction | Default Earnings | Job Labor Distribution | Routing | Other Information and Comments

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Jobs Effective Date		01-NOV-2008
<input type="checkbox"/>	Personnel Date		01-NOV-2008
<input type="checkbox"/>	Job Status		T
<input checked="" type="checkbox"/>	Job Change Reason		00015
<input type="checkbox"/>			
<input type="checkbox"/>			

Click here to return to NOAAPSM

Continued on Next Page

6. Editing an EPAF

An EPAF can be edited when the transaction status is “Return/Correction” or “Waiting”. Any of the data fields can be edited on the EPAF.

Electronic Personnel Action NOAEPAF 7.3.0.1 (XUTEMP)

Pending Change

Proxy For: [Dropdown] Transaction Status

ID: 900028581 [Dropdown] Beyonce Knowles

Transaction: 1378 [Dropdown] Return/Correction

Approval Category: 6319LD [Dropdown] LABOR DIST FOR POSN SP6319

Approval Type: TERMB [Dropdown] Termination of job

Query Date: 03-OCT-2008 [Calendar] Last Paid Date: [Text]

Position: SP6319 [Dropdown] Software Systems Programmer

Suffix: 1 [Dropdown]

Transaction | Default Earnings | Job Labor Distribution | Routing | Other Information and Comments

In order to edit an EPAF you will need either the transaction number or the name of the employee for whom the EPAF was created.

Step 1: Go to NOAEPAF.

Details of a transaction can only be changed on the form NOAEPAF.

Step 2: Verify the status of the transaction.

In order to edit an EPAF the Transaction Status must be in “Return for Correction” or “Waiting”

Step 3: Click the comments tab.

If the transaction Status is Return for Correction, an explanation of why the EPAF was returned for correction will be noted in the comments area.

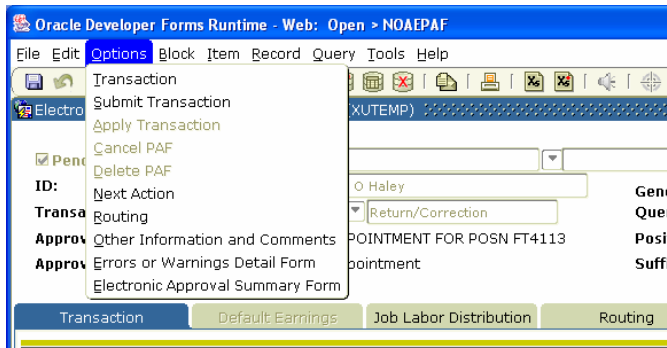
Step 4: Make the changes to the data fields as detailed in the comments area.

Step 5: After the changes have been made click the save icons (press F10 or click File, then Save.

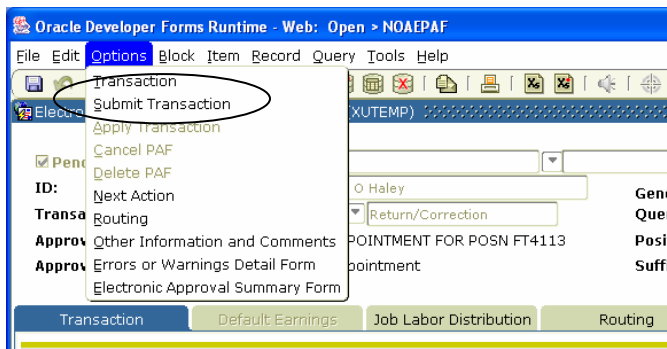
Step 6: Submit the transaction

- A** Click the Transaction Tab
- B** On the file menu, click **Options**.

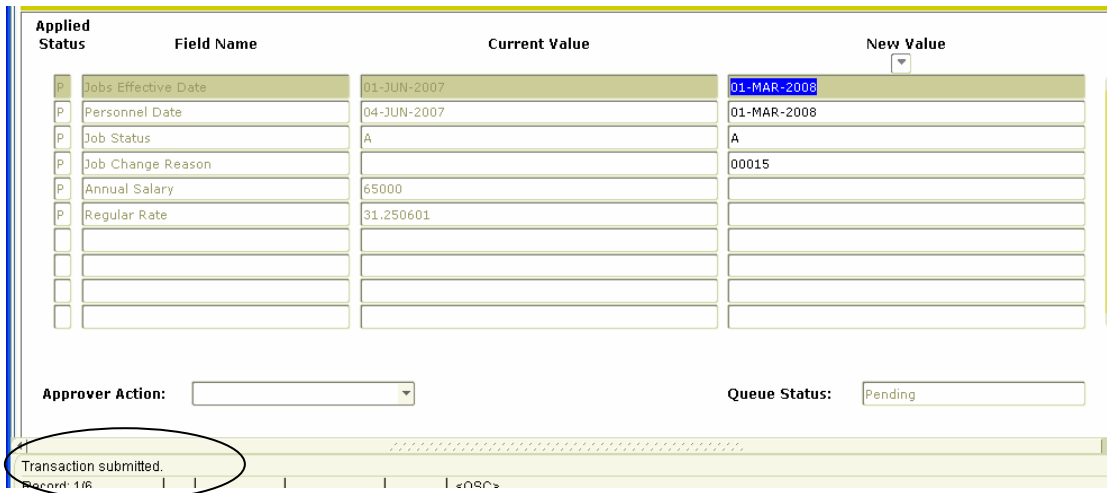
Continued on next page



C Select Submit Transaction.



If your submission was successful “Transaction Submitted” should appear in the message bar at the bottom of the form.



Once the transaction has been edited and resubmitted to the approval queue all individuals defined in the approval queue will be required to take action on the

Continued on next page

transaction again. When an EPAF's transaction status is "Return/Correction" it is as if the transaction was never submitted to the approval queue, which is why it must be resubmitted.

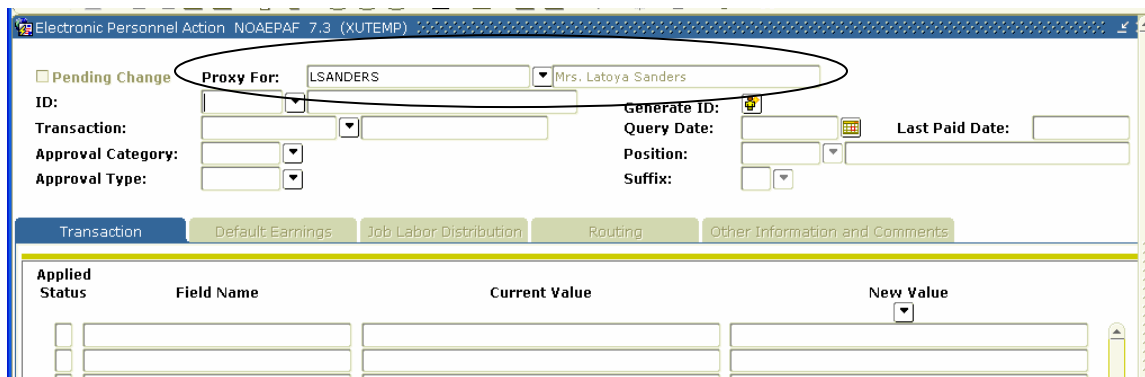
7. Taking an Action as a Proxy

A proxy can:

- take an action for an Approver on either NOAAPSM or NOAEPAF
- create an EPAF on behalf of an originator from either NOAEPAF.

In order to act as a Proxy, the individual must be designated as a Proxy by the Approver for whom they are making the action. In order to receive the designation the Approver must notify Human Resources with the name(s) of the individuals that can act as a Proxy **before** the proxy can take an action on the Approver's behalf.

To take an action or create an EPAF as a Proxy from the form NOAEPAF:



The screenshot shows the 'Electronic Personnel Action NOAEPAF 7.3 (XUTEMP)' form. The 'Proxy For' field is highlighted with a red oval and contains the text 'LSANDERS'. To the right of this field, the name 'Mrs. Latoya Sanders' is displayed. Below the 'Proxy For' field, there are several other fields: 'ID:', 'Transaction:', 'Approval Category:', 'Approval Type:', 'Generate ID:', 'Query Date:', 'Last Paid Date:', 'Position:', and 'Suffix:'. The form also has a tabbed interface with tabs for 'Transaction', 'Default Earnings', 'Job Labor Distribution', 'Routing', and 'Other Information and Comments'. At the bottom, there is a table with columns for 'Applied Status', 'Field Name', 'Current Value', and 'New Value'.

Step 1: In the “Proxy For” field enter the Banner User Id of the individual for whom you are designated as a Proxy. If you have been designated as a Proxy the person's name will appear automatically in the field to the right of the “Proxy For” field.

Step 2: If you are creating or completing an EPAF as a Proxy, complete the transaction as detailed in the documentation for the type of EPAF that you are trying to complete (see table of contents for a link to each action).

Continued on next page

To take action as a Proxy from NOAEPAF:

Electronic Personnel Action NOAEPAF 7.3 (XUTEMP)

Pending Change

Proxy For: LSANDERS Mrs. Latoya Sanders

ID:

Transaction:

Approval Category: REAPPOINTMENT FOR POSN FT4113

Approval Type: REAPPT

Generate ID:

Query Date: 18-OCT-2007 Last Paid Date: 31-MAY-2007


Position: FT4113 Faculty, Business

Suffix: 0

Transaction | Default Earnings | Job Labor Distribution | Routing | Other Information and Comments

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>			
<input type="checkbox"/>			

Step 1: In the “Proxy For” field enter the Banner User Id of the individual for whom you are designated as a Proxy. If you have been designated as a Proxy the person’s name will appear automatically in the field to the right of the “Proxy For” field.

Step 2: In the Transaction ID field, enter the transaction number for the ID that you are to Approve. Then click next block , or Ctrl + Pgdn to access the Transaction Tab

Step 3: Once on the Transaction Tab, click the drop down arrow next to the Approver Action field. Select the Action that the Approver has instructed you to take.

Step 4: On the Tool Bar click the Save Icon. (or click File, then Save.)

Pending Change

Proxy For: LSANDERS Mrs. Latoya Sanders

ID: 900079745 Gene O Haley

Transaction: 198 Pending

Approval Category: 4113RE REAPPOINTMENT FOR POSN FT4113

Approval Type: REAPPT Reappointment

Generate ID:

Query Date: 18-OCT-2007 Last Paid Date: 31-MAY-2007

Position: FT4113 Faculty, Business

Suffix: 0

Transaction | Default Earnings | Job Labor Distribution | Routing | Other Information and Comments

Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date	01-SEP-2007	01-NOV-2007
P	Personnel Date	01-SEP-2007	18-OCT-2007
P	Job Status	T	A
P	Title	Faculty, Business	
P	Job Change Reason	00017	REAPP
P	Factor	S	S
P	Pays	S	S
P	Regular Rate	None	7367
P	Annual Salary	Acknowledge	1900
		Approve	
		Disapprove	
		More Information	
		Return/Correction	
		Void	

Approver Action: **Approve**

Queue Status: Pending

Enter new value. Record: 1/9 <OSC>

Continued on the next page

You have completed “Approving a Transaction as a Proxy via the form NOAEPAF”.

To take action as a Proxy from NOAAPSM:

Step 1: Go to the form NOAAPSM

Step 2: In the “Proxy For” field enter the Banner User Id of the individual for whom you are designated as a Proxy. If you have been designated as a Proxy the person’s name will appear automatically in the field to the right of the “Proxy For” field.

Electronic Approval Summary NOAAPSM 7.2 (XUTEMP) [Exit]

User ID: Proxy For: Mrs. Latoya Sanders

Submitted From Date: Transaction Status:

Submitted To Date: Queue Status:

Transaction Information | Other Information and Comments

ID	Name	Approval Category	Application Date	Applied to Database By	Originator ID	Approver Action	Apply
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Step 3: To view only the transactions that the Approver can take action on in the Transaction Status field, set to “pending” and also set the Queue Status to “pending”.

Step 4: Control page+ Down, or next block  to access the Transaction Tab.

Step 5: If you know the name or XULA ID of the employee for whom the action was created, select the employee’s ID.

If only the transaction number is known, in the center of the tab click the right arrow which will all you to scroll to the transaction number column

Transaction Inform | Information and Comments

Scroll here to search by Transaction number

ID	Name	Approval Category	Description	Queue Status	Required Action Indicator	Approver Action
900013920	Mrs. Cathy R Brimmer	6321TM	TERMINATER POSN SP	Pending	Approval	None
900079745	Gene O Haley	4113RE	REAPPOINTMENT FOR F	Pending	Approval	
900079745	Gene O Haley	4113RE	REAPPOINTMENT FOR F	Pending	Approval	
900079745	Gene O Haley	4113RE	REAPPOINTMENT FOR F	Pending	Approval	
900152585	Dr. Betty Cecile Brookover	2118ST	STIPEND FOR POSN SP	Pending	Approval	
900013920	Mrs. Cathy R Brimmer	6321TM	TERMINATER POSN SP	Pending	Approval	
900079745	Gene O Haley	4113RE	REAPPOINTMENT FOR F	Pending	Approval	
900079745	Gene O Haley	4113RE	REAPPOINTMENT FOR F	Pending	Approval	
900013920	Mrs. Cathy R Brimmer	6321TM	TERMINATER POSN SP	Pending	Approval	
900079745	Gene O Haley	4113RE	REAPPOINTMENT FOR F	Pending	Approval	
900079745	Gene O Haley	4113RE	REAPPOINTMENT FOR F	Pending	Approval	
900110202	Mr. Benventra M. Wandera	2389LD	LABOR DIST FOR POSN	Pending	Approval	
900150347	Mr. Shane Jones	4454LD	LABOR DIST FOR POSN	Pending	Approval	

Id number.

Comments

Queue Status	Required Action Indicator	Transaction Number	Transa Create
	Approval	120	30-AUG-
	Approval	121	30-AUG-
	Approval	122	30-AUG-
	Approval	123	30-AUG-
	Approval	124	30-AUG-
	Approval	125	30-AUG-
	Approval	126	30-AUG-
	Approval	127	31-AUG-
	Approval	129	31-AUG-
	Approval	130	31-AUG-
	Approval	173	03-OCT-
	Approval	194	18-OCT-
	Approval	195	18-OCT-

Click on the transaction number that you want to take Action on.

Step 6: In the Approver Action Column, select the action that you would like to take.

Based on the Required Action column, an Approver can select the action that he/she would like to take in the Approver Action Column. To do so Click the drop down arrow and select the Action that you would like to take.

Queue Status	Required Action Indicator	Approver Action
Pending	Approval	None
Pending	Approval	Acknowledge
Pending	Approval	Approve
Pending	Approval	Disapprove
Pending	Approval	More Info
Pending	Approval	Return/Correction
Pending	Approval	Void
Pending	Approval	
Pending	Approval	
Pending	Approval	
Pending	Approval	
Pending	Approval	
Pending	Approval	
Pending	Approval	
Pending	Approval	

Continued on the next page

If you would like to see the details of the action, and you are on the form NOAAPSM on the tool bar, click options, EPAF Detail Information. You will then be taken to the NOAEPAF form where you will see all of the pertinent information about the EPAF.

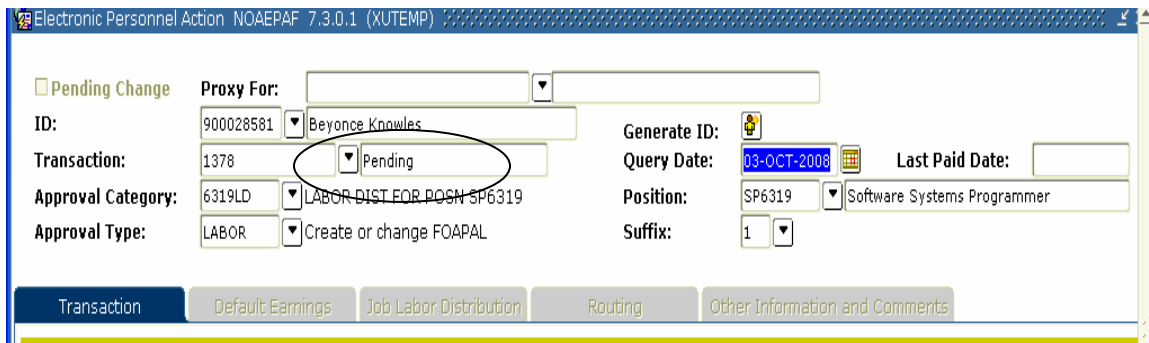
You have completed “Taking an Action as a Proxy from the form NOAAPSM”.

8. An EPAF's Status

An EPAF is always associated with two types of status: *Transaction Status* and *Queue Status*, throughout its life in the approval process. These statuses are very important because they control whether action can be taken on the transaction by the individuals in the Approval Routing queue.

Transaction Status

An EPAF Transaction Status refers to the status of the Electronic Personnel Action itself. This status is displayed on the form NOAEPAF.



The screenshot shows the NOAEPAF form with the following fields:

<input type="checkbox"/> Pending Change	Proxy For:		Generate ID:			
ID:	900028581	Beyonce Knowles	Query Date:	03-OCT-2008	Last Paid Date:	
Transaction:	1378	Pending	Position:	SP6319	Software Systems Programmer	
Approval Category:	6319LD	LABOR DIST FOR POSN SP6319	Suffix:	1		
Approval Type:	LABOR	Create or change FOAPAL				

Navigation tabs: Transaction (selected), Default Earnings, Job Labor Distribution, Routing, Other Information and Comments

Valid EPAF Statuses are:

Waiting

The transaction is in the process of being created and has not been submitted to the Approval Queue. Only the person that created the transaction can view a transaction in this status.

Pending

The transaction requires action from the individuals in the routing queue. It is available for Approval.

Return for Correction

Allows HR to return the transaction to the originator/creator for correction when an error is detected before final approval. The EPAF can be updated and resubmitted to the Approval Queue.

Approved

The transaction is approved for the person when all individuals in the

Approval Queue have approved the transaction.

Continued on the next page

Complete

The transaction has been approved and Human Resources has applied the changes.

Disapproved

The transaction has been disapproved by a person in the routing queue. The individuals defined in the approval queue after the person that disapproved the transaction no longer need to take action on the item.

Void

The originator has voided the transaction. No action is required by the individuals in the routing queue

Queue Status

Queue status refers to the status of the Electronic Personnel Action with regard to the individual defined in the approval queue.

Continued on the next page

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
1025	20	TEST	Miss Sally Sue Test	Approval	Pending	
2611	20	TEST	Miss Sally Sue Test	Approval	Pending	
110000	20	TEST	Miss Sally Sue Test	Approval	Pending	
APPLY	999	TEST	Miss Sally Sue Test	Apply	In Queue	

Level Code. Press LIST for All, CQH - Mandatory Lvl's, Dup Item - Personal Queue
Record: 1/4

Valid Queue Statuses are:

Pending

The approver needs to take positive action on the item.

Approved

You, the approver, have approved the transaction.

Disapproved

You, the approver, disapproved the transaction.

Void

The originator has voided the transaction. No action is required by the individuals in the routing queue

Acknowledge

Action may be taken by a person in the approval queue with a Required Action of "FYI"

More Info

You, the approver, would like more information before taking a positive action.

Return/Correction

You, the approver, would like to return the EPAF to the originator of the transaction.

Void

Indicates the transaction has been voided. This action can only be taken by the originator or the Applier.


Default Earnings						Job Labor Distribution	Routing	Other Information and Comments		
Earnings						Hours or Units	Deemed Hours	Special Rate	Shift	Ended as of Date
ngs										

9. Adding Comments to an EPAF

Comments can be added to an EPAF by selecting the **Other Information and Comments Tab**. Comments entered are viewable by all the individuals included in the **Approval Routing**.

The screenshot displays the 'Other Information and Comments' tab in the EPAF system. At the top, there are five tabs: 'Transaction', 'Default Earnings', 'Job Labor Distribution', 'Routing', and 'Other Information and Comments'. Below the tabs, there are several input fields: 'Created Date' (17-JAN-2008), 'Submitted Date', 'Application Date', 'Originator ID' (LSANDERS), 'Submitter ID', and 'Applied to Database By'. The main area contains two 'Comment' sections. The first section has a large green rectangular area for the comment, with 'Date and Time' set to '17-JAN-2008 02:12:53 PM' and 'Made By' set to 'LSANDERS'. The second section is empty, with 'Date and Time' and 'Made By' fields. At the bottom, a status bar shows 'Record: 1/1' and '<OSC>'.

To add a comment to a transaction:

- 1) Select the Other Information and Comments Tab.
- 2) Enter comments into the Comments field.
- 3) Click the save icon , to save the comments you have entered.

A. APPENDIX

EPAF FREQUENTLY ASK QUESTIONS

1. What is the difference between when a transaction is “**saved**” and when a transaction is “**submitted**”?
2. How do I customize my view so that I only see EPAFs that I can take action on?
3. Can I see all EPAFs that are open from my department?
4. How do I know with certainty that an EPAF has been submitted?
5. What is the difference between **terminating the funding for an employee’s position** and **terminating** an employee’s position?
6. What are the Approvers responsibilities?
7. What are the originators responsibilities?
8. What are proxies?
9. Can an originator have proxies?
10. Can an approver have a proxy?
11. Can an approver also be an originator?
12. How will I know who has approved my EPAF?
13. I am ready to take a Personnel Action using EPAF, What do I have to do?
14. How do I know the Approval Category for an Employee?
15. What are the Abbreviations for the Approval Categories in EPAF Phase I?
16. How do I know which position number to use for a Labor Redistribution?

17. [Can a Faculty/Staff member have more than one Primary Position?](#)
18. [Can a Faculty/Staff member have more than one Secondary Position number?](#)
19. [What is a Secondary Position?](#)
20. [Can I add and delete Approval Levels on the Routing tab?](#)
21. [How is a Retroactive Labor Distribution handled in EPAF?](#)
22. [What do I do if I notice that there is an incorrect person listed in the Approval Routing on the "Routing Tab"?](#)
23. How can I search for a Supervisor's ID and Position number?

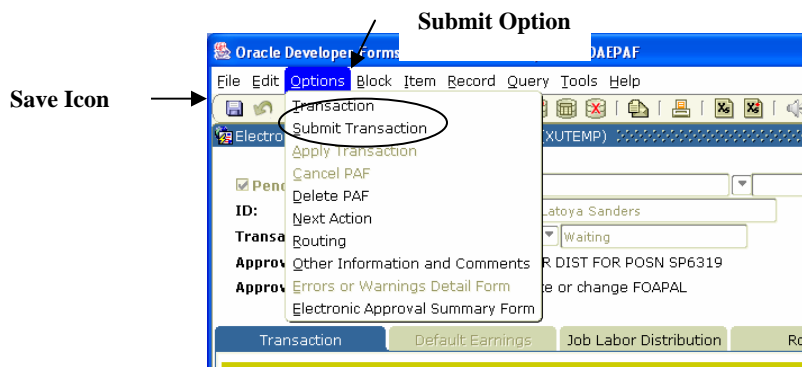
Q1. What is the difference between when a transaction is “**saved**” and when a transaction is “**submitted**”?

A. Saving a Transaction

Saving a transaction allows you to only save the information entered on the EPAF form. The first time a transaction is “Saved”, the system will automatically assign a transaction number and change the Transaction Status to “Waiting”. The transaction does not go into the Approval queue for Approvers to view or take an action on the transaction. To save a transaction, click the “Save” icon on the file menu.

B. Submitting a transaction

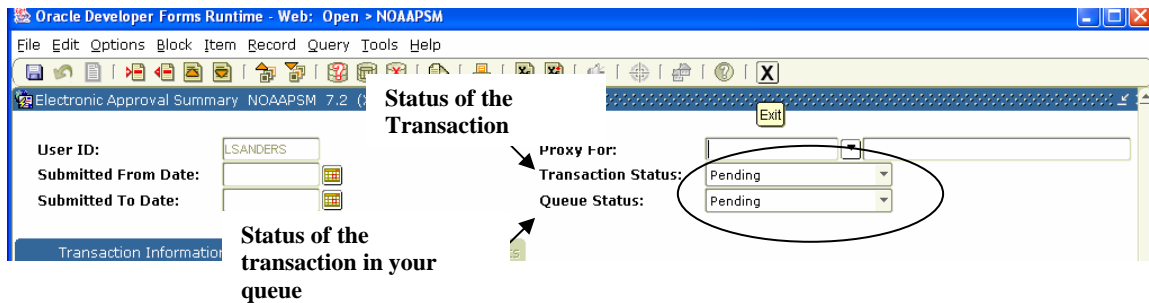
Submitting a transaction changes the status of the transaction from “waiting” to pending and the transaction is placed in the routing queue of the individuals defined on the routing tab of PAF.



Q2. How do I customize my view so that I only see EPAFs that I can take action on?

A. If you are designated as an Approver, you can go to the Approval Summary form **NOAAPSM**. On that form set the Transaction Status to “**Pending**” and the Queue Status to “**Pending**”. Setting both statuses to “Pending” will return all of the transactions that you are required to take action on with a Transaction status of “Pending” and a Queue status of “Pending”. For more details on queue status and Transaction Status, see section 8 of the EPAF Documentation Manual.

Continued on next page



Q3. How do I see all EPAFs that are open from my department?

A. Unfortunately, no one person can see all of the EPAF's for a specific department from either the Approval Summary Form (NOAAPSM) or Electronic Personnel Action Form (NOAEPAF). However an individual can see all of the EPAF's that he/she has been designated to take an action. If you are designated as an Approver, you can go to the form Approval Summary from **NOAAPSM**. On that form set the Transaction Status to "**All**" and the Queue Status to "**All**". Setting both statuses to "**All**" will return every EPAF that you have ever been designated to take action on, regardless of the transaction or queue status.

Q4. How do I know with certainty that an EPAF has been submitted?

A. The message area will return the message Transaction Submitted, and the transaction status changes from **Waiting** to **Pending** and the transaction can be seen on the Approval Summary Form (**NOAAPSM**).

Continued on next page

Before
Transaction
Submitted

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 7.3 (XUTEMP)

Pending Change Proxy For: []

ID: 900407242 [] Mrs. Latoya Sanders

Transaction: 527 [] Waiting

Approval Category: 6319LD [] LABOR DIST FOR POSN SP6319

Approval Type: LABOR [] Create or change FOAPAL

Generate ID: []

Query Date: []

Position: []

Suffix: []

Transaction Default Earnings Job Labor Distribution Routing Ot

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 7.3 (XUTEMP)

Pending Change Proxy For: []

ID: 900407242 [] Mrs. Latoya Sanders

Transaction: 527 [] Pending

Approval Category: 6319LD [] LABOR DIST FOR POSN SP6319

Approval Type: LABOR [] Create or change FOAPAL

Transaction Default Earnings Job Labor Distribution

Q5. What is the difference between “**Terminate the funding for a position**” and “**Terminating an employee in an employee in a position**”?

A. “**Ending the funding for a position**” allows you to terminate the funding for a position but **NOT** terminate an employee from employment. For example, when a Labor Distribution EPAF is submitted, it is required that you specify when the funding that you are entering will end. By contrast, Faculty/Staff are only terminated from employment when a Termination EPAF is submitted by the Supervisor/Manager, or when a Faculty/Staff member is terminated involuntary.

Q6. What are the originators responsibilities?

A. The “Originator” is responsible for accurately entering information on the Electronic Personnel Action Form. The Originator should check the status of their **EPAFs** transaction on a regular basis.

Q7. What are the Approvers responsibilities?

A. Check the Approval Summary from **NOAAPSM** for any transaction with a status of pending. Approved or Disapproved an action timely.

Continued on next page

Q8. What are proxies?

A. Individuals **authorized** to take approval action in the absence of the approver.

Q9. Can an originator have proxies?

A. Yes! The proxy of an originator can update or change data on an EPAF in which he or she did not originate as long as the transaction's status is "Pending" or "Return for Correction".

Q10. Can an approver have a proxy?

A. Yes! For details on how to take an action as a Proxy for an Approver please refer to section 7 entitled "Taking an Action as a Proxy" in the EPAF Documentation Manual.

Q11. Can an approver also be an originator?

A. Yes! An Approver can also be an originator as long as he or she request both approver and originator access to the NOAEPAF forms.

Q12. How will I know who has approved my EPAF?

A. Go to the form **NOAEPAF**, enter the transaction number and click the routing tab. The "Queue Status" column next to each individuals name will give the status of the transaction in their queue. The "Action Date" field will also be populated with the date the individual made the action.

Q13. I am ready to take a Personnel Action using EPAF, what do I have to do?

A. First you should check to insure that you have access to the required forms. If you do not have access, please contact the EPAF Administrator at ext 5282. After you have accessed the form, get into to Brio on the web and run the **Department Position Report** to gather the information required to complete an EPAF.

Q14. How do I know the Approval Category for an Employee?

A. The Approval Category for any employee will always be the numeric portion of the Faculty/Staff member's position number and the suffix for the action that you desire to take. Listed below is a list of the suffixes.

EX	New Hire
EG	New Hire Grant Funded

Continued on next page

LD	Labor Distribution
RE	Reappointment
TM	Termination
ST	Stipend
HC	Hours Change
JC	Job Change
LE	Employee Leave
RT	Return from Leave
TC	Title Change

For example, for position number AB1234, to do a Labor Redistribution for that position the Approval Category would be '1234LD'.

Q15. What are the Abbreviations for the Approval Categories in EPAF Phase I?

- | | |
|--------------------------------|---------------|
| A. Labor Redistribution | LD, L1 |
| Reappointment | RE, R1 |
| Stipend Existing Position | S1, ST |
| Terminations | TM, T1 |

Q16. How do I know which position number to use for a Labor Redistribution?

- A.** You will always use the Faculty/Staff member Primary Position for A Labor Redistribution.

Q17. Can a Faculty/Staff member have more than one Primary Position?

- A.** No a Faculty/Staff member can only have one active Primary Position number.

Q18. Can a Faculty/Staff member have more than one Secondary Position number?

- A.** A Faculty/Staff member can have more than one active Secondary Position number.

Q19. What is a Secondary Position?

- A.** It is a position that a Faculty/Staff member has in addition to his/her Primary Position.

Continued on next page

Q20. Can I add and delete Level Codes on the Routing tab?

- A. Level Codes cannot be deleted from the Routing Tab. If a code needs to be deleted you must notify Human Resources via e-mail regarding the change and Human Resources will update the routing.

Q21. How is a Retroactive Labor Distribution handled in EPAF?

- A. A Retroactive Labor Distribution happens when you are to start paying an employee from a fund and that employee should have been paid from that fund in prior pay period. In this situation submit the EPAF with a Jobs Effective Date this greater than the last Paid Date and make a note on the “Other Information and Comments” tab detailing the date the employee should have begun being paid from the fund.
- B. For example: Professor Scott was awarded the XULA EXCEL grant in March of this year. In the month of April, Jill is creating a Labor Distribution EPAF for Professor Scott. Jill is going to pay Professor Scott from the XULA EXCEL grant starting April 1 make a note in the comments that Professor Scott should have also been paid from the grant in March.

If more information about how to handle a Retroactive Labor Distribution is required please contact Human Resources @ ext. 5282.

Q22. What do I do if I notice that there is an incorrect person listed in the Approval Routing on the “Routing Tab”?

If you observe that an incorrect person is listed on the “Routing Tab” for a transaction you are involved in, either as an Originator or an Approver, contact Human Resources immediately @ ext. 5282.

Q23. How can I search for a Supervisor’s ID and/or Position number?

To search for a Supervisor ID:

1. From the Banner form NOAEPAF on the Transaction tab, click in the Supervisor ID field.

Continued on next page

4. Enter the Supervisor's First and last name in their respective fields.
5. Click "Execute Query" or "F8" to execute the query.

6. Once the ID field is populated with the Supervisor's XULA ID, double click the ID field and you will be taken back to the form NOAEPAF (and the XULA ID will be automatically populated in the Supervisor ID field).

The screenshot shows the Oracle Developer Forms Runtime interface for the NOAEPAF form. The top section contains input fields for:

- Proxy For: [Empty]
- ID: 900407242, Name: Mrs. Latoya Sanders
- Transaction: [Empty]
- Approval Category: 6319EX, NEW HIRE FOR SP6319
- Approval Type: HIRE, New Hire/Re-Hire
- Generate ID: [Icon]
- Query Date: 01-DEC-2008
- Last Paid Date: [Empty]
- Position: SP6319, Software Systems Programmer
- Suffix: 1

 Below these fields are tabs for Transaction, Default Earnings, Job Labor Distribution, Routing, and Other Information and Comments. The main area contains a table with columns: Applied Status, Field Name, Current Value, and New Value. The 'Supervisor ID' row is highlighted, and a dropdown arrow is visible in the 'New Value' column. An arrow points to this dropdown arrow.

Supervisor's ID will auto populate here.

To Search for the Supervisor's Position from NOAEPAF:

1. Click the down arrow click the arrow under "New Values"
2. You are then taken to the form NBIJLST. From this form enter the Supervisor's ID, then click the "Next Block" icon or Ctrl+PageDown, to get the next block of the form.

Continued on next page

Enter the Supervisor's ID here

Once the search is executed, the Supervisor's Posn will be populated

Position	Suffix	Begin Date	End Date	Job Type
SP1108	1	23-AUG-2004		P

Effective Date	Job Status	Description	Employee Class	Pay ID	COA	Organization	Job Change Reason	Employer
01-JUL-2008	A	Training Manager	02	MN	X	2702	00012	XU

3. Select the Supervisor's position, and then double click it to be returned to NOAEPAF.

Position	Suffix	Begin Date	End Date	Job Type
SP1108	1	23-AUG-2004		P

Effective Date	Job Status	Description	Employee Class	Pay ID	COA	Organization	Job Change Reason	Employer
01-JUL-2008	A	Training Manager	02	MN	X	2702	00012	XU

