IMPORTANT: Students should not start working until the department save the EPAF and submitting it successfully to the department approval queue. Once the originator receives the “transaction has been submitted successfully” confirmation, the student can now start to work. This is the best practice to avoid I-9 violations; and in turn, reduces risk for departments to incur fines.

In cases where an EPAF is returned back to the originator for correction (and the correction requires the original EPAF to be voided and a new EPAF to be submitted), originators should add a comment in the new EPAF referencing the transaction number (of the original EPAF) and indicating the correct start date of the job assignment. This will give Payroll enough information to process hours submitted on paper timesheets.

Accessing the EPAF

Log into ESTHER (https://esther.rice.edu/) using your Rice ID and password (PIN). Then, click Login.
Click on the Employee link at the main menu.

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

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

- Electronic Personnel Action Form (EPAF)
  - Electronic Personnel Action Form (EPAF)

Click on the New EPAF link.

Electronic Personnel Action Form

Useful Tools:
- EPAF Originator Dashboard by Department
- EPAF Approver Dashboard by Department
- Payroll Calendar
- EPAF Documentation (Student Job Assignments)
- EPAF Documentation (Labor Distributions)

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

Note: The Payroll Calendar for the current year is available for review by clicking on the Payroll Calendar link. In addition, there is EPAF documentation for Student Job Assignments and Labor Distributions available by clicking on the appropriate EPAF Documentation link.
Completing the EPAF

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

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

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

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

### New EPAF Person Selection

**Approval Category is a required field.**

**ERROR** This employee does NOT have a valid I9 Verification.

You cannot proceed and the student cannot start work until the I9 is valid.

Please contact the Payroll Office if you have any questions.

If the individual has completed the I-9 requirement, originators should be able to move beyond the initial EPAF screen and complete the EPAF.

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

**Query Date:** MM/DD/YYYY

10/01/2017

**Approval Category:** *Not Selected*

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

**Query Date:** MM/DD/YYYY

10/01/2017

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

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

### New EPAF Person Selection

**ERROR** The allowable dates for Query Date may only be current or future dates.

Please contact the Payroll Office if you have any questions.
Once the query date (start or effective date of employment) and approval category (EPAF form) are populated, the screen will appear as follows - depending on whether or not there are active job assignments.

**Employee Job Assignments**

<table>
<thead>
<tr>
<th>Type</th>
<th>Position</th>
<th>Suffix</th>
<th>Title</th>
<th>Time Sheet Organization</th>
<th>Start Date</th>
<th>End Date</th>
<th>Last Paid Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td>R69500</td>
<td>00</td>
<td>Test Intern</td>
<td>695000, Controller’s Office</td>
<td>Nov 10, 2013</td>
<td>May 12, 2018</td>
<td>Sep 02, 2017</td>
<td>Active</td>
</tr>
</tbody>
</table>

**Submit**

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

**All Jobs**

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

**Employee Job Assignments**

<table>
<thead>
<tr>
<th>Type</th>
<th>Position</th>
<th>Suffix</th>
<th>Title</th>
<th>Time Sheet Organization</th>
<th>Start Date</th>
<th>End Date</th>
<th>Last Paid Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td>R69500</td>
<td>00</td>
<td>Test Intern</td>
<td>695000, Controller’s Office</td>
<td>Nov 10, 2013</td>
<td>May 12, 2018</td>
<td>Sep 02, 2017</td>
<td>Active</td>
</tr>
<tr>
<td>Secondary</td>
<td>S69500</td>
<td>00</td>
<td>Payroll Student Assistant</td>
<td>695002, Payroll</td>
<td>May 11, 2014</td>
<td>Aug 08, 2015</td>
<td>Aug 08, 2015</td>
<td>Terminated</td>
</tr>
</tbody>
</table>

**Active Jobs**

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

Then, click Submit.

**All Jobs**

**Next Approval Type**

**Submit**

**New EPAF Job Selection**

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

Click on **All Jobs** to view all jobs. **NOTE:** Any active jobs with a **primary** type (includes jobs that will be terminated as of the start of new job but are currently active). This information is needed for the next screen.

Determine if the employee has work study funds by asking the student or contacting Financial Aid. If there is an **active FWS (R position)** without a term date, **new job must be Rice Work (S position)**.

Click on **Select** button to use a position/suffix previously used for this employee.

Enter **Position/Suffix** for a new position (never assigned to this employee) using the following format:

- Federal Work Study **POSITION = R + first 3-digits of home org + 00** (ex. R69500)
- Rice Work **POSITION = S + first 3-digits of home org + 00** (ex. S69500)
- **SUFFIX = 2-digits** (ex. 00, 01, etc.) - allows same position number to be used for multiple jobs assigned to employee using a different suffix.
IMPORTANT: Click on All Jobs.

ID: Sammy Owl, S12345678
Query Date: Oct 01, 2017
Approval Category: Student Job Assignment (AY), STJOB

Job Assignment, STJB

Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select

New Job
Primary R69500 00 Test Intern 695000, Controller’s Office Nov 10, 2013 May 12, 2018 Sep 02, 2017 Active

All Jobs
Next Approval Type Submit

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

1. Determine if the employee has work study funds by asking the student or contacting Financial Aid. If there is no active FWS (R position) without an end date, the new job must be a Rice Work (S position). In the example below, the new job must be a Rice Work position.

2. If there is an active job with a primary type (includes jobs that will end as of the start of the new job but are currently active), make note of this. The new job assignment will need a secondary type on the next screen.

3. Next, either click on the Select button to use a position/suffix previously assigned to this employee or enter a position/suffix for a new job assignment (never assigned to this employee). Refer to the sections below for more information.

Create New Job (new position/suffix never assigned to employee)

IMPORTANT: Click on All Jobs.

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

Federal Work Study POSITION = R + first 3-digits of home org + 00 (ex. R69500)

Rice Work POSITION = S + first 3-digits of home org + 00 (ex. S69500)

SUFFIX = 2-digits (ex. 00, 01, etc.) – allows same position number to be used for multiple jobs assigned to an employee by using a different suffix. Enter 00 (zeroes) unless there is a currently active position listed with the same position number with a 00 suffix. In these cases, enter 01 or other sequential numbers.

**IMPORTANT:** If the new EPAF has the same position number and same suffix as an active position, the EPAF will not be able to be submitted successfully to the department approval queue until this is corrected.

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

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

Then, click Submit.

Use Existing Job (position/suffix already assigned to employee)

**IMPORTANT:** Click on All Jobs.

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

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

Then, click on Submit.
On the next screen, scroll down to the **JOB ASSIGNMENT** section.

**Electronic Personnel Action Form**

Click **SAVE** before clicking **SUBMIT**-otherwise you may lose your changes.

**Warnings**=Info only (no action needed)
**Errors**= **ACTION REQUIRED** to remove before EPAF can be submitted

**JOB ASSIGNMENT** section:
Fields that require action have a red asterisk * (5 fields require attention)

- **Contract Type**= Default is primary. Change to secondary if active primary job on previous screen.
- **Job Begin Date**= Leave default (if new position/suffix for employee). **DELETE** if position/suffix was assigned to employee before (clicked on Select button on previous screen).
- **Title**= Specific job titles help employees identify the correct position in Web Time Entry
- **Timesheet Orgn**= Org tied to primary timesheet approver. Enter the appropriate org so the approver can access/approve timesheet.
- **Regular Rate**= Hourly pay rate

**JOB LABOR** section:
- **Effective Date**= Do **NOT** change if job assignment EPAF
- **COA** (chart of accounts)= **Required** and always 1
- **FWS Fund**= Verify/change fund (R19900 for FY19)
- **Account Code**= 60810 for undergrads and 60880 for graduates

**ROUTING QUEUE** section:
- **DEPT 20**= Banner ID of approver
- **SFS 30**= JBUCK
- **RCA 40**= BWF1
- **PAYROL 85**= Banner ID of anyone in Payroll

**Name and ID:** Sammy Owl, S12345678

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

**Query Date:** Oct 01, 2017

Fields that **require action** have a red asterisk * (5 fields require attention).

- * - indicates a required field.

**Job Assignment, S69500-00 Payroll Student Assistant, Last Paid Date:** Aug 08, 2015

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contract Type</strong></td>
<td>Secondary</td>
<td>Primary</td>
</tr>
<tr>
<td><strong>Job Begin Date</strong></td>
<td>05/11/2014</td>
<td>10/01/2017</td>
</tr>
<tr>
<td><strong>Title</strong></td>
<td>Payroll Student Assistant</td>
<td></td>
</tr>
<tr>
<td><strong>Timesheet Orgn</strong></td>
<td>695020</td>
<td></td>
</tr>
<tr>
<td><strong>Regular Rate</strong></td>
<td>9</td>
<td></td>
</tr>
</tbody>
</table>

**Contract Type**— This will default to Primary. Leave the default of **Primary** only if no other active job has Primary as the type from the previous screen; otherwise select **Secondary** from the drop-down box. **[IMPORTANT]**: If the new EPAF and an existing active position both have the Primary Contract Type, the user will not be able to submit the EPAF successfully until this is corrected. Refer to previous screen if necessary.]
Job Begin Date – This will default as the query date (start of employment) from the initial screen. Leave the default when hiring a student into a new position/suffix for the first time. However, if this position/suffix was previously assigned to him/her (a date may appear in the current value depending on the originator’s Banner HR security), remove the default date and leave blank.

[IMPORTANT: Remove the job begin date and leave blank for job assignments with employees hired (or rehired) into an existing position/suffix. This step is required to avoid errors when submitting the EPAF to the departmental approval queue.]

Title* – Enter the job title. Specific job titles help employees identify the correct position in Web Time Entry.

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

Regular Rate* – Enter the hourly pay rate. The hourly rate must be at least the federal minimum wage ($7.25 per hour as of 7/24/2009) and not exceed $20.00 per hour or the market rate. Market rates that exceed $20.00 per hour must include documentation with the hiring form from the hiring department indicating the market rate and sources of such rate. The requirement is met by either (1) providing the link to support in the EPAF comment or (2) submitting an email to payroll@rice.edu to include the support and reference the payroll ticket# in the EPAF comments. The EPAF will be returned to the originator for correction if these criteria are not met.

[IMPORTANT: Students hired as a performer for a campus event, a photographer for a campus publication, or hired to complete a special project outside the regular scope of work normally done by student employees must be paid at least the federal minimum wage and not exceed $50.00 per hour or the market rate. These assignments are limited to a one-week period. Market rates that exceed $50.00 per hour must include documentation with the hiring form from the hiring department indicating the market rate and sources of such rate. The requirement is met by either (1) providing the link to support in the EPAF comment or (2) submitting an email to payroll@rice.edu to include the support and reference the payroll ticket# in the EPAF comments. The EPAF will be returned to the originator for correction if these criteria are not met.]

The following fields are for informational purposes only (enterable – but no action is required).

Job Change Reason: TERMD
Home Organization:
Distribution Orgn:

Job Change Reason – The default is NEWHI, New Hire. Type REHIR to change the job change reason to REHIR, Rehire.

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

Distribution Orgn – Leave blank unless the current value is 695021, Payroll Student I-9. When the current value is 695021, Payroll Student I-9, enter the org that should be used for reporting (should be an org that the individual who should receive reports has appropriate HR security (orgs/employee class). [IMPORTANT: This field should be left blank for graduate students (RS) or undergrad students (RT, RW) with a secondary position (indicated in the Contract Type field).]
All other fields in the JOB ASSIGNMENT section are non-enterable fields. However, the following fields may provide information that is helpful to hiring departments. The current value column may appear depending on the end user’s Banner HR Security.

**Employee Class Code:** (Not Enterable)  
**I9 Date:** MM/DD/YYYY (Not Enterable)  
**I9 Expiration Date:** MM/DD/YYYY (Not Enterable)

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

**I9 Date** – The current value indicates the date when the student completed the I-9 requirement. This is for informational purposes only.

**I9 Expiration Date** – The current value indicates the date when the I-9 will expire, if applicable. The student will not be able to work beyond this date unless there is recertification of the I-9 with document(s) extending the work authorization. This is for informational purposes only. Additional notification will be sent to the student employee and hiring department about a month before the I-9 expiration date.

Scroll down to the **JOB LABOR** section. The effective date will default to the employment start date of the EPAF. Leave this date as the default to avoid errors.

Make any appropriate changes to the funding.

- Enter a **number 1** in the **COA** field for every funding line to avoid errors. This field is required for every funding source line.
- Delete rows and enter new funding in a blank line to populate the default program/activity codes.
- After the fund, org, and accounts are entered, click Default from Index to populate the program/activity codes.
- Make sure the total **percent is 100**.
- When funding lines need to be deleted, click on Save and Add New Rows for the Remove check box to appear. Then, check the Remove box for funding lines that need to be deleted.
- If the job assignment is FWS (R position), verify/change the **FWS fund** (R19900 for FY19) and **percentages** (department = 25%; FWS subsidy = 75%).
- Use the correct account code for student wages (60810 for undergrads and 60880 for graduates).
Scroll down to the **JOB END DATE** section.

The end date will default to the end date for the academic year or summer employment period. **For positions with an end date prior to the academic year or summer employment period, change the end date to reflect the correct end date (using the MM/DD/YYYY format).** **Note:** The end date will inactivate the timesheet so students will not be able to enter hours after the end date.

**IMPORTANT:** This is required for one-time events or special projects. The end date must be within one week of the employment start date in accordance to the student pay guidelines/procedures. **If the job was only for one day,** enter the day after the query date (start or effective date of employment).

---

**Job End Date, S69500-00 Payroll Student Assistant, Last Paid Date: Aug 08, 2015**

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs Effective Date: MM/DD/YYYY*</td>
<td>08/08/2015</td>
<td>05/12/2018</td>
</tr>
<tr>
<td>Job Status: (Not Enterable)</td>
<td>Terminated</td>
<td>T</td>
</tr>
<tr>
<td>Job Change Reason: (Not Enterable)</td>
<td>TERMD</td>
<td>ENDT</td>
</tr>
</tbody>
</table>

Scroll down to the **ROUTING QUEUE**.

Enter the Banner ID for the individual who is to approve the EPAF in the departmental (20) queue or select the applicable Banner ID from list (by clicking on the magnifying glass). Confirm name appears in field next to the User Name field to avoid errors. Then, type the user names for the Student Financial Services (30), Research & Cost Accounting (40), and Payroll (85) queues or select approvers from the list (by clicking on the magnifying glass).

If multiple approvers are needed at the department level, additional approvers can be added by selecting Department 20 as the approval level from the “Not Selected” drop-down boxes located under the Payroll 85 queue. Please be sure to add the appropriate User Name (Banner ID) and select “Approve” for the required action. **Note:** This is used when there is split funding and the department approver does not have security to approve for all of the orgs.
If any information needs communicated to department approvers, Student Financial Services, Research & Cost Accounting, and/or Payroll, please add a comment.

**Comment**

![Comment field]

Click on Save.

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

**Electronic Personnel Action Form**

![EPAF interface with a message]  
*Your change was saved successfully.*

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

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

![EPAF interface with transaction details]  
Name and ID:  
Transaction: 15227  
Query Date: Jun 20, 2016

Transaction Status:  
Approval Category: Student job assignment (Academic Year), STJO

![Save, Submit, Delete buttons]

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

**Electronic Personnel Action Form**

![EPAF interface with an alert]  
**Transaction was not submitted. Please review errors.**

Scroll down to the Errors and Warning Messages (located under the student summary information). The warnings (shown below) are allowable and will appear since students do not follow the same guidelines for budgeting as faculty/staff.
However, the errors will need corrected before the EPAF submitting to the approval queues. Refer below for common errors:

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

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

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

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

**ERROR* The Fund (Organization, Account, Program, Activity, or Location) code is invalid. Please change.** This error appears when any part of the funding is invalid or the COA field has anything other than a number 1. Return to the job information screen and update the funding under the Job Labor Change section.

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

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

**Electronic Personnel Action Form**

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

**Action:** Return to the job information screen and scroll down to the Routing Queue section. Enter the appropriate Banner IDs for the departmental queues.
Electronic Personnel Action Form

Job Labor Distribution Total Percentages must be exactly 100%.

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

Electronic Personnel Action Form

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

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

Electronic Personnel Action Form

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

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

Electronic Personnel Action Form

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

Action: Return to the job information screen and enter the distribution orgn. Leave blank unless the current value is 695021, Payroll Student I-9. When the current value is 695021, Payroll Student I-9, enter the orgn that should be used for reporting (should be an orgn that the individual who should receive reports has appropriate HR security (orgn/employee class).

[IMPORTANT: This field should be left blank for graduate students (RS) or undergrad students (RT, RW) with a secondary position (indicated in the Contract Type field).]

Electronic Personnel Action Form

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

Action: Return to the job information screen and enter the home organization. Leave blank unless the current value is 695021, Payroll Student I-9. When the current value is 695021, Payroll Student I-9, enter the home org. [IMPORTANT: This field should be left blank for graduate students (RS) or undergrad students (RT, RW) with a secondary position (indicated in the Contract Type field).]
After all corrections to errors are made, click on **Save**. Then, click **Submit**.

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

**Electronic Personnel Action Form**

- Be sure to ‘**Save**’ any changes before you ‘**Submit**’ otherwise you may lose your changes.
- “Your transaction has been successfully submitted, the student is eligible to start employment and be added to the work/training schedule.”

**Reviewing Status of EPAF – Originator**

Initiators may click on the EPAF Originator Dashboard by Department link in the EPAF main menu to access EPAFs.

**Electronic Personnel Action Form**

Then, enter the search criteria (date range **or** employee ID) and click **Submit**.

**Hint:** Both date fields are required and are the activity dates of the EPAF (dated created/submitted). The date range cannot exceed 180 days from the begin date.
Click on the View Details link to access the EPAF.

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

**Electronic Personnel Action Form**

**Useful Tools:**
- EPAF Originator Dashboard by Department
- EPAF Approver Dashboard by Department
- Payroll Calendar
- EPAF Documentation

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

**EPAF Originator Summary**

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

**EPAF Originator Summary**

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

**EPAF Transactions**

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

**EPAF Preview**
Waiting – The EPAF is in the process of being created and has not been submitted to the approval queue.

Pending – Awaiting approval by department, Student Financial Services, Research & Cost Accounting, and/or Payroll. Changes can be made to EPAF by clicking Void or Return for Correction.

Return for Correction – The EPAF has been returned to the originator for correction. Originator needs to correct the EPAF and resubmit through the approval queue.

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

Voided – Originator has voided the entry.

Approved – Department or other approval level (SFS, RCA) have approved the EPAF.

Completed – Entry has been applied to Banner by Payroll.

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

Routing Queue

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>Name</th>
<th>Required Action</th>
<th>Queue Status</th>
<th>Action Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department, 20</td>
<td>Kimberly A Parr, KAPS</td>
<td>Approve</td>
<td>Approved</td>
<td>06/01/2016 06:20 PM</td>
</tr>
<tr>
<td>Student Financial Services, 30</td>
<td>John Joseph Buck, JBUCK</td>
<td>Approve</td>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>Research &amp; Cost Accounting, 40</td>
<td>Charles Edward Tarantino, TARANTINO</td>
<td>Approve</td>
<td>In the Queue</td>
<td></td>
</tr>
<tr>
<td>Payroll, 85</td>
<td>Kimberly A Parr, KAPS</td>
<td>Approve</td>
<td>In the Queue</td>
<td></td>
</tr>
</tbody>
</table>

Pending – Awaiting approval by department, Student Financial Services, Research & Cost Accounting, and/or Payroll.

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

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

Approved – Department or other approval level has approved entry.

Disapproved – Department or other approval level has rejected entry.

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

Applied – Entry has been approved at all levels and applied to Banner by Payroll.
Approving the EPAF – Departmental Approver

Click on the EPAF Approver Dashboard by Department link. (Approvers can also click on the EPAF Approver Summary link to access EPAFs.)

For those who clicked on **EPAF Approver Dashboard by Department**, click on **Action** link to access the EPAF.

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

**EPAF Preview**

Repeat these steps as necessary to submit actions for all available entries.
For those who clicked on **EPAF Approver Summary**, select Current or In My Queue tab; select the queue status. Then, click Go.

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

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

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