Electronic
Personnel Action Form

Creating EPAFs

The purpose of this document is to help you become familiar with the use of the Self Service Banner (SSB) feature called Electronic Personnel Action Forms (EPAFs). This document assumes you have a basic knowledge of accessing and navigating SSB.

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*Attached documents within this PDF, click on the paperclip to view the file.

Electronic Personnel Action Form

EPAF Terms, Abbreviations, and Reference Key

Before you begin, take a few moments to become familiar with the terms used throughout this process.

You will need to know

- Employee classification codes
- The organization (FOAPAL) code for your department
- The position code, or where to get it
- How to search for people

Term Abbreviations

BE . . . . . Benefits Eligible
COA . . . . Chart of Accounts
Cont . . . . Continuing
Contrt . . Contract
FT . . . . . Full Time
LTD . . . . . Long Term Disability
NB. . . . . No Benefits
PT . . . . . Part Time
Rec . . . . . Receive
Reg. . . . . Regular
Rtmt . . . . Retirement
Sck . . . . . Sick Pay

EMPLOYEE CLASS

A1 . . . Affiliated Service–FT BE
B1. . . . Bargaining Unit–FT BE
B2 . . . Bargaining Unit PT No Benefits
E1. . . . Exempt Staff–FT BE
E2 . . . Exempt Staff–PT No Benefits
F1. . . . Faculty Tenure or Ten Track–BE
F2 . . . Faculty Contract–PT BE No Rtmt
F3 . . . Faculty Contract–FT BE No Rtmt
F4 . . . Faculty Semester–PT No Benefit
F5 . . . Faculty Semester–FT NB Rec Sck
LR . . . LTD Retiree Post Emp–BE Varies
N1 . . . Non Exempt Staff–FT BE
N2 . . . Non Exempt Staff Reg–PT NB
P1. . . . Professional–FT Cont Contrt BE
P2 . . . Professional–PT Cont Contrt BE
P3 . . . Professional–FT Contract BE
P4 . . . Professional–PT Contract BE
P5 . . . Professional–FT BE 10mo
S1. . . . Student-Under Grad Hourly
S2 . . . Student-Under Grad Salary*
S3 . . . Student-Graduate Asst Salary*
S4 . . . Student-Graduate Asst Hourly
TB . . . All Temporary BiWeekly–NB
TM. . . All Temporary Monthly–NB

Hourly/*Paid Bi-Weekly | Salary/Paid Monthly

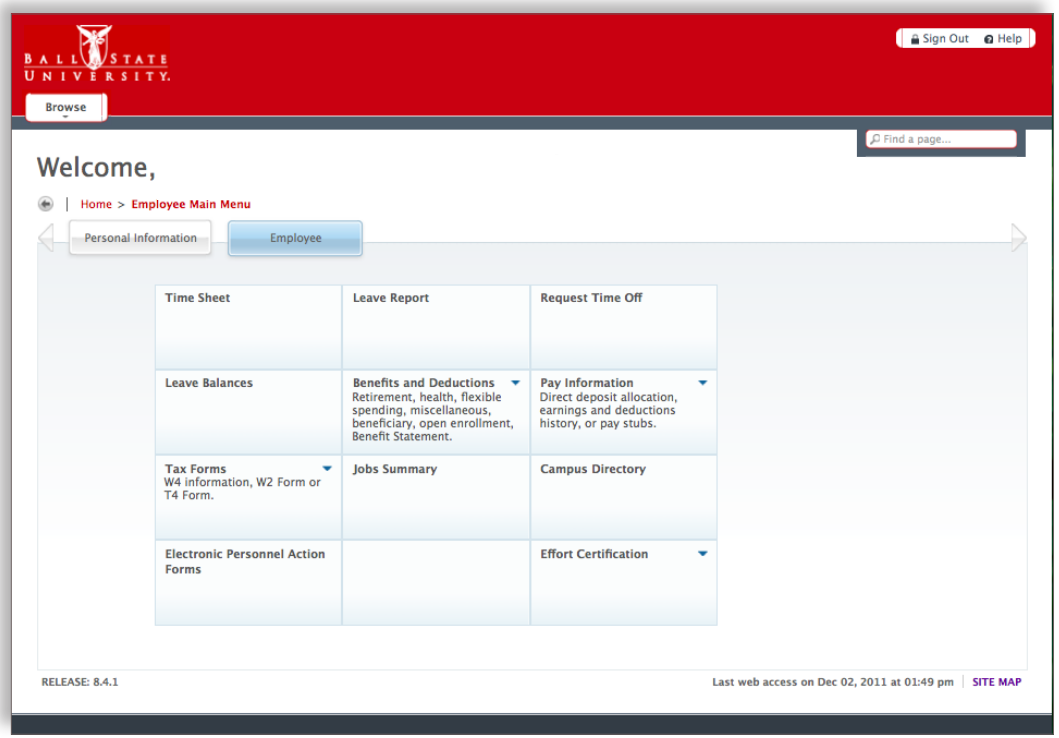
APPROVAL CATEGORIES

BW–New Job Assignment Ongoing, BWK100
BW–Casual Assignment Flat Amount, BWK101
BW–Add a Stipend as a Secondary Job, BWK102
BW–Add a Secondary Job Assignment, BWK103
BW–New Job Assignment with Termination Date, BWK110
BW–Change Base Pay, BWK201
BW–Add Additional Earnings to Existing Job, BWK300
BW–Change in Labor, BWK301
BW–End Job Assignment, BWK400
General Title Change, GEN300
MO–New Job Assignment Ongoing, MTH100
MO–Limited Contract Assignment, MTH101
MO–New Job Assignment with Termination Date, MTH110
MO–Additional Compensation with New Labor, MTH105
MO–Change Base Pay, MTH201
MO–Additional Earnings, MTH300
MO–Change In Labor, MTH301
MO–End Job Assignment, MTH400
Student–New Hire, STU100
Student–New Stipend Hire, STU101
Student–Reactivate, STU200
Student–Change Base Pay, STU201
Student–End Job Assignment, STU400

Electronic Personnel Action Form

Before you start your EPAF

The Electronic Personnel Action Form (EPAF) is used to assign activation dates, employment classifications and wages to new employee records or change existing employee's records. Some changes would include: title change, new job assignment, adding stipends, changing jobs, and ending job assignments.



This document assumes that you have basic skills for using Self Service Banner.

Before you begin. . .

The person must exist in the database. If this EPAF is for a new employee, complete the *New Person Identity Form* and submit it to University Human Resource Services (UHRS).

Once the person's identity is established in the database, you can complete the EPAF.

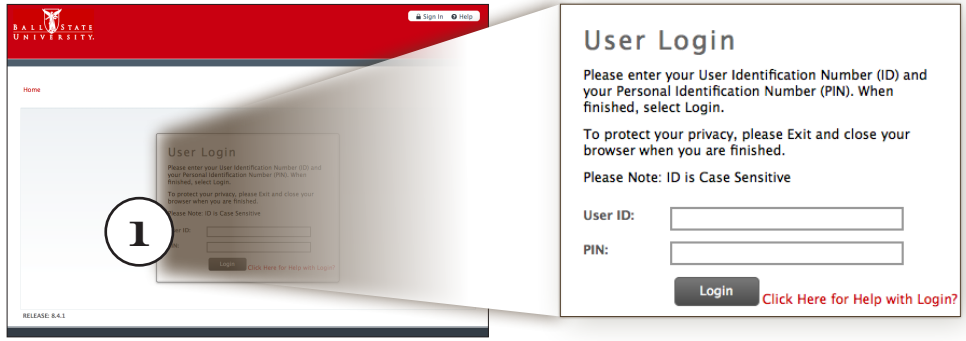
When you use an EPAF for a new or existing employee, make sure you have the following details before you begin.

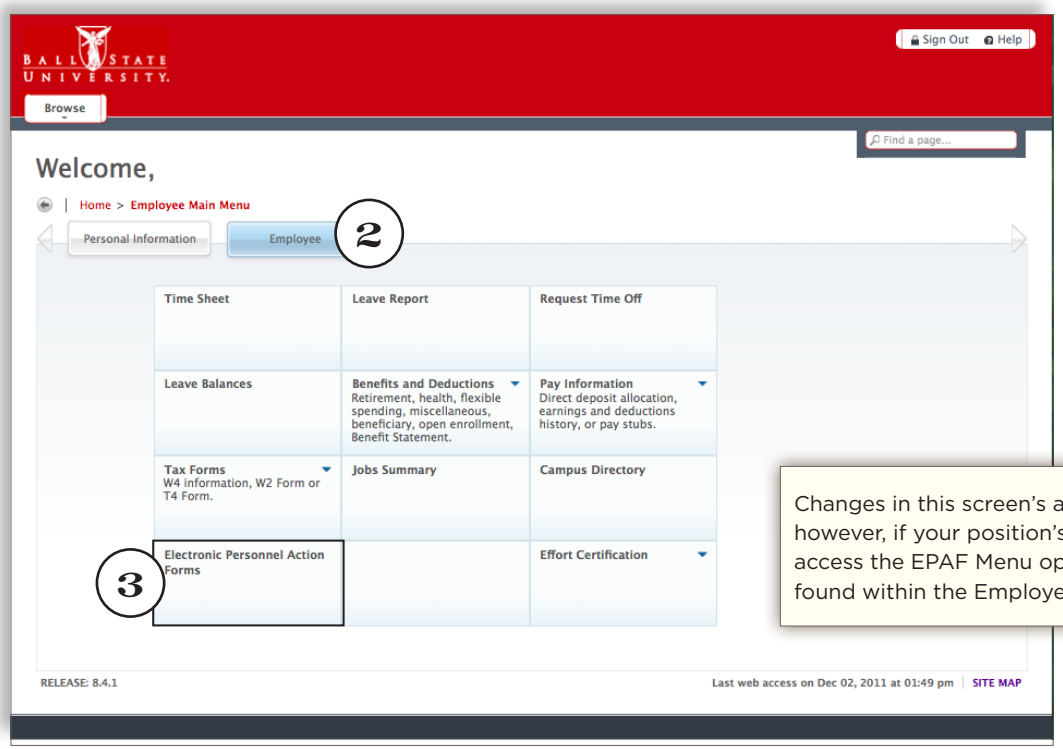
You will need to know

- The person's ID or name
- If the person is a new hire or an existing employee
- If the payroll category for the person is biweekly, monthly, or student
- The date you want the change to occur
- Know the job position number
- Know which employee class (E-class) to select for the position
- Know who should approve this request in your department
- Know the supervisor's ID—the person to whom the employee will report in the department

Electronic Personnel Action Form

Where to find the EPAF Option





1 **ENTER** your Ball State User ID and password [PIN].

2 **SELECT** the button labeled Employee

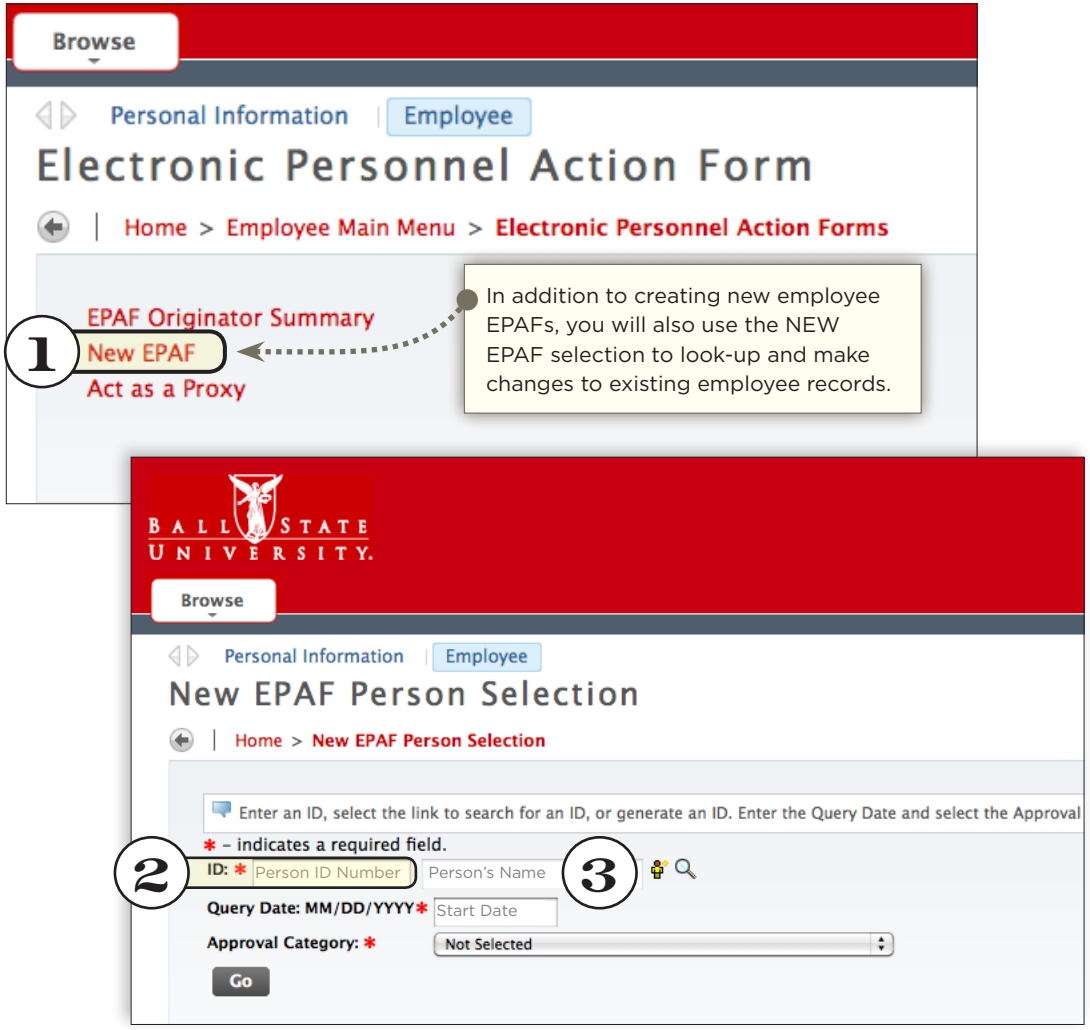
3 **SELECT** the button labeled Employee Personnel Action Forms (EPAF).

This action will take you to EPAF Menu to start a new EPAF,

Changes in this screen's appearance may occur; however, if your position's role has rights to access the EPAF Menu option it can always be found within the Employee section.

Electronic Personnel Action Form

Entering the Person ID or Name



Starting a New EPAF

1 From the menu, **SELECT New EPAF**

2 **ENTER** the person's ID.

You will need to know the person's ID number* or name to apply a change [action] to their record. The person ID will always be nine digits.

3 After you enter the person's ID, **SELECT** the **TAB KEY** on your keyboard once.

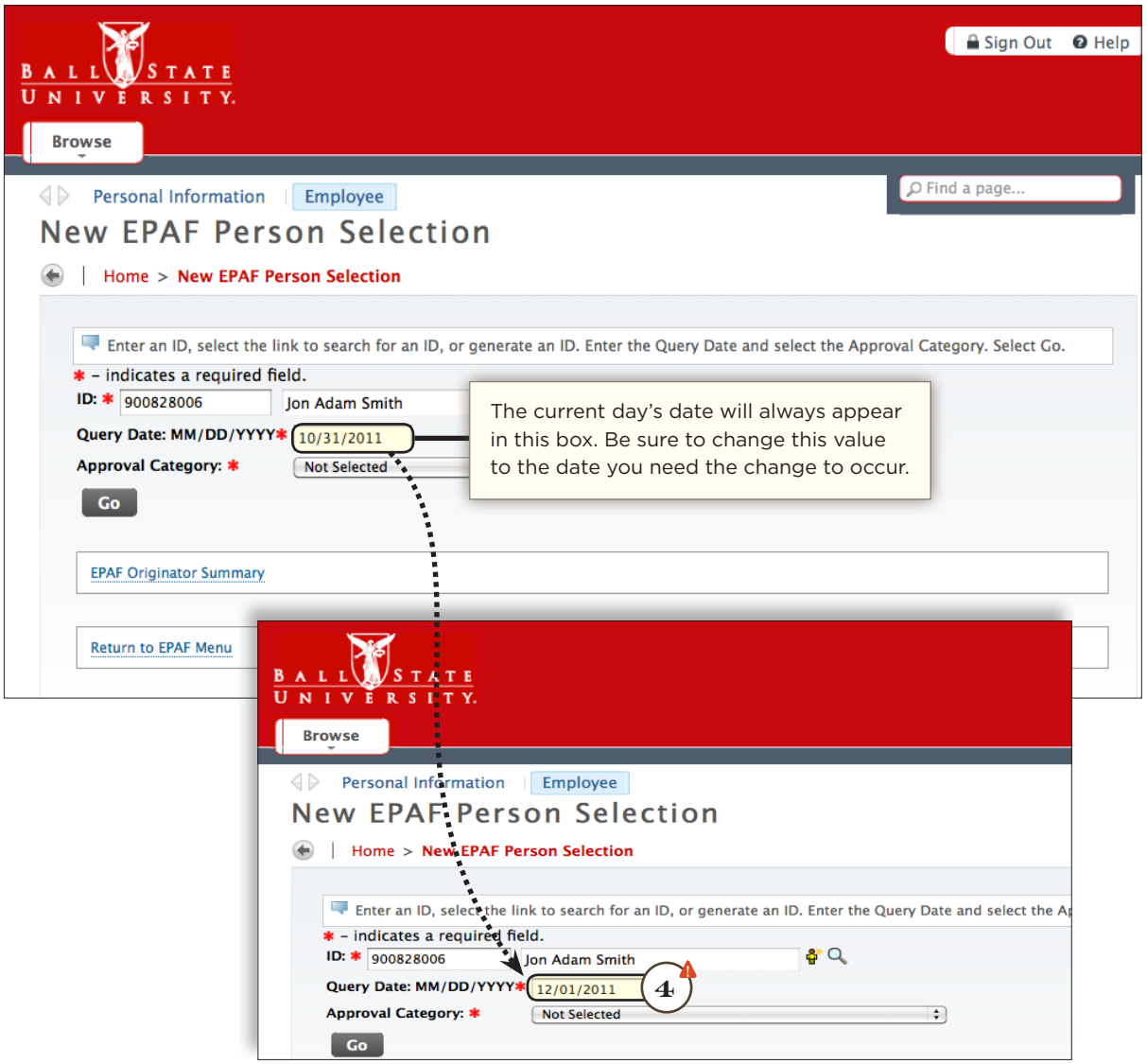
This action will move the cursor to the Person's Name field causing the browser's window to refresh and within two seconds the Person's Name will appear.

*Employees hired before mid-December 2011 will most likely have IDs beginning with three zeros. For example, their IDs would be similar to this format 000456789 and will not change.

Starting January 2012, new employee IDs will begin with '9' followed by two zeros. For example, their IDs would be similar to this format 900456789.

Electronic Personnel Action Form

Entering the Query Date



The Query Date is the date the action or change needs to occur on the employee's personnel record.

For example: If today's date is Nov. 15, 2011 and the employee's first day of work is Dec. 1, 2011, you would enter 12/01/2011 for the Query Date.

For this tutorial, I will use 12/01/2011 as the date the employee will begin working at Ball State.

By default, the Query Date box is filled with the current day's date.

In most cases, this date will need to be changed to a date in the future for an upcoming change, or a date in the past to retroactively correct or update a change to an employee's record.

4 **ENTER** the date using this format MM/DD/YYYY.

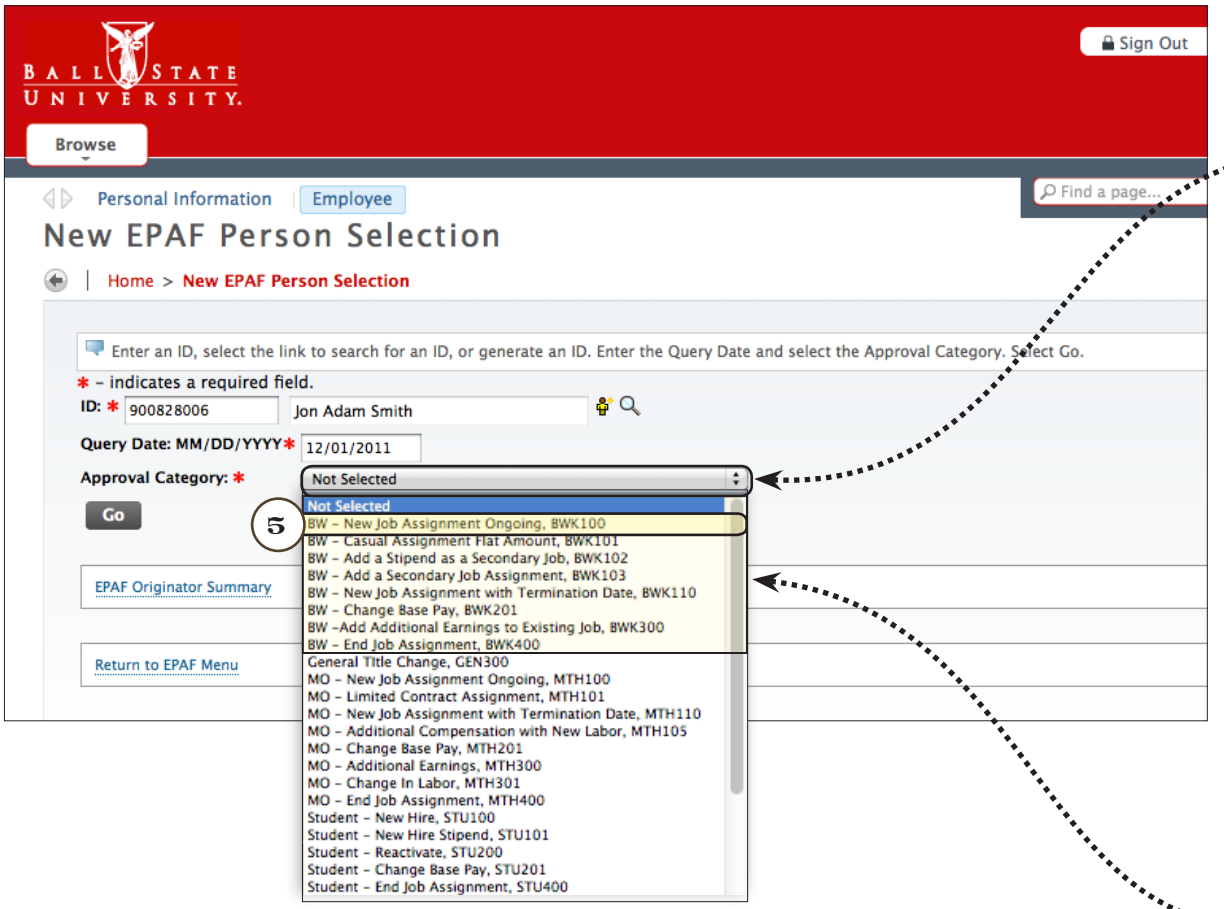
To eliminate errors from occurring in later steps, make sure the date entered here is the correct starting date for when the change or action should take effect.

If you don't know the date, **STOP NOW.** Find out what the correct effective date is before you go any further.

Enter the correct date, and then proceed with the EPAF process.

Electronic Personnel Action Form

Selecting an Approval Category



Next, you will need to select the type of action or change you need to initiate for the selected employee.

5 **SELECT** the Approval Category menu by clicking on the directional arrow to drop down the menu of options.

The approval categories are divided by payroll type. You will need to know the payroll cycle for the employee's job.

Select the Approval Category based on two conditions:

1. The payroll to which the job is assigned

   BW – Bi-Weekly and Hourly
   MO – Monthly Employee
   Student – Student Employee

2. Select the description that most appropriately fits the EPAF being created

For example:

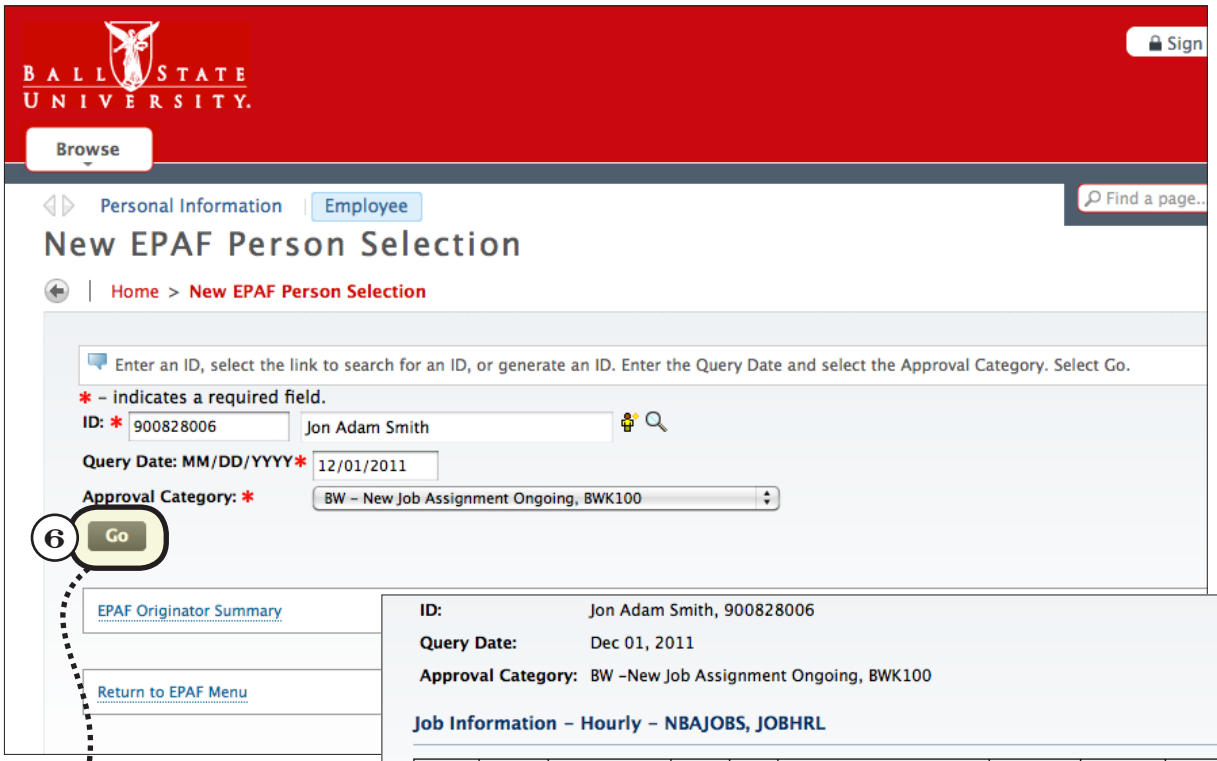
Jon Smith is a new employee. The job is ongoing and will be paid hourly. Because Jon will be paid hourly, you would only choose from **the selections beginning with BW,** and then among those choices, select the description matching the circumstance.

For this circumstance you would use

BW – **New Job Assignment Ongoing, BWK100**

Electronic Personnel Action Form

Entering Job Information



6 With the ID, Name, Query Date and Approval Category complete, **SELECT GO**

After **GO** is selected, the next screen displays new boxes for job information.

The appearance of the Job Information screen will change depending upon the person's status as either being a new employee or an existing employee.

ID: Jon Adam Smith, 900828006
Query Date: Dec 01, 2011
Approval Category: BW –New Job Assignment Ongoing, BWK100

Job Information – Hourly – NBAJOBS, JOBHRL

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

7a

*If you are creating an EPAF for **a new employee,** the next screen will be similar in appearance to this example.*

Job Information – Hourly – NBAJOBS, JOBHRL

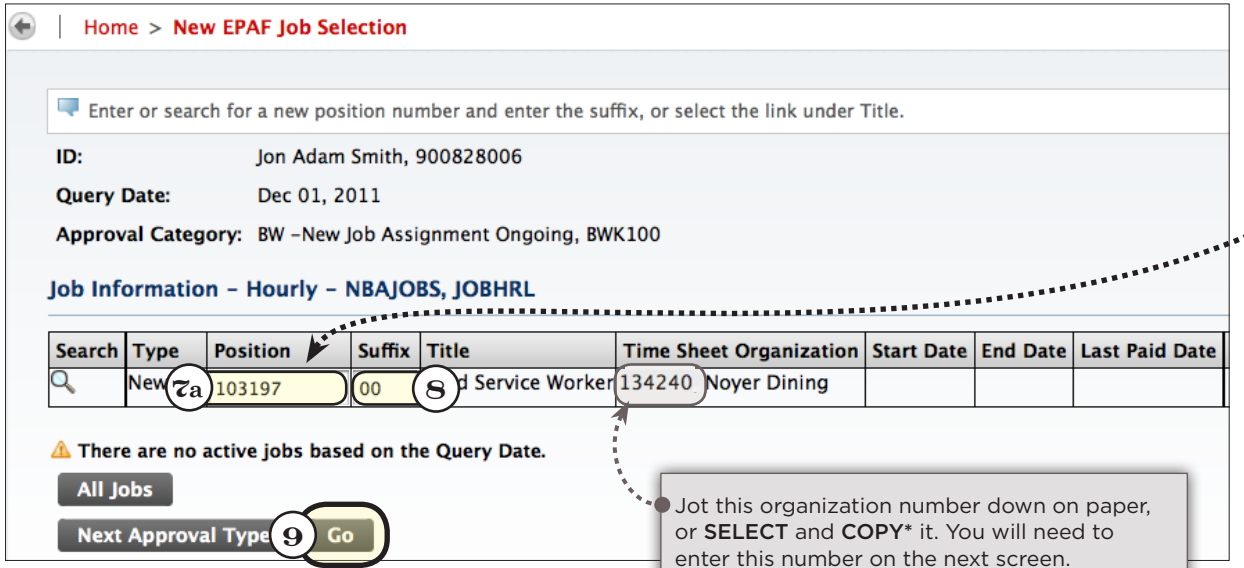
Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									
	Primary	798303	00	Temporary Staff and Service	10, President	Oct 01, 2011	Dec 31, 2011		Active	

7b

*If you are making a change to an EPAF for an **existing employee,** the next screen will be similar to this example.*

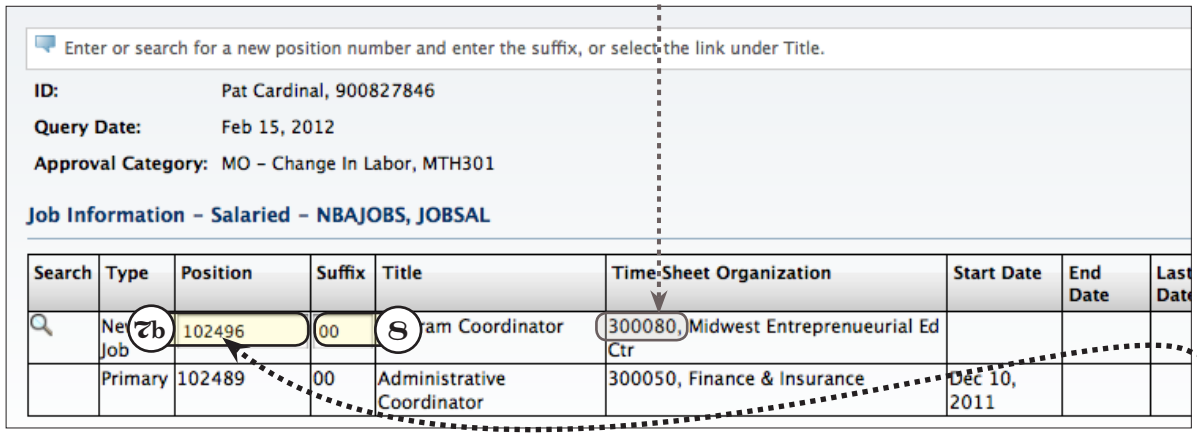
Electronic Personnel Action Form

Position Number and Suffix for a New Employee



Watch the video clip to learn how to search for positions

Jot this organization number down on paper, or **SELECT** and **COPY*** it. You will need to enter this number on the next screen.



For this exercise, we are assigning a primary job to a new employee paid biweekly.

7a **ENTER** the position number, and then **PRESS the TAB KEY** to move to the next field.

7b This is an example shows how the screen will appear when you are changing the job position of an existing employee.

Tabbing over to the next field labeled SUFFIX will automatically cause the browser's window to refresh and within a second the job title and time sheet organization fields will be filled with needed information.

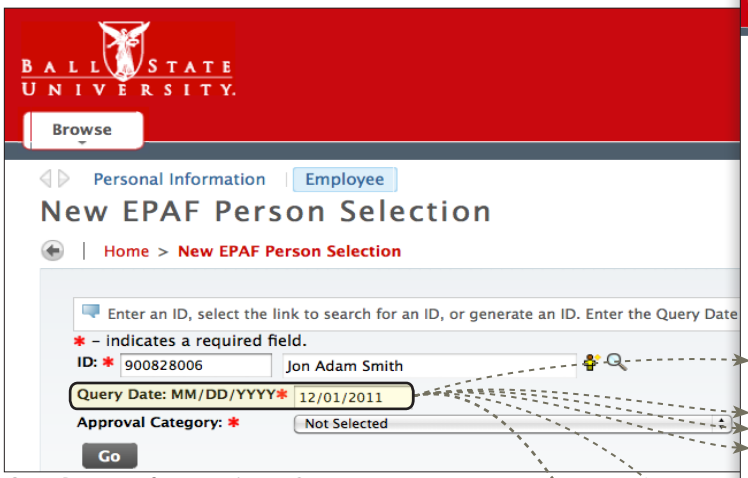
8 For most employee situations, you will **ENTER '00'** for the Suffix.

9 With the Position number, Suffix, Job Title, and Time Sheet Organization boxes complete, **SELECT GO**

*The keyboard shortcut to copy and paste text:
To copy, select the text, then press Command + C (Mac) or Ctrl + C (WIN).
To paste, place the cursor where you would like to add the copied information,
then press Command + V (Mac) or Ctrl + V (WIN).

Electronic Personnel Action Form

Query Date and its use

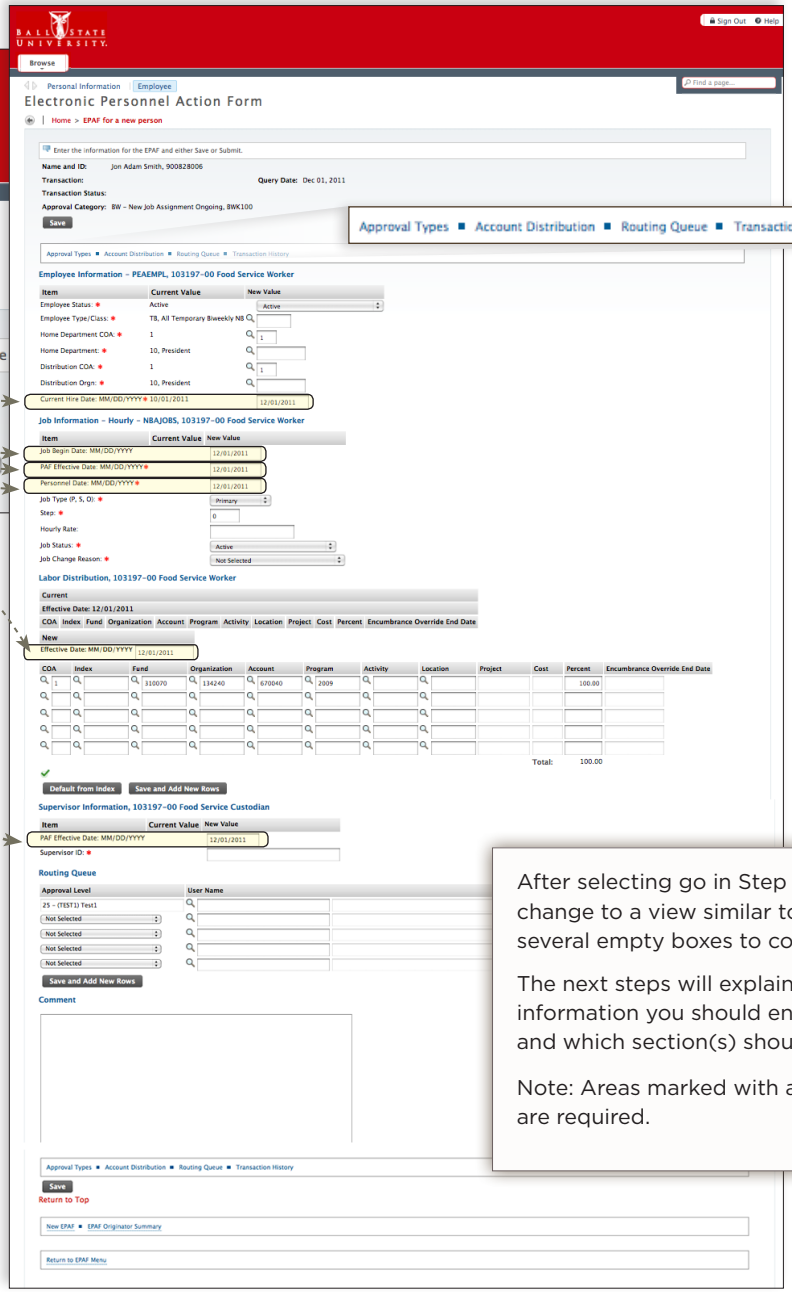


Query Date entry from step 4, page 9.

The Query Date you initially entered in Step 4 *(above)* is automatically transferred to several boxes on this screen.

To eliminate errors from occurring, make sure to use the correct start date at the beginning of the EPAF process.

Review Step 4 on page 7



Use the navigation bar to jump to different sections of this screen

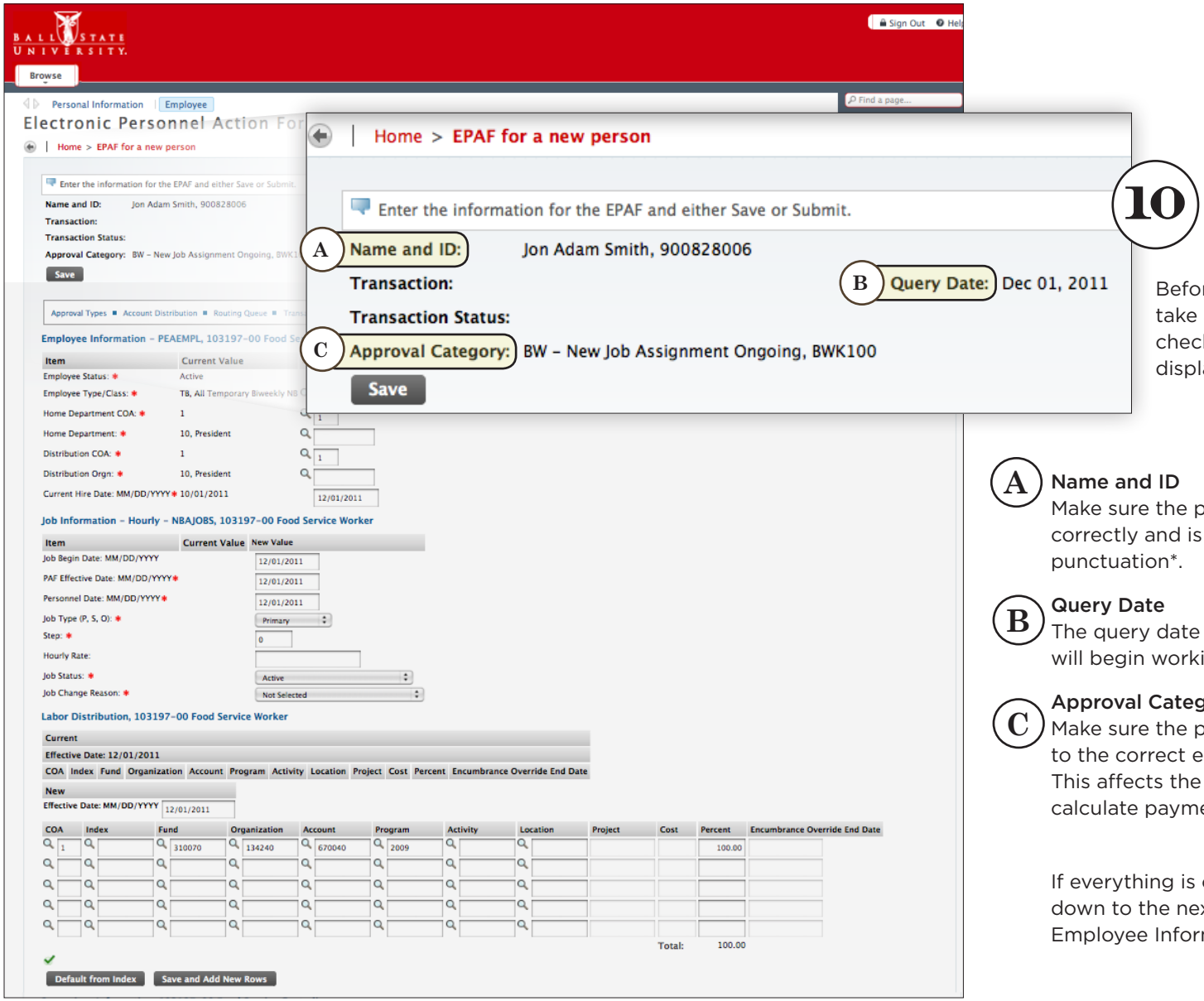
After selecting go in Step 9, the screen will change to a view similar to this example with several empty boxes to complete.

The next steps will explain the type of information you should enter in each section and which section(s) should be skipped.

Note: Areas marked with a red asterisk * are required.

Electronic Personnel Action Form

Person Information



Before you continue, take a moment to double check the information displayed in this block.

A **Name and ID**
Make sure the person's name is spelled correctly and is entered using proper punctuation*.

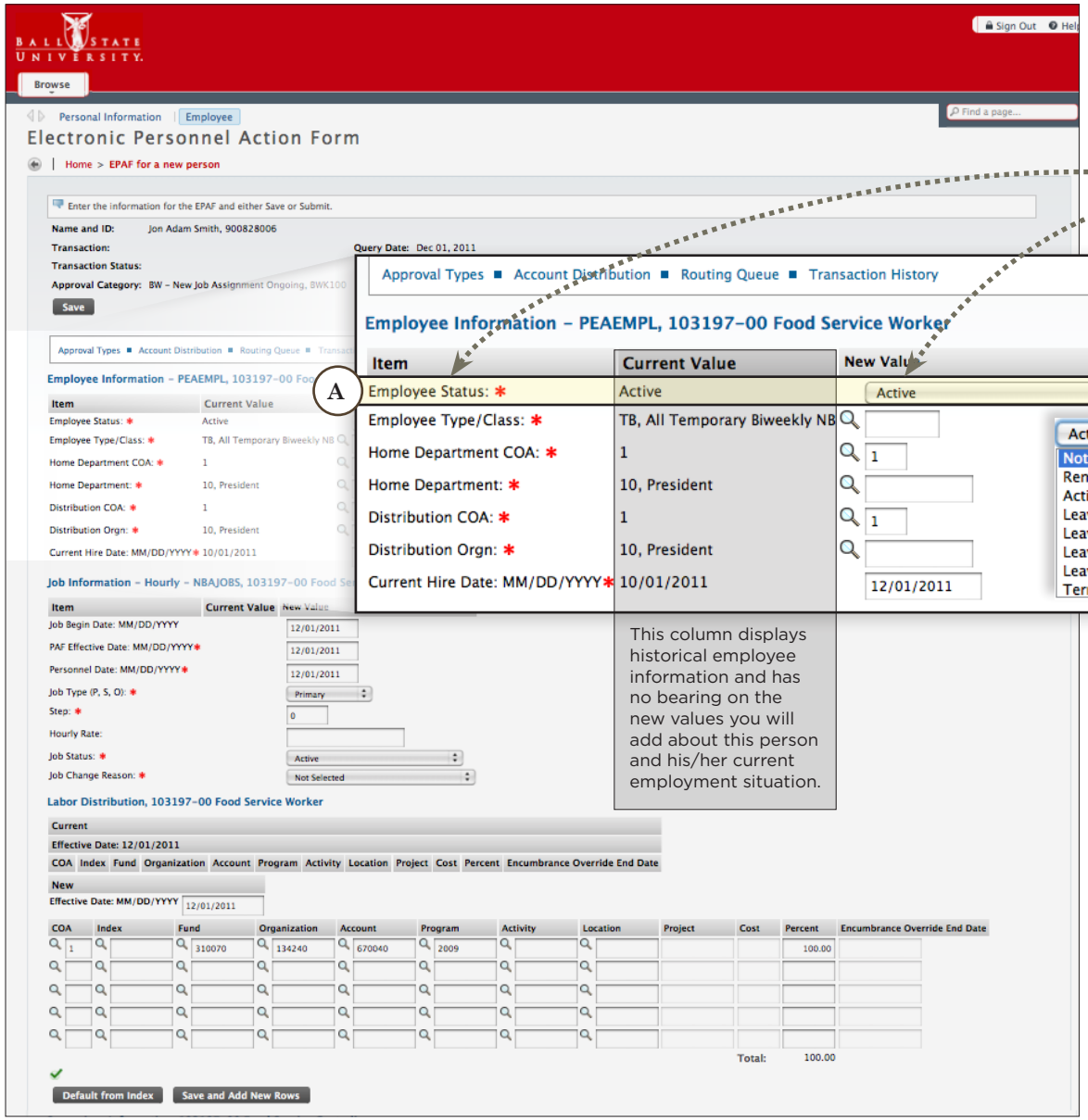
B **Query Date**
The query date is the date the employee will begin working in the new position.

C **Approval Category**
Make sure the person is being assigned to the correct employment category. This affects the methods used to calculate payments and benefits.

If everything is correct, scroll down to the next section labeled Employee Information.

Electronic Personnel Action Form

Employee Information and Status



11 The Employee Information section defines the position's classification, the area funding the position,.

A **Employee Status**
Since this person is now an employee, the selection should be set to

'ACTIVE'

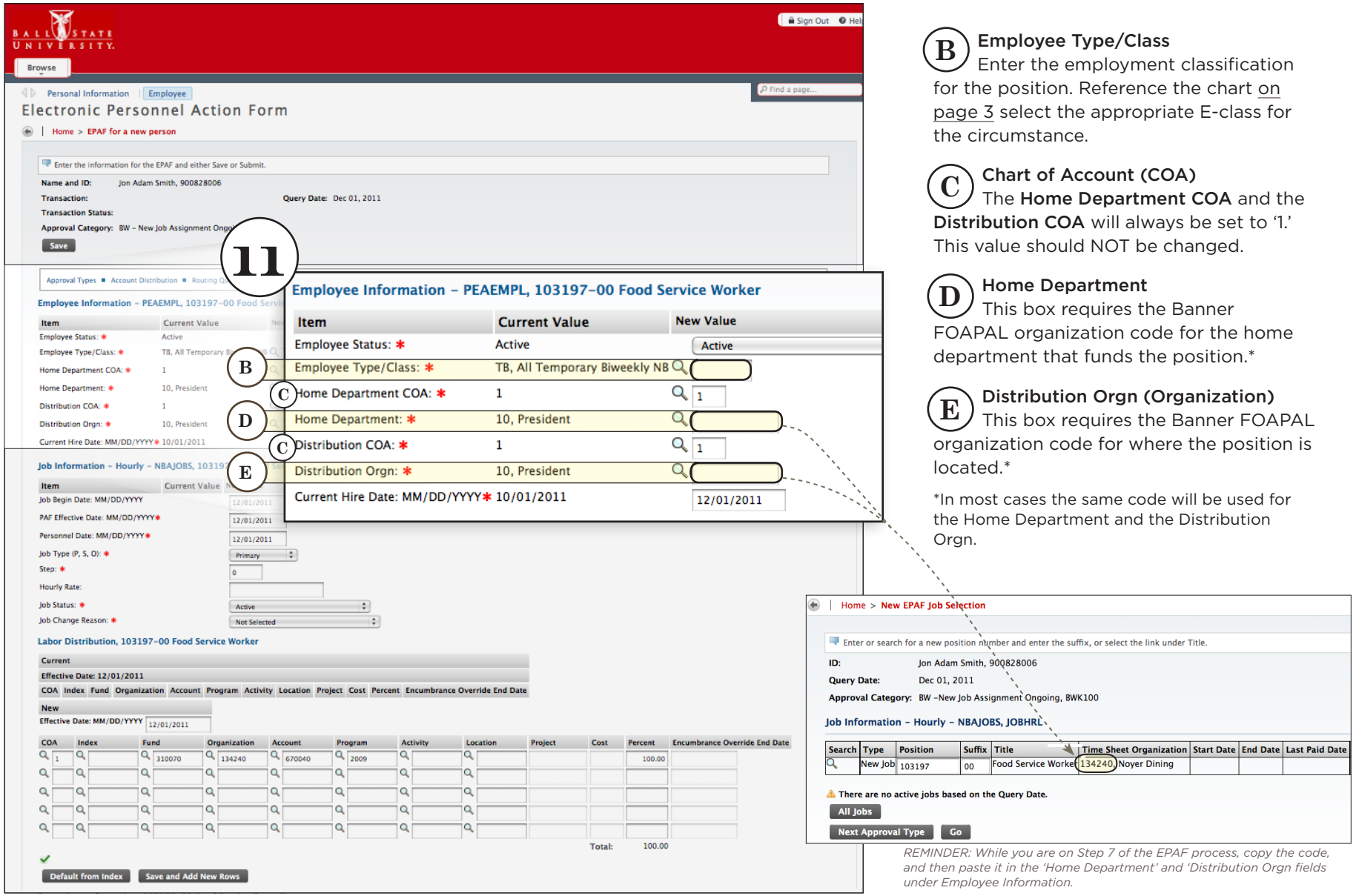
Additional selections appear in the drop down menu. The chart below describes which selections to use and why.

Select

Not Selected	Default Value
Remove	Will remove a future dated record. Consult with UHRS before using this selection.
Active	When the person is actively employed by Ball State
Leave without Pay, with Benefits	FOR UHRS ONLY, **DO NOT USE**
Leave without Pay, without Benefits	FOR UHRS ONLY, **DO NOT USE**
Leave with Pay, with Benefits	FOR UHRS ONLY, **DO NOT USE**
Leave with Partial Pay, with Benefits	FOR UHRS ONLY, **DO NOT USE**
Terminated	When the employee is no longer employed by Ball State University.

Electronic Personnel Action Form

Employee Class, COA, Home Department and Distribution Organization



B **Employee Type/Class**
Enter the employment classification for the position. Reference the chart on page 3 select the appropriate E-class for the circumstance.

C **Chart of Account (COA)**
The **Home Department COA** and the **Distribution COA** will always be set to '1.' This value should NOT be changed.

D **Home Department**
This box requires the Banner FOAPAL organization code for the home department that funds the position.*

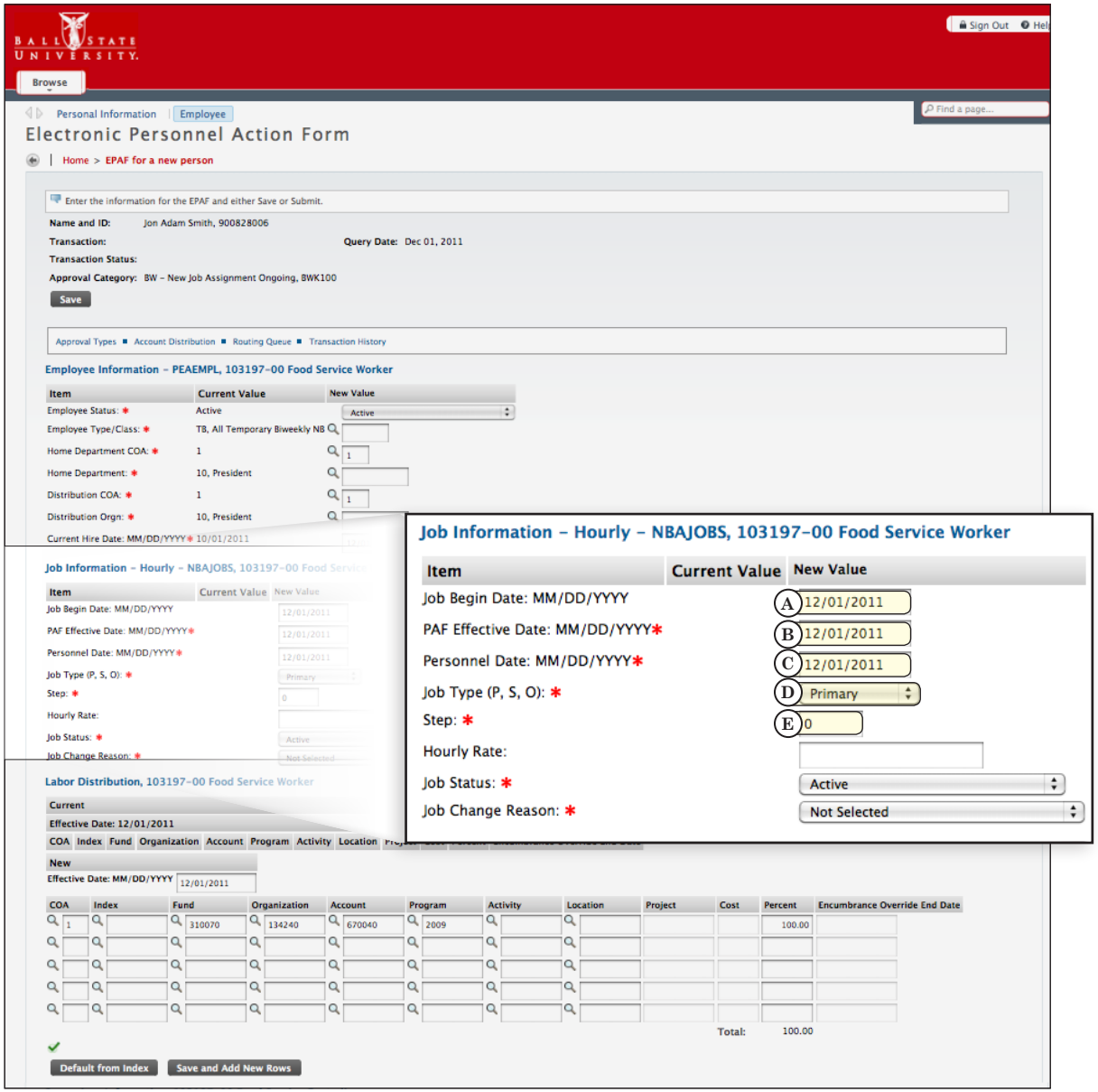
E **Distribution Orgn (Organization)**
This box requires the Banner FOAPAL organization code for where the position is located.*

*In most cases the same code will be used for the Home Department and the Distribution Orgn.

REMINDER: While you are on Step 7 of the EPAF process, copy the code, and then paste it in the 'Home Department' and 'Distribution Orgn fields under Employee Information.

Electronic Personnel Action Form

Job Type, Step and Job Begin, PAF, and Personnel Dates



12 This section is for Job Information. The Job Begin Date, PAF Effective Date and the Personnel Date will be automatically filled with the Query Date that was entered in Step 4.

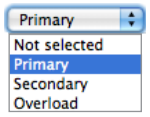
A **Job Begin Date**
The date the employee will begin work in this job.

B **PAF Effective Date**
The date this EPAF should take effect.

C **Personnel Date**
The date of this personnel action.

In most cases, the entries will be the same date. This date is entered at the beginning of the EPAF process in Step 4.

D **Job Type**
The Job Type box is used to indicate if this position is the person's primary or secondary job. Employees can only be assigned one primary job.



In this tutorial, since Jon Adam Smith is a new employee being assigned a new job, PRIMARY is selected.

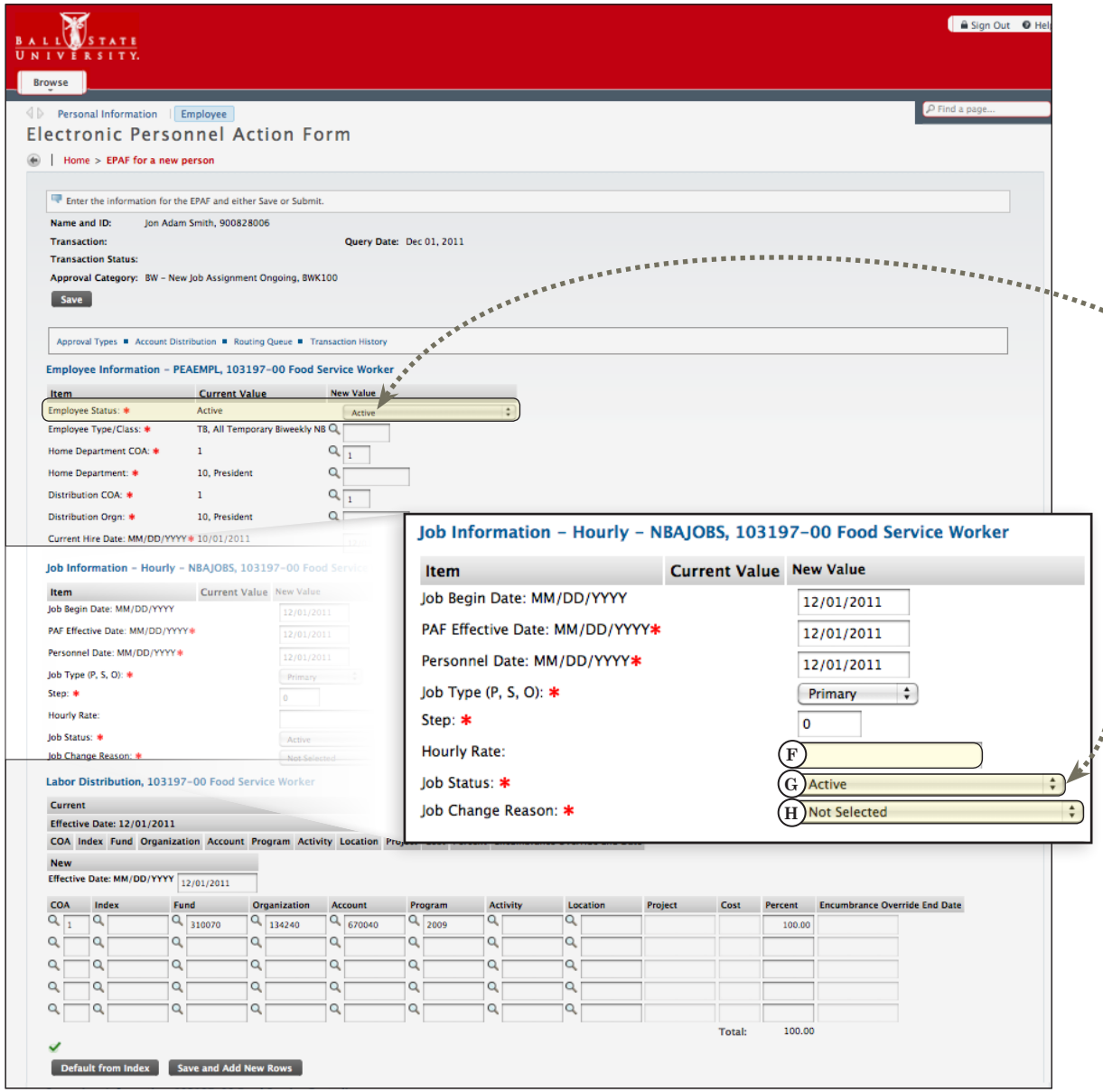
E **Step**
The Step Value is used for longevity increases for the bargaining unit.

For a new position of this type, ENTER '1.'

For all other positions the Step Value will be set to '0.'

Electronic Personnel Action Form

Hourly Rate, Job Status, and Job Change Reasons



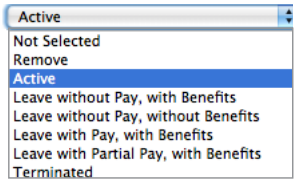
12 Continuing with the Job Information section, the next three steps will explain the rate of pay, employee status, and job reason change reasons.

F **Hourly Rate**

Enter the hourly rate for positions paid by the hour, OR enter the annual salary amount for positions paid on a salary basis.

G **Job Status**

The Job Status and Employee Status options are the same.



The Job Status setting should always match the Employee Status setting under Employee Information.

Job Change Reason

H The Job Change Reason is used to further describe why the change is being made.

Refer to the chart on page 17 for a list of the job change reasons and definitions of use.

Once the reason code is determined, you can enter the first letter or the first few letters of the code to jump to that section of the menu.

Electronic Personnel Action Form

Job Change Reasons and their Definitions of Use

2YINC, Second Year Increase
2nd year pay increase for an academic multi-year contract

3YINC, Third Year Increase
3rd year pay increase for an academic multi-year contract

ADERN, Additional Earnings
Compensation for extra work (former HR-113 or NOA), commissions, awards, honorarium, negotiated contract class, or Internet class

ADSHF, Add Shift
Add a 2nd or 3rd shift premium to hourly rate

ALLOW, Allowance
Allowance for auto, cell phone, uniform

BGSMA, Begin Semester Assignment
Primarily used for jobs in academic areas

BONUS, Bonus

CGACT, Change Account
Change in account number to be charged

CGADD, Change Address
Change of home address or building/room number

CGDEP, Change Department
Change department in a FOAPAL or physical location

CGFTE, Change in FTE Percent
Use when there is a change in full time equivalency

CGLAB, Change Labor Distribution
Use when you need to change an existing FOAPAL or add additional FOAPALS

CONT, Continuation of Assignment
Use to set the continuation of the last assignment

DECSD, Deceased

EGRTF, End of Grant Funding
Use when the funds from a grant are no longer available

EINTA, End Interim Appointment
Assignment as interim has ended

EMPCC, Employee Class Change

ENDJB, End of Job Assignment

ENDOC, End of Contract

INREP, Increase of Responsibilities
Temporary pay increase for additional duties

INTAP, Interim Appointment
Appointed as an interim

NEWHR, New Hire
A new employee to Ball State or an employee who has left and is now returning

POSTR, Position Transfer

PROMO, Promotion

RELAY, Recall from Layoff

RESGN, Resignation
Employee is voluntarily leaving the university

RETRM, Retirement
Employee is retiring from the university

RSHFT, Remove Shift
Remove a 2nd or 3rd shift premium from hourly rate

RTWK, Return to Work

SECJB, Secondary Job
Use when you are assigning another job in addition to the person's primary job

STBWI, Student Base Wage Increase

STLON, Student Longevity Increase

STPND, Stipend
A fixed amount of money paid for a specific duty or event for a specific period of time

STREN, Student Employee Renewal

STRIN, Skill Trainee Increase
Increase given when trainee reaches specified milestones

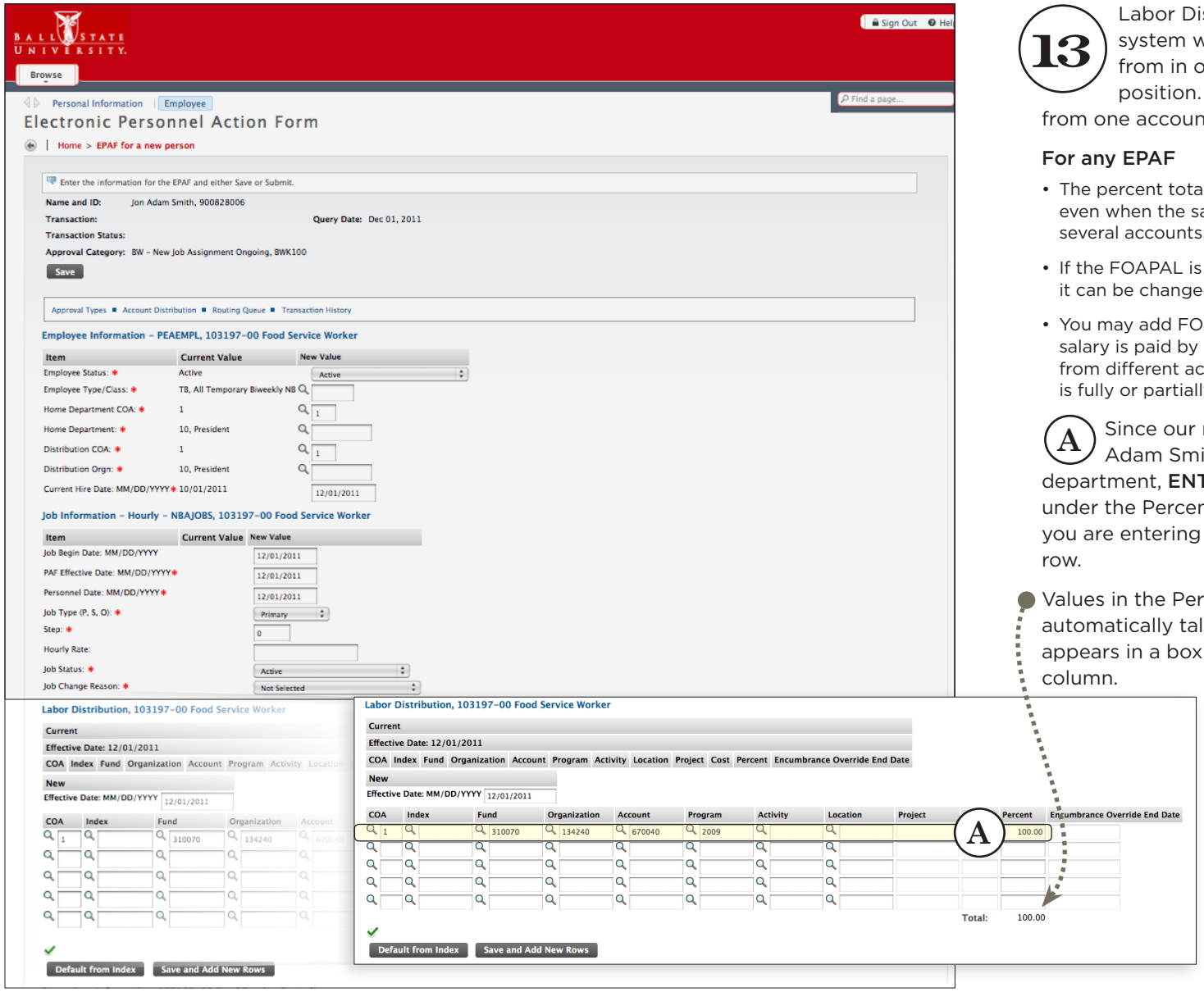
TEMP, Temporary Assignment
An assignment for a specific period of time

TICHG, Title Change
Employee has same position, but a new title is being given

WKSTE, Work Study Assignment Ended

Electronic Personnel Action Form

Labor Distribution



13 Labor Distribution tells the system where to take monies from in order to fund the position. The funds may come from one account or several.

For any EPAF

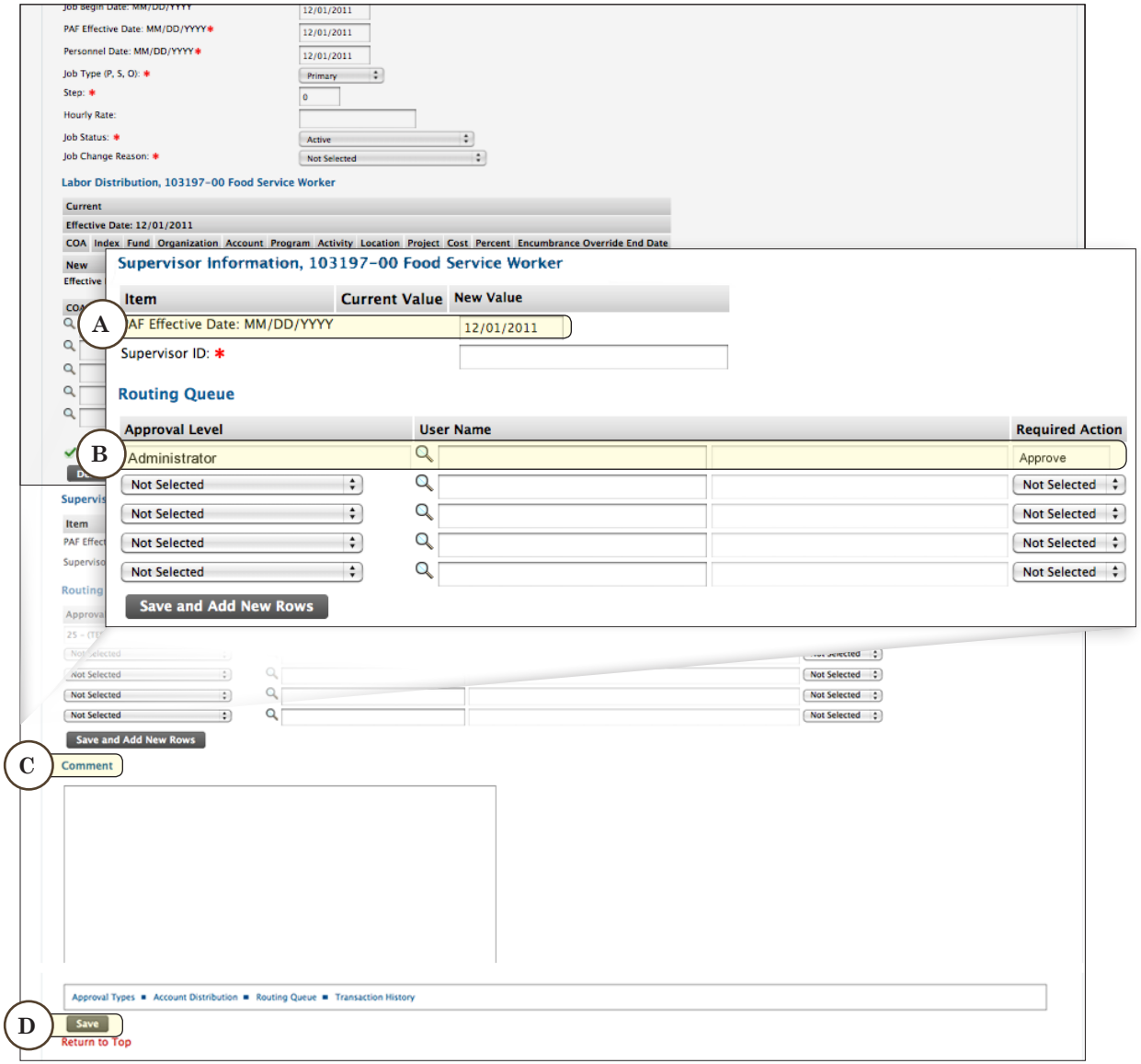
- The percent total must always equal 100.00, even when the salary is split among several accounts.
- If the FOAPAL is not correct at this stage, it can be changed.
- You may add FOAPALs if this employee's salary is paid by multiple departments from different accounts, or the position is fully or partially funded from a grant.

A Since our new employee, Jon Adam Smith, is paid from one department, **ENTER 100.00** in the box under the Percent column making sure you are entering the value in the first row.

Values in the Percent column are automatically tallied and the total appears in a box at the base of the column.

Electronic Personnel Action Form

Supervisor Information and Routing Queue



14 This section covers Supervisor Information and the [Approval] Routing Queue.

A The person ID for the supervisor of the selected position must be entered in this box.

If you do not know the supervisor's ID number, you can search for it using EPAF. Open another browser window to start a new EPAF and then do a person search.

B In the Routing Queue section, select the approval level from the drop down menu, and then the matching person for the selected level of approval.

C The comments box may be used to communicate additional details about this personnel change to the people who will be approving the change.

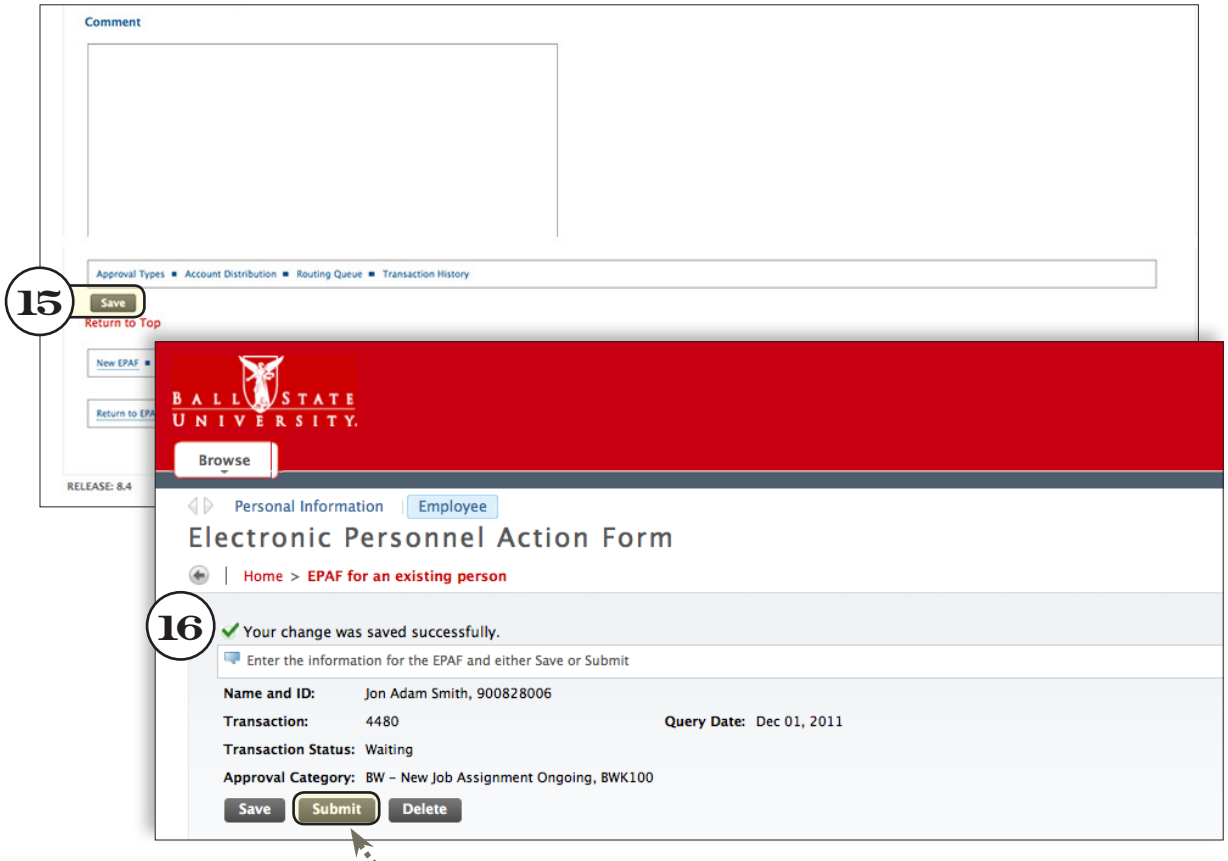
If there is any information the approver may need to know or that may be required to support this change or that you would normally put on a FormBlaster form, add those details to the comments box.

D For example, you must use the comments box to indicate job assignments for Extended Education **and the faculty load hours for teaching assignments.**

When you have completed the form, **SELECT SAVE.**

Electronic Personnel Action Form

Save, Delete, and Submit Options



15 **SELECT SAVE.**
This action will save the EPAF.

There are "Save" buttons at both the top and bottom of this screen. Throughout this process, you may save your entries and return at a later time to finish the EPAF, submit it, or you may both save and submit.

Remember, if you saved the EPAF at an earlier step and have since changed information as the result of an error message, you must save the EPAF again before it is submitted.

16 After saving the EPAF, you will see the message, "Your change was saved successfully" and summary box similar to this example.

DO NOT log out of the system before saving your work. If you log out without saving the EPAF, the information you have entered will be lost.

Using the **DELETE** button at this stage will erase all of the information entered and delete this EPAF.

17 Next, **SELECT SUBMIT.**

This action will place your EPAF into the approval queue. The next screen will confirm if the transmission was successfully submitted. If the process was successful, your EPAF is finished and is in queue awaiting approval(s).