INSTRUCTIONS

FOR

CREATING

MU

SUMMER SCHOOL FACULTY

EPAFS

Human Resource Services

Before you begin an EPAF, you must verify the following . . .

1. You have the correct position number
   a. Identify an available vacant position of the correct type in the org where the position will work on NBIPORG. For Summer School Faculty, the positions will begin with "FS"

2. how you will pay the employee
   a. Identify the fund and org to be utilized for the position and verify it is showing on the Labor Distribution tab of NBAPBUD. If it is incorrect, send an email to budgetoffice@marshall.edu with the subject "Change funding on position____", then provide in the text of the email the position number and the correct fund and org to be utilized – write out the name of the org.
   b. Wait until confirmation from budget office and/or you verify in Banner NBAPBUD that the funding has changed for the position number per your request before proceeding with the EPAF so that the correct fund/org defaults for the EPAF salary.
   c. Verify sufficient budget is available in the operating ledger labor pool for the fund and org to be utilized on FGIBSUM. If it is not, see instructions at http://www.marshall.edu/finance/budget-adjustments/

3. That you have the required bio data on the PPAIDEN form to be made an employee
   a. MUID number
   b. full name
   c. Social Security Number (with the exception of international students who are hired as Graduate Assistants; however, an MUID number must be entered into the SSN field)
   d. PR or WP Address
   e. Gender
   f. Ethnicity
   g. Birthdate
   h. Citizenship

   If any or all of the data fields above is missing the EPAF will not go through, the hiring department must complete a Banner HR Person Data Entry Form. The form is found on the following web site: http://www.marshall.edu/wpmu/human-resources/files/downloads/2011/09/HR-SERV-FORM-14.pdf

   The form should be faxed to 696-6844 or emailed to human-resources@marshall.edu. HR will notify you when the data fields have been entered.

4. the employment status on the PEAEMPL form
   a. MUID number
   b. full name
   c. employment status (active, terminated, etc.).
      i. If employment status is active but the other information is grayed out and you receive a "Do not have org privileges" message at the bottom left, please call Glenna Racer (66253) or Erica Thomas (63406).
      ii. If employment status is active but other information is missing and todays date is displayed in the date fields, the employee is a "New Employee."

5. any other information needed to complete the EPAF particularly information for the comment field
   a. class, section, and CRN for part-time faculty

By submitting the EPAF, you are stating that you have checked the above information and it is correct.

How to Create an EPAF in Banner

Note: EPAFs are for Current (Active) Employees ONLY! All others will be processed on paper PARs

1.) **Log onto the EPAF form by typing "NOAEPAF" in the "Go To…" box and hit "Enter" OR**
You can also access the EPAF form by clicking on the "Human Resources [*HRS]" link.
Click on the "Electronic Approvals [HRSELECAPPR]" link.
Click on the Electronic Personnel Action link [NOAEPAF]

You must make sure that before you begin an EPAF all the information on the top must be cleared out before you can begin. If you previously did an EPAF, the information at the top will appear. You will need to go to "Record" and "Clear" to remove all of the information.

2.) **If you know the employee's 901 number, enter it in the ID text box.**
3.) **If you do not know the employee's 901 number, click on the drop-down arrow beside the ID text box.**
4.) **Select the "List for Person" SOAIDEN link from the pop-up menu**
Enter the person's Last Name and First Name and either press "F8" or from the top menu click "Query" and then "Execute."
5.) **Once you have selected the employee's name, it will appear on the EPAF form.**
6.) **You will now select an Approval Category. For the Summer School Faculty Session the choices are:**

CATEGORY NAME	SUMMER SCHOOL SESSIONS DO NOT USE THE DATES BELOW IN EPAF	BANNER PAYROLL BEGIN DATE (USE FOR QUERY DATE)	BANNER PAYROLL END DATE
SSFINT	Intersession May 11, 2015-June 5, 2015 (100% FY15)	05/17/15	06/15/15
SSFAAO	Session 1-A	05/17/15	06/30/15

	May 18, 2015-June 30, 2015 (FY15 at 50%)		
SSF01B	**Session 1-B** July 1, 2015-August 7, 2015 (FY16 at 50%)	**07/01/15**	**08/16/15**
SSFS2A	**Session 2-A** (June 08, 2015 – June 30, 2015) (FY15 65%)	**06/16/15**	**06/30/15**
SSFS2B	**Session 2-B** (July 1, 2015 – July 10, 2015) (FY16 35%)	**07/01/15**	**07/16/15**
SSFS03	**Session 3** (July 14, 2015 – August 14, 2015) (FY16 100%)	**07/17/15**	**08/16/15**

Now click "OK".

7.) You will notice that the "Approval Type" field has been populated based on the Approval Category chosen.

8.) Please click in the "Query Date" text box. This date is the "Banner Payroll Begin Date" from above. This is <u>not</u> the date when the session begins. Enter the date here.

9.) Click in the "Position" text box. If you know the position number, enter it here.

10.) School Faculty position numbers MUST begin with "FS." If you do not know your position number, refer to step 1.a. of "Before you begin an EPAF".

11.) You now need the "Suffix Number." Click the down arrow and select the "List of Employee's Jobs" link. This takes you to the NBIJLST form. <u>Once you are on this form, you will need to do a rollback and change the query date on the top right of the screen.</u>

12.) <u>Change the date year to 1999 to see if the person has had this position before. If not, their suffix will be "01." If they have had this position before, select the next chronological Example: If a person has position # FS2195 and the last suffix listed beside that position is "01," then the suffix that you will use on the EPAF you are creating is "02." Click the "X" to exit from this screen.</u>

13.) Enter the number in the "Suffix" textbox. Please Note: <u>If you type in the suffix, and a date appears in the "Last Paid Date" field beside the Query Date, if information appears in the "Current Value Field," you have chosen the wrong suffix. Also remember if you have entered any other EPAFs for this person recently with the same position, go to the next suffix number even if it doesn't appear on NBIJLST.</u>

Example: You just entered and EPAF for Susie Smith with position FS1234 with suffix 12. If this job does not appear on NBIJLST, it has not been applied to the database yet, so on the next EPAF for her with this position number choose suffix 13.

14.) You will now need Control + Page Down to see in EPAF information below. You will notice that most of the field information is defaulted in. The fields that you will need to enter are blank.

15.) The middle fields, "Current Value" should be empty. If they are not, the incorrect suffix has been used. You will need to do a rollback, do not save any information if asked, and repeat # 12 & 13.

16.) Enter the "Annual Salary," numbers only. Ex. $1,000.00 can be entered as 1000. If you are paying with cents you need to enter decimals Ex. $1,235.23 can be entered as 1235.23.

17.) Enter the "Timesheet Orgn." This is the org where the employee actually works, not necessarily the org from which they are paid.

18.) The contract type is defaulted as "S" for secondary job. If this is a primary job for the employee, change the "S" to a "P."

19.) Click the "Save" button.

20.) Select "Options" from the top menu.

21.) Select "Next Action" from the options menu.

22.) The "Approval Type" has automatically changed for "Labor Distribution." Hit Control + Page Down to see the information on the screen.

23.) If there are multiple lines of labor distribution, the ORG on the FUNDS(s) must be the same. If they are not, please process on two different EPAFs.

a. If there are multiple lines for the Labor Distribution, and the FUND/ORG is different, you need to remove one of the lines. To remove the line which is not needed; click on that line and go to the icon menu at the top underneath File, Edit where the pictures are showing. Click "Remove Record." You may need to click it a couple of times to make sure the entire record is removed. Once the record is removed, you will need to change the percentage to "100."

b. Remember to process another EPAF for the line of funding you removed that did not match. (If there is a need to fund a portion of the salary on another source only).

c. DO NOT ENTER ANYTHING IN THE FUNDING LINE THAT IS NOT ALREADY THERE!!!

24.) Hit "Save."

25.) Select "Options" from the menu.

26.) Select "Next Action" from the options menu.

27.) The "Approval Type" has now changed to the "Alternate Earn Code." Hit Control + Page Down to see the information on the screen.

28.) **Add your information under the "New Default Earnings" located at the bottom of the screen. You will need to add the "Earnings Code" under the "Earnings" column by using one of the codes below:**

Go to http://www.marshall.edu/accounting/payroll for when to use specific earn codes below.

EARNINGS CODE	NAME
STA	Summer School Faculty - Adjunct
STO	Summer School Faculty - Overload

29.) **Enter 1.00 in the "Hours or Units." Make sure the Deemed Hours field is empty.**

30.) **Hit "Save."**

31.) **Select "Options" from the menu.**

32.) **Select "Next Action" from the options menu.**

33.) **The "Approval Type" has now changed for the "Pay Factors." You will need to do a Control + Page Down to see the information.**

34.) **Everything on this screen defaults in.**

35.) **Hit the "Save" button.**

36.) **Go to "Options" on the menu.**

37.) **Select "Next Action" from the options menu.**

38.) **This screen is where you will "Terminate" the job. The "Approval Type" has changed so you can set the termination information. You will need to do a Control + Page Down to see the information.**

39.) **All the information is defaulted in.**

40.) **Hit the "Save" button.**

41.) **Go to "Options' from the menu.**

42.) **Go to "Routing" from the options menu.**

43.) You are now at the "Routing Screen." This is the path that the EPAF will travel.

Approval Level	Approval Level Code	Action	Person
30	Dean/Director	Approval	Approver in your Department
41	VP/PRE	Approval	VP in your area
70	PAYROLL	Apply	Jeanette Porter

44.) The "Level Code" and "Level Number" are defaulted due to mandatory settings. You can have your usernames default in, or you can select them from the drop down box.

45.) You can also click on the "User ID" drop-down and select a name from the pop-up menu.

46.) This pop-up menu has been pre-populated with users that are authorized at this specific level. Select a name from the list.

47.) The name you selected will now populate on the EPAF "Routing Form," if you chose to select the name.

48.) Click "Save"

49.) Go to "Options" from the menu.

50.) Select "Other Information and Comments."

51.) This is where you enter comments. In this section, you MUST enter the class information (ex. Course Number, Course Name). Your Username and Date and Time will be saved.

52.) Hit "Save."

53.) Go to "Options" from the menu.

54.) Go to "Transaction."

55.) Hit "Save."

56.) Go to "Options."

57.) Select "Submit Transaction."

58.) If the transaction was successful, you will see "Transaction Submitted" at the bottom left of the screen. If it states "Transaction Submitted" you can just click the "X" to exit, or go back to the main screen to enter additional EPAFs. You will just need to click on the "Transaction" tab on the left side of your screen and then do a rollback. If you do additional EPAFs, make sure all the information at the top of the form is taken off. When you start a new EPAF the fields should be blank. You will now enter a 901 number. You will also ignore the remaining instructions.

59.) <u>If you do not see "Transaction Submitted,"</u> and a new screen NOIEMSG pop-up, this means that you have "Errors and/or Warnings". You can "<u>ignore</u>" the warnings because the EPAF will send

with warnings. However, if you have any errors, <u>you will need to correct them</u> because the EPAF will not send.

60.) If you have errors, click on the "Approval Type" to the left of the Error.

61.) Select "Options

62.) Select Personnel Action Form [NOAEPAF].

63.) You will notice that it takes you back to the EPAF form and the Approval Type where the corrections need to be made.

64.) Make the changes to the EPAF that are requested and hit "Save"

65.) You will need to go back and correct all the errors that you see and hit "Save".

66.) You will go to "Options" and "Submit Transaction." If there are additional errors, you will repeat # 60 through 64.

67.) If you see "Transaction Submitted" at the lower left corner of your screen, the EPAF has been successful.

68.) Click the "Exit" button.

69.) You are now back at the main menu.