INSTRUCTIONS

FOR

CREATING

PART-TIME FACULTY

EPAFS

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

1. how you will pay the employee
    a. salary
    b. position and sufficient budget
    c. correct fund and org.

2. that you have the correct job information for the position
    a. position number
    b. EPAF category

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
    b. encumbrance information for hourly positions.

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**
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]

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

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.**
7.) **The Categories are:**

CATEGORY NAME	SESSIONS	BANNER PAYROLL BEGIN DATE (USE FOR QUERY DATE)	BANNER PAYROLL END DATE
CPFFAL	Fall	8/17/13	12/16/13
CPFSPR	Spring	1/17/14	5/16/14

8.) **Note that the "Approval Type" field has been populated based on the Approval Category chosen.**
9.) **Please click in the "Query Date" text box. This date is the "Banner Payroll Begin Date" from above. This is not the date when the session begins. Enter the date here.**
10.) **Click in the "Position" text box. If you know the position number, enter it here.**

11.) **If you do not know the position number, click on the drop-down arrow beside the position text box. Part-Time Faculty position numbers MUST begin with "17" followed by the four-digit org the position is paid from. Select "List of all Positions" from the pop-up menu.**

12.) **Search for the correct position number in the list provided. Double click on the position number to select.**

13.) **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>**

14.) **<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 number. Example: If a person has position # 172195 and the last suffix listed beside that position is "27," then the suffix that you will use on the EPAF you are creating is "28." Click the "X" to exit from this screen.</u>**

15.) **Enter the number in the "Suffix" textbox. <u>If you type in the suffix, and a date appears in the "Last Paid Date" field beside the Query Date OR if information appears in the "Current Value Field," you have chosen the wrong suffix. If you have entered any other EPAFs for this person with the same position, go to the next suffix number even if it doesn't appear on NBIJLST. Example: You just entered and EPAF for Susie Smith with position 172495 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.</u>**

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

17.) **The default for Contract Type is "P" for primary job. If this is a secondary job, change the "P" to an "S."**

18.) **Hit the "Tab" key or click with the mouse on the fields where the information is needed.**

19.) **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.**

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

21.) **Click the "Save" button.**

22.) **Select "Options" from the top menu.**

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

24.) **The "Approval Type" has automatically changed for "Labor Distribution." Hit Control + Page Down to view the screen.**

25.) **If there are multiple lines showing and you need both of the orgs listed please process on two different EPAFs.**

   a. **If there are multiple lines for the Labor Distribution, you only need one of the lines. 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. **DO NOT ENTER ANYTHING IN THE FUNDING LINE THAT IS NOT ALREADY THERE!!!**

26.) **Hit "Save."**

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

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

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

30.) **This information is not defaulted in. The system does not allow it.**

31.) **Make sure that you do not type over the "Effective Date" when entering your information. This date must not be changed.**

32.) **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	EARNINGS CODE DESCRIPTION
PTA	Part-Time Faculty - Adjunct
PTO	Part-Time Faculty - Overload

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

34.) **Hit "Save."**

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

36.) **Select "Next Action."**

37.) **The "Approval Type" has now changed for the "Pay Factors." Control + Page Down.**

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

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

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

41.) **Select "Next Action."**

42.) This screen is where you will "Terminate" the job. The "Approval Type" has changed so you can set the termination information. Control + Page Down.

43.) All the information is defaulted in.

44.) Hit the "Save" button.

45.) Go to "Options' on the menu.

46.) Select "Routing" from the options menu.

47.) You are now at the "Routing Screen." This is the path that the EPAF will travel. Your "Routing" path will be:

Approval Level	Approval Level Code	Action	Person
30	Dean/Director	Approval	Approver in your Department
41	VP/PRE	Approval	Carol Hurula
70	PAYROLL	Apply	Karen Fischer

48.) 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.

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

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

51.) The name you selected will now populate on the EPAF "Routing Form."

52.) Click "Save."

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

54.) Select "Other Information and Comments."

55.) In this section, you MUST enter the information you would normally enter in the PAR remarks section for a Part-Time Faculty (ex. Course Number, Course Name). Your Username and Date and Time will be saved.

56.) Hit "Save."

57.) Go to "Options" on the menu.

58.) Select "Transaction."

59.) Hit "Save."

60.) Go to "Options."

61.) Select "Submit Transaction."

62.) If the transaction was successful, you will see "Transaction Submitted" at the bottom left of the screen. Click the "X" to exit or go back to the main screen to enter additional EPAFs. Click on the "Transaction" tab on the left side of your screen and then do a rollback if you have 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. Enter a 901 number. Ignore the remaining instructions.

63.) <u>If you DO NOT see "Transaction Submitted,"</u> a new screen NOIEMSG pops-up, which means that you have "Errors and/or Warnings". You can ignore 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.

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

65.) Select "Options."

66.) Select "Personnel Action Form [NOAEPAF]."

67.) This takes you back to the EPAF form and the Approval Type where the corrections need to be made.

68.) Make the requested changes to the EPAF and hit "Save"

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

70.) Go to "Options" and "Submit Transaction." If there are additional errors, you must repeat steps 68 through 74.

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

72.) Click the "Exit" button.