Electronic Personnel Action Form Guide
Monthly Student Employees

Human Resources Information Systems
www.drexel.edu/hr

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Understanding Web-Based EPAFs

General Information

An Electronic Personnel Action Form (EPAF) processes the same information as a paper PAF. EPAFs can currently be used to process appointments for new and rehires in the following approval categories:

- Graduate Assistants (GA)
- Teaching Assistants (TA)
- Research Assistants (RA)
- Research Fellows (RF)
- Dormitory Resident Assistants (SM)

Additional Assistance

In addition to the information in this manual, there is help built into DrexelOne. Simply select Bannerweb Help in the upper right corner to see a basic description of what is currently on the screen.

Additional Assistance Visual Aid

Setting up Default Routing

Once default routing is set up for a particular Approval Category, you will not have to set routing up for each individual EPAF within that category.

Step 1: Log in to DrexelOne (http://one.drexel.edu/cp/home/loginf).

Step 2: Select Employees tab.

Step 3: Under Payroll section, select More BannerWeb Employee Services.

Step 4: Select Electronic Personnel Action Forms.

Step 5: Select EPAF Originator Summary.

Step 6: Select Default Routing Queue.

Step 7: From the Approval Category drop down menu, select the type of employee that you want to set up in your routing for. Select Go.

Step 8: Set up the routing levels. There are pre-set approval levels and required actions that correspond to each individual Approval Category, which will default into the routing fields when you select the Approval Category and select Go. Simply input the User ID for the appropriate levels if you would like to use the default levels. If you would like to add approvers to the default levels, please use the following steps:

  Sub Step 1: Select the user level for the appropriate level of the routing.
  Sub Step 2: Enter User ID for approval levels under the User Name field. If you don't know the User Names for your approvers, use the magnifying glass to search for them.
  Sub Step 3: Select drop down menu under Required Action to change these defaults.
      Grant funded positions must include PI and GRANTS in the routing. The following are standard approval levels for routing:

Approval Category	Action
DEPT	FYI or
DEPBUD	Approve
HUMRES	Approve
HRADMIN	Apply

Step 9: When finished entering approvers, select Save and Add New Rows. If the employee is not research funded, you can exit the screen.

Step 10: Repeat for as many employee types as necessary.

Step 6 Visual Aid

EPAF Originator Summary

Current **History**

[i] Select the link under Name to access details of the transaction, or select the link under Transaction to update the

Transaction Status: All [Go]

[STOP] **No transactions found in your queue.**

New EPAF | Default Routing Queue | Search | Superuser or Filter Transactions
Return to EPAF Menu

Steps 7-9 Visual Aid

EPAF Default Rou

Select type of employee from the drop down menu. Select Go.

Select here to change default required actions.

[i] Select an Approval Category ... hes, select the Approval Lev

Approval Category: Not Selected [Go]

Use magnifying glass to find approver's User ID or enter User ID in User Name field.

A		User Name		Required Action
	[▼] 🔍			Not Selected [▼]
	[▼] 🔍			Not Selected [▼]
Not Selected	[▼] 🔍			Not Selected [▼]
Not Selected	[▼] 🔍			Not Selected [▼]

[Save and Add New Rows]

Select when finished setting up routing to perform other EPAF actions.

EPAF Originator Summary
Return to EPAF Menu

Select when finished entering routing information or if you need to add more rows.

Creating an EPAF

Monthly EPAFs must be submitted by the 10th of the month of hire. If the 10th of the month of hire has passed, please submit on a paper PAF.

Step 1: Log in to DrexelOne (http://one.drexel.edu/cp/home/loginf).

Step 2: Select Employees tab.

Step 3: Under Payroll section, select More BannerWeb Employee Services.

Step 4: Select Electronic Personnel Action.

Step 5: Select New EPAF.

Step 6: Enter the university ID of the person you want to create an EPAF for. If you don't know the person's university ID, click on the magnifying glass on the right to search for the person.

Step 7: Enter the Start Date in the Query Date field. (**Hint:** Start Date must be the first of the month and must be in MM/DD/YYYY format (i.e. 10/01/2006)).

Step 8: Select the type of employee from the Approval Category drop down menu. **If the employee has ever worked anywhere in the university, they are a rehire.** *(***HINT:*** If you are hiring a new hire, make sure they go to Human Resources to fill out a new hire packet!)*

Step 9: Once ID, Query Date, and Approval Category are selected, click Go.

Step 10: Enter position number for employee in the Position field. If you don't know the position number, click on the magnifying glass to search for it. If you are renewing a position that the employee has already had, simply select the job under Existing Jobs.

Step 11: Enter Suffix as 00. (Disregard if you selected an existing job.)

Step 12: When Position number and Suffix are completed, select Create.

Steps 6-9 Visual Aid

New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Ent...

Click here to search for a university ID.

✳ - indicates a required field.

Enter Start Date here.

ID: ✳ [   ] [   ]

Query Date: MM/DD/YYYY ✳ [11/03/2006]

Approval Category: ✳ [Not Selected ▼]

Go — Click here when you are ready to move forward.

Click here to select the type of employee.

Steps 10-12 Visual Aid

New EPAF Job Selection

Enter or search for a new position number and enter the suffix, or select the link under Title.

ID:
Query Date:
Approval Category:

Here you will see the employee's name, ID, Start Date, and the type of employee the person will be hired as.

New Job
Position: [   ] [   ] 🔍
Suffix: [   ] — Suffix should always be 00.
Create

Click here to search for a position number.

Existing Jobs

Number and Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status

All Jobs

Positions that employee has already had – they can be renewed.

Creating an EPAF

Step 13: Under the Start section, enter the information pertaining to each field in the EPAF:

Job Begin Date: Enter the employee's Start Date in MM/DD/YYYY format (must be the first day of the month of hire). (If you are rehiring a student into a position in which they have already worked, keep this field *blank*.)

Job Category: Keep as Secondary or Primary (whichever defaults).

Job Effective Date: Enter the employee's Start Date in MM/DD/YYYY format.

Contract/Salary: Enter rate of pay without Dollar Signs or commas – use decimal points. Example: 2000.00 (will pay employee $2,000 for the term)

Hours per Pay: Enter hours per pay period (some employees have a default hours per pay – you may leave the default in the field).

Job Change Reason: Keep as NEW or REHIR (whichever defaults).

Job Change Reason: Keep as NEW or REHIR (whichever defaults).

Number of Pays: Enter the total number of months for the appointment (Ex. 10/01/2006— 12/31/06 = 3 Number of Pays)

Number Pays Periods: Enter the same number you entered for Number of Pays.

Job Status: Keep as A.

Timesheet Orgn: Enter organization number.

Job End Date: Keep as null (–).

Step: Keep as 0.

FTE: Enter if a default does not populate.

FTE Calculation Cheat Sheet	
Hours Per Pay	FTE Calculation
80	1
40	.5

Step 14: Select Save at the top of the screen.

Standard Hours for Students

Full Appointment: 80 hours per pay
Part Time Appointment: 40 hours per pay

Steps 13-14 Visual Aid

Electronic Personnel Action Form

ℹ️ Enter the information for the EPAF and either Save or Submit.

Here you will see information for the employee as well as information for the position that you are hiring the employee for.

Name and ID:
Transaction:
Transaction Status:
Approval Category:

Job and Suffix:
Query Date:
Last Paid Date.

Save

Select when finished entering hire information.

Approval Types | Routing Queue | Transaction History

RA Rehire Start

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		
Job Category:		Secondary ▼
Job Effective Date: MM/DD/YYYY		
Contract/Salary:		
Hours per Pay:		
Job Change Reason: (Not Overrideable)		REHIR
Number of Pays:		
Number Pays Periods:		
Job Status: (Not Overrideable)		A
Timesheet Orgn:	🔍	
Job End Date: MM/DD/YYYY (Not Overrideable)		-
Step: (Not Overrideable)		0
FTE:		.462

Creating an EPAF

Step 15: Under Default Earnings section, enter the following information:
   Effective Date: Enter the employee's Start Date in MM/DD/YYYY format.
   Earnings: From the drop down menu, select the type of pay.
   Hours or Units Per Pay: Enter the hours per pay period.

Step 16: Under the Fund Change section, enter the job labor distribution. If you don't have a Fund Change section, proceed to the next step. The default job labor distribution that was set for the 2007 fiscal year is automatically populated. If this is the correct job labor distribution, proceed to the next step.

Step 17: Under the End section, enter the information pertaining to each field in the EPAF:
   Job Effective Date: Enter the employee's End Date in MM/DD/YYYY format (must be the
         last day of the month of hire).
   Job Change Reason: Keep as EXPIR.
   Job Status: Keep as T.

Steps 15-17 Visual Aid

Default Earnings

Current

Effective Date Earnings Hours or Units Per Pay Deemed Hours Special Rate Shift End Date

Enter Start Date here.

Enter Hours Per Pay here.

New Value

Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY
	Not Selected				1	
	Not Selected				1	
	Not Selected				1	
	Not Selected				1	

Save and Add New Rows

Fund Change

Current

Effective Date: 10/01/2006

COA Index Fund Organization Account Program Activity Location Project Cost Percent

New

Effective Date: MM/DD/YYYY 10/01/2006

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent

Total: 100.00

☑ Job Labor Distributions defaulted from the approved Position Labor Distributions for fiscal year 2007, position 100790.

Save and Add New Rows

RA Rehire End

Enter End Date here.

Item	Current Value	New Value
Job Effective Date: MM/DD/YYYY		
Job Change Reason: (Not Overrideable)		EXPIR
Job Status: (Not Overrideable)		T

Creating an EPAF

Step 18: Enter Routing Information, if necessary. (If you set up default routing, it should automatically populate here.)

> **Sub Step 1:** Select the user level for the appropriate level of the routing.
> **Sub Step 2:** Enter User ID for approval levels under the User Name field. If you don't know the User Names for your approvers, use the magnifying glass to search for them.
> **Sub Step 3:** Select drop down menu under Required Action to change these defaults. **Grant funded positions must include PI and GRANTS in the routing.** The following are standard approval levels for routing:

Approval Category	Action
DEPT	FYI or
DEPBUD	Approve
HUMRES	Approve
HRADMIN	Apply

Step 19: You cannot enter comments for graduate students. Only the following tuition remission information should be entered in the Comments section:

Term	Credits	Tuition	Fees	Total	Fund	Orgn	Account

Step 20: Review the information you entered in the EPAF.

Step 21: When finished entering all information in the EPAF, select Save. (You MUST save your EPAF before submitting it!)

Step 22: If you are ready to send the EPAF into your routing queue, select Submit. If you need to trash the EPAF and start over, select Delete.

HINT 1: You will know that your EPAF was submitted successfully by an alert at the top of your screen.

HINT 2: Remember to periodically review your outstanding EPAFs to ensure that they are all approved in a timely fashion.

HINT 3: If you entered comments and then received an error when you saved, your comments are still saved even though you don't see them in the Comments box.

Steps 18-22 Visual Aid

Routing Queue

Approval Level		User Name		Required Action
10 - (DEPT) Department Head	🔍			Approve
15 - (DEPBUD) College/School Budget Admin	🔍			Approve
98 - (HUMRES) HRIS	🔍			Approve
99 - (HRADMN) HR System Administration	🔍			Apply
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected

Save and Add New Rows

Comment

Example:
Winter 2009-2010, 9 credits, $8475, 110001-3782-4515 ← **DO NOT ENTER COMMENTS.** *ONLY* tuition remission may be entered in the Comments section for a Graduate Student.

Transaction History

Action	Date	User Name

You will see your transaction history information here.

Save   Submit   Delete ← Select Save when finished entering information.
Select Submit if ready to send EPAF into routing queue.
Select Delete if you want to delete the EPAF entirely.

Hint 1 Visual Aid

Electronic Personnel Action Form

☑ The transaction has been successfully submitted.

Approving an EPAF

Step 1: Log in to DrexelOne (http://one.drexel.edu/cp/home/loginf).

Step 2: Select Employees tab.

Step 3: Under Payroll section, select More BannerWeb Employee Services.

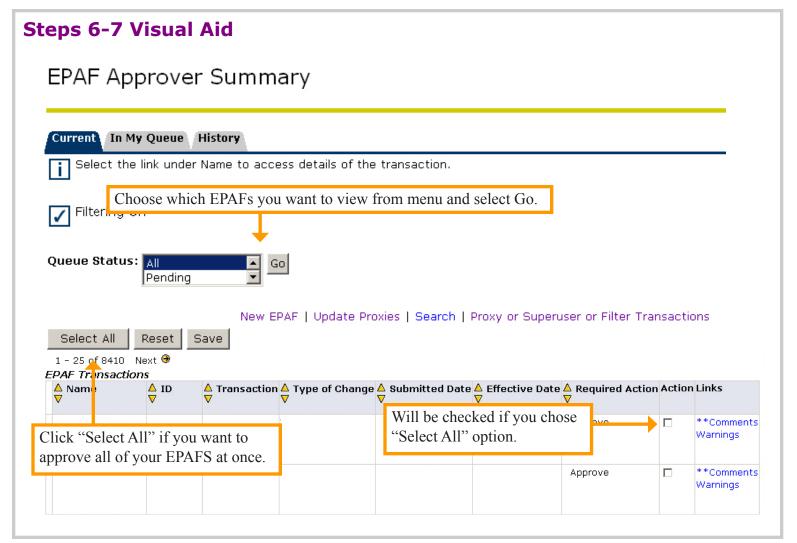**Step 4:** Select Electronic Personnel Action Forms.
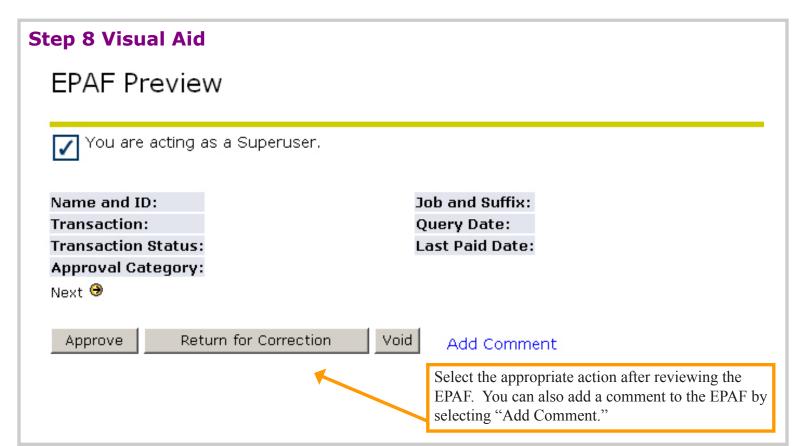
Step 5: Select EPAF Approver Summary.

Step 6: By choosing "All" from the Queue Status list, you will see all of the EPAFs that exist within your department. By choosing "Pending" from the Queue Status list, you will see all of the EPAFs that are waiting for your approval. You can view and approve each EPAF individually by clicking on their names, or you can approve them all at once but selecting "Select All" in the Action column.

Step 7: If you chose "Select All," you should see the boxes in the Action column checked. Once this box is checked, simply select Save, and your EPAFs will be approved.

Step 8: If you selected one EPAF to view, review the EPAF. If it is correct and you want to approve it, select Approve. If you want to return the EPAF to the originator for correction, select Return for Correction.

HINT: You know that your EPAF has been approved when you see "Transaction successfully completed" at the top of the screen and Transaction Status has changed to "Approved."

Steps 6-7 Visual Aid

EPAF Approver Summary

| Current | In My Queue | History |

ℹ️ Select the link under Name to access details of the transaction.

Choose which EPAFs you want to view from menu and select Go.

☑ Filtering On

Queue Status: [All / Pending ▲▼] [Go]

New EPAF | Update Proxies | Search | Proxy or Superuser or Filter Transactions

[Select All] [Reset] [Save]

1 - 25 of 8410   Next ➡

EPAF Transactions

△▽ Name	△▽ ID	△▽ Transaction	△▽ Type of Change	△▽ Submitted Date	△▽ Effective Date	△▽ Required Action	Action	Links
							☐	**Comments Warnings
						Approve	☐	**Comments Warnings

Will be checked if you chose "Select All" option.

Click "Select All" if you want to approve all of your EPAFS at once.

Step 8 Visual Aid

EPAF Preview

☑ You are acting as a Superuser.

Name and ID:	Job and Suffix:
Transaction:	Query Date:
Transaction Status:	Last Paid Date:
Approval Category:	

Next ➡

[Approve] [Return for Correction] [Void]   Add Comment

Select the appropriate action after reviewing the EPAF. You can also add a comment to the EPAF by selecting "Add Comment."

Setting up a Proxy

Step 1: Log in to DrexelOne (http://one.drexel.edu/cp/home/loginf).

Step 2: Select Employees tab.

Step 3: Under Payroll section, select More BannerWeb Employee Services.

Step 4: Select Electronic Personnel Action Forms.

Step 5: Select EPAF Proxy Records.

Step 6: From the Approval Level drop down menu, select the approval level of your proxy. Select Go.

Step 7: From the Name drop down menu, select the name of the person you are assigning as a proxy. Check "Add" box to add proxy. Select Save.

Step 8: Repeat for as many Approval Levels as necessary.

HINT: To remove a person as a proxy, go to the EPAF Proxy Records screen and check the box under remove. Select Save.

Step 6 Visual Aid

EPAF Proxy Records

Select Approval Level of Proxy here.

Approval Level: Budget Approval, BUDGET ▾ [Go]

Budget Approval, BUDGET
College/School Budget Admin, DEPBUD
Department Head, DEPT
HR System Administration, HRADMN
HRIS, HUMRES

EPAF Approver Summary
Return to EPAF Menu

RELEASE: 7.3

Step 7 Visual Aid

EPAF Proxy Records

Approval Level: Department Head, DEPT ▾ [Go]

Click arrow to access drop down menu to find employee name.

Name	Remove	Add
Not Selected ▾		☐

[Save]

Click here once you have selected a name and then select Save.

Acting as a Proxy

The person who you want to act as a proxy for must first set you up for access as a proxy (see page 16).

Step 1: Log in to DrexelOne (http://one.drexel.edu/cp/home/loginf).

Step 2: Select Employees tab.

Step 3: Under Payroll section, select More BannerWeb Employee Services.

Step 4: Select Electronic Personnel Action Forms.

Step 5: Select Act as a Proxy.

Step 6: From the Proxy For drop down menu, select the name of the person you want to act as a proxy for.

Step 7: Select Superuser if the person you are a proxy for is a Superuser.

Step 8: Select Go.

Steps 6-8 Visual Aid

Proxy or Superuser or Filter Transac

Click here to select who you want to act as a proxy for.

i Act as a proxy or a superuser and enter the following criteri

Proxy For: Self

Act as a Superuser: ☐

Click here if the person you are a proxy for is a Superuser.

Submitted From Date: MM/DD/YYYY

Submitted To Date: MM/DD/YYYY

Transactions Per Page: 25

Go

Frequently Asked Questions

Q: What does it mean when the EPAF's Transaction Status is "Waiting"?
    A: The EPAF is waiting for you to submit it. Select Submit at the bottom of the page.

Q: When is the last day an EPAF for a monthly employee can be created and submitted?
    A: The EPAF must be submitted by the 10th day of the month of hire.

Start Date	Due Date
October 1	October 10

Q: What do I do if I receive a warning?
    A: You can ignore all warnings.

Q: What are some common error messages?
    A: See list below.

Error Message	Suggested Action
New effective date cannot be after employee's termination date.	Email HRIS the error message.
First Name, SSN, birth date, sex code, or ethnic code incomplete.	Email HRIS the error message.

Q: How do I view all of the employee's previous positions?
    A: Once you decide to create an EPAF and enter the employee's ID number, start date, and Approval Category, select Go. You will then see two choices: you can either enter a position number for the employee to be hired in to, or you can select one of the employee's previous positions that are listed on the page. For more information, please see page 6, step 10.