



## Quick Guide:

# How to Enter an Electronic Personnel Action Form (EPAF)

1. Before you begin entering an EPAF, you will need:
  - a. Employee's ID number
  - b. Position number
  - c. Start date (which will be referred to as effective date)
  - d. Rate of pay
  - e. Time sheet org code for web time entry (Payroll can provide the correct time sheet org code if needed)
2. From the **Employee** tab of Banner Web for Employees (Self Service), click **EPAF Administrator**.
3. Click on **New EPAF**.
4. On the **New EPAF Person Selection** page:
  - a. Enter the employee ID number, then tab to show the name
  - b. Enter the effective date in the "Query Date" box
  - c. Select the "Approval Category" to identify the type of EPAF you wish to process. The Approval Category is critical as it determines the routing queue.
  - d. Once you've chosen the Approval Category, click **Go**.

5. On the **New EPAF Job Selection** page, enter the position number and suffix in the boxes next to “New Job”, then click **Go**.
  
6. On the **Electronic Personnel Action Form** page, enter all the details for the position.
  - ⇒ Some fields are pre-filled and marked “Not Enterable”
  - ⇒ The asterisked fields in red are required and must be completed
  - ⇒ If the employee has never held this position number and suffix, enter a Job Begin Date equal to the Query Date. If the person has held this position before you will see “Last Paid Date XX/XX/XXXX” right after the Approval category line, position number and suffix.  
**If this information is present you do not need a Job Begin Date.**
  - a. Enter the regular rate
  - b. Enter the Contract Type as Primary or Secondary
  - c. Enter the Home Department as a numeric org code
  - d. Enter a title for the position
  - e. In the Check Distribution Org line, enter the same numeric org code as the Home Department
  - f. Enter the appropriate Time Sheet Org Code in the Timesheet Org line. This is for electronic time entry
  - g. Next, review the FOAPAL that appears to be sure it corresponds with the correct department and position. If it is incorrect, you have an incorrect position number and will need to start the EPAF over.
  - h. Under the Terminate a Job for an Employee section, enter the end date for the position. Depending on the category, a prefilled date equal to the last day of classes or the last day of the fiscal year will be in this box. This date can be changed.

- i. Next complete the **Routing Queue**. If it is not pre-filled from the Default Routing Queue, navigate to the magnifying glass across from each line and select the proper name.
  - j. If there are any special comments, add them in the comment box. This can be helpful in the future. For example, if you are hiring a grader you can list the name of the professor and class. \*Do not enter personal information here.
7. Once you have entered all the information, click the **Save** button. A message should appear, "Your change was saved successfully".
8. Click the **Submit** button. Once again, a message will appear, "The transaction has been successfully submitted".
9. If there are errors, a message will appear that errors occurred and the transaction was not submitted. All errors will need to be cleared in order to submit the transaction. If warnings appear, they will not stop the successful submission of the EPAF.
10. If the EPAF was submitted successfully it will appear in your **Originator Summary** as **Pending**.

## Common Errors and Troubleshooting

**\*\*ERROR\*\* First Name, Social Security Number, Birth Date, Sex Code or Ethnic Code incomplete.**

This error typically means that the social security number for the employee is not yet in the Banner system. In an effort to keep employee social security numbers protected, only HR and Financial Aid have access to this information and only HR can enter social security numbers into the Banner system. If you get this error you should contact the Office of Human Resources and ask that the social security number be entered into Banner. Once this is done, you should be able to submit the EPAF successfully.

**\*\*ERROR\*\* Employee already has a primary job.**

This error means that the employee already has a primary job in the Banner system. For student employees this is not an issue of concern, and to correct the error, simply change the job to secondary, and the error should be resolved.

**\*\*ERROR\*\* Begin Date must equal the first Jobs Detail Effective Date.**

The error typically appears when a value is present in the Begin Date field for a student who has already had a job on campus. If this error appears and you know the student has a history of working at WPI already in Banner, simply remove the Begin Date and leave it blank, re-save, and then re-submit the transaction.

**\*\*ERROR\*\* The future dated Job record must be deleted before ending job**

This occurs when terminating a job earlier than the end date from their original EPAF. Human Resources will need to remove the future date to submit this EPAF successfully. Call or email Human Resources with the ID # and position number.

Always make sure your EPAF has a created and a submitted date. Without this this EPAF has not gone to the next person in the routing queue for approval.

It will now be in your Originator queue with a status of pending.