Banner

Electronic Personnel Action Forms (EPAF)

Information Resources and Technology Training Services
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<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Person</th>
<th>Change</th>
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<td>1.0</td>
<td>Feb 2017</td>
<td>Jennifer Savage</td>
<td>Original Version</td>
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<td>1.1</td>
<td>Mar 2017</td>
<td>Rolf Mikkelsen</td>
<td>Changes to Query Date</td>
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<td>1.2</td>
<td>Mar 2017</td>
<td>Jennifer Savage</td>
<td>Updated Screen Shots</td>
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<td>1.3</td>
<td>May/June 2017</td>
<td>Jennifer Savage</td>
<td>Terminations and Corrections</td>
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<td>1.4</td>
<td>September 2017</td>
<td>Jennifer Savage</td>
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<table>
<thead>
<tr>
<th>Page</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>EPAF Introduction</td>
</tr>
<tr>
<td>5</td>
<td>Log On To Banner Self Service</td>
</tr>
<tr>
<td>6</td>
<td>Entering New Student</td>
</tr>
<tr>
<td>14</td>
<td>Entering New International Student</td>
</tr>
<tr>
<td>15</td>
<td>Entering Student Change</td>
</tr>
<tr>
<td>19</td>
<td>Emails</td>
</tr>
<tr>
<td>21</td>
<td>EPAF Originator Summary</td>
</tr>
<tr>
<td>22</td>
<td>Return for Correction</td>
</tr>
<tr>
<td>23</td>
<td>Student Terminate Assignment</td>
</tr>
<tr>
<td>26</td>
<td>Conclusion</td>
</tr>
</tbody>
</table>
Electronic Personnel Action Forms (EPAF)

Roles:

**Students** – will supply Administrators with information to be entered into EPAF system.

- Institutional Work Study (IWS) – Positions made available through institutional funding. Jobs vary from general office work to pre-professional opportunities. May not exceed 20 hours while classes in session/25 hours when not in session. Students must be enrolled full time.
- Federal Work Study (FWS) - Available through Department of Education’s Federal Work Study Program. Students must indicate desire to participate in Work Study program and show “financial need” on their FAFSA. Students must present Federal Work-Study Referral Form to administrator. Jobs provide skills and experience to assist students in career development. May not exceed 20 hours per week while classes in session/30 hours per week when not in session. Available to full and part time students.
- Hourly - Based on department funds.
- Grant Funded - Funding received from Office of Special Programs (OSP).

**Administrators** – will enter information into EPAF link of Banner Self Service and send any required documentation to the human resources department.

**Proxy** – All secretaries should be trained in the EPAF process so that they can be backup for absent Administrators.

**Approvers** - HR will review information entered into EPAF and once all mandatory documentation is received (I9, W4, I9 Documentation), either approve or disapprove.

- Approvals will be processed two times a day. You can email the Budget office to get the correct position number if needed.
- Once approved and the Job Begin Date is reached, student will be active in Banner Self Service.
- OSP must approve the funding of Grant Funded students and they will provide the position number. Email OSP to obtain the position number if needed.

**Documentation:** All forms necessary to complete the EPAF process are available at [https://sites.rowan.edu/hr/recruitment_and_staffing/index.html](https://sites.rowan.edu/hr/recruitment_and_staffing/index.html).

There is also a **Student Employment Worksheet** available for administrator’s use only (a way to document the student information prior to entering it into the system). This worksheet will not be turned into HR or Payroll.
Log on to Banner Self Service

If you have not yet set up a Banner Self Service Pin go to http://id.rowan.edu to create one.

Log on to Banner Self Service from any web browser: http://www.rowan.edu/selfservice.
Select Access Banner Services.

Enter your User ID (Banner number)

Enter your PIN number.
Entering New Student

Select **Employee** tab, **Electronic Personnel Action Forms**.

---

**Entering New Students**

Select **New EPAF**.

**IMPORTANT:** **New Students** are students who have **NEVER** worked in any capacity at Rowan University.

---

**Electronic Personnel Action Form**

- **EPAF Originator Summary**
- **New EPAF**
- **Act as a Proxy**

RELEASE: 8.12.1.5

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Entering New Student

You will be prompted to enter an ID. If you know the Banner ID of the student, enter it into the field and then tab. Leave the Query Date as today’s date.

If you do not know the Banner ID of the student, or want to make sure you have the correct student, you can select the Search Icon and search by Last Name, First Name, Banner ID or Social Security Number.
Entering New Student

Select **Go**.

Then select the hyperlink to the **ID** of the correct student.
The Student ID, Name and Query Date will pre-populate. Select **Student New Assignment, NEWAGN** from the **Approval Category** drop down.

**IMPORTANT:** Select **All Jobs** to view any previous jobs. There should not be any active or terminated jobs listed there. If there are, select **Student Changing Assignment CHGAGN** instead -- follow those directions below).

If **No Jobs Based on Query Date** displays, select **Go**.
Entering New Student

Enter in the **Position Number** and **Suffix**. The **Suffix** will always be **00**. Based on the **Position Number** and **Suffix** you enter, the correct job type will autofill. (Federal Work Study, Hourly or Institutional Work Study). Select **Go**.
Entering New Student

The student’s new job information page will appear. You must enter in the information in the fields marked with an *.

Enter in the **Home** and **Timesheet ORGN**.

**Contract Type** (Primary 1st, if error, Secondary).

**Active Job Status.**

**Current Hire Date.** Must be beginning of **CURRENT PAY PERIOD**.

**Job Begin Date:** Must be beginning of **CURRENT PAY PERIOD**.

**Job Effective Date:** Must be beginning of **CURRENT PAY PERIOD**.

**Personnel Date:** **ONLY USE IF** actual start date **PRIOR TO CURRENT PAY PERIOD.** Make sure to enter 1st day of actual pay period here.

**Salary Encumbrance:** Always 1.0 unless FWS position. That will be attached on a card student will have from Financial Aid.

**I9 Date** should be the first day of the pay period in which the student started.

**Comment** Can enter the name and extension of the supervisor of the employee, **Save**.

***NOTE: Dates MUST be entered in MM/DD/YYYY format or will create error***
## Entering New Student

### Student New Assignment, 744046-00 STUDENT WORKER

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Organization: *</td>
<td></td>
<td>99907</td>
</tr>
<tr>
<td>Timesheet Orgn: *</td>
<td></td>
<td>99907</td>
</tr>
<tr>
<td>Contract Type: *</td>
<td></td>
<td>Primary</td>
</tr>
<tr>
<td>Job Status: *</td>
<td></td>
<td>Active</td>
</tr>
<tr>
<td>Current Hire Date: MM/DD/YYYY*</td>
<td></td>
<td>05/26/2017</td>
</tr>
<tr>
<td>Job Begin Date: MM/DD/YYYY*</td>
<td></td>
<td>05/26/2017</td>
</tr>
<tr>
<td>Jobs Effective Date: MM/DD/YYYY*</td>
<td></td>
<td>05/26/2017</td>
</tr>
<tr>
<td>Personnel Date: MM/DD/YYYY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regular Rate: *</td>
<td>10.00</td>
<td></td>
</tr>
<tr>
<td>Hours per Pay: (Not Enterable)</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Salary Encumbrance: *</td>
<td>1.0</td>
<td></td>
</tr>
<tr>
<td>I9 Form Indicator: *</td>
<td></td>
<td>Received</td>
</tr>
<tr>
<td>I9 Date: MM/DD/YYYY</td>
<td></td>
<td>05/26/2017</td>
</tr>
<tr>
<td>Home COAS: (Not Enterable)</td>
<td>R</td>
<td>26.1</td>
</tr>
<tr>
<td>Factor: (Not Enterable)</td>
<td>26.1</td>
<td>00</td>
</tr>
<tr>
<td>Pays: (Not Enterable)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Salary Grade: (Not Enterable)</td>
<td>W</td>
<td>S1</td>
</tr>
<tr>
<td>Step: (Not Enterable)</td>
<td></td>
<td>2017</td>
</tr>
<tr>
<td>Time Entry Method: (Not Enterable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Class Code: (Not Enterable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salary Group: (Not Enterable)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Entering New Student

If you entered all of the data correctly, you will get the message Your change was saved successfully.

Select the Submit button and you will receive another message The transaction has been successfully submitted.

The transaction history on the bottom of the page will show the user name of the person who created and submitted the EPAF as well as the dates.
Entering New International Student

When entering a new, international student, you may receive an error message: **First Name, SSN/SIN, Birth Date or Gender Incomplete.** This is an indication that all of the student’s basic information is not entered into Banner yet. You will need to scan and email Edyta Paluch (paluch@rowan.edu) a copy of the student’s SS card, visa and passport, asking Edyta to enter the information and notify you when you can go back in and enter a **New Student EPAF.**

Errors and Warning Messages

<table>
<thead>
<tr>
<th>Type</th>
<th>Message Type</th>
<th>Description</th>
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<tbody>
<tr>
<td>Student New Assignment</td>
<td>ERROR</td>
<td>First Name, SSN/SIN, Birth Date or Gender Incomplete.</td>
</tr>
</tbody>
</table>

* Indicates a required field.

Student New Assignment, 745245-00 STUDENT WORKER

_User does not have access to view current values._

--

From: savagej@rowan.edu

To: Paluch, Edyta

Cc: 

Bcc: 

Subject: New International Student Information

---

Please enter the attached documentation into Banner for (Name). This is a new international student.

Can you please let me know when I can enter in the New Student EPAF?

Thank you.

Jennifer Savage
Technical Trainer
Entering Student Change

If a student has ever been paid through the work study program, they are considered a **Returning Student**. They should either let you know, or when you try and enter as a New Student, their former **Employee Job Assignments** will show up. Enter their ID or Name, then **Student Change Assignment, CHGAGN**, from the **Approval Category** drop-down menu. **Go.**

Select All Jobs to see all previous jobs. Then select **Go**. If no active jobs, you will receive message **There are no active jobs based on the Query Date.**
Select All Jobs to show previous jobs.

Either select the previous job if you want to re-instate that same Position and Organization, or select the New Job and enter in the Position and Suffix. Select Go.

The student’s Changing Assignment page will appear.

If this is a job that is being reinstated, the previous values display under Current Value. You must re-enter in the information under New Value in the fields marked with an *.

The Job Begin Date should be the ORIGINAL begin date, (Listed under Current Value--this was the first day of the original pay period).

The Job Effective Date should be the new date (first day of CURRENT pay period).

The Personnel Date: ONLY USE IF actual start date PRIOR TO CURRENT PAY PERIOD. Make sure to enter 1st day of actual pay period here.

NOTE: A new 1-9 Form Indicator will only be required if it has been more than 3 years since employment. Save.

If this is not a reinstated job, but a NEW Change Student Assignment, then you will enter in the new job information and there will not be values under Current Value.
Entering Student Change

Jump to Bottom

* - indicates a required field.

**Student Changing Assignment, 705146-SU STUDENT WORKER 705146**

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
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</thead>
<tbody>
<tr>
<td>Home Organization: *</td>
<td>99902, Training ORGN 99902</td>
<td>99902</td>
</tr>
<tr>
<td>Timesheet Orgn: *</td>
<td>99902</td>
<td>99902</td>
</tr>
<tr>
<td>Contract Type: *</td>
<td>Primary</td>
<td>Primary</td>
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<tr>
<td>Job Status: *</td>
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<tr>
<td>Job Begin Date: MM/DD/YYYY*</td>
<td>01/01/2013</td>
<td>01/01/2013</td>
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<tr>
<td>Jobs Effective Date: MM/DD/YYYY*</td>
<td>06/01/2013</td>
<td>05/27/2017</td>
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<tr>
<td>Personnel Date: MM/DD/YYYY</td>
<td></td>
<td></td>
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<td>Regular Rate: *</td>
<td>40.790301</td>
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<tr>
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<td>R</td>
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<tr>
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<td>Pays: (Not Enterable)</td>
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<td>0</td>
</tr>
<tr>
<td>Employee Class Code: (Not Enterable)</td>
<td>S1, Student</td>
<td>S1</td>
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<tr>
<td>Salary Group: (Not Enterable)</td>
<td>2015</td>
<td>2018</td>
</tr>
<tr>
<td>Time In/Out Ind: (Not Enterable)</td>
<td>Yes</td>
<td>Y</td>
</tr>
</tbody>
</table>

Select **Submit** and you should get the following message.

Electronic Personnel Action Form

- The transaction has been successfully submitted.
- Enter the information for the EPAF and either Save or Submit.

Name and ID: James Smith, 99999001
Transaction: 74089
Transaction Status: Pending
Approval Category: Student Changing Assignment, CHCAGN
Emails

Once the EPAF has been successfully submitted, several emails will be automatically generated in the system.

The administrator that entered the EPAF will receive the following email:

[Image of an email message]

The student will received the following email:

[Image of an email message]

IMPORTANT: The student MUST read and select the link in the email.
Emails

When the student clicks on the link embedded in the email, they will be directed to their **Student Authorization Form**. They will need to confirm their information listed at the top, indicate if they are currently working in another department at Rowan University, and if they are, will need to indicate how many hours.

Once the student reads the verification information, they need to check the **I understand** box and then select **Acknowledge** (this will be their electronic signature).

![Student Employment Authorization Form]

**IMPORTANT**: If student does not open and acknowledge the **Student Authorization Form** in their email, the Approver will NOT be able to approve the request. The request will be stuck in PENDING status (see PENDING information below). The student will receive the email 3 times per week for two weeks.
Once the student reviews and accepts their **Student Authorization Form**, the approver will receive the following email:

![Image of an email]

A student work study EPAF has been submitted that requires your approval before it is processed. Please go to the following link and approve, [https://asaforms-test.rowan.edu/Forms/StudentEmploymentAuth/openOSPAuth?requestid=181](https://asaforms-test.rowan.edu/Forms/StudentEmploymentAuth/openOSPAuth?requestid=181) **This email would have been sent to the OSP, hegeli@rowan.edu but this is running in TEST**

If the student has not read and accepted their **Student Authorization Form**, you will receive the following email PLUS

If an EPAF has been pending for 14 days, the approver will **VOID** the request and you will receive this email informing you.

---

From: DoNotReply [mailto:DoNotReply@rowan.edu]
Sent: Friday, May 19, 2017 8:54 AM
To: Paluch, Edyta <paluch@rowan.edu>
Subject: Student Work Study Reminders Emails have been sent

The following students have been sent a reminder to acknowledge their employment authorization (Name, Request Id, Tran No):

Matthew Smith, 5785, 79752

The following students EPAF have been pending for more than 14 dates and have been voided (SubmitterName, Email, Student, Tran No, Job Effective Date, Days Since):

Liza Brown brownl@rowan.edu, Habeeb Ori, 78719, 29-APR-2017, 20  Susan Chapman, Mary O'Hare Barrows, 78052, 29-APR-2017, 20
You **must** go to the **EPAF Originator Summary** to check the transaction status of any submitted EPAF. There is a **Current** and **History** tab so you can view past transactions as well as current ones.

Emails will also be sent to students and you if EPAFs are stuck in Pending status (see below).

Once you view your current or past transactions, you can view the status (**Pending**-- either awaiting approval or awaiting student acceptance), see if there are comments and other transaction information. You can select the student’s name to enter into the EPAF to get more detail or select the Comments hyperlink to enter or view comments already made.
Return for Correction

If there is an error in the EPAF submission, the approver will send back a Return for Correction email to you. Depending on the error, you will have specific actions to take to fix the error.

**Return for Correction/Edit Information:** If the error is something like you did not enter the beginning of a pay period date or entered a personnel date when one was not needed, you can go to the **EPAF Originator Summary**, select the Student Name hyperlink, then select the **UPDATE** link at the bottom of the page.

Once you make the corrections, you will select **Save** and **Submit**.

**Return for Correction/Void and Resubmit:** If you receive an email saying that you entered a **New Student Request** instead of a **Change Student Request**, you will need to void and resubmit a new **Change Student Request**. You will go to the **EPAF Originator Summary**, select the Student Name hyperlink, then the **Void** button on the top or bottom of the page. Then you will need to submit a new **Change Student Request** (see directions above).
There is a new selection for you to utilize in the EPAF Approval Category drop down menu: **Student Terminate Assignment (STUTRM)**. You will select **New EPAF**, enter the student’s Banner ID, tab to enter in the name and then select **Student Terminate Assignment (STUTRM)**. The student’s active job should show on the bottom of the screen (or select **All Jobs** to see past jobs). Select **Go**.

You will need to select the position that you want to terminate, then select **Go**.
You will be brought to the **EPAF Student Terminate Assignment Form.** You will be required to enter in the **Job Effective Date** and the **Job End Date.** Both dates MUST be the last day of the CURRENT PAY PERIOD. Do NOT use the **Current Value** listed for the Job Effective Date.

The **Job Status** will automatically be entered as **T** (for Terminate).

**IMPORTANT:**

You will receive an error if you use the **Current Value** for the **Job Effective Date.**

You will receive an error if the **Effective Date** is less than the **Last Paid Date.**

The EPAF will be returned for correction if you are not using the last day of the Current pay period.
IMPORTANT:
The **Jobs Effective Date** and the **Job End Date** must be the same date.

The **Jobs Effective Date** and the **Job End Date** must be the last day of the CURRENT pay period.

Once the correct required information has been entered, select **Save** and **Submit**. You will receive a message that they were saved and submitted successfully.

---

**Electronic Personnel Action Form**

- The transaction has been successfully submitted.
- Enter the information for the EPASF and either Save or Submit

**Name and ID:** Jamie Tyler Waider, 916224363

**Job and Suffix:** P44612-00, STUDENT HOURLY

**Transaction:** 80628

**Transaction Status:** Pending

**Approval Category:** Student Terminate Assignment, STUTRM

**Query Date:** Jun 02, 2017

**Last Paid Date:** May 26, 2017

Jump to Bottom

* - indicates a required field.

**Student Terminate Assignment, P44612-00 STUDENT HOURLY, Last Paid Date: May 26, 2017**

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs Effective Date:</td>
<td>MM/DD/YYYY</td>
<td>05/13/2017</td>
</tr>
<tr>
<td></td>
<td>05/26/2017</td>
<td>05/26/2017</td>
</tr>
<tr>
<td>Job Status:</td>
<td>(Not Enterable)</td>
<td>Active</td>
</tr>
<tr>
<td></td>
<td>T</td>
<td></td>
</tr>
<tr>
<td>Job End Date:</td>
<td>MM/DD/YYYY</td>
<td>05/26/2017</td>
</tr>
<tr>
<td></td>
<td></td>
<td>05/26/2017</td>
</tr>
</tbody>
</table>
Conclusion

The **Electronic Personnel Action Forms (EPAF)** system allows administrators to easily enroll new and returning student workers directly into Self Service Banner. Administrators can also make changes to the EPAFs and terminate assignments directly within Banner. The process is further enhanced by the electronic notification and approval system utilized by administrators, students and approvers. The system will reduce the steps and paperwork needed to complete this process, making it more efficient and easier to complete.

All forms and calendars relating to the EPAF system are located on [https://sites.rowan.edu/hr/recruitment_and_staffing/student_forms.html](https://sites.rowan.edu/hr/recruitment_and_staffing/student_forms.html) website. Any questions or concerns can be directed to support@rowan.edu.