RowanUniversity
INFORMATION RESOURCES & TECHNOLOGY

ELECTRONIC PERSONNEL ACTION FORMS (EPAF)

TRAINING MANUAL

November 2023

CONTACT

Information Resources & Technology
Rowan University
irt.rowan.edu

V1.03.2019

TABLE OF CONTENTS

EPAF Introduction and Roles.....3
Documentation.....4
Access via Banner Employee Dashboard.....4
Entering New Student.....5
Entering New International Student.....12
Entering Student Changes.....13
Active Assignment Changes.....17
Emails.....19
EPAF Originator Summary.....22
Return for Correction.....23
Student Terminate Assignment.....24
Conclusion.....26

ELECTRONIC PERSONNEL ACTION FORMS INTRODUCTION

Electronic Personnel Action Form (EPAF)

- EPAFs are used to enter new or returning student workers directly into Banner.
- They can also be used to make pay rate changes and terminate existing student assignments.

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 to participate.
- 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 demonstrate financial need on their FAFSA. Jobs provide skills and experience to assist students in career development. Students participating in FWS may not exceed 20 hours per week while classes in session and are not permitted to work during holidays and breaks, including winter break and summer break. FWS is available to full- and part-time students.
- Hourly - Available for main campus and SOM students and based on a surplus in department funds.
- Grant-Funded - Funding received from Office of Sponsored Programs (OSP).

Administrators will enter information into the necessary EPAF on the Banner Employee Dashboard and communicate with the Office of Human Resources as needed. NOTE: If administrator entering the EPAF is NOT responsible for the student's timesheet, contact Payroll Services so they can set up Web Time Entry accordingly. Do not use the **Notes** section in EPAF to communicate this.

Proxy - All secretaries should be trained in the EPAF process so that they can be backup for absent administrators. The proxy cannot see the EPAF created by another administrator; however, they will be able to enter new EPAFs during the administrator's absence.

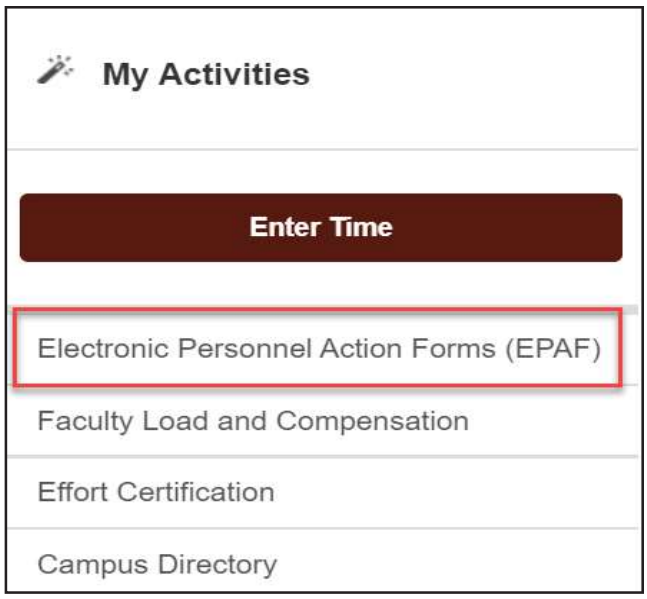
Approvers - The Office of Human Resources will review information entered into the EPAF and either approve or disapprove. NOTE: the Form I-9 must be completed in Equifax I-9 HQ prior to the Administrator/Proxy submitting the EPAF.

- Approvals will be processed on an hourly basis. 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.
- OSP must approve the funding of the Grant-Funded students and they will provide position number. Email OSP to obtain position number if needed.

DOCUMENTATION

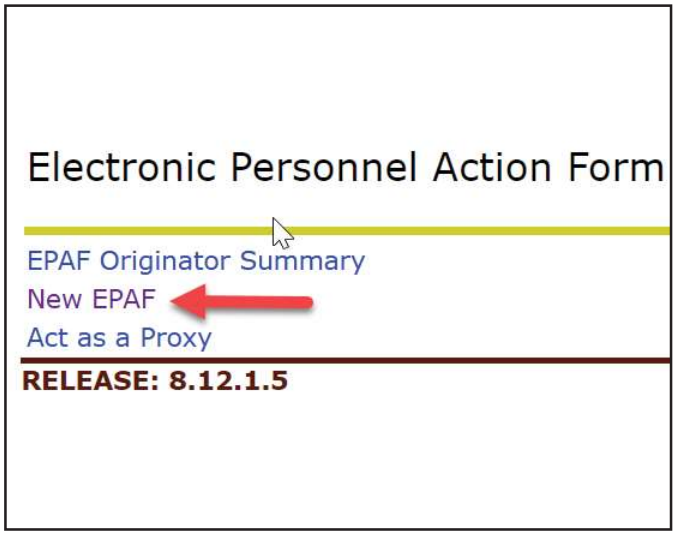
All forms necessary to complete the EPAF process are available at https://sites.rowan.edu/hr/recruitment_and_staffing/student_forms.html. There is also a **Student Employment Worksheet** available for *departmental use only* (used to document student information prior to entering into system). This will NOT be turned into HR or Payroll.

ACCESS EPAF VIA EMPLOYEE DASHBOARD



- Log in to the Employee Dashboard.
- Select the **Electronic Personnel Action Forms (EPAF)** link under **My Activities**.
- If you do not see the **EPAF** link under **My Activities**, email hr@rowan.edu to obtain access. You must include your Banner ID in the email.

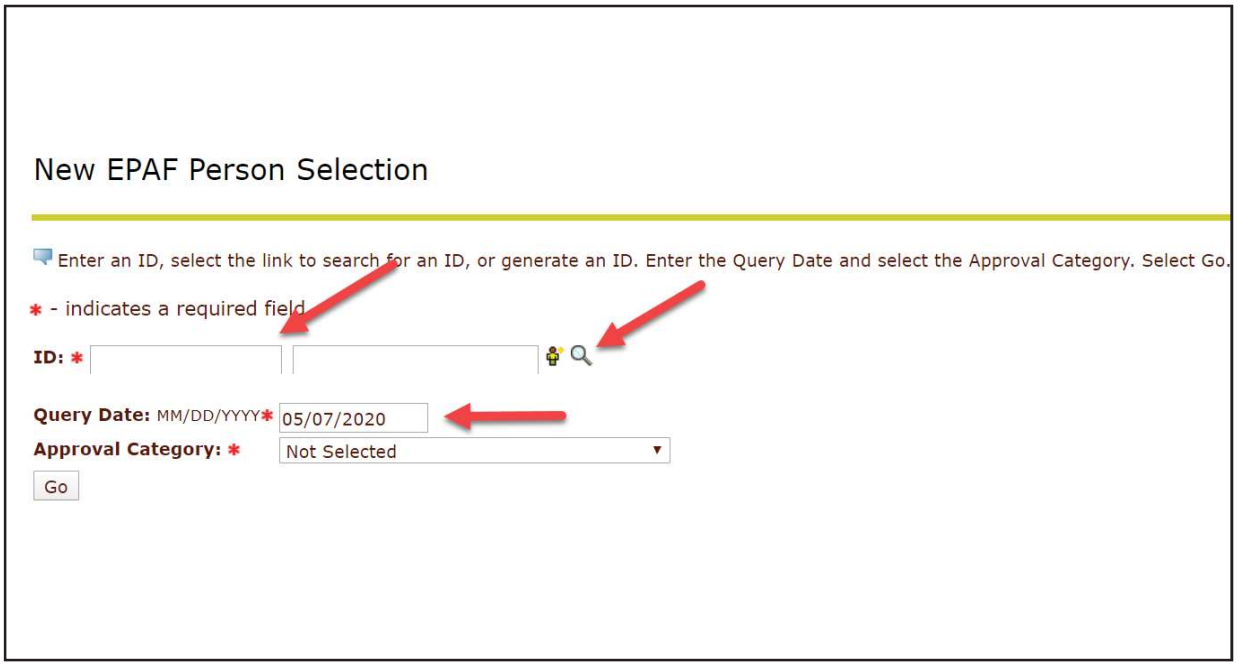
- You will be brought to the EPAF menu.
- To enter in New Assignments, Change Assignments or to Terminate an Assignment, you will select **New EPAF**.



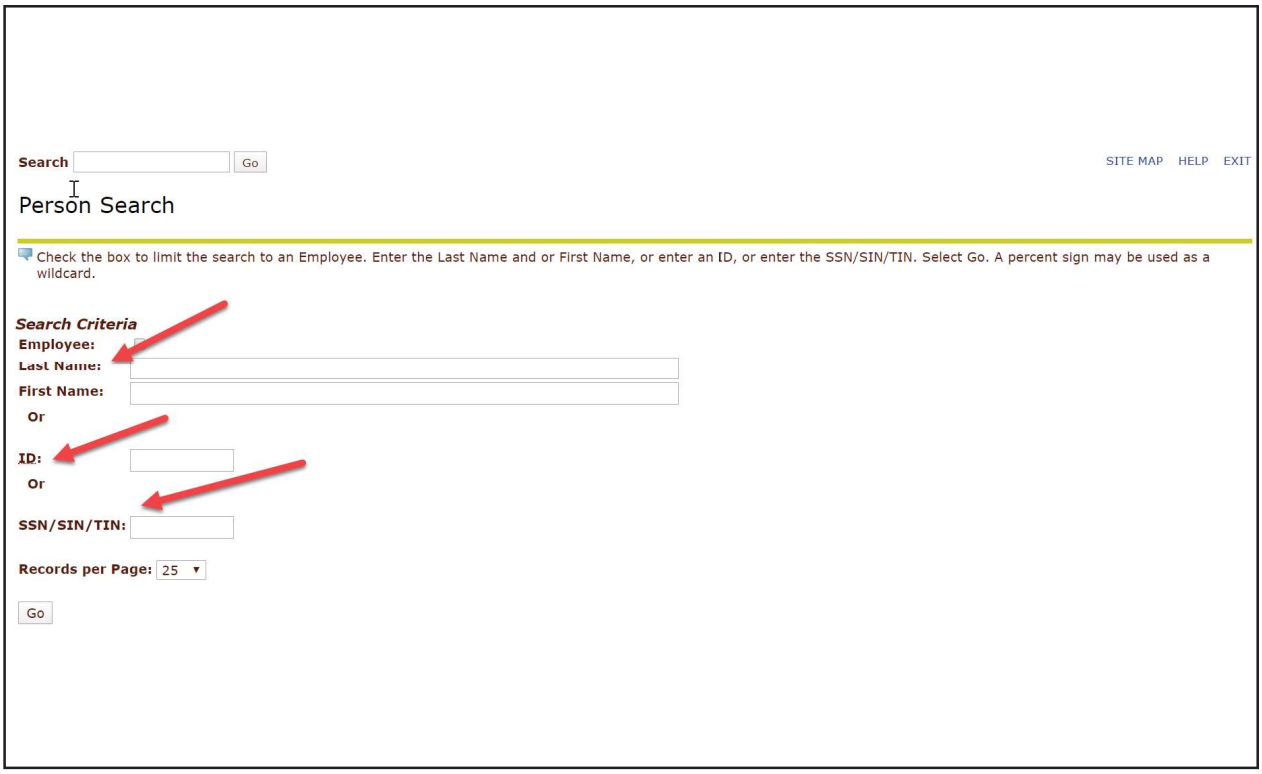
NEW STUDENTS

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

Select **New EPAF**



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.

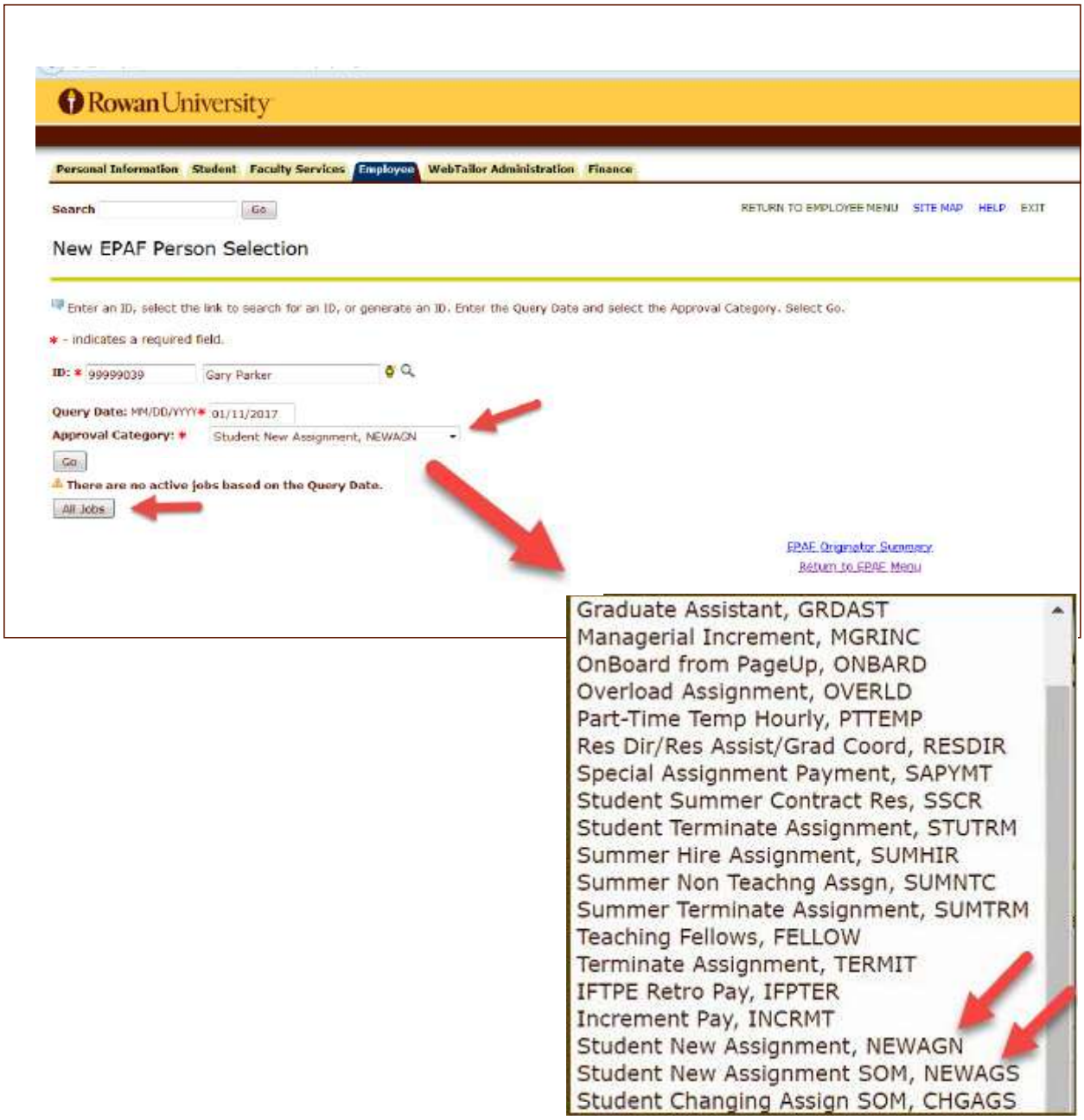


If you do not know the Banner ID of the student, or want to make sure you have the correct student, you can select the Search Icon and search by **Last Name, First Name, Banner ID** or **Social Security Number**.

Select **Go**.

Then select the hyperlink to the **ID** of the correct student.

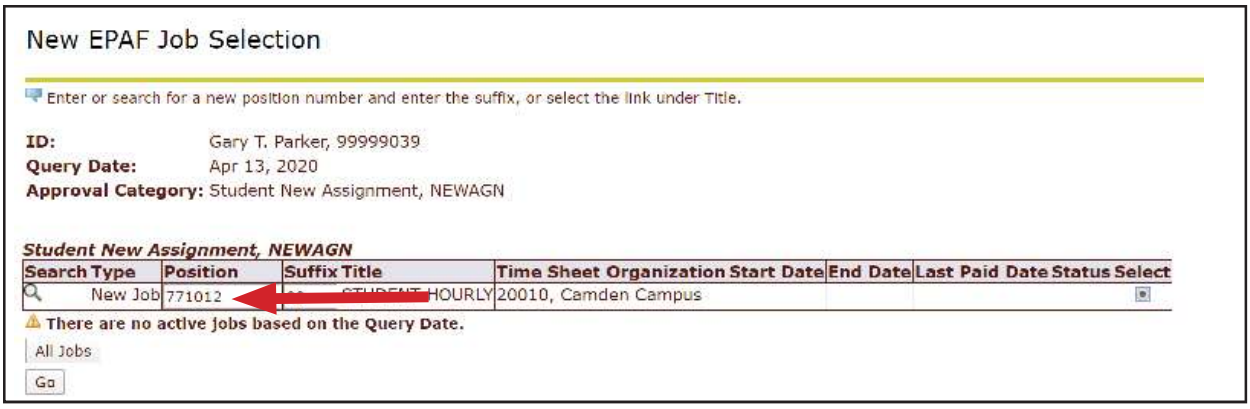
ENTERING NEW STUDENTS

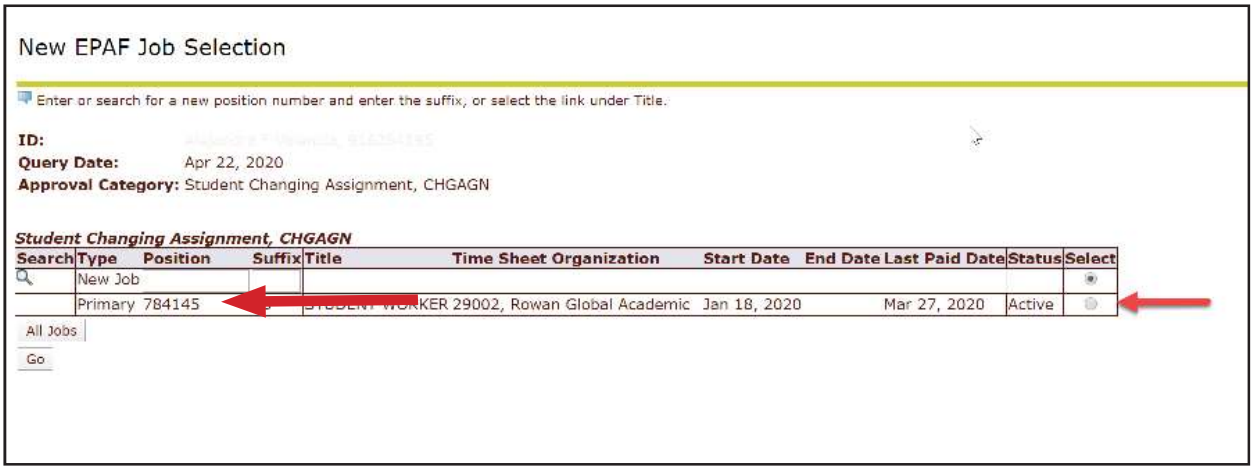


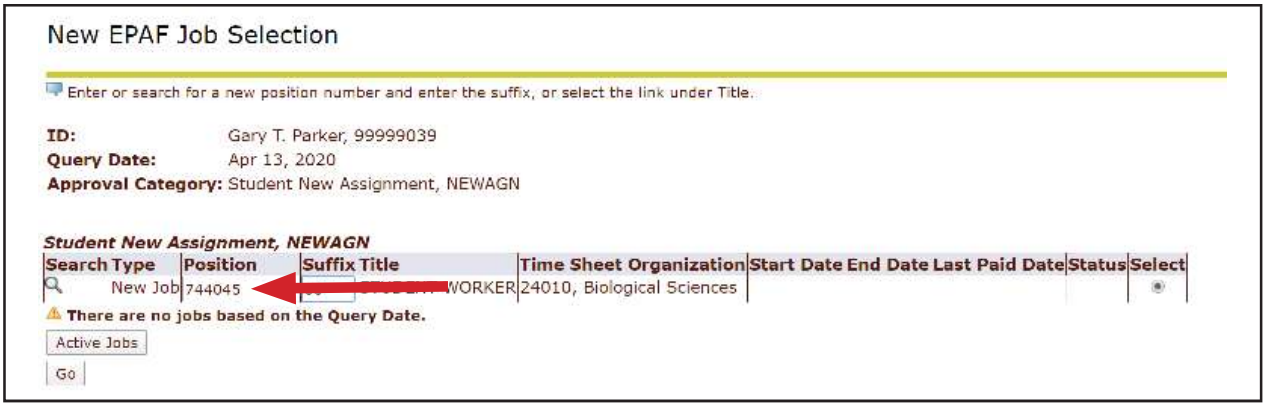
The Student ID, Name and Query Date will pre-populate. Select **Student New Assignment, NEWAGN** or **Student New Assignment SOM NEWAGS** for SOM students from the **Approval Category** drop down.

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** or **Student Changing Assign SOM CHGAGS** instead (follow those directions below).

ENTERING NEW STUDENTS







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**.

Student New Assignment, 77OL11-00 STUDENT WORKER

Item	Current Value	New Value
Home Organization: *		
Timesheet Orgn: *		
Contract Type: *		Primary
Job Status: *		Active
Current Hire Date: MM/DD/YYYY*		
Job Begin Date: MM/DD/YYYY*		
Jobs Effective Date: MM/DD/YYYY*		08/13/2022
Personnel Date: MM/DD/YYYY*		
Regular Rate: *		
Hours per Pay: (Not Enterable)		40
Salary Encumbrance: *		1.0
I9 Form Indicator: *		Received
I9 Date: MM/DD/YYYY		08/16/2022
Home COAS: (Not Enterable)		R
Factor: (Not Enterable)		26.1
Pays: (Not Enterable)		26.1
Salary Grade: (Not Enterable)		00
Step: (Not Enterable)		0
Time Entry Method: (Not Enterable)		W
Employee Class Code: (Not Enterable)		S1
Job Change Reason: (Not Enterable)		A09
Salary Group: (Not Enterable)		2023
Employee Status: (Not Enterable)		A
Leave Category Code:		N2, NJ PAID LEAVE
Accrue Leave:		Yes
Web Time Approver: *		

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 (select Primary; if you receive an error, select 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: The date that the student actually begins working. Must match the Original Hire Date listed on the I-9 in I-9 HQ.

Salary Encumbrance: Must be 1.0.

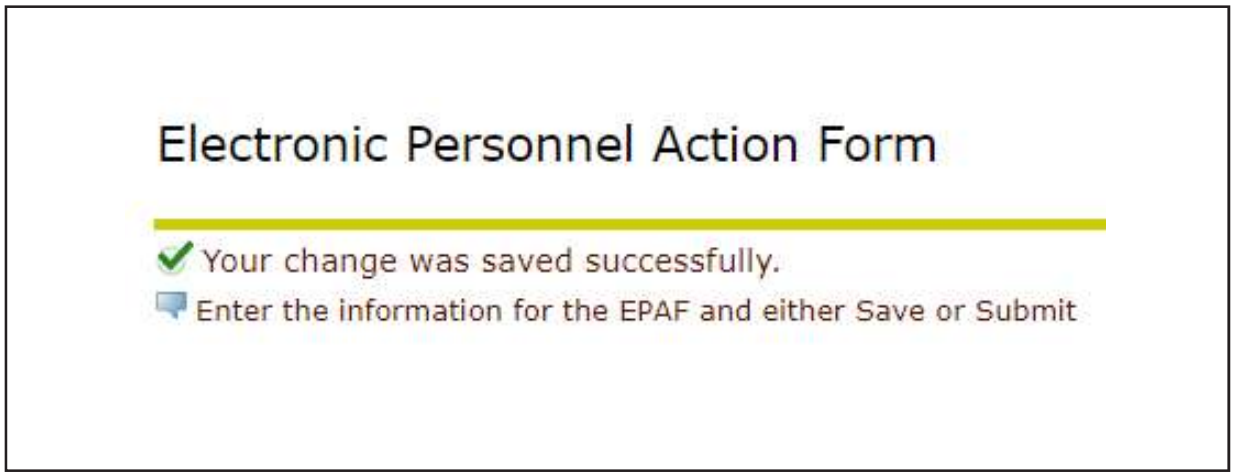
I-9 Date should reflect the date that Section 2 of the I-9 was completed in I-9 HQ.

Web Time Approver: Enter the Banner ID of the student's Web Time Entry approver.

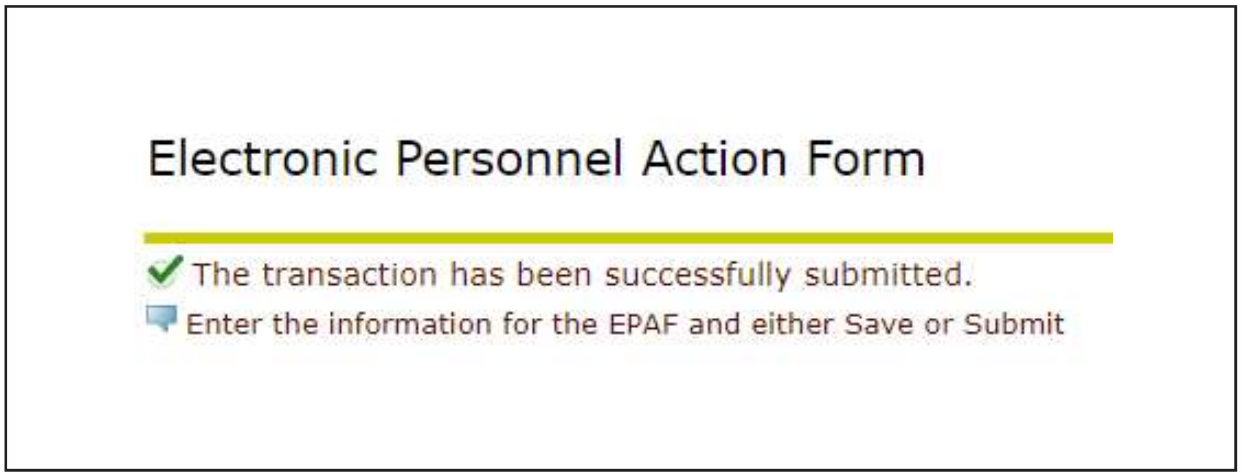
Comment Enter any additional information (i.e. job description and pay rate justification, if neccessary).

Select **Save**.

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



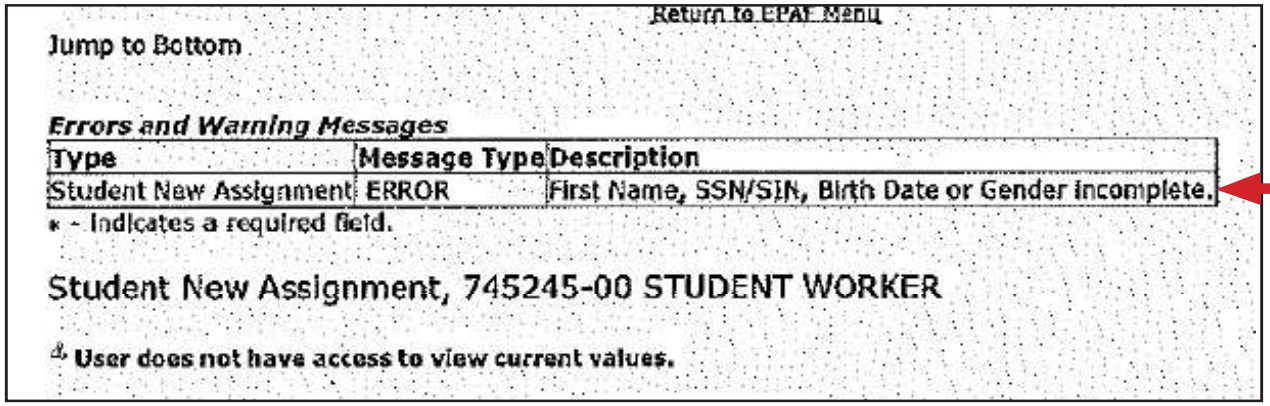
If you entered all of the data correctly, you will get the message **Your change was saved successfully**.



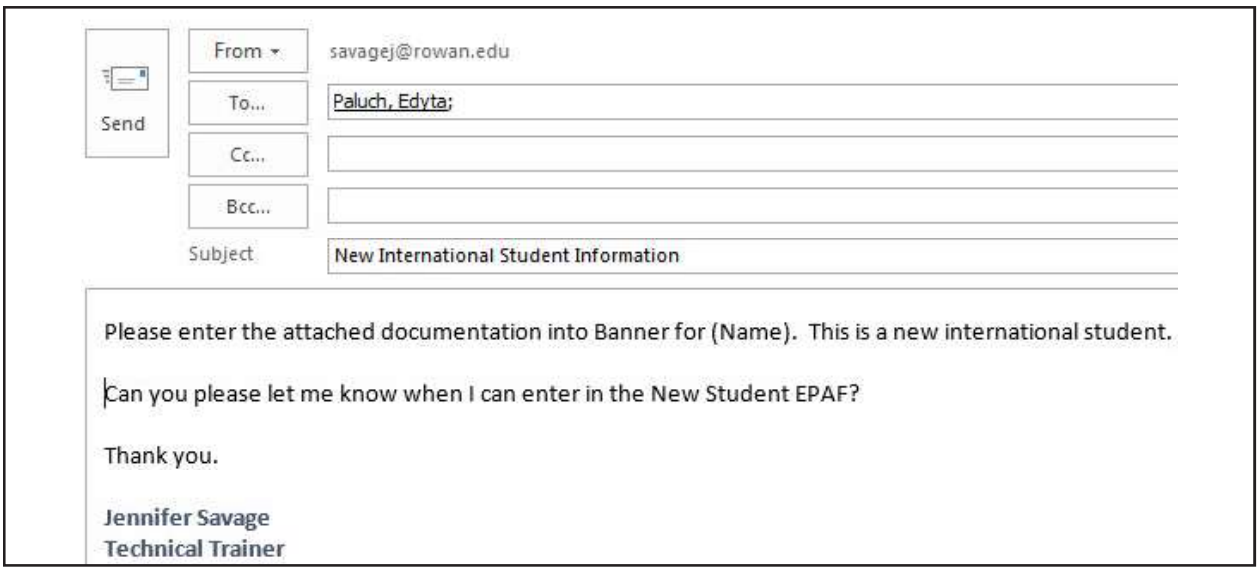
Select the **Submit** button and you will receive another message **The transaction has been successfully submitted**.

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.

NEW INTERNATIONAL STUDENTS



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.

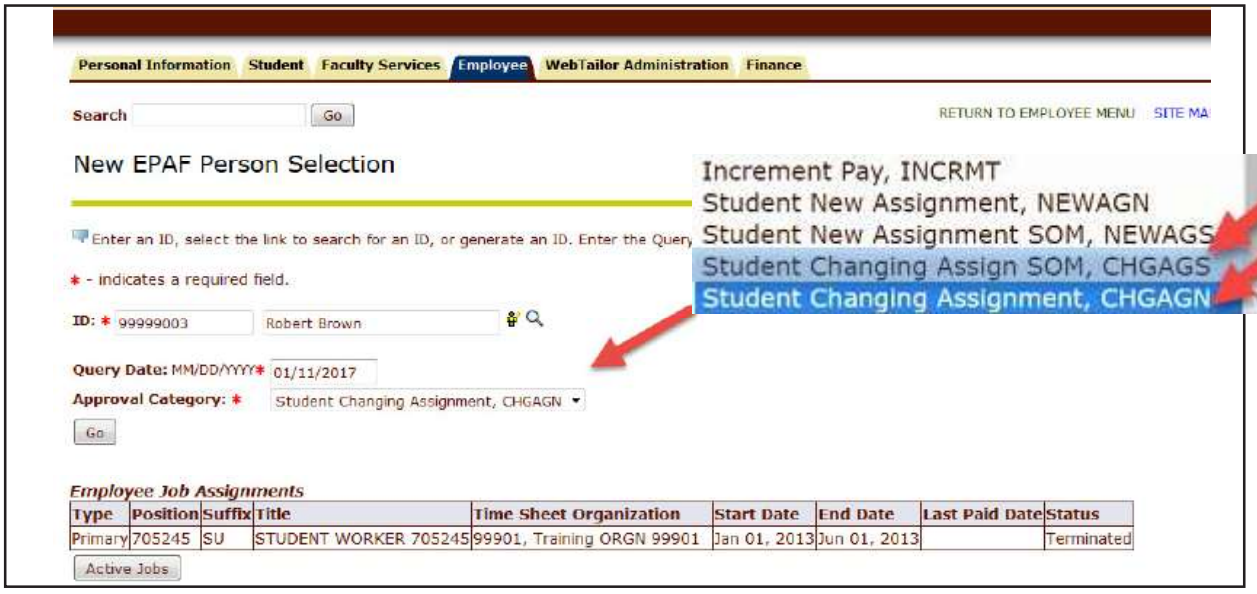


You will need to email Edyta Paluch (paluch@rowan.edu) the student's Social Security number and ask her to enter the information and notify you when you can go back in and enter a **New Student EPAF**.

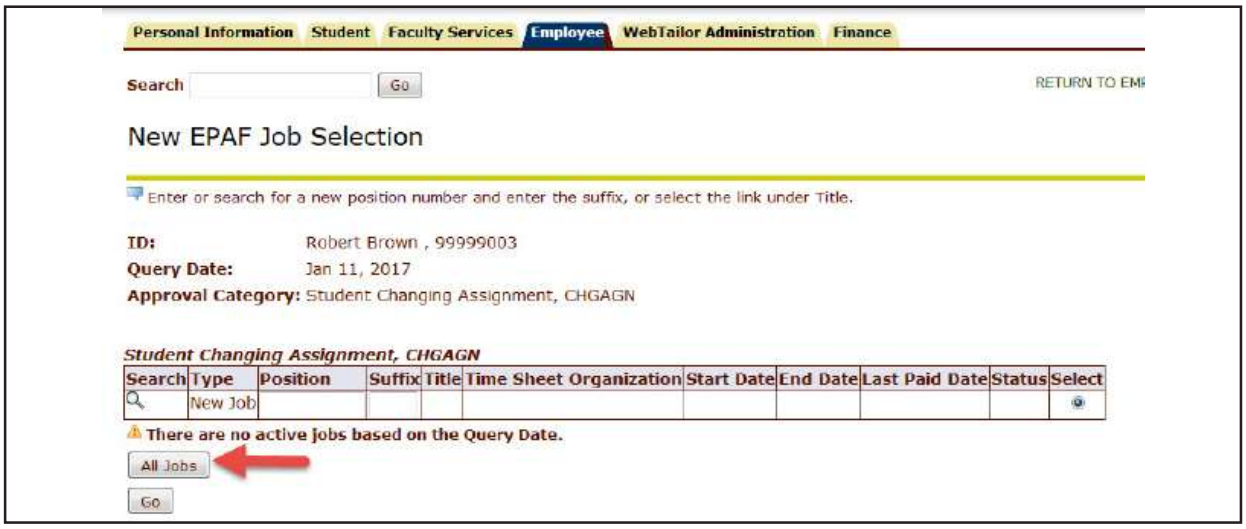
STUDENT CHANGE ASSIGNMENTS

If a student has ever been paid by Rowan in any capacity, 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.

To access the **Student Changing Assignment**, you will still select **New EPAF**.



Enter their **ID** or Name, then **Student Change Assignment CHGAGN** or **Student Changing Assign SOM CHGAGS** from the **Approval Category** drop-down menu. **Go**.



Select **All Jobs** to see all active 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** again 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**.

ENTERING STUDENT CHANGES

Student Changing Assignment, 718546-01 STUDENT WORKER

Item	Current Value	New Value
Home Organization: *	52002, Asst VP Student Life	
Timesheet Orgn: *		
Contract Type: *		Not selected
Job Status: *		Not Selected
Job Begin Date: MM/DD/YYYY*		
Jobs Effective Date: MM/DD/YYYY*		03/18/2021
Personnel Date: MM/DD/YYYY		
Regular Rate: *		
Hours per Pay: (Not Enterable)		40
Salary Encumbrance: *		1.0
I9 Form Indicator: *	Received	Received
Home COAS: (Not Enterable)	R	R
Factor: (Not Enterable)		26.1
Pays: (Not Enterable)		26.1
Salary Grade: (Not Enterable)		00
Time Entry Method: (Not Enterable)		W
Step: (Not Enterable)		0
Employee Class Code: (Not Enterable)	S1, Student	S1
Salary Group: (Not Enterable)		2021
Job Change Reason: (Not Enterable)		A09
Time In/Out Ind: (Not Enterable)		Y
Leave Category Code:	N2, NJ PAID LEAVE	N2, NJ PAID LEAVE
Accrue Leave:		Yes
Web Time Approver: *		

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 New 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 a**nd a prior timesheet is needed. Make sure to enter 1st day of actual pay period here.

NOTE: A new I-9 Form Indicator will only be required if it has been more than 1 year since the employee last worked. If it has been more than 1 year since the student last worked but less than three years since the I-9 was completed, contact HR to have them complete Section 3. If it has been more than 1 year since the student last worked and more than three years since the I-9 was completed, the student will need to complete a new Form I-9.

Web Time Approver: Enter the Banner ID of the Web Time Entry approver.

Select **Save**.

If this is not a reinstated job, but a **NEW Change Student Assignment** (a new assignment for a returning student worker), then you will enter in the new job information and there will not be values under **Current Value**.

Select **Submit** and you should get the message: **The transaction has been successfully submitted**.

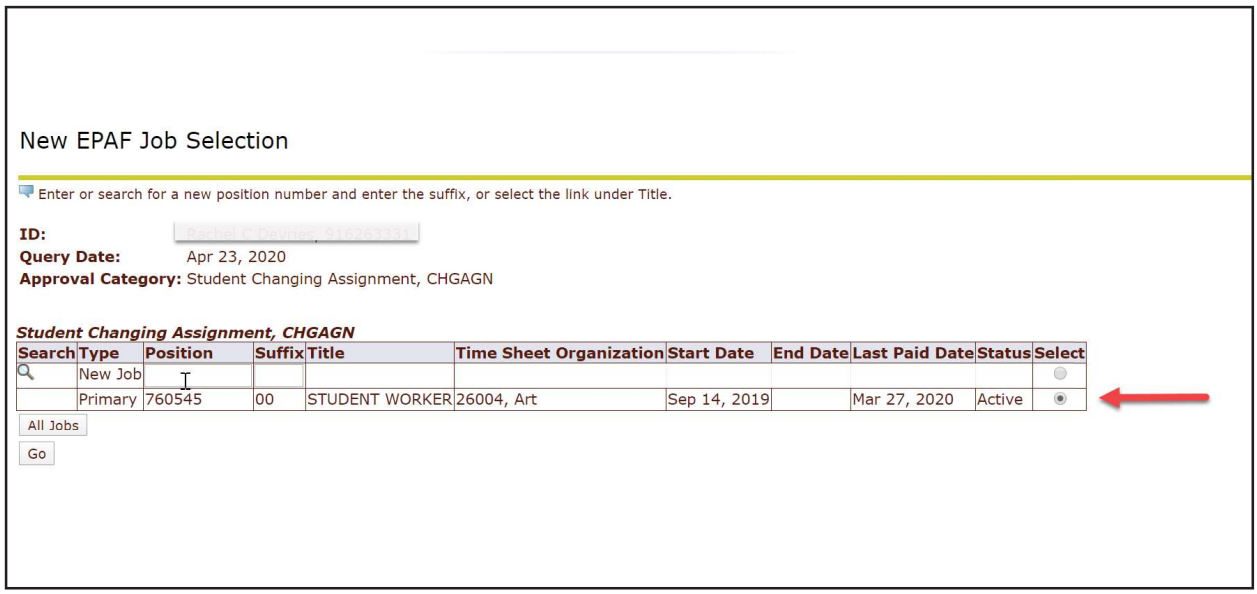
PAY RATE CHANGES

You can make pay rate changes to ACTIVE student assignments through **Student Changing Assignment**.

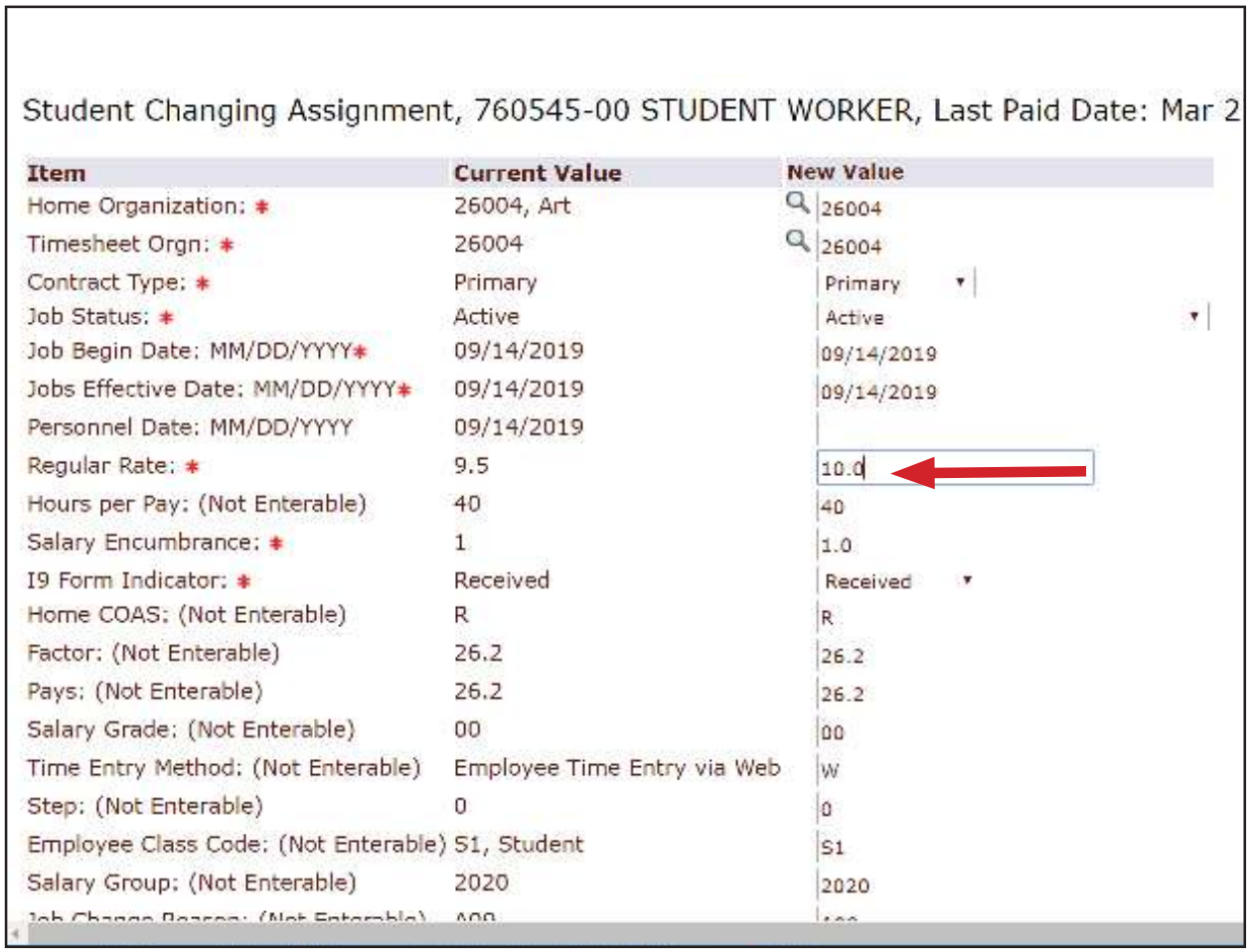
To access the **Student Changing Assignment**, you will still select **New EPAF**.

Enter their **ID** or Name, then **Student Change Assignment, CHGAGN**, from the **Approval Category** drop-down menu. **Go**.

ACTIVE ASSIGNMENT CHANGES



A list of the student's active jobs should display. Select the active job, then **Go**.



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:

Reply Reply All Forward

Wed 1/11/2017 9:14 AM

noreply@rowan.edu

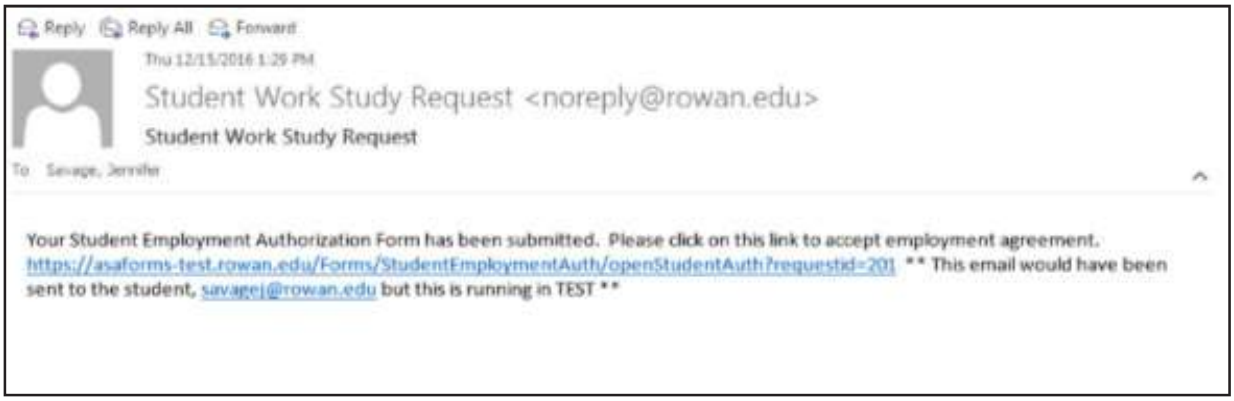
Student Work Study EPaf

To Savage, Jennifer

Message Parker_99999039.html (6 KB)

Your epaf has been submitted. The student will be sent this link so they can electronically approve. https://asaforms-test.rowan.edu/Forms/StudentEmploymentAuth/openStudentAuth?requestid=143
Home Organization: 99901
Timesheet Orgn: 99901
Contract Type: P
Job Status: A
Current Hire Date: 08-JAN-2017
Job Begin Date: 08-JAN-2017
Jobs Effective Date: 08-JAN-2017
Regular Rate: 10.00
Hours per Pay: 40
Salary Encumbrance: 1.0
I9 Form Indicator: R
I9 Date: 11-JAN-2017
Home COAS: R
Factor: 26.1
Pays: 26.1
Salary Grade: 00
Step: 0
Time Entry Method: W
Employee Class Code: S1
Salary Group: 2017

The student will received the following email:



Reply Reply All Forward

Thu 12/15/2016 1:29 PM

Student Work Study Request <noreply@rowan.edu>

Student Work Study Request

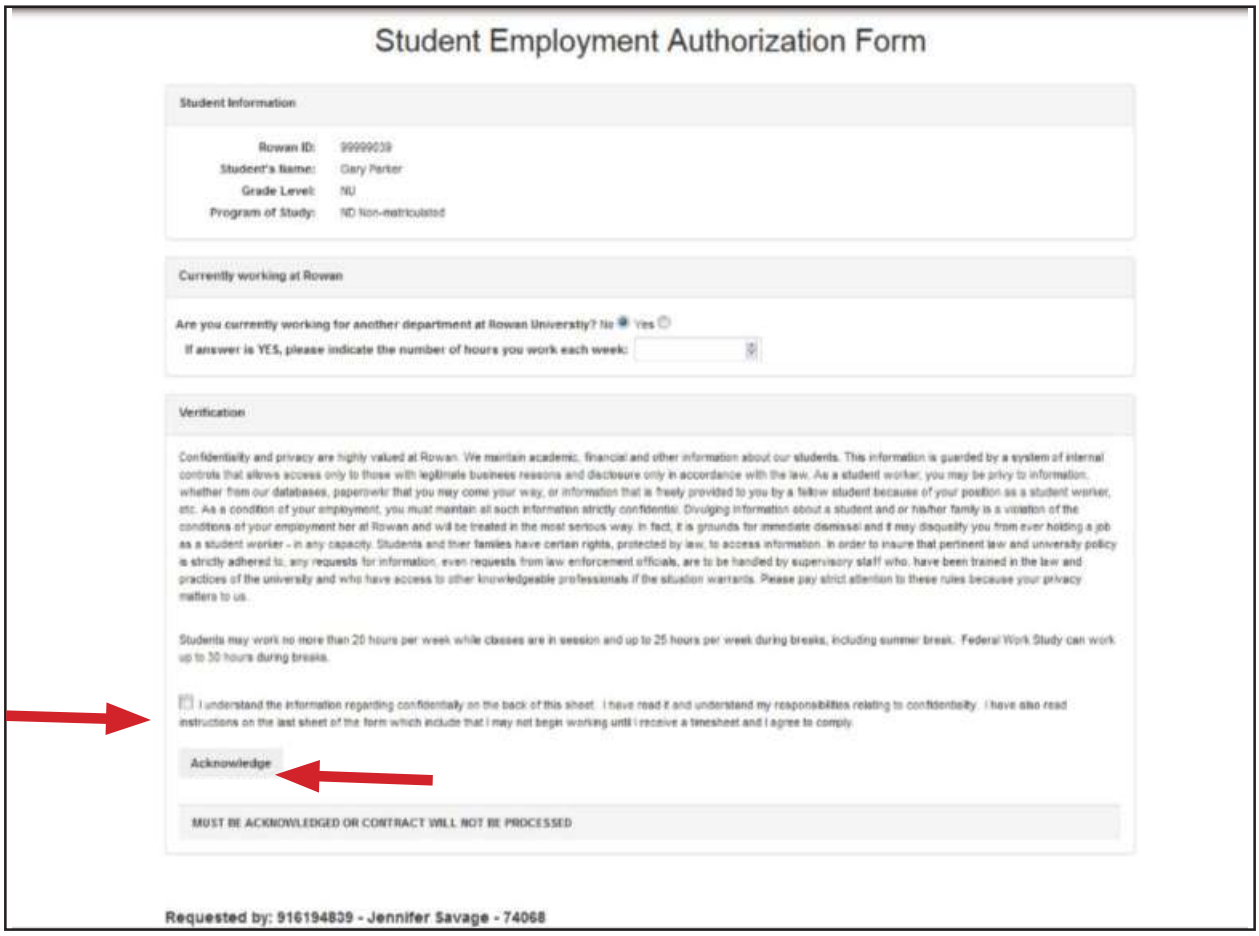
To Savage, Jennifer

Your Student Employment Authorization Form has been submitted. Please click on this link to accept employment agreement. https://asaforms-test.rowan.edu/Forms/StudentEmploymentAuth/openStudentAuth?requestid=201 ** This email would have been sent to the student, savagej@rowan.edu but this is running in TEST **

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

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).



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 three times per week for two weeks.

Once the student reviews and accepts their **Student Authorization Form**, the approver will receive the following email:

Reply Reply All Forward

Thu 12/15/2016 12:56 PM

Student Work Study Request <noreply@rowan.edu>

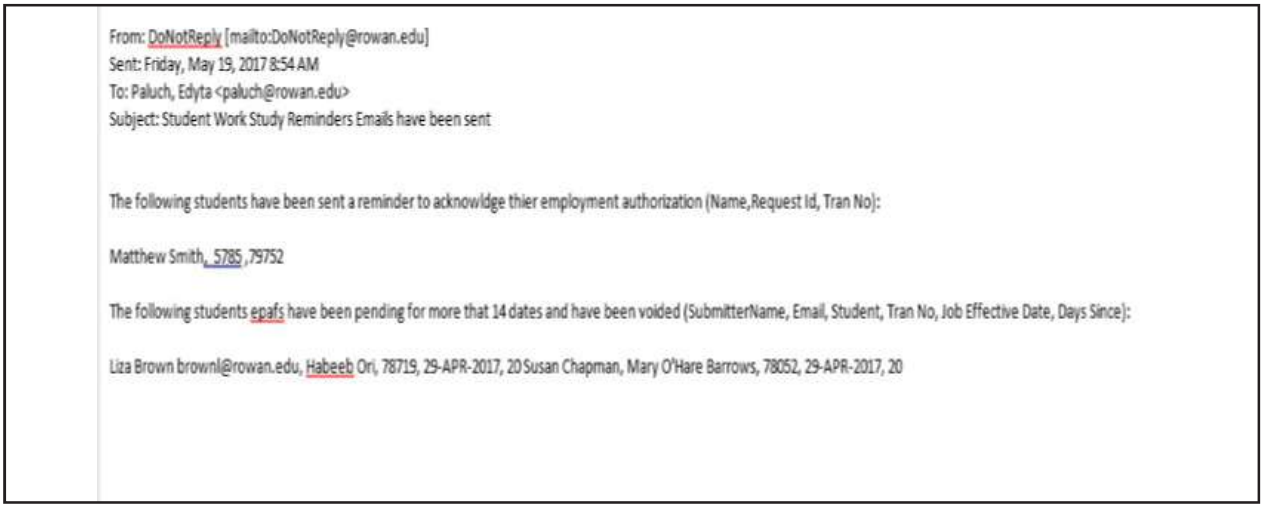
Student Work Study Request

To: Savage, Jennifer

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 ** This email would have been sent to the OSP, hegel@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 acknowldge thier employment authorization (Name,Request Id, Tran No):

Matthew Smith, 5785 ,79752

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

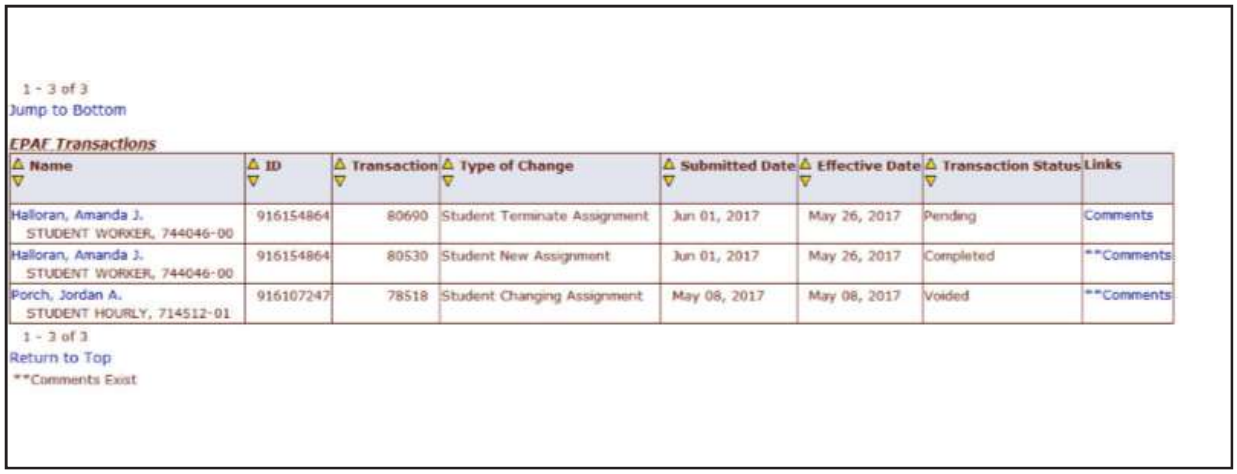
Liza Brown brownl@rowan.edu, Habeeb Ori, 78719, 29-APR-2017, 20 Susan Chapman, Mary O'Hare Barrows, 78052, 29-APR-2017, 20

ORIGINATOR SUMMARY

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

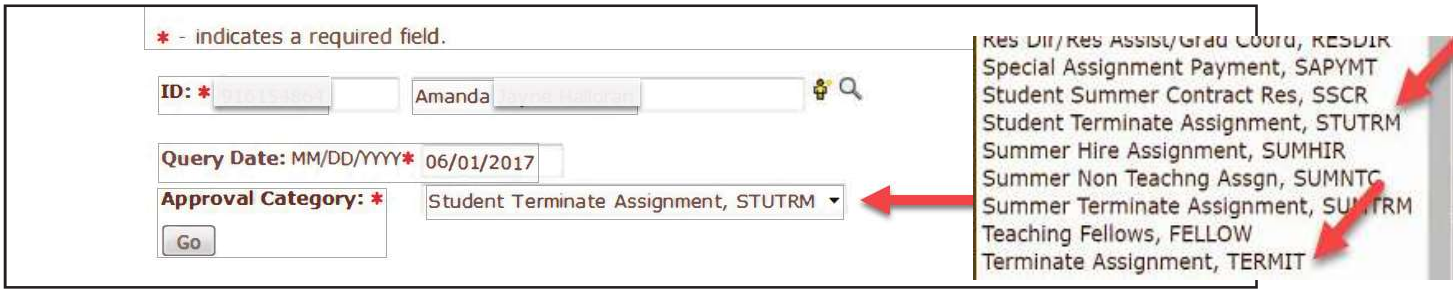
If there is an error in the EPAF submission, the approver will send back a Return for Correction email to you. Depending on the error, you will have specific actions to take to fix the error.

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.

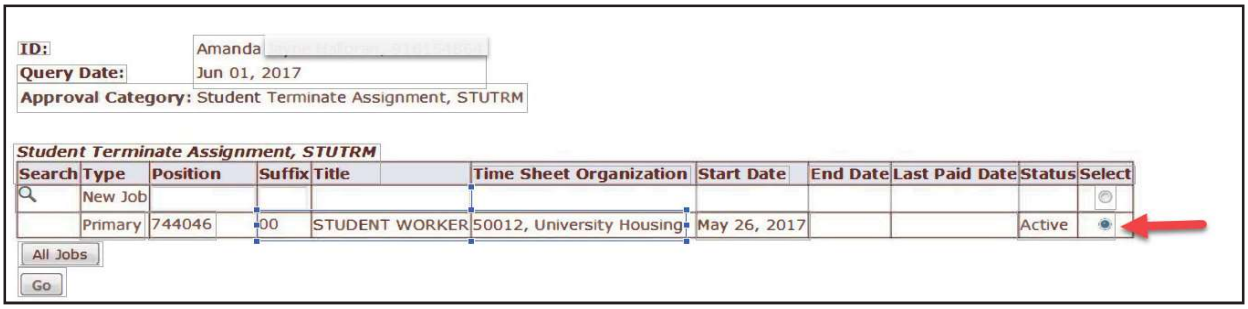
Return for Correction/Void and Resubmit: If you receive an email saying that you entered a New Student Request instead of a Change Student Request, you will need to void and resubmit a new Change Student Request. You will go to the EPAF Originator Summary, select the Student Name hyperlink, then the **Void** button on the top or bottom of the page. Then you will need to submit a new Change Student Request (see directions above).

STUDENT TERMINATE ASSIGNMENT

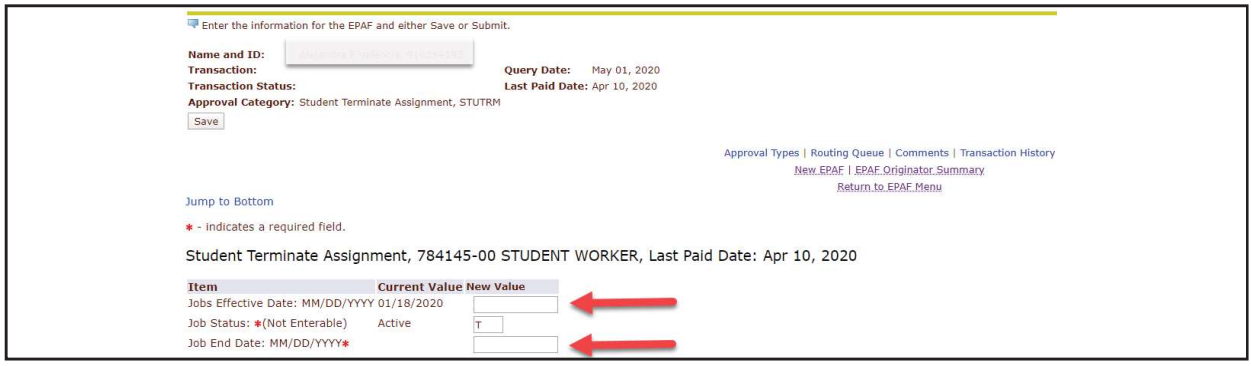
There is also a selection for you to utilize in the EPAF Approval Category drop down menu: Student Terminate Assignment (STUTRM).



You will select **New EPAF**, enter the student's Banner ID, tab to enter in the name and then select **Student Terminate Assignment STUTRM** or **Terminate Assigment TERMIT** for SOM. Select **Go**.



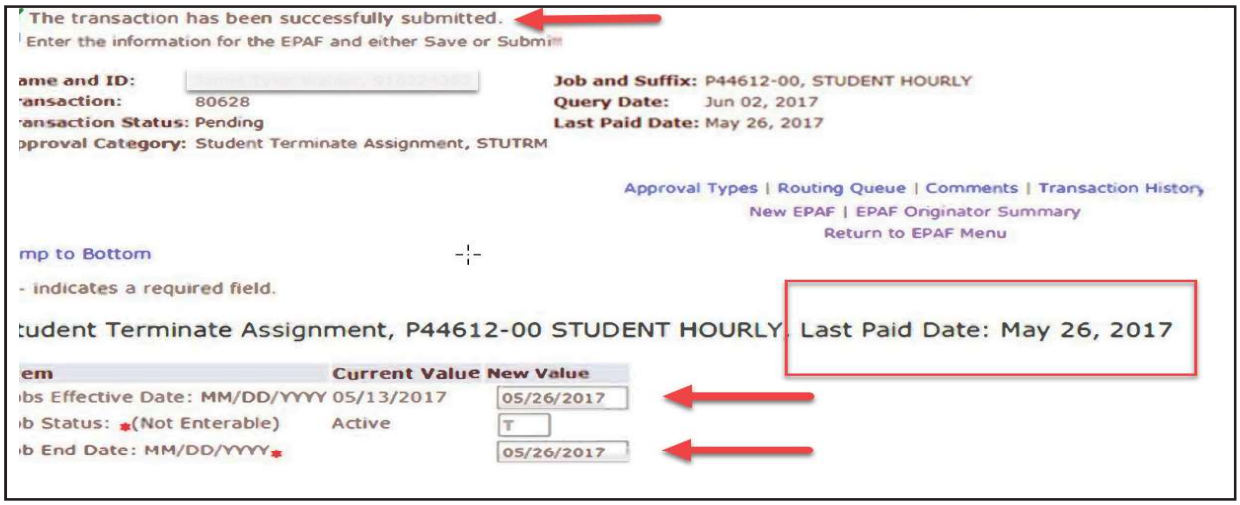
The student's active job should show on the bottom of the screen (or select **All Jobs** to see past jobs). Select the position you want to terminate, then select **Go**.



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 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).

STUDENT TERMINATE ASSIGNMENT



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 pay period.

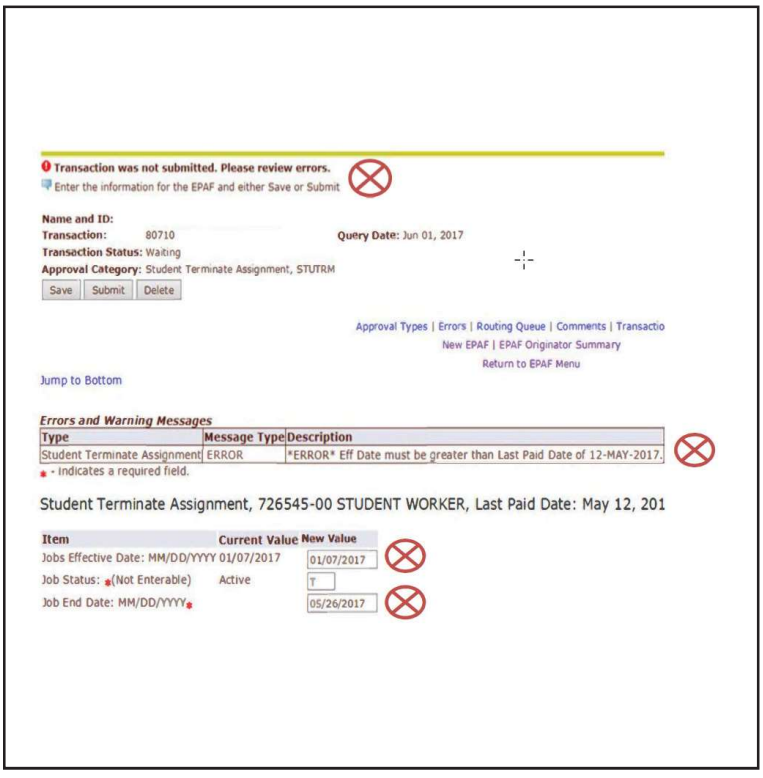
Once the correct required information has been entered, select **Save** and **Submit**. You will receive a message that they were saved and submitted successfully.

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.



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/index.html website. Any questions or concerns can be directed to support@rowan.edu.