

## EPAF End User Guide

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## What is an EPAF?

- EPAF stands for Electronic Personnel Action Form
- It is a Banner tool used for routing transactions
- EPAFs are used for Part-Time Lecturer hires, both new and rehires

## How to Access EPAFs

1. To access EPAFs, log into your myNortheastern account and click on the Services & Links tab
2. Under the HRM Benefits and Services box, click Employee Self-Service

The screenshot shows the myNortheastern HR Navigator interface. At the top, there is a red navigation bar with the myNortheastern logo, a 'Home' link, and a 'Services & Links' link which is highlighted with a black box. Below this, the 'Services & Links' section is displayed. On the left, there is a 'Jump To...' sidebar with a list of links, including 'HRM Benefits and Services' which is highlighted with a red box. The main content area is titled 'HRM Benefits and Services' and contains a grid of links. The 'Employee Self-Service' link is highlighted with a red box. Other links in the grid include Benefits Navigator, Fidelity, I-9 Service Center, Payroll Distribution Change Form, Termination Form, Time Tracking, Commuter Benefit, Extra Compensation Request Form, Human Resources - Benefits, INB (Internet Native Banner), Temporary Non-Student Hire Form, TIAA, and Tuition Waiver Form.

3. Once in Employee Self Service, click the Employee tab
4. Click on Electronic Personnel Action Forms
  - This will bring you to the main EPAF menu

Search

[RETURN TO MENU](#) [SITE MAP](#) [HELP](#)

## Employee

### [Electronic Personnel Action Forms](#)

[Update Tax Information](#)

[Pay Information](#)

Direct deposit allocation, earnings and deductions history, or pay stubs.

[W-2 Wage and Tax Statement](#)

W-2 Wage and Tax Statement

[Salary Planner](#)

[Annual Benefits Statement](#)

[Employee Directory](#)

[Jobs Summary](#)

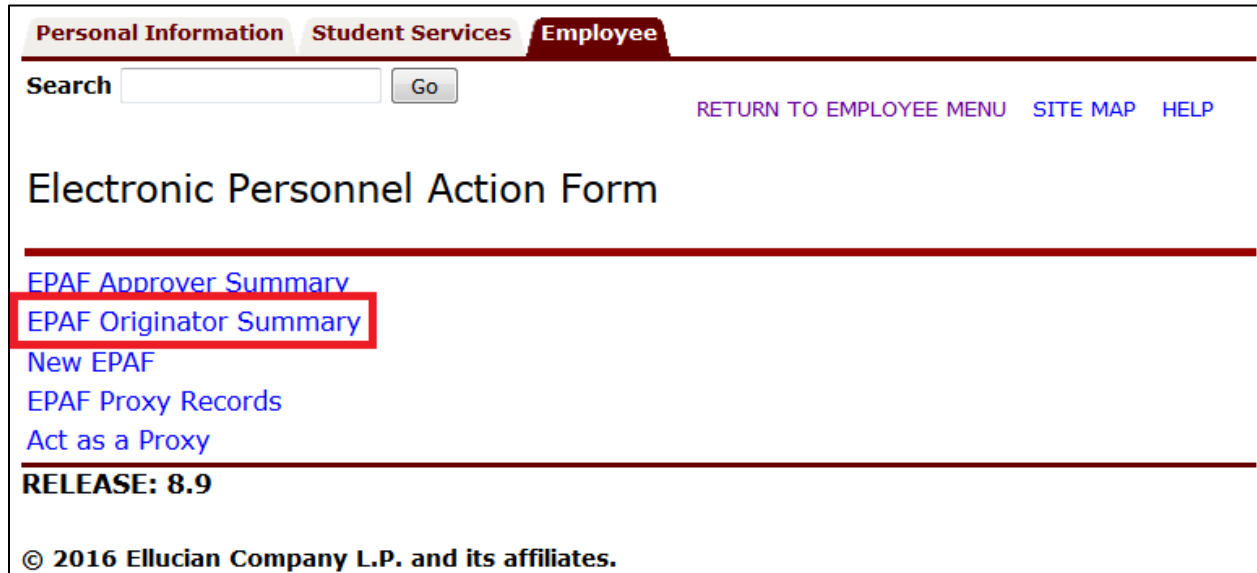
[Temporary Non-Student Sick Time Balance](#)

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## Setting Up or Updating Your Default Routing Queue

- The routing queue will direct the EPAF to the appropriate approvers (Initiator – Key Contact – HR Operations – the Dean – Superuser/Apply)
  - Before creating an EPAF for the first time, you should set up your default routing queue
    - You will only need to set this up once as the changes made here will be your defaults for all future EPAFs
1. From the main EPAF menu, click on EPAF Originator Summary



The screenshot shows the HR Navigator interface. At the top, there are three tabs: "Personal Information", "Student Services", and "Employee". The "Employee" tab is selected and highlighted in red. Below the tabs is a search bar with the text "Search" and a "Go" button. To the right of the search bar are three links: "RETURN TO EMPLOYEE MENU", "SITE MAP", and "HELP". The main heading is "Electronic Personnel Action Form". Below this heading is a list of links: "EPAF Approver Summary", "EPAF Originator Summary", "New EPAF", "EPAF Proxy Records", and "Act as a Proxy". The "EPAF Originator Summary" link is highlighted with a red rectangular box. Below the links is the text "RELEASE: 8.9". At the bottom of the page is the copyright notice "© 2016 Ellucian Company L.P. and its affiliates."

2. Click on the Default Routing Queue link
  - If there are EPAFs showing on this page, the Default Routing Queue link can be found at the bottom of the page

[Personal Information](#)
[Student Services](#)
[Employee](#)

Search  

[RETURN TO EMPLOYEE MENU](#)
[SITE MAP](#)
[HELP](#)

## EPAF Originator Summary

---

[Current](#)
[History](#)

Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

**Transaction Status:**

**No transactions found in your queue.**

[New EPAF](#)
[Default Routing Queue](#)
[Search](#) | [Superuser or Filter Transactions](#)

[Return to EPAF Menu](#)

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3. Change the approval category to Create Job for New Position Number and Suffix, FPNJOB.
4. Set up the approval levels as shown below
  - Key Contact first, then HR Operations, the Dean, and finally Superuser/Apply.
5. Set up the Required Action as shown below
  - Approve, Approve, FYI, and Apply

[Personal Information](#)
[Student Services](#)
[Employee](#)

Search  

[RETURN TO EMPLOYEE MENU](#)
[SITE MAP](#)
[HELP](#)

## EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

**Approval Category:** Create Job for New Position Number and Suffix, FPNJOB

**Approval Queue**

Approval Level	User Name	Required Action
15 - (KEYCON) Key Contact	<input type="text"/>	Approve
20 - (HROPS) HR Operations	<input type="text"/>	Approve
80 - (DEAN) Dean	<input type="text"/>	FYI
99 - (APPLY) Superuser / Apply	<input type="text"/>	Apply

6. Fill in the appropriate user for each Approval level
  - Click on the magnifying glass to search for approvers; this will open a new window.
  - Select the employee's name you wish to add and click the Select button. If you are unsure who to add reach out to your HR Operations contact.

### Valid Values

---

Search:

**User Names,  
99 - Superuser / Apply**

Candido, Megan R. (N001665210)

Cushman, Judith (N000572378)

Dajko, Esmeralda (N001698546)

Daoudi Nejm, Sahar (N001640659)

Foldvary, Stephanie (N001641909)

Mottern, Alexandra P. (N000423143)

Munir, Aneeta (N001700560)

Regan, Clare S. (N000148985)

Glauss, Jason (N001215210)

[Exit Window](#)

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- This will populate the employee's User Name, as shown below.

### Approval Queue

Approval Level	User Name	
15 - (KEYCON) Key Contact	<input type="text"/>	<input type="text"/>
20 - (HROPS) HR Operations	<input type="text"/>	<input type="text"/>
80 - (DEAN) Dean	<input type="text"/>	<input type="text"/>
99 - (APPLY) Superuser / Apply	N000148985	Clare Sandra Regan

[EPAF Originator Summary](#)

- Once you've added all of the appropriate users, click the Save and Add New Rows button to save your default routing queue
- After saving the routing queue for new hires, you need to set up the default routing queue for rehires as well
  - Return to step 3, but select Reactivate Job for Existing Position Number, FPRJOB as the Approval Category.

- The only difference in the routing queue set up is that the Dean's Required action should be set to *Approve*, not FYI (shown below)

Personal Information Student Services **Employee**

Search   [RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#)

### EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

**Approval Category:** Reactivate Job for Existing Position Number, FPRJOB

**Approval Queue**

Approval Level	User Name	Required Action
15 - (KEYCON) Key Contact	<input type="text"/>	Approve
20 - (HROPS) HR Operations	<input type="text"/>	Approve
80 - (DEAN) Dean	<input type="text"/>	Approve
99 - (APPLY) Superuser / Apply	<input type="text"/>	Apply

- Continue through the rest of the steps as indicated
9. Once completed, click the Return to EPAF Menu link at the bottom of the page to return to the main EPAF Menu

## Adding and Removing a Proxy User

1. A proxy user is someone who has permissions to approve EPAFs on your behalf
2. You cannot act as a proxy for another user until that user has added you to their own list of proxies
3. To set up a proxy user, go to the main EPAF menu
4. Click on EPAF Approver Summary

The screenshot shows the HR Navigator interface with the 'Employee' tab selected. A search bar is at the top left, and navigation links for 'RETURN TO EMPLOYEE MENU', 'SITE MAP', and 'HELP' are at the top right. The main heading is 'Electronic Personnel Action Form'. Below it, a list of links is displayed: 'EPAF Approver Summary' (highlighted with a red box), 'EPAF Originator Summary', 'New EPAF', 'EPAF Proxy Records', and 'Act as a Proxy'. Below the links, it says 'RELEASE: 8.9' and '© 2016 Ellucian Company L.P. and its affiliates.'

5. Click on the Update Proxies link at the bottom of the screen.
  - If you have any EPAFs pending your review/approval, this link will be below these

The screenshot shows the 'EPAF Approver Summary' page. At the top, there are tabs for 'Current', 'In My Queue', and 'History'. Below the tabs, there is a message: 'Select the link under Name to access details of the transaction.' There is a 'Queue Status' dropdown menu set to 'All' and a 'Go' button. Below that, a red error message states: 'No transactions found in your queue.' At the bottom right, there are links for 'New EPAF', 'Update Proxies' (highlighted with a red box), 'Search | Proxy or Superuser or Filter Transactions', and 'Return to EPAF Menu'. Below the links, it says 'RELEASE: 8.9' and '© 2016 Ellucian Company L.P. and its affiliates.'

6. Select the appropriate Approval Level in the dropdown menu (most commonly Key Contact or Dean). Click the Go button.



Personal Information Student Services **Employee**

Search  Go [RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#)

## EPAF Proxy Records

Approval Level: HR Operations, HROPS

[EPAF Approver Summary](#)

[Return to EPAF Menu](#)

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- This page shows any existing proxy users. To add a new user, use the drop down menu to select an employee's name.
- Tick the corresponding box under the Add column and click the Save button.
  - If you do not see a user in the dropdown menu, that individual does not have access to EPAFs. A Banner Access form will need to be submitted to HRIS
    - [http://www.northeastern.edu/hrm/pdfs/resources/employment/BannerHR\\_System\\_Access\\_Request\\_Form\\_17MAY2016.pdf](http://www.northeastern.edu/hrm/pdfs/resources/employment/BannerHR_System_Access_Request_Form_17MAY2016.pdf)

Personal Information Student Services **Employee**

Search  Go [RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#)

## EPAF Proxy Records

Approval Level: HR Operations, HROPS

Name	Remove	Add
Candido, Megan R. (N001665210)	<input type="checkbox"/>	<input type="checkbox"/>
Dajko, Esmeralda (N001698546)	<input type="checkbox"/>	<input type="checkbox"/>
Mottern, Alexandra P. (N000423143)	<input type="checkbox"/>	<input type="checkbox"/>
Regan, Clare S. (N000148985)	<input type="checkbox"/>	<input checked="" type="checkbox"/>

[EPAF Approver Summary](#)

[Return to EPAF Menu](#)

- After clicking save, you can see that the user selected has moved to the list of proxies.
- If you wish to remove any users from your proxy list, tick the corresponding box under the Remove column and click Save.

**Personal Information** **Student Services** **Employee**

Search   [RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#)

## EPAF Proxy Records

**Approval Level:**

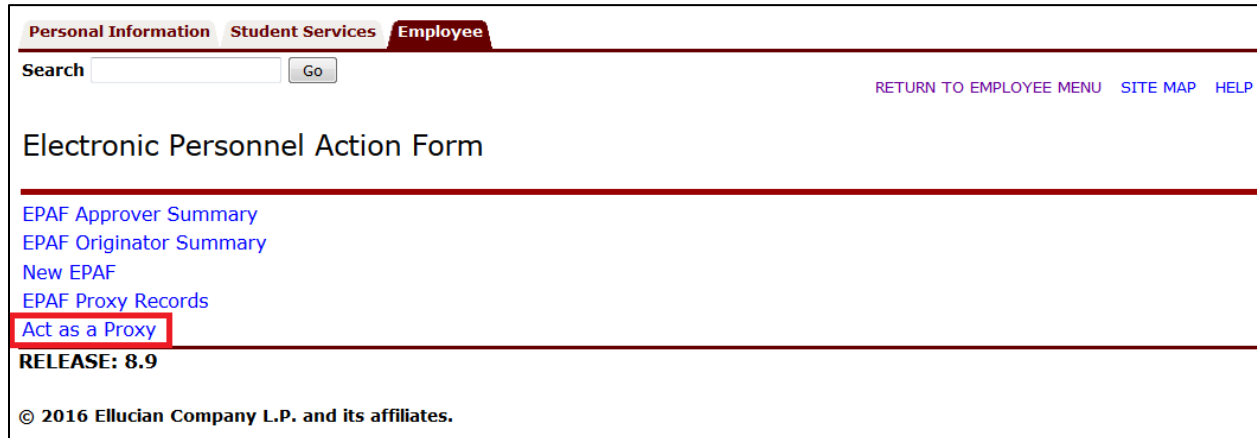
Name	Remove	Add
Candido, Megan R. (N001665210)	<input type="checkbox"/>	<input type="checkbox"/>
Dajko, Esmeralda (N001698546)	<input type="checkbox"/>	<input type="checkbox"/>
Mottern, Alexandra P. (N000423143)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Regan, Clare S. (N000148985)</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Not Selected	<input type="checkbox"/>	<input type="checkbox"/>

[EPAF Approver Summary](#)

[Return to EPAF Menu](#)

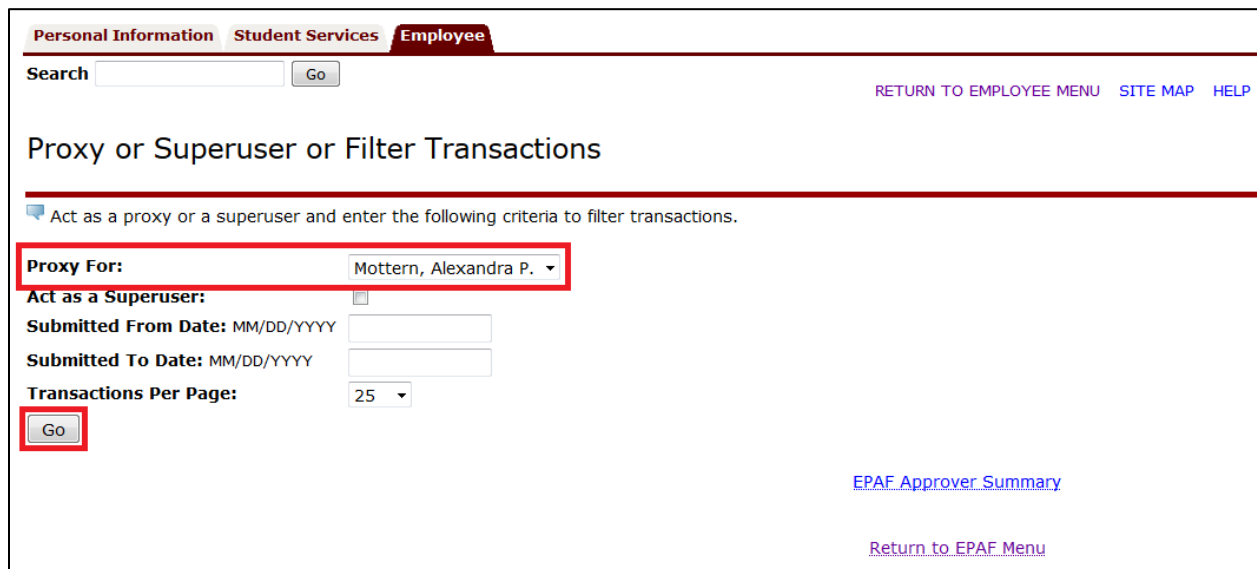
## Acting as a Proxy User

1. To act as a proxy for another user, go to the main EPAF menu and click Act as a Proxy.



The screenshot shows the HR Navigator interface with the 'Employee' tab selected. A search bar is at the top left, and navigation links 'RETURN TO EMPLOYEE MENU', 'SITE MAP', and 'HELP' are at the top right. The main heading is 'Electronic Personnel Action Form'. Below this, a list of links is provided: 'EPAF Approver Summary', 'EPAF Originator Summary', 'New EPAF', 'EPAF Proxy Records', and 'Act as a Proxy'. The 'Act as a Proxy' link is highlighted with a red box. Below the links, the text 'RELEASE: 8.9' and '© 2016 Ellucian Company L.P. and its affiliates.' is visible.

2. Select the user you wish to proxy for by using the dropdown menu. Click the Go button.
  - If you choose Self, you will be directed to your own Approval Summary



The screenshot shows the 'Proxy or Superuser or Filter Transactions' form. The 'Employee' tab is selected. A search bar and navigation links are at the top. The main heading is 'Proxy or Superuser or Filter Transactions'. Below the heading, a blue icon and text prompt the user to 'Act as a proxy or a superuser and enter the following criteria to filter transactions.' The form contains several fields: 'Proxy For:' with a dropdown menu showing 'Mottorn, Alexandra P.' (highlighted with a red box), 'Act as a Superuser:' with a checkbox, 'Submitted From Date: MM/DD/YYYY' with a text input, 'Submitted To Date: MM/DD/YYYY' with a text input, and 'Transactions Per Page:' with a dropdown menu showing '25'. A 'Go' button is at the bottom left (highlighted with a red box). At the bottom right, there are links for 'EPAF Approver Summary' and 'Return to EPAF Menu'.

3. You are now viewing the selected individual's Approver Summary.
4. Click on the appropriate employee's name to view the EPAF details and approve.

## EPAF Approver Summary

**Current** | In My Queue | History

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

✓ Filtering On

Queue Status: All  More Information

[New EPAF](#) | [Update Proxies](#) | [Search](#) | [Proxy or Superuser or Filter Transactions](#)

[Return to EPAF Menu](#)

1 - 1 of 1

[Jump to Bottom](#)

**EPAF Transactions**

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
<a href="#">EMPLOYEE NAME</a> Part-time Lecturer, 800011-01	[REDACTED]	89994	Reactivate Job for Existing Position Number	Sep 29, 2016	Sep 28, 2016	Approve		<a href="#">Comments</a>

1 - 1 of 1

[Return to Top](#)

## Creating an EPAF for a New Position Number and Suffix (FPNJOB)

- Use this approval category for:
    - Individuals who are new to the University
    - Hiring an individual into a position they have not been hired into before
  - Before creating an EPAF for an individual who is new to the University, ensure that they have already been hired through PeopleAdmin
    - Skipping this step will delay the hiring process as Operations will not approve the EPAF until this is completed
1. Go to the main EPAF menu and click New EPAF

The screenshot shows the 'Employee' tab selected in the HR Navigator interface. Below the navigation tabs, there is a search bar with a 'Go' button and links for 'RETURN TO EMPLOYEE MENU', 'SITE MAP', and 'HELP'. The main heading is 'Electronic Personnel Action Form'. Underneath, there are several menu items: 'EPAF Approver Summary', 'EPAF Originator Summary', 'New EPAF' (highlighted with a red box), 'EPAF Proxy Records', and 'Act as a Proxy'. At the bottom, it says 'RELEASE: 8.9' and '© 2016 Ellucian Company L.P. and its affiliates.'

2. Enter the employee's NUID and tab over, their name will populate
3. Enter the Query Date (it automatically populate with today's date)
  - **You must use the 1<sup>st</sup> or the 16<sup>th</sup> of the month for the query date**
    - This will match the job effective date entered on the EPAF Preview in a future step
    - To determine if the query date should be the 1<sup>st</sup> or the 16<sup>th</sup>, check the EPAF payroll deadlines on the HRM website.
4. Change the Approval Category to Create Job for New Position Number and Suffix, FPNJOB
5. After choosing the Approval Category, the employee's active jobs (as of the query date entered) will appear below.
  - If there are no active jobs on the query date entered, no jobs will appear
6. Click the All Jobs button to view the Employee Job Assignments table.

\* - indicates a required field.

ID: \*

Query Date: MM/DD/YYYY\*

Approval Category: \*

**Employee Job Assignments**

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	800075	00	Part-Time Lecturer	128120, Writing Program	Sep 01, 2014	Jan 15, 2018	Jan 15, 2018	Active

7. The Employee Job Assignments table will populate, showing all of the positions the employee has ever been hired into.
  - o If you see the position number and suffix you wish to use, you **must** change the approval category to **Reactivate Job for Existing Position (FPRJOB)**. Click here for instructions for Reactivating Job for Existing Position.
    - If you do not change the approval category, you will not be able to submit the EPAF, even after entering all of the information.
8. Once you've confirmed that the employee has never been hired in to the position number and suffix you are using, click Go to continue.

\* - indicates a required field.

ID: \*

Query Date: MM/DD/YYYY\*

Approval Category: \*

**Employee Job Assignments**

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	498990	00	Extra Compensation	129100, English	Jan 16, 2012	Apr 30, 2012	Apr 30, 2012	Terminated
Secondary	502732	00	Part-Time Lecturer	129100, English	Jul 01, 2010	Dec 31, 2013	Dec 31, 2013	Terminated
Secondary	800075	00	Part-Time Lecturer	128120, Writing Program	Sep 01, 2014	Jan 15, 2018	Jan 15, 2018	Active
Primary	800075	01	Part-Time Lecturer	128120, Writing Program	Sep 01, 2016	Apr 30, 2018	Jan 31, 2018	Terminated

9. The new screen will have a blank position and suffix box above the employee's active jobs
  - o Enter the position number and suffix and tab over, the Title and Time Sheet Org will populate
10. Click the Go button

**Create New Part Time Faculty Job, FPNJOB**

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	502002	po	Part-Time Lecturer	131500, Marine and Environmental Sciences					<input type="radio"/>
	Primary	600960	00	HR Operations Assistant	168100, Human Resources Management			Oct 15, 2016	Active	<input type="radio"/>

Next Approval Type

- You are now viewing the EPAF (EPAF Preview)
- 11. The Update Employee Record section cannot be edited as it is part of delivered Banner
  - If the Employee Status is terminated, the individual will need to be hired through PeopleAdmin

Update Employee Record		
Item	Current Value	New Value
Employee Status: (Not Enterable)	Active	<input type="text" value="A"/>
Employee Class Code: (Not Enterable)	O7, Office Technical Support 7h	<input type="text"/>
Home Organization: (Not Enterable)	168100, Human Resources Management	<input type="text"/>
Distribution Orgn: (Not Enterable)	168100, Human Resources Management	<input type="text"/>
Current Hire Date: MM/DD/YYYY(Not Enterable)	<input type="text" value=""/>	<input type="text"/>

- 12. Under Create New Part Time Faculty Job, the field with red asterisks are required:
  - Job Begin Date: This field must be the 1<sup>st</sup> or the 16<sup>th</sup> of the month
    - If the EPAF is on time or early, use the following dates
      - Fall semester: 9/1
      - Spring semester: 1/1
      - Summer 1 and Full Summer semester: 5/1
      - Summer 2 semseter: 7/1
    - **If the EPAF is late and contains retro payment**, you must use the first day of the current pay period. Use the EPAF deadlines, located on the HRM website, as a guideline
    - If you're unsure of which date to use, reach out to your Ops contact directly
  - Contract Type: Select either Primary or Secondary
    - An employee can have only 1 primary position. Keep this in mind if you're creating multiple EPAFs for the same individual for the same time period
  - Job Effective Date: This field **must match** the Job Begin Date
  - Personnel Date: This field is not required, but it is suggested that you use the employee's actual start date/start date of the appointment. This date drives the I-9 for new hires and rehires who have not worked for the university in the past year, if left blank section 1 of the I-9 will be due by the Query/Effective date.
  - Job Change Reason: This field will default to HRNEW and cannot be changed
  - Annual Salary: Enter the total salary amount for the appointment
    - This amount must match the offer letter received by Ops
  - Hours per Day: Typically 1 for Part-Time Lecturer positions
    - For all other positions, it should be the average weekly hours divided by 5
  - Factor: This field is the total number of payments the employee will receive for the appointment.
    - For Fall, Spring, and Full Summer semester appointments, use 8
    - For Summer 1 and Summer 2 semester appointments, use 4
    - For Fall, Winter, Spring, and Full Summer quarter appointments, use 6

- **If the EPAF is late and contains retro payment, DO NOT** adjust the number of pays to make up for this
    - This will cause the individual to be underpaid until the very last payment
- Pays: This field must be the same number used in the Factor field
- Contract Number: This is the total number of weeks for the appointment
  - For Fall, Spring, and Full Summer semester appointments, use 16
  - For Summer 1 and Summer 2 semester appointments, use 8
  - For Fall, Winter, Spring, and Full Summer quarter appointments, use 12
  - **If the EPAF is late and contains retro payment, DO NOT** adjust the contract number number to make up for this
- Step: This field cannot be changed; should be 0.
- Supervisor ID: Enter the NUID of the employee's supervisor
  - The supervisor will be responsible for approving requests in Time Tracking
- Supervisor Position: Leave this field blank
- Supervisor Suffix: Leave this field blank

## Create New Part Time Faculty Job, 502002-00 Part-Time Lecturer

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		01/01/2017
Contract Type: *		Primary
Jobs Effective Date: MM/DD/YYYY*		01/01/2017
Personnel Date: MM/DD/YYYY		
Job Change Reason: *(Not Enterable)		HRNEW
Annual Salary: *		
Hours per Day: *		
Factor: *		
Pays: *		
Contract Number: *		
Step: *(Not Enterable)		0
Supervisor ID: *		
Supervisor Position:		
Supervisor Suffix:		

13. Double check the funding information, as it defaults from the position used in a previous step
  - If the index is incorrect, check that the correct position number was used (top right hand corner of the page)
  - If you need to enter multiple indexes, you can do so here
    - You will not be able to save the EPAF if the percent sum does not total 100
  - Click the Save and Add New Rows button to save any changes made in this section



Current  
 Effective Date: 01/01/2017  
 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New  
 Effective Date: MM/DD/YYYY 01/01/2017

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
N	235800	200000	131500	61040	1010					100.00			
<b>Total:</b>										100.00			

Default from Index Save and Add New Rows





14. Under the Terminate Job section, the fields with red asterisks are required
- Job Effective Date: This field must be the 15<sup>th</sup> or the last day of the month
    - If the EPAF is on time or early, use the following dates
      - Fall semester: 12/31
      - Spring semester: 4/30
      - Summer 1 semester: 6/30
      - Summer 2 semester and Full Summer semester: 8/31
    - **If the EPAF is late and contains retro payment, DO NOT** adjust the Job Effective Date to make up for this
    - If you're unsure of which date to use, reach out to your Ops contact directly
  - Personnel Date: This field is not required, but it is suggested that you use the employee's actual end date (or end date of the appointment)
  - Job Status: This field will default to T and cannot be changed
  - Job Change Reason: This field will default to TIAPT and cannot be changed

**Terminate Job, 502002-00 Part-Time Lecturer**

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		<input type="text"/>
Personnel Date: MM/DD/YYYY		<input type="text"/>
Job Status: *(Not Enterable)		<input type="text" value="T"/>
Job Change Reason: *(Not Enterable)		<input type="text" value="TIAPT"/>

15. Under the Compensation Details section, select if the EPAF is for Teaching
- If Yes:
    - Compensation: Total Compensation for the corresponding CRN
    - CRN: Enter the course reference number that the EPAF is for
      - Click on the Magnifying Glass icon to the right of the CRN field to view courses the individual is connected to
        - You must connect the instructor to the course with the Registrar's Office prior to completing the EPAF

- You can enter multiple courses on one EPAF if the index number is the same
  - **Term:** Enter the six digit term code
    - Click on the Magnifying Glass icon to the right of the CRN field to confirm the term code (6 digit number beginning with the year)
  - After entering the CRN and Term, click the Save and Add New Rows button and the remaining fields will populate (Subject, Course Number, Course Title, Instructional Method, and Campus)
- If No:
  - **Compensation:** Total Compensation for the non-teaching portion of the Annual Salary previously entered
- The total Compensation entered in this section must match the Annual Salary previously entered to submit the EPAF

NEU Custom: Compensation Details									
Teaching?*	Compensation*	CRN	Term	Subject	Course Number	Course Title	Instructional Method	Campus	Remove
Not Selected ▾	<input type="text"/>	<input type="text"/> 	<input type="text"/>						
Not Selected ▾	<input type="text"/>	<input type="text"/> 	<input type="text"/>						
Not Selected ▾	<input type="text"/>	<input type="text"/> 	<input type="text"/>						
Not Selected ▾	<input type="text"/>	<input type="text"/> 	<input type="text"/>						

16. Under the Routing Queue section, verify that the information populated is correct.
- If you did not set up your default routing queue, nothing will populate. Fill in the correct contact for the following Approval Levels:
    1. 15 – (KEYCON) Key Contact
      - Required Action: Approve
    2. 20 – (HROPS) HR Operations
      - Required Action: Approve
    3. 80 – (DEAN) Dean
      - Required Action: FYI
    4. 99 – (APPLY) Superuser/Apply
      - Required Action: Apply
  - If incorrect, choose the appropriate user by click on the magnifying glass next to the corresponding Approval Level. Click the Save and Add New Rows button after you've made your changes.

Routing Queue

Approval Level	User Name	Required Action
15 - (KEYCON) Key Contact	Q [REDACTED]	Approve
20 - (HROPS) HR Operations	Q N001641909	Stephanie Foldvary Approve
80 - (DEAN) Dean	Q [REDACTED]	[REDACTED] FYI
99 - (APPLY) Superuser / Apply	Q N000148985	Clare Sandra Regan Apply
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected

Save and Add New Rows

Comment

[Approval Types](#) | [Account Distribution](#) | [Routing Queue](#) | [Comments](#) | [Transaction History](#)

[Return to Top](#)

[New EPAF](#) | [EPAF Originator Summary](#)

17. Click the Save button at the bottom of the page
  - Review any errors or warning messages received, correct the EPAF, and click the Save button
    - Use the guide on the HRM website if you're unsure of how to correct an error ([http://www.northeastern.edu/hrm/pdfs/hr-payroll/epaf\\_warning\\_errors.pdf](http://www.northeastern.edu/hrm/pdfs/hr-payroll/epaf_warning_errors.pdf))
18. Click the Submit button
  - This will send the EPAF to the individual listed as the Key Contact approver

## Creating an EPAF to Reactivate Job for Existing Position (FPRJOB)

- Use this approval category when you are using a position number and suffix combination that the individual has previously been hired into
  - **You will not necessarily use this approval category for all FP rehires**
- 1. Go to the main EPAF menu and click New EPAF

The screenshot shows the 'Employee' menu in the HR Navigator system. At the top, there are tabs for 'Personal Information', 'Student Services', and 'Employee'. Below the tabs is a search bar with a 'Go' button and links for 'RETURN TO EMPLOYEE MENU', 'SITE MAP', and 'HELP'. The main heading is 'Electronic Personnel Action Form'. Underneath, there are several links: 'EPAF Approver Summary', 'EPAF Originator Summary', 'New EPAF' (highlighted with a red box), 'EPAF Proxy Records', and 'Act as a Proxy'. Below the links, it says 'RELEASE: 8.9' and '© 2016 Ellucian Company L.P. and its affiliates.'

2. Enter the employee's NUID and tab over, their name will populate
3. Enter the Query Date (it automatically populate with today's date)
  - You will always use the 1<sup>st</sup> or the 16<sup>th</sup> of the month for the query date
    - This will match the job effective date entered on the EPAF Preview in a future step
4. Change the Approval Category to Reactive Job for Existing Position, FPRJOB
5. After choosing the Approval Category, the employee's active jobs (as of the query date entered) will appear below.
  - If there are no active jobs on the query date entered, no jobs will appear
6. Click the All Jobs button to view the Employee Job Assignments table.

The screenshot shows the EPAF form with the following fields: 'ID: \*' (with a search icon), 'Query Date: MM/DD/YYYY\*' (set to 01/01/2017), and 'Approval Category: \*' (set to 'Reactivate Job for Existing Position Number, FPRJOB'). There is a 'Go' button below these fields. Below the form is the 'Employee Job Assignments' table:

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	800075	00	Part-Time Lecturer	128120, Writing Program	Sep 01, 2014	Jan 15, 2018	Jan 15, 2018	Active

Below the table is an 'All Jobs' button, which is highlighted with a red box.

7. The Employee Job Assignments table will populate, showing all of the positions the employee has ever been hired into.
  - **If you see the position number and suffix you wish to use with an end date equal to or after the termination date you plan to use, you must make the following changes:**

- Use a different the suffix number (the next sequential number)
    - If you do not change the suffix number, the EPAF you create will overwrite the current job, causing the pay to be wrong.
  - Change the approval category to Create New Job for New Position Number and Suffix (FPNJOB). Click here for instructions on how to continue.
    - If you do not change the approval category, you will not be able to submit the EPAF, even after entering all of the information.
8. Once you've confirmed the position number and suffix you will use are not new to the employee, click Go to continue.

\* - indicates a required field.

ID: \*

Query Date: MM/DD/YYYY\*

Approval Category: \*

**Employee Job Assignments**

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	498990	00	Extra Compensation	129100, English	Jan 16, 2012	Apr 30, 2012	Apr 30, 2012	Terminated
Secondary	502732	00	Part-Time Lecturer	129100, English	Jul 01, 2010	Dec 31, 2013	Dec 31, 2013	Terminated
Secondary	800075	00	Part-Time Lecturer	128120, Writing Program	Sep 01, 2014	Jan 15, 2018	Jan 15, 2018	Active
Primary	800075	01	Part-Time Lecturer	128120, Writing Program	Sep 01, 2016	Apr 30, 2018	Jan 31, 2018	Terminated

9. The new screen will have a blank position and suffix box above the employee's active jobs
- Enter the position number and suffix and tab over, the Title and Time Sheet Org will populate
10. Click the Go button

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

ID:

Query Date: Jan 01, 2017

Approval Category: Part Time Faculty Reactivate, FPRJOB

**Update Existing Part Time Faculty Job, UFPJOB**

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	<input type="text"/>	<input type="text"/>							<input type="radio"/>
	Secondary	800075	00	Part-Time Lecturer	128120, Writing Program	Sep 01, 2014	Jan 15, 2018	Jan 15, 2018	Active	<input checked="" type="radio"/>

Next Approval Type:

- You are now viewing the EPAF (EPAF Preview)
11. The Update Employee Record section cannot be edited as it is part of delivered Banner
- If the Employee Status is terminated, the individual will need to be hired through PeopleAdmin

## Update Employee Record

Item	Current Value	New Value
Employee Status: (Not Enterable)	Active	<input type="text" value="A"/>
Employee Class Code: (Not Enterable)	O7, Office Technical Support 7h	<input type="text"/>
Home Organization: (Not Enterable)	168100, Human Resources Management	<input type="text"/>
Distribution Orgn: (Not Enterable)	168100, Human Resources Management	<input type="text"/>
Current Hire Date: MM/DD/YYYY(Not Enterable)	<input type="text" value=""/>	<input type="text"/>

12. Under Create New Part Time Faculty Job, the field with red asterisks are required:

- Job Begin Date: This field must be the 1<sup>st</sup> or the 16<sup>th</sup> of the month
  - If the EPAF is on time or early, use the following dates
    - Fall semester: 9/1
    - Spring semester: 1/1
    - Summer 1 and Full Summer semester: 5/1
    - Summer 2 semester: 7/1
  - **If the EPAF is late and contains retro payment**, you must use the first day of the current pay period. Use the EPAF deadlines, located on the HRM website, as a guideline
  - If you're unsure of which date to use, reach out to your Ops contact directly
- Contract Type: Select either Primary or Secondary
  - An employee can have only 1 primary position. Keep this in mind if creating multiple EPAFs for the same individual
- Job Effective Date: This field **must match** the Job Begin Date
- Personnel Date: This field is not required, but it is suggested that you use the employee's actual start date (or start date of the appointment) This date drives the I-9 for new hires and rehires who have not worked for the university in the past year, if left blank section 1 of the I-9 will be due by the Query/Effective date.
- Job Change Reason: This field will default to HRNEW and cannot be changed
- Annual Salary: Enter the total salary amount for the appointment
  - This amount must match the offer letter received by Ops
- Hours per Day: Typically 1 for Part-Time Lecturer positions
  - For all other positions, it should be the average weekly hours divided by 5
- Factor: This field is the total number of payments the employee will receive for the appointment.
  - For Fall, Spring, and Full Summer semester appointments, use 8
  - For Summer 1 and Summer 2 semester appointments, use 4
  - For Fall, Winter, Spring, and Full Summer quarter appointments, use 6
  - **If the EPAF is late and contains retro payment, DO NOT** adjust the pays number to make up for this
    - This will cause the individual to be underpaid until the very last payment
- Pays: This field must be the same number used in the Factor field
- Contract Number: This is the total number of weeks for the appointment

- For Fall, Spring, and Full Summer semester appointments, use 16
- For Summer 1 and Summer 2 semester appointments, use 8
- For Fall, Winter, Spring, and Full Summer quarter appointments, use 12
- **If the EPAF is late and contains retro payment, DO NOT** adjust the contract number number to make up for this
- Step: This field cannot be changed; should be 0.
- Supervisor ID: Enter the NUID of the employee's supervisor
  - The supervisor will be responsible for approving requests in Time Tracking
- Supervisor Position: Leave this field blank
- Supervisor Suffix: Leave this field blank

## Create New Part Time Faculty Job, 502002-00 Part-Time Lecturer

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		<input type="text" value="01/01/2017"/>
Contract Type: *		<input type="text" value="Primary"/>
Jobs Effective Date: MM/DD/YYYY*		<input type="text" value="01/01/2017"/>
Personnel Date: MM/DD/YYYY		<input type="text"/>
Job Change Reason: *(Not Enterable)		<input type="text" value="HRNEW"/>
Annual Salary: *		<input type="text"/>
Hours per Day: *		<input type="text"/>
Factor: *		<input type="text"/>
Pays: *		<input type="text"/>
Contract Number: *		<input type="text"/>
Step: *(Not Enterable)		<input type="text" value="0"/>
Supervisor ID: *		<input type="text"/>
Supervisor Position:		<input type="text"/>
Supervisor Suffix:		<input type="text"/>

13. Double check the funding information, as it defaults from the position used in a previous step
  - If the index is incorrect, check that the correct position number was used (top right hand corner of the page)
  - If you need to enter multiple indexes, you can do so here
    - You will not be able to save the EPAF is the percent sum does not enter 100
  - Click the Save and Add New Rows button to save any changes made in this section

<b>Current</b>											
Effective Date: 01/01/2017											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
<b>New</b>											
Effective Date: MM/DD/YYYY 01/01/2017											
Q	N	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q
	235800	200000	131500	61040	1010					100.00	
Q	Q			Q							
Q	Q			Q							
Q	Q			Q							
Q	Q			Q							
Q	Q			Q							
<b>Total:</b>										100.00	

Default from Index   

14. Under the Terminate Job section, the fields with red asterisks are required
- Job Effective Date: This field must be the 15<sup>th</sup> or the last day of the month
    - If the EPAF is on time or early, use the following dates
      - Fall semester: 12/31
      - Spring semester: 4/30
      - Summer 1 semester: 6/30
      - Summer 2 semester and Full Summer semester: 8/31
    - **If the EPAF is late and contains retro payment, DO NOT** adjust the Job Effective Date to make up for this
    - If you're unsure of which date to use, reach out to your Ops contact directly
  - Personnel Date: This field is not required, but it is suggested that you use the employee's actual end date (or end date of the appointment)
  - Job Status: This field will default to T and cannot be changed
  - Job Change Reason: This field will default to TIAPT and cannot be changed





### Terminate Job, 502002-00 Part-Time Lecturer

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		<input style="width: 100%;" type="text"/>
Personnel Date: MM/DD/YYYY		<input style="width: 100%;" type="text"/>
Job Status: *(Not Enterable)		<input style="width: 100%;" type="text" value="T"/>
Job Change Reason: *(Not Enterable)		<input style="width: 100%;" type="text" value="TIAPT"/>

15. Under the Compensation Details section, select if the EPAF is for Teaching
- If Yes:
    - Compensation: Total Compensation for the corresponding CRN
    - CRN: Enter the course reference number that the EPAF is for
      - Click on the Magnifying Glass icon to the right of the CRN field to view courses the individual is connected to
        - You must connect the instructor to the course with the Registrar's Office prior to completing the EPAF



- You can enter multiple courses on one EPAF if the index number is the same
  - **Term:** Enter the six digit term code
    - Click on the Magnifying Glass icon to the right of the CRN field to confirm the term code (6 digit number beginning with the year)
  - After entering the CRN and Term, click the Save and Add New Rows button and the remaining fields will populate (Subject, Course Number, Course Title, Instructional Method, and Campus)
- If No:
  - **Compensation:** Total Compensation for the non-teaching portion of the Annual Salary previously entered
- The total Compensation entered in this section must match the Annual Salary previously entered to submit the EPAF

NEU Custom: Compensation Details									
Teaching?*	Compensation*	CRN	Term	Subject	Course Number	Course Title	Instructional Method	Campus	Remove
Not Selected ▾	<input type="text"/>	<input type="text"/> 	<input type="text"/>						
Not Selected ▾	<input type="text"/>	<input type="text"/> 	<input type="text"/>						
Not Selected ▾	<input type="text"/>	<input type="text"/> 	<input type="text"/>						
Not Selected ▾	<input type="text"/>	<input type="text"/> 	<input type="text"/>						

16. Under the Routing Queue section, verify that the information populated is correct.
- If you did not set up your default routing queue, nothing will populate. Fill in the correct contact for the following Approval Levels:
    1. 15 – (KEYCON) Key Contact
      - Required Action: Approve
    2. 20 – (HROPS) HR Operations
      - Required Action: Approve
    3. 80 – (DEAN) Dean
      - Required Action: FYI
    4. 99 – (APPLY) Superuser/Apply
      - Required Action: Apply
  - If incorrect, choose the appropriate user by click on the magnifying glass next to the corresponding Approval Level. Click the Save and Add New Rows button after you've made your changes.

Routing Queue

Approval Level	User Name	Required Action
15 - (KEYCON) Key Contact	Q [REDACTED]	Approve
20 - (HROPS) HR Operations	Q N001641909	Stephanie Foldvary Approve
80 - (DEAN) Dean	Q [REDACTED]	[REDACTED] FYI
99 - (APPLY) Superuser / Apply	Q N000148985	Clare Sandra Regan Apply
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected

Save and Add New Rows

Comment

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[New EPAF](#) | [EPAF Originator Summary](#)

17. Click the Save button at the bottom of the page

- Review any errors or warning messages received, correct the EPAF, and click the Save button
  - Use the guide on the HRM website if you're unsure of how to correct an error ([http://www.northeastern.edu/hrm/pdfs/hr-payroll/epaf\\_warning\\_errors.pdf](http://www.northeastern.edu/hrm/pdfs/hr-payroll/epaf_warning_errors.pdf))

18. Click the Submit button

- This will send the EPAF to the individual listed as the Key Contact approver

## Approving an EPAF as a Key Contact

- To approve as a Key Contact, go to the main EPAF menu and click on EPAF Approver Summary
  - The Approver Summary page will show you any EPAFs that are pending your approval.

The screenshot shows the HR Navigator interface with the 'Employee' tab selected. A search bar is present at the top. The main heading is 'Electronic Personnel Action Form'. Below this, a list of links is shown, with 'EPAF Approver Summary' highlighted in a red box. Other links include 'EPAF Originator Summary', 'New EPAF', 'EPAF Proxy Records', and 'Act as a Proxy'. At the bottom, it says 'RELEASE: 8.9' and '© 2016 Ellucian Company L.P. and its affiliates.'

- Click on the appropriate employee name to open the EPAF and view the details.

The screenshot shows the 'EPAF Approver Summary' page. It has tabs for 'Current', 'In My Queue', and 'History'. Below the tabs, there's a filter section with 'Queue Status' set to 'All' and 'Pending'. A table titled 'EPAF Transactions' is displayed with the following data:

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action Links
EMPLOYEE NAME Part-Time Lecturer, 800011-02	[REDACTED]	90099	Create Job for New Position Number and Suffix	Oct 17, 2016	Oct 15, 2016	Approve	<input type="checkbox"/> **Comments
[REDACTED] Part-Time Lecturer, 800011-01	[REDACTED]	89994	Reactivate Job for Existing Position Number	Sep 29, 2016	Sep 28, 2016	Approve	<input type="checkbox"/> Comments
[REDACTED] Part-Time Lecturer, 800011-01	[REDACTED]	89999	Create Job for New Position Number and Suffix	Sep 29, 2016	Oct 01, 2016	Approve	<input type="checkbox"/> **Comments

- In the EPAF Preview, check that the information provided is correct.
  - You may add any comments necessary by clicking the "Add Comment" button located at the top and bottom of the page.
  - If all of the information is correct, click the "Approve" button located at the top and bottom of the page.
    - This will send the EPAF to HR Operations for approval

- If changes/corrections are needed, click the “Return for Correction” button located at the top and bottom of the page.
  - This will send the EPAF back to the initiator so that they can make the necessary updates

Personal Information Student Services **Employee**

Search   [RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#)

## EPAF Preview

---

**Name and ID:** ██████████ **Job and Suffix:** 800011-02, Part-Time Lecturer  
**Transaction:** ████████ **Query Date:** Oct 15, 2016  
**Transaction Status:** Pending **Last Paid Date:**  
**Approval Category:** Create Job for New Position Number and Suffix, FPNJOB  
Next 🗑

[Add Comment](#)

[Approval Types](#) | [Account Distribution](#) | [Routing Queue](#) | [Comments](#) | [Transaction History](#)

[EPAF Approver Summary](#)

[Return to EPAF Menu](#)

4. After approving an EPAF, you must send the signed offer letter to the EPAF inbox ([HREPAF@northeastern.edu](mailto:HREPAF@northeastern.edu)).
  - The offer letter should have the NUID and EPAF/Transaction number on it
    - This number can be found at the top of the EPAF Preview
  - The subject should include the College and EPAF/Transaction number
    - This is helpful for both HR Operations’ and your own organization

## EPAF Preview

---

**Name and ID:** ██████████ **Job and Suffix:** 800011-02, Part-Time Lecturer  
**Transaction:** 90099 **Query Date:** Oct 15, 2016  
**Transaction Status:** Pending **Last Paid Date:**  
**Approval Category:** Create Job for New Position Number and Suffix, FPNJOB  
Next 🗑

[Add Comment](#)

## Frequently Asked Questions

1. How do I know which suffix to use?
  - Use suffix 00 when the employee is not currently active in the position number that the EPAF is for (or will not be active during the time period you're hiring them for).
  - Suffix 01 is used when the employee is currently active in the position number the EPAF being submitted is for (or will be active during the time period you're hiring them for).
  - If two EPAFs are created with the same position and suffix number that overlap, the new EPAF will overwrite the prior EPAF, causing the employee to be paid incorrectly.
    - For example, position 500200 suffix 00 ends on 4/30, but an extra payment needs to be submitted for this employee beginning 3/31 through 4/30. You would create a new EPAF for position 500200, but use suffix 01.
2. Why does the effective date need to be the 1<sup>st</sup> or 16<sup>th</sup> of the month?
  - The effective date drives the individual's pay. If you use a date other than the 1<sup>st</sup> or the 16<sup>th</sup>, the full salary amount will not be paid out, resulting in an underpayment.
3. Why does the termination date need to be the 15<sup>th</sup> or the last day of the month?
  - The effective date drives the individual's pay. If you use a date other than the 15<sup>th</sup> or the last day of the month, the individual will be overpaid or underpaid.
4. What if I receive late paperwork?
  - Create an EPAF with the next possible query/effective date (1<sup>st</sup> or 16<sup>th</sup>). The salary amount and number of pays should not change based on when the paperwork was received. HR Ops will put in a retro payment for any missed pays.
    - For example, you received paperwork on 5/17 for an individual to start 5/11. The EPAF cannot be approved with an effective date of 5/1 per the EPAF deadlines (check the HRM website). So, you will need to use 5/16 as the start date, with the same number of pays as originally intended.
5. What do I do when a course was cancelled, but the EPAF has already been applied?
  - If you're able to access the EPAF, click the Cancel button. This will not stop the payment, so you will need to reach out to your HR Ops contact to cancel the EPAF in Banner as well. If you cannot access the EPAF, your HR Ops contact can cancel it on your behalf.
6. I'm receiving an error message, but I don't understand it.
  - Check the Common EPAF Error Messages and Warnings located on the HRM website ([http://www.northeastern.edu/hrm/pdfs/hr-payroll/epaf\\_warning\\_errors.pdf](http://www.northeastern.edu/hrm/pdfs/hr-payroll/epaf_warning_errors.pdf)).
  - If the error/warning message is not listed, or you need further assistance, please send a screenshot of the EPAF and error message to your HR Ops contact
7. How do I request EPAF access?
  - You will need to fill out a Banner Access form, selecting EPAF
  - The form is located on the HRM website under Resources and Forms – HR Info Systems – Banner “This Form”
    - [http://www.northeastern.edu/hrm/pdfs/resources/employment/BannerHR\\_System\\_Access\\_Request\\_Form\\_17MAY2016.pdf](http://www.northeastern.edu/hrm/pdfs/resources/employment/BannerHR_System_Access_Request_Form_17MAY2016.pdf)

\*\*If your question were not answered, feel free to reach out to your [HR Operations contact](#) directly