TEMP NON-STUDENT EPAF END USER GUIDE

Temp Non-Student hiring will be managed through the Talent Acquisition System. Key Contacts will create and send the offer letters. There are a few exceptions to this process:

– If you use an agency to fill the position
– If the candidate is already an active employee and will be taking a temporary position (PEAEMPL)
– If the person you are hiring has been in a temporary position at Northeastern and still has an active employee record

EPAF can be used in the last two instances. Follow this guide to create an EPAF for a Temp Non-Student employee.

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What is an EPAF?

- EPAF stands for Electronic Personnel Action Form and is a Banner tool used for routing transactions
- EPAFs are used for both Temp Non-Student and Part-Time Lecturer hires

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
3. Once in Employee Self Service, click the Employee and Students tab
4. Click on Electronic Personnel Action Forms
   - This will bring you to the main EPAF menu
Setting Up or Updating Your Default Routing Queue

- The routing queue will direct the EPAF to the appropriate approvers (Initiator – Key Contact – HR Operations – 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

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

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

   ![User Names, 99 - Superuser / Apply](image)

   - This will populate the employee’s User Name
7. Once you’ve added all of the appropriate users, click the Save and Add New Rows button to save your default routing queue.

8. 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 TP - Reactivate Job for Existing Position Number, TPRJOB as the Approval Category.
   - There is no difference between the two required Approval Queues.

9. Once completed, click the Return to EPAF Menu link at the bottom of the page to return to the main EPAF Menu.
Creating the EPAF

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

3. Once in Employee Self-Service Banner, click the Employee and Students tab
4. Click on Electronic Personnel Action Forms
   a. You are now viewing the main EPAF menu
5. Click New EPAF
6. Enter the employee’s NUID and press the tab key to populate their name
7. In the Query Date field, enter the Job Start Date
   a. This field automatically populates with today’s date
8. Change the approval category to either TPNJOB or TNRJOB
   a. TPNJOB (TP - Create Job for New Position Number): Use this approval category if the individual has never been hired into the position you plan to use
   b. TPRJOB (TP - Reactivate Job for Existing Position Number): Use this approval category if the individual has been hired into the position you plan to use (even if there was a gap in employment)
   c. If you’re unsure which Approval Category to choose:
      i. Select an Approval Category and a table with Employee Job Assignments at the time of the Query Date will populate at the bottom of the page
      ii. Below this table, click the All Jobs button
         1. If the position you plan to use is listed, select TPRJOB (TP - Reactivate Job for Existing Position Number)
2. If the position you plan to use is not listed, select TPNJOB (TP - Create Job for New Position Number)
   
   iii. If you choose the wrong Approval Category, you will not be able to submit the EPAF, even after entering all of the required information

9. After choosing the Approval Category, the employee’s active jobs as of the Query Date entered will appear
   
   a. Click the Go button to continue

![New EPAF Person Selection](image)

10. Work Address Selection
    
    a. Click the Show All Addresses button to view all work addresses
       
       i. The page automatically loads to show only addresses active as of the Query Date entered
    
    b. Mark the select button at the end of the correct work address
    
    c. If there is no existing work address or if none of the addresses match the new assignment, mark the select button at the end of the New Record row
       
       i. Note that you will not enter the new work address until the EPAF preview page (Step 14)
    
    d. Click the Go button to continue

![Address Selection](image)
11. Select the position number to hire the individual in
   a. If the Approval Category is Temp Non-Student New Job, TPNJOB
      i. Enter the position number you wish to use in the blank Position field
         1. Position numbers can be found by clicking on the following link. Select Temporary Non-Student as the Employee Class and enter in the pertinent search criteria.
         https://prod-web.neu.edu/wasapp/HRPositionLookup/public/searchPositions.action
      ii. Enter 00 in the Suffix field
          1. Operations will not approve the EPAF if you use a different suffix number
      iii. Mark the Select button at the end of the row
   b. If the Approval Category is Temp Non-Student Reactivate, TPRJOB
      i. Find the row that lists the position number you wish to use and mark the Select button at the end of the row
         1. Position numbers can be found by clicking on the following link. Select Temporary Non-Student as the Employee Class and enter in the pertinent search criteria.
         https://prod-web.neu.edu/wasapp/HRPositionLookup/public/searchPositions.action
   c. Click the Go button to continue

12. Listed at the top of the page, confirm that the Name, Query Date, and Approval Category are correct

13. Update Employee Record section
   a. Employee Status in the Current Value column must be Active
      i. If it is Terminated, the individual’s PEAEMPL is terminated; therefore you cannot use an EPAF. You must go through PageUp to complete the hire.
         1. Operations will not approve the EPAF if the Employee Status is Terminated
**14. Update Employee Work Address section**

*You must complete this section even if the employee’s physical work address is not changing*

i. Current Value column shows the current work address

ii. All addresses located on the Boston Main Campus must be entered as 360 Huntington Ave, Boston, MA 02115

a. **Address Type:** This field populates automatically and cannot be edited

b. **Address Sequence No.:** This field populates automatically and cannot be edited

c. **Address From Date:** This field populates to match the Query Date entered in Step 7

i. If this date is not the employee’s Start Date, you must restart the EPAF process and enter the correct Query Date

d. **Address Line 1:** Enter the employee’s physical work street address

i. If the address is located anywhere on the Boston Main Campus, enter “360 Huntington Ave” in this field

e. **Address Line 2:** This field is not required

f. **City:** Enter the city

g. **State:** Select the State or Province, if applicable

h. **ZIP or Postal Code:** Enter the ZIP code, if applicable

i. If the address is located anywhere on the Boston Main Campus, enter “02115” in this field

i. **Nation:** Make a selection in this field **only if the work address is outside of the United States**

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**15. Create New TP Job Record section**

a. **Job Begin Date:** This field populates to match the Query Date entered in Step 7
i. If this date is not the employee’s Start Date, you must restart the EPAF process and enter the correct Query Date

ii. Note that this field only appears on EPAFs with Approval Category TPNJOB

b. Contract Type: Select either Primary or Secondary
   i. If you’re unsure of which to use, reach out to the HR Operations team for assistance

c. Jobs Effective Date: This field populates to match the Query Date entered in Step 7
   i. If this date is not the employee’s Start Date, you must restart the EPAF process and enter the correct Query Date

d. Job Status: This field populates automatically and cannot be edited

e. Job Change Reason: This field populates automatically and cannot be edited

f. Title: Enter one of the below acceptable titles for a temp non-student position. If any other title is entered, Operations will not approve the EPAF
   i. Temp Academic Support
   ii. Temp Administration Support
   iii. Temp Administrative Support
   iv. Temp Advancement Support
   v. Temp Athletics Support
   vi. Temp Clerical Support
   vii. Temp Crafts & Trade Support
   viii. Temp Customer Service Support
   ix. Temp Day Care Support
   x. Temp Facilities/Maint Support
   xi. Temp Finance/Acctg Support
   xii. Temp Health Services Support
   xiii. Temp Human Resources Support
   xiv. Temp Info Technology Support
   xv. Temp Legal Support
   xvi. Temp Library Support
   xvii. Temp Mktg & Comms Support
   xviii. Temp Research Support
   xix. Temp Research Admin Support
   xx. Temp Sign Language Interpreter
   xxi. Temp Student Services Support
   xii. Temp Technician

g. Regular Rate: Enter the hourly rate
   i. If the hourly rate exceeds $49.99, you must manually add the VP/Dean approver to the Routing Queue (Step 18)
      1. If this additional approver is not added, HR Operations will not approve the EPAF

h. Hours per Pay: Enter the standard weekly hours

i. Hours per Day = Standard weekly hours/5

j. Supervisor ID: Enter the NUID of the individual’s supervisor
   i. The supervisor will be responsible for approving weekly timesheets in the Time Tracking system

k. Timesheet Orgn: Enter the 6-digit organization code
   i. If you’re unsure what to enter, reach out to your Key Contact for assistance
16. Funding Information section
   a. The funding information defaults based on the position number entered in a previous step
      i. Index
         1. If the index is correct, no action is required
         2. If the index is incorrect, you have used the wrong position number as the two are linked for temp non-student positions
            a. Refer to step 11 to find the correct position number or reach out to your division’s Key Contact for assistance
      ii. Account = 61417
   b. If you need to enter multiple indexes, you can do so at this step
      i. The percent sum must equal 100 in order to submit the EPAF
   c. Click the Save and Add New Rows button to save any changes made to the funding information

17. NEU Custom: Compensation Details section
   a. Teaching?: Select No
   b. Compensation: Enter 0
   c. CRN: Leave this field blank
   d. Term: Leave this field blank
18. Routing Queue section
   a. Verify that the Routing Queue is correct:
      i. 15 – (KEYCON) Key Contact
         1. User Name: Your division’s Key Contact
         2. Required Action: Approve
      ii. 18 (VPDEAN) VP/Dean
          1. Required ONLY IF the Regular Rate exceeds $49.99
          2. User Name: Your division’s VP/Dean
          3. Required Action: Approve
      iii. 20 – (HROPS) HR Operations
           1. User Name: Your division’s Operations contact
           2. Required Action: Approve
      iv. 99 – (APPLY) Superuser/Apply
          1. User Name: Select Clare Sandra Regan
          2. Required Action: Apply
   b. If the information is correct, no action is required for this section
   c. If information requires correction, update the discrepant information
      i. User Name can be found by clicking on the magnifying glass next to the corresponding Approval Level
      ii. Click the Save and Add New Rows button after all changes have been made
   d. If the Routing Queue is blank, you have not yet set up your default routing queue, so you must manually enter the information:
      i. 15 – (KEYCON) Key Contact
         1. User Name: Your division’s Key Contact
         2. Required Action: Approve
      ii. 18 (VPDEAN) VP/Dean
          1. Required ONLY IF the Regular Rate exceeds $49.99
          2. User Name: Your division’s VP/Dean
          3. Required Action: Approve
      iii. 20 – (HROPS) HR Operations
           1. User Name: Your division’s Operations contact
           2. Required Action: Approve
      iv. 99 – (APPLY) Superuser/Apply
          1. User Name: Select Clare Sandra Regan
          2. Required Action: Apply
      v. Click the Save and Add New Rows button after all changes have been made to the Routing Queue
vi. Though HRM only requires Key Contact approval (and VP/Dean if the regular rate exceeds $49.99) for Temp Non-Student hires, your division may have different guidelines.
   
   1. Add any additional approvals as needed, such as Department Head

e. Click the Save button at the bottom of the page
f. Click the Submit button at the top or the bottom of the page
   i. If any errors or warning message are received, make corrections to the EPAF as needed
      
      1. Refer to the EPAF Error Messages and Warnings Guide on the HRM website for assistance with this step
         https://www.northeastern.edu/hrm/pdfs/hr-payroll/epaf_warning_errors.pdf

g. Click the Save button at the top or bottom of the page
   i. You cannot click the Submit button before saving any changes
h. Click the Submit button at the top or bottom of the page

19. The EPAF has been successfully completed
   a. Note the transaction number at the top of the page for your records
Approving an EPAF as a Key Contact

1. 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
2. Click on the appropriate employee name to open the EPAF and view the details.

3. 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
Frequently Asked Questions

1. What other documentation is needed to hire a returning Temp Non-Student?
   o Only the EPAF is needed as the employee’s PEAEMPL record is still active
   o If there is a change to their Direct Deposit information, the employee can submit a direct deposit form to HR Customer Service
     ▪ Direct deposit information can be checked in myNortheastern under the employee information tab.

2. What if I receive late paperwork?
   o Create an EPAF following the same steps outlined above and enter the Query Date as the actual Start Date for the employee

3. What is the approval process for a Temp Non-Student EPAF?
   o There are two Temp Non-Student approval processes
     ▪ If the hourly rate is less than $50
       • Key Contact
       • HR Operations
     ▪ If the hourly rate is greater than or equal to $50
       • Key Contact
       • VP/Dean
       • HR Operations
   o In addition to the approvers listed above, the Department Head may be manually added to the routing queue if needed (HRM does not require this approval level)

4. I’m receiving an error message, but I don’t understand it.
   o 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).
   o 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

5. How do I request EPAF access?
   o You will need to fill out a Banner Access form, selecting EPAF
   o 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

**If your question was not answered, feel free to reach out to your HR Operations contact directly**