

EPAF Originator
Manual
Full-time, Temporary
Faculty



EPAF Originator Instruction Manual

1. Log into Bannerweb through MyMiami or www.muohio.edu/bannerweb
2. Use your Unique ID and Novell Password to sign on
3. Once in Bannerweb, left mouse click on "Employee Services Online"

Main Menu

Welcome, Sandra L. Ledger, to Miami University's BannerWeb! Last web access on Feb 26, 2008 at 02:25 pm

[Site Map](#)

[Student Services & Financial Aid](#)

Complete an application for admission; Register for classes; Display your class schedule; Display your grades; Review your DARS (degree audit); Review Financial Aid requirements & awards; View your student financial account. View and update personal information.

→ [Employee Services Online](#)

View benefit data, earnings and deduction history, pay stubs, direct deposit information, W2 and W4 information.

[Personal Information](#)

View your address(es), phone number(s), and e-mail address(es). View name change and social security number change information.

[Financial Information](#)

Query Budget & Encumbrance data

4. Once in "Employee Services Online," left mouse click on "Electronic Personnel Action Forms" (EPAFs)

Employee Services Online

Welcome to Miami University Employee Services Online! At this site, you can view your benefit data, earnings and deduction history, pay stubs, direct deposit information, and W2/W4 information as well as submit your monthly vacation/sick leave report and view your leave balances.

Please note: information related to life, long-term disability and AD&D insurance is not yet available to be viewed, but will be available soon. We appreciate your patience.

[Benefit and Deduction Information](#)

View information related to medical, dental, voluntary group accident insurance, flexible spending accounts, retirement, annuities, state withholding, and beneficiaries.

[Pay Information](#)

Direct deposit information, earnings and deductions history, and pay stubs.

[Tax Forms](#)

W4 and W2 information.

[Leave Balances](#)

View leave information including leave earned, taken and balances.

[Leave Reporting](#)

Leave reporting for unclassified staff and faculty.

→ [Electronic Personnel Action Forms](#)

Access to the Electronic Personnel Action Forms (EPAFs) menu. For authorized personnel only.

5. Once in the "Electronic Personnel Action Forms" left mouse click on "New EPAF"

Electronic Personnel Action Form

[EPAF Approver Summary](#)

[EPAF Originator Summary](#)


→ [New EPAF](#)

[EPAF Proxy Records](#)

[Act as a Proxy](#)

6. In the "ID" field, enter the Banner ID number (+00123123) of the person for which you wish to initiate a Full-Time Temporary Rehire Appointment and hit tab
 - a. You can do a name search by left mouse clicking on the drop-down box to the far right of the "ID" field to activate a name search engine.
7. When the name field is filled, you will automatically move to "Query Date" field. You will use the first day in August of that particular school-year (example: 08/01/2009). Be sure to enter the date in the format that is displayed (MM/DD/YYYY).
8. Hit Tab.
9. From the drop-down menu for "Approval Category," select Faculty FT Re-Hire, Oxford Campus, FAFTR0; or Faculty FT Re-Hire Regional Campus, FAFTRR for the Hamilton and Middletown Campuses.
10. Left mouse click on "Go"

New EPAF Person Selection

 Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

* - indicates a required field.

→ ID: *

→ Query Date: MM/DD/YYYY *


→ Approval Category: *

→

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)
[Return to EPAF Menu](#)

11. Scroll to the bottom and left mouse click on "All Jobs" to obtain all prior positions held by this employee.

New EPAF Job Selection


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

ID: Joan T Nolan, +01219727
 Query Date: Aug 01, 2009
 Approval Category: Faculty FT Re-Hire, Oxford, FAFTR0

New Job

Position:

Suffix:

 **There are no active jobs based on the Query Date.**

→

[New EPAF](#)
[Return to EPAF Menu](#)

- In the column "Number and Title," left mouse click the row with the applicable Banner position number for a full-time temporary appointment, matching the title and department which applies to the EPAF you wish to create. You need to make sure you are selecting the Position Number which will most likely have a Suffix of 00 along with the correct Organization name.

New EPAF Job Selection

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

ID: Joan T Nolan, +01219727
Query Date: Aug 01, 2009
Approval Category: Faculty FT Re-Hire, Oxford, FAFTR0

New Job

Position:

Suffix:

Existing Jobs

Number and Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
997515-00 Visiting Assistant Professor	SPP99, Speech Pathology & Audiology	Aug 16, 2007	May 14, 2009	Feb 28, 2009	Terminated

[New EPAF](#)
[Return to EPAF Menu](#)

You are now ready to complete the EPAF. The EPAF form has four main sections. The first section is the "Contract Type."

You need to select the "Contract Type" for the "New Value" field that is the same selection shown under the "Current Value" field.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: Joan T Nolan, +01219727
Transaction: **Job and Suffix:** 997515-00, Visiting Assistant Professor
Transaction Status: **Query Date:** Aug 01, 2009
Approval Category: Faculty FT Re-Hire, Oxford Campus, FAFTR0 **Last Paid Date:** Feb 28, 2009

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

Contract Type

Item	Current Value	New Value
Contract Type:	Primary	<input type="text" value="Primary"/>

The "Jobs Effective Date" for 2009-10 will be 08/16/2009 where the "Factor" is 9 and the "Pays" is 9; and 09/01/2009 where the "Factor" is 9 and the "Pays" is 12.

The Personnel Date will be 08/17/2009 for all for the upcoming Fall (2009/2010). New dates will be given each school-year.

Some fields are pre-filled and are unable to be changed. For example, the "Job Status" and "Job Change Reason" are non-overrideable fields.

The FTE will be the same under the "New Value" section as it is under the "Current" section.

The "Annual Salary" amount will be provided by your Department Chair.

In order to accurately input the "Factor" and "Pays", look under the "Current Value" section for both "Factors" and "Pays." Faculty whose pay is divided by nine months will have eight full and two half month's pay and have a 9 in the "Factor" field and a 9 "Pays" field. Faculty whose pay is divided equally over 12 months, will have a 9 in the "Factor" field and a 12 in the "Pays" field. Enter the same "Factor" and "Pays" in the "New Value" field that is shown in the "Current Value" field.

9 over 9 (example)

Faculty FT Temp Re-Hire		
Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	05/14/2009	08/16/2009
Personnel Date: MM/DD/YYYY	05/09/2009	08/17/2009
Job Status: (Not Overrideable)	Terminated	A
FTE:	1	1
Job Change Reason: (Not Overrideable)	ENDAP	REAPT
Annual Salary:	41500	41500
Factor:	9	9
Pays:	9	9

9 over 12 (example)

Faculty FT Temp Re-Hire		
Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	09/01/2008	09/01/2009
Personnel Date: MM/DD/YYYY	08/18/2008	08/17/2009
Job Status: (Not Overrideable)	Active	A
FTE:	1	1
Job Change Reason: (Not Overrideable)	REAPT	REAPT
Annual Salary:	40000	40000
Factor:	9	9
Pays:	12	12

The "Current Effective Date" reflects the most recent date the position number was used for payroll. The "New Effective Date" pre-fills from the date you entered as New Value on this EPAF. The next portion will pre-fill with the information from the previously submitted EPAF. The only fields that can be manually changed on this position are "Index", "Account" and "Percent". Make sure this information is correct on the EPAF.

At this point, you need to left mouse click on "Save and Add New Rows" and then return back to the "Account" field and re-enter it. You can refer back to the "Account" field under the "Current" section to find the correct "Account Number".

Current											
Effective Date: 08/16/2007											
COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent		
C	SPP001	000000	000392	111410	00190						100.00
New											
Effective Date: MM/DD/YYYY 08/01/2009											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	
C	SPP001	000000	000392	111410	00190						100.00
										Total:	100.00
<input checked="" type="checkbox"/> Defaulting values for Labor Distribution from the Job records.											
<input type="button" value="Save and Add New Rows"/>											

The following is the "End Job" Record. Under the "New Value" field, in the "Job Effective Date" section, you will input 05/16/2010 for the 9 "Factor" and 9 "Pays" and 08/31/2010 for the 9 "Factors" and 12 "Pays." Under the "Personnel Date" section, you will input 05/08/2010 for both 9 "Factors" and 9 "Pays" and 9 "Factors" and 12 "Pays" appointments. Again, the "Job Status" field and the "Job Change Reason" are pre-filled and cannot be changed.

9 over 9 (example)

End job record		
Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	05/14/2009	05/16/2010
Personnel Date: MM/DD/YYYY	05/09/2009	05/08/2010
Job Status: (Not Overrideable)	Terminated	T
Job Change Reason: (Not Overrideable)	ENDAP	ENDAP

9 over 12 (example)

End job record		
Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	09/01/2008	08/31/2010
Personnel Date: MM/DD/YYYY	08/18/2008	05/08/2010
Job Status: (Not Overrideable)	Active	T
Job Change Reason: (Not Overrideable)	REAPT	ENDAP

You will now create the Routing Queue to set up the list of approvers/appliers for your EPAF. You will always select HR/Academic Personnel as an Applier. By "Approval Level," select Chair, Dean, Regional Campus Dean, if applicable, and VP Provost as Approvers. The HR/Academic Personnel contact person in Academic Personnel will be Stephania Morton. Inserting someone in the "Routing Queue" as an FYI will allow that person to review the EPAF only. When selecting the "User Name" for each level, you will left mouse click on the drop-down arrow on the left hand side of "User Name" to locate the available approvers/appliers for that level.

Approval Level	User Name	Required Action	Remove
45 - (LVL_45) Chair	HUTCHIK Kathleen Hutchinson	Approve	
50 - (LVL_50) Dean	SHACKEDE Donna E. Skillings	Approve	
60 - (LVL_60) VP and Provost	COXJL Janet L. Cox	Approve	
90 - (LVL_90) Human Resources	MORTONSS	Apply	
Not Selected		Not Selected	
Not Selected		Not Selected	
Not Selected		Not Selected	
Not Selected		Not Selected	

Save and Add New Rows

SPECIAL INSTRUCTIONS:

If you are creating EPAFs for the **College of Arts & Science**, you will select Donna Skillings as the "Approver" for the Dean's position.

If you are creating EPAFs for the **School of Business**, you will select Theodore Pickerill as the "Approver" for the Dean's position.

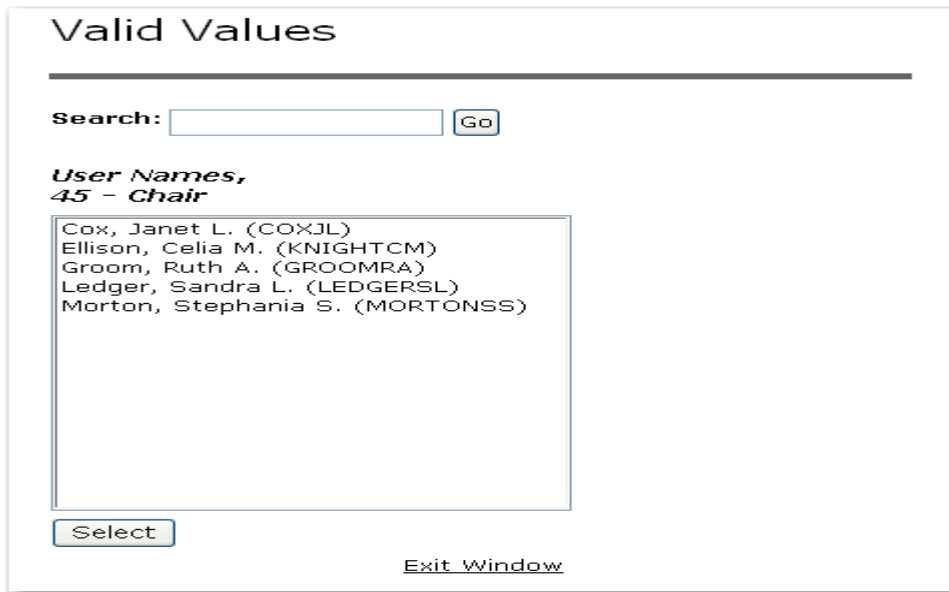
If you are creating EPAFs for the **Middletown Campus**, you will select LVL-15 for the Middletown_Dean_FYI (by selecting the drop-down arrow to the right of the Not Selected field) and select Kelli Bray and then drop down the "Not Selected" arrow to the right of Kelli's name and select "Approver".

If you are creating EPAFs for the **School of Education, Health & Society**, you will select LVL-48 for the Budget Approver (by selecting the drop-down arrow to the right of the Not Selected field) and select Lisa Gault and then drop down the "Not Selected" arrow to the right of Lisa's name and select "Approver".

If you are creating EPAFs for the **School of Fine Arts**, you will select LVL-48 for the Budget Approver (by selecting the drop-down arrow to the right of the Not Selected field) and select Connie Asher and then drop down the "Not Selected" arrow to the right of Connie's name and select "Approver".

If you are creating EPAFs for the **School of Engineering and Applied Science**, you will select Linda Kramer as the "Approver" for the Dean's position.

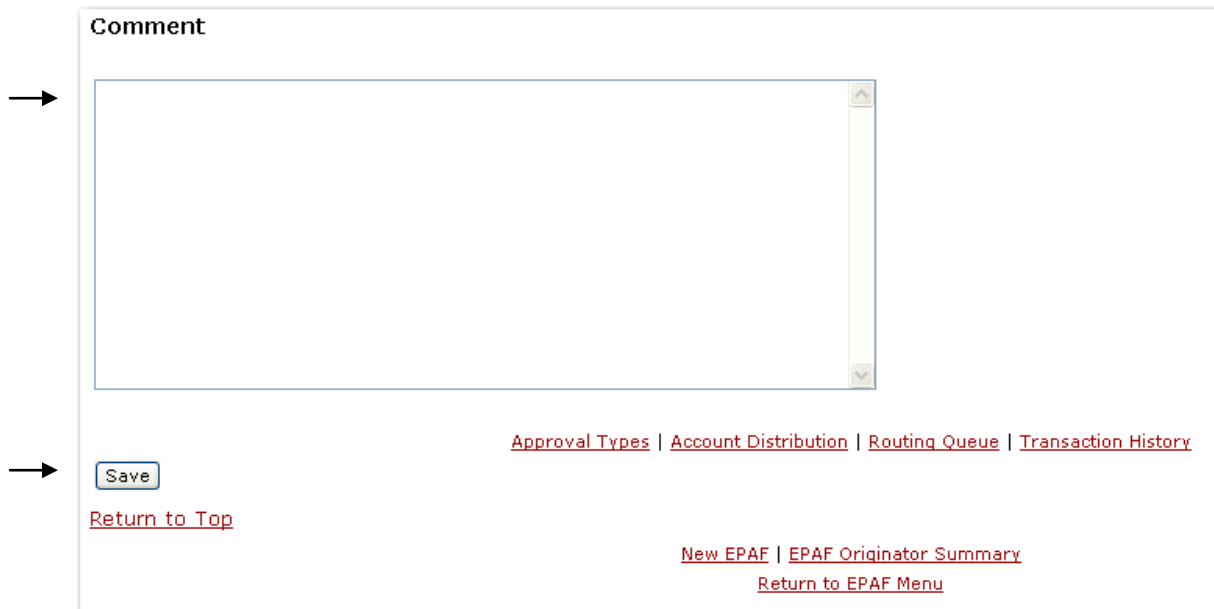
When you left mouse click on the drop-down arrow next to an Approval Level and Use Name, the following pop-up box will appear allowing you to select the appropriate approver for each level.



The image shows a pop-up window titled "Valid Values". At the top, there is a search bar with the label "Search:" followed by a text input field and a "Go" button. Below the search bar, the text "User Names, 45 - Chair" is displayed. A list box contains the following names and IDs: "Cox, Janet L. (COXJL)", "Ellison, Celia M. (KNIGHTCM)", "Groom, Ruth A. (GROOMRA)", "Ledger, Sandra L. (LEDGERSL)", and "Morton, Stephania S. (MORTONSS)". At the bottom left of the list box is a "Select" button. At the bottom center of the window is the text "Exit Window".

There is a "Comment" field available on this EPAF for special notes, instructions, etc. For this particular EPAF, the "Comment" box is NOT used for information a faculty contract. Therefore, it will be used for internal communication only.

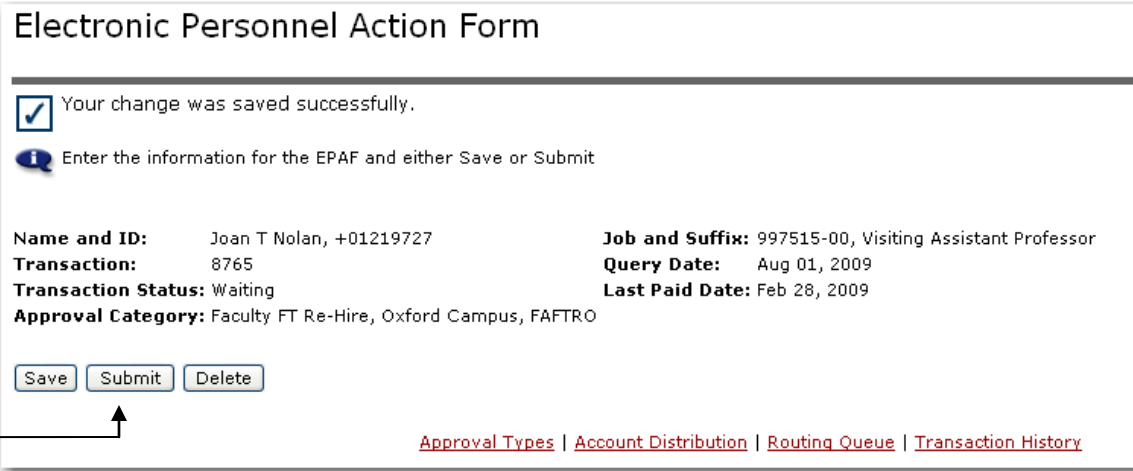
You must click the "SAVE" button to save the EPAF that you created.



The image shows a "Comment" field, which is a large text area with a vertical scrollbar on the right side. To the left of the field, there are two black arrows pointing to the left. Below the comment field, there is a "Save" button. To the right of the "Save" button, there are several red hyperlinks: "Approval Types", "Account Distribution", "Routing Queue", and "Transaction History". Below the "Save" button, there is a red hyperlink "Return to Top". At the bottom right of the form, there are two more red hyperlinks: "New EPAF" and "EPAF Originator Summary", with "Return to EPAF Menu" centered below them.

Once you left mouse click on "Save" you will no longer be able to see the comments that you created on that screen unless you left mouse click on the yellow icon on the right-hand corner of the comment section.

You will see the comment, "Your change was saved successfully".



The screenshot shows the 'Electronic Personnel Action Form' interface. At the top, a message box contains a checkmark icon and the text 'Your change was saved successfully.' Below this is an information icon and the text 'Enter the information for the EPAF and either Save or Submit'. The form details are as follows:

Name and ID:	Joan T Nolan, +01219727	Job and Suffix:	997515-00, Visiting Assistant Professor
Transaction:	8765	Query Date:	Aug 01, 2009
Transaction Status:	Waiting	Last Paid Date:	Feb 28, 2009
Approval Category:	Faculty FT Re-Hire, Oxford Campus, FAFTR0		

At the bottom of the form, there are three buttons: 'Save', 'Submit', and 'Delete'. Below the buttons, there are four links: 'Approval Types', 'Account Distribution', 'Routing Queue', and 'Transaction History'. An arrow points to the 'Submit' button.

When the EPAF has successfully been saved, you will left mouse click on "Submit" to submit your EPAF into the routing queue.

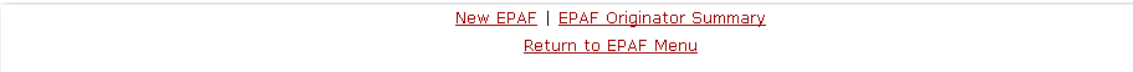
You will see the comment "The transaction has been successfully submitted." At this time, your newly created EPAF is forwarded into the routing queue for approvals and applying.



The screenshot shows the 'Electronic Personnel Action Form' interface. At the top, a message box contains a checkmark icon and the text 'The transaction has been successfully submitted.' Below this is an information icon and the text 'Enter the information for the EPAF and either Save or Submit'. The form details are as follows:

Name and ID:	Joan T Nolan, +01219727	Job and Suffix:	997515-00, Visiting Assistant Professor
Transaction:	8765	Query Date:	Aug 01, 2009
Transaction Status:	Pending	Last Paid Date:	Feb 28, 2009
Approval Category:	Faculty FT Re-Hire, Oxford Campus, FAFTR0		

When the EPAF has been submitted successfully, you can scroll down to the bottom of your EPAF and select the "EPAF Originator Summary" to get a summary of your EPAF.



The screenshot shows the bottom of the EPAF interface. It contains three links: 'New EPAF', 'EPAF Originator Summary', and 'Return to EPAF Menu'. An arrow points to the 'EPAF Originator Summary' link.

The "Current" tab will allow you to review the EPAFs that you have created.

The "History" tab will show you the "Transaction Status" of the EPAF.

- Pending – Awaiting approval
- Approved – EPAF has been approved by approvers
- Completed – Means that EPAF has been applied into payroll

The screenshot shows a web interface with two tabs: "Current" and "History". Below the tabs is an information icon and a message: "Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction." There is a "Transaction Status:" filter with a dropdown menu showing "All" and "Pending", and a "Go" button. Below the filter are links: "New EPAF", "Default Routing Queue", "Search", and "Superuser or Filter Transactions". The page shows "1 - 2 of 2" transactions. The table below has the following data:

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Murray, Joseph E. Visiting Faculty, 995118-81	+00280958	6984	Faculty Part-Time Re-Hire, Regional Campus	Dec 01, 2008	Jan 01, 2009	Voided	**Comments
Nolan, Joan T. Visiting Assistant Professor, 997515-00	+01219727	8765	Faculty FT Re-Hire, Oxford Campus	Feb 17, 2009	Aug 01, 2009	Pending	Comments

You may click on the employee's name and preview the EPAF in its entirety.

EPAF Preview

You are acting as an Originator.

Name and ID: Joan T Nolan, +01219727 **Job and Suffix:** 997515-00, Visiting Assistant Professor
Transaction: 8765 **Query Date:** Aug 01, 2009
Transaction Status: Pending **Last Paid Date:** Feb 28, 2009
Approval Category: Faculty FT Re-Hire, Oxford Campus, FAFTR0

Previous

[Add Comment](#)

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

Contract Type

Enter Changes	Current Value	New Value
Contract Type: Primary	Primary	

Faculty FT Temp Re-Hire

Enter Changes	Current Value	New Value
Jobs Effective Date: 05/14/2009	08/16/2009	
Personnel Date: 05/09/2009	08/17/2009	
Job Status: Terminated	Active	
FTE: 1	1	
Job Change Reason: ENDAP	REAPT	
Annual Salary: 41500	41500	
Factor: 9	9	
Pays: 9	9	

New

Effective Date: 08/01/2009

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
C	SPP001	000000	000392	111410	00190				100.00

End job record

Enter Changes	Current Value	New Value
Jobs Effective Date: 05/14/2009	05/16/2010	
Personnel Date: 05/09/2009	05/08/2010	
Job Status: Terminated	Terminated	
Job Change Reason: ENDAP	ENDAP	

Routing Queue

Approval Level	Name	Required Action	Queue Status	Action Date
Chair, 45	Kathleen Hutchinson, HUTCHIK	Approve	Pending	
Dean, 50	Donna E. Skillings, SHACKEDE	Approve	In the Queue	
VP and Provost, 60	Janet L. Cox, COXJL	Approve	In the Queue	
Human Resources, 90	Sandra Lee Ledger, LEDGERSL	Apply	In the Queue	

Comments

Date: Feb 19, 2009 09:31:04 AM
Made by: Sandra Lee Ledger, LEDGERSL
Comments: Ph.D. will be completed by August, 2009.

Transaction History

Action	Date	User Name
Created:	Feb 19, 2009	Sandra Lee Ledger
Submitted:	Feb 19, 2009	Sandra Lee Ledger

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

[Add Comment](#)

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