

# EPAF Originator Instruction Manual



# EPAF Originator Instruction Manual

1. Log into Bannerweb through MyMiami or [www.muohio.edu/bannerweb](http://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) for the person you wish to initiate a Part-Time Faculty 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. You will automatically move to "Query Date Field." You will use the first day of the month the faculty will be paid. For Spring Semester, you would input 01/01/2009. 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 Part-Time Re-Hire, Oxford Campus, FAPTRO" or "Faculty Part-Time Re-Hire, Regional Campus, FAPTRR" for each Regional Campus
10. Left mouse click on "Go"

Personal Information Student Services & Financial Aid **Employee Services Online** Finance

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

### New EPAF Person Selection

**i** 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 this employee has worked.

**New EPAF Job Selection**

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

**ID:** Karen Lee Cole, +00163071  
**Query Date:** Jan 01, 2009  
**Approval Category:** Faculty PT Re-Hire, Oxford, FAPTRO

**New Job**  
**Position:**     
**Suffix:**

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

[New EPAF](#)

12. In the column "Number and Title," left mouse click the row with the applicable Banner position number, matching the title and department which applies to the EPAF you wish to create.

**ID:** Karen Lee Cole, +00163071  
**Query Date:** Jan 01, 2009  
**Approval Category:** Faculty PT Re-Hire, Oxford, FAPTRO

**New Job**  
**Position:**     
**Suffix:**

**Existing Jobs**

Number and Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
<a href="#">910040-60 SPEC Temporary Faculty PT HC9</a>	MUH99, Hamilton Campus-Admin	Jan 01, 2008	Jan 31, 2008	Jan 31, 2008	Terminated
<a href="#">910140-60 SPEC Temp Unclass Staff HC9</a>	MUH99, Hamilton Campus-Admin	Sep 01, 2007	Jan 31, 2008	Jan 31, 2008	Terminated
<a href="#">994996-52 Summer Appointment</a>	HTE99, Teacher Education-HC	Jun 01, 2000	Jul 31, 2008	Jul 31, 2008	Terminated
<a href="#">995016-52 Summer Appointment</a>	HEN99, English-HC	Jun 01, 2001	Jul 31, 2007	Jul 31, 2007	Terminated
<a href="#">995131-80 Visiting Faculty</a>	HTE99, Teacher Education-HC	Sep 01, 2001	Dec 31, 2008	Sep 30, 2008	Terminated
<a href="#">995131-81 Visiting Faculty</a>	HTE99, Teacher Education-HC	Oct 01, 2006	Dec 31, 2008	Apr 30, 2008	Terminated
<a href="#">995131-82 Visiting Faculty</a>	HEN99, English-HC	Mar 01, 2008	Apr 30, 2008	Apr 30, 2008	Terminated
<a href="#">995151-80 Visiting Faculty</a>	HEN99, English-HC	Sep 01, 2000	Dec 31, 2007	Dec 31, 2007	Terminated
<a href="#">995151-81 Visiting Faculty</a>	HTE99, Teacher Education-HC	Oct 01, 2006	Dec 31, 2008	Dec 31, 2006	Terminated
<a href="#">998345-80 Credit Hour Faculty</a>	HEN99, English-HC	Feb 01, 2000	May 31, 2000	May 31, 2000	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 where you enter the job appointment information. The "Contract Type" will be Primary, Overload or Secondary. The "Jobs Effective Date" is ALWAYS the first day of the month that payroll is being entered. Fall Semester payroll is entered in September which would make the date 09/01/2008. Spring Semester payroll is entered in January which would make the date 01/01/2009.

Use the chart, Example A, to determine the correct Personnel Dates for the semester for which you are creating an appointment form.

Some fields are pre-filled and are unable to be changed. For example, the "Job Status" in the re-hire action will always be pre-filled with the letter "A" (Active). You are unable to change this field in the EPAF.

When calculating the "FTE" and the "Hours per Pay" please refer to Example B. When calculating the "Annual Salary", keep in mind that new part-time faculty earn \$700 per credit hour, returning faculty earn \$800 per credit hour and Emeritus earn \$1000 per credit hour.

**Name and ID:** Andrew J. Marko, +00145660

**Transaction:**

**Transaction Status:**

**Approval Category:** Faculty Part-Time Re-Hire, Oxford Campus, FAPTR0

**Job and Suffix:** 992006-76, Visiting Faculty

**Query Date:** Jan 01, 2009

**Last Paid Date:** Dec 31, 2007

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

**Faculty Part-Time Re-Hire, Oxford Campus**

Item	Current Value	New Value
<b>Contract Type:</b>	Overload	Overload
<b>Jobs Effective Date:</b> MM/DD/YYYY	12/31/2007	01/01/2009
<b>Personnel Date:</b> MM/DD/YYYY	12/15/2007	01/10/2009
<b>Job Status:</b> (Not Overrideable)	Terminated	A
<b>FTE:</b>	.04	.04
<b>Job Change Reason:</b> (Not Overrideable) ENDAP		REAPT
<b>Hours per Pay:</b>	4	4
<b>Factor:</b>	2	4
<b>Pays:</b>	2	4
<b>Annual Salary:</b>	800	1600

Under the "New Value" column, enter

- Contract Type - Select Primary (if this is the primary position for the employee); Select Overload (if the person already has a primary full-time position); Select Secondary (if the person already has a primary part-time position)
- Job Effective Date – The first day of the month in which payroll begins (ex. 01/01/2009)
- Personnel Date – The first date the employee actually began working (see Example A)
- FTE – Based on number of credit hours (not contact hours) teaching. Refer to Example B to determine the FTE
- Factor and Pays - Reflects the number of times the faculty member should be paid. Example: If the faculty is working a full semester, the Factor and Pays will reflect 4/4. If the faculty is working a sprint from January through March, the Factor and Pays will reflect 3/3 (January, February and March).
- Hours per Pay – Based on number of credit hours (not contact hours) teaching. Refer to Example B to determine the Hours per Pay
- Annual Salary – Amount the employee is to receive for this particular EPAF. Keep in mind if the faculty member is being paid based on contact hour's, you will input that salary, not the salary based on credit hours.

**NOTE 1:** The Approval Types, Account Distribution, Default Earnings, Routing Queue and Transaction History act as "Jumpers" to move you to different parts of the EPAF, if needed.

**NOTE 2:** The Job Effective Date should reflect the first day of the month that the employee should be put on payroll; the Personnel Date should reflect the first day that the employee will actually begin working for this current contract.

*Non-Overrideables are: Job Status and Job Change Reason*

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 two fields that can be manually changed on this portion are "Index" and "Account Number".

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

**Current**  
Effective Date: 11/01/2007

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
C	CAS001	000000	000025	111420	30010				100.00

**New**  
Effective Date: MM/DD/YYYY 01/01/2009

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
C	CAS001	000000	000025	111420	30010				100.00
<b>Total:</b>									100.00

Defaulting values for Labor Distribution from the Job records.

Save and Add New Rows

The following section (entitled "New Value") reflects the Effective Date, Earnings and Hours or Units Per Pay that you just entered. The "Effective Date" field will always need to be changed to reflect the first day of the month that the faculty is to be paid (ex. 01/01/2009). Hours or Units Per Pay are pre-filled (from prior semester), however, if the Hours or Units Per Pay changes because the FTE changes from the previous semester, you are able to override the value listed to change to the correct Hours or Units Per Pay.

**New Value**

Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date	Remove
MM/DD/YYYY						MM/DD/YYYY	
01/01/2009	FPY	24.00			1		
					1		
					1		
					1		
					1		

Defaulting values for Default Earnings from the Job records.

Save and Add New Rows

The following is the "End Job" Record. Under the "New Value" field, you will input the last day of the month of the contract (For Fall Semester, use December 31, 2008 and for Spring Semester, use April 30, 2008). Refer to Example A to determine the date to use for the "Personnel Job Effective Date" (termination/end date) of the appointment. Again, the "Job Status" field and the "Job Change Reason" are pre-filled and cannot be changed.

3



End job record		
Item	Current Value	New Value
<b>Jobs Effective Date:</b> MM/DD/YYYY	12/31/2008	<input type="text" value="04/30/2009"/>
<b>Personnel Date:</b> MM/DD/YYYY	12/19/2008	<input type="text" value="05/08/2009"/>
<b>Job Status:</b> (Not Overrideable)	Terminated	<input type="text" value="T"/>
<b>Job Change Reason:</b> (Not Overrideable) ENDAP		<input type="text" value="ENDAP"/>

***NOTE 3:** The Job Effective Date on the End Job Record should reflect the last day of the month that the employee should be put on payroll; the Personnel Date should reflect the last day that the employee actually ends work for this current contract.*

You will now create the Routing Queue to set up the list of approvers/appliers for your EPAF. You will need to always select HR/Academic Personnel as an Applier and the Chair, Dean, Regional Campus Dean, if applicable, and VP and Provost as Approvers. 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.

Routing Queue			
Approval Level	User Name		Required Action
45 - (LVL_45) Chair	MORTONSS	Stephania S. Morton	Approve
50 - (LVL_50) Dean	KNIGHTCM	Celia M. Ellison	Approve
60 - (LVL_60) VP and Provost	COXJL	Janet L. Cox	Approve
90 - (LVL_90) Human Resources	LEDGERSL	Sandra Lee Ledger	Apply
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected

Save and Add New Rows

If you are creating EPAFs for the School of Engineering & Applied Science, you will select Linda Kramer as the “Approver” for the Dean’s position.

If you are creating EPAFs for the College of Arts & Science, you will select Donna Skillings as the “Approver” for the Dean’s position.

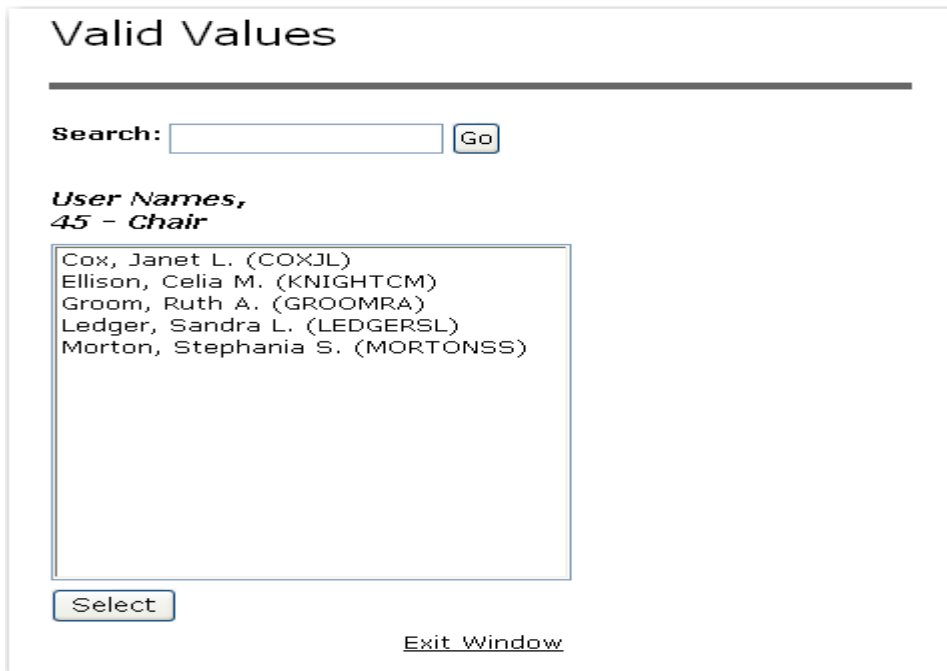
If you are creating EPAFs for the School of Business, you will select Ted Pickerill as the “Approver” for the Dean’s position.

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”.

When you left mouse click on the drop-down arrow, the following pop-up box will appear allowing you to select the appropriate approver for each level.



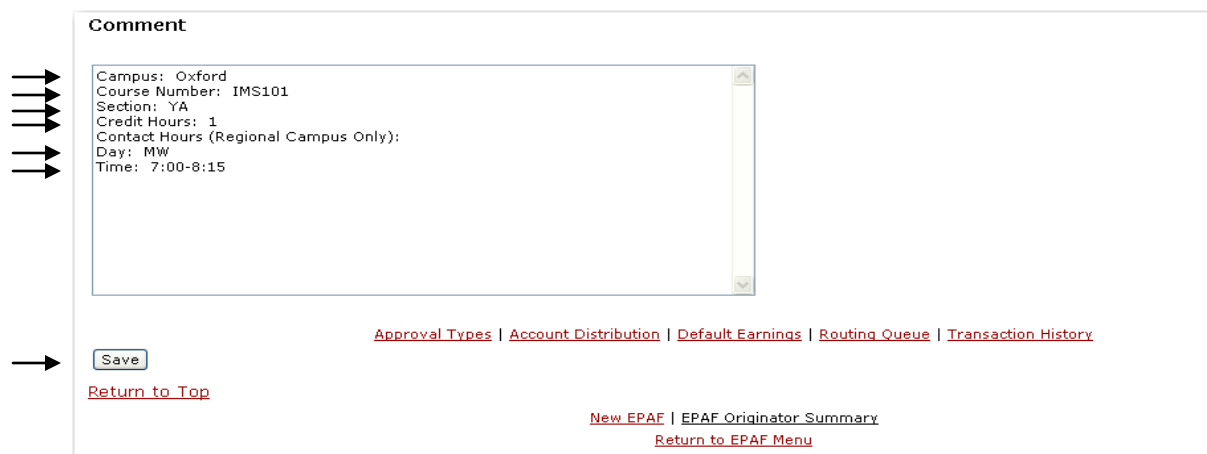
The image shows a pop-up window titled "Valid Values". At the top, there is a search bar with the label "Search:" followed by a text input field and a "Go" button. Below the search bar, the text "User Names, 45 - Chair" is displayed. A list box contains the following names and IDs: Cox, Janet L. (COXJL), 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 an "Exit Window" link.

At this point, you will create the "Comment" section of the EPAF. This must include the Campus, Course Number, Section, Credit Hours, Contact Hours (Regional Campus Only), Days and Time. These fields are necessary in order to properly process the EPAF and create a contract. (THESE FIELDS ARE NON-TABABLE FIELDS. YOU MUST ARROW DOWN TO EACH FIELD.) In order to make the EPAF easier to read, you will need to add a semi-colon at the end of each line of text.

If the faculty member is teaching off-campus, you will need to add another line underneath the "Time" field and type the place that they will be teaching.

**NOTE – You should NEVER put an apostrophe into the "Comment" field. It acts as a formula and will not allow the Comments to be viewed on the contract.**

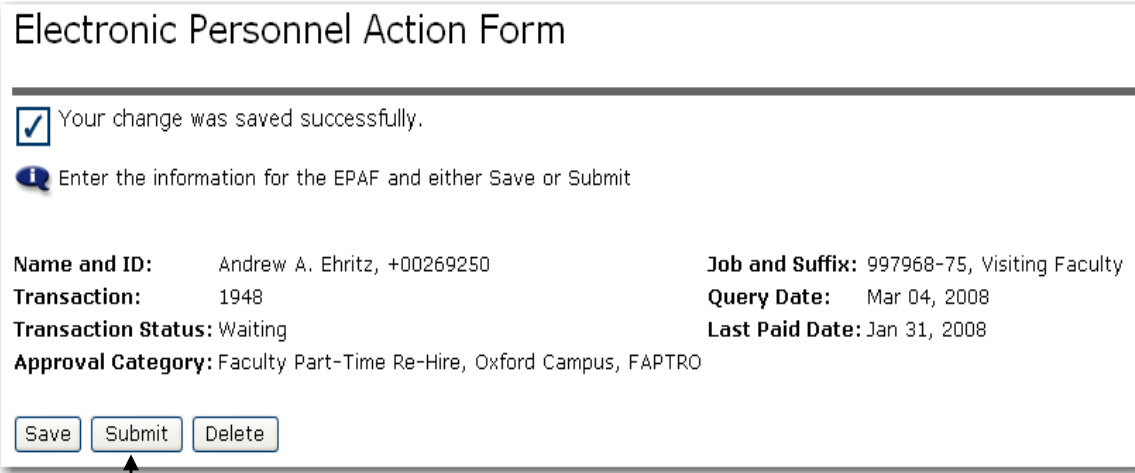
You will click the "SAVE" button to save the EPAF that you created.



The image shows a "Comment" form. On the left side, four arrows point to the following text in the form: "Campus: Oxford", "Course Number: IMS101", "Section: YA", and "Credit Hours: 1". Below these are "Contact Hours (Regional Campus Only):", "Day: MW", and "Time: 7:00-8:15". At the bottom left, an arrow points to a "Save" button. At the bottom center, there are several links: "Approval Types", "Account Distribution", "Default Earnings", "Routing Queue", and "Transaction History". At the bottom right, there are links for "Return to Top", "New EPAF", "EPAF Originator Summary", and "Return to EPAF Menu".

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

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



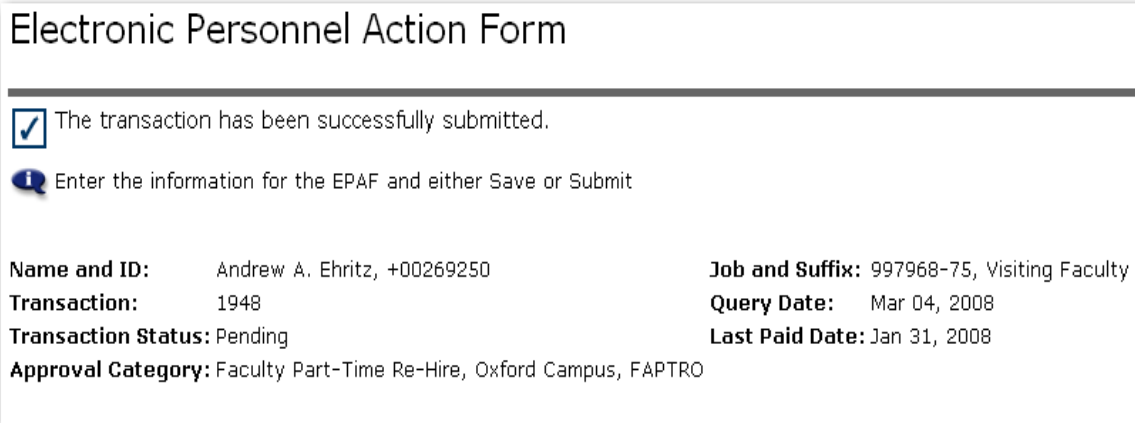
The screenshot shows the top of the EPAF form with a title bar. Below the title bar, there is a comment section with a checkmark icon and the text "Your change was saved successfully." Below this is an information icon and the text "Enter the information for the EPAF and either Save or Submit". The main form area contains the following fields:

<b>Name and ID:</b>	Andrew A. Ehritz, +00269250	<b>Job and Suffix:</b>	997968-75, Visiting Faculty
<b>Transaction:</b>	1948	<b>Query Date:</b>	Mar 04, 2008
<b>Transaction Status:</b>	Waiting	<b>Last Paid Date:</b>	Jan 31, 2008
<b>Approval Category:</b> Faculty Part-Time Re-Hire, Oxford Campus, FAPTRO			

At the bottom of the form, there are three buttons: "Save", "Submit", and "Delete". 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 now 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 top of the EPAF form with a title bar. Below the title bar, there is a comment section with 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 main form area contains the following fields:

<b>Name and ID:</b>	Andrew A. Ehritz, +00269250	<b>Job and Suffix:</b>	997968-75, Visiting Faculty
<b>Transaction:</b>	1948	<b>Query Date:</b>	Mar 04, 2008
<b>Transaction Status:</b>	Pending	<b>Last Paid Date:</b>	Jan 31, 2008
<b>Approval Category:</b> Faculty Part-Time Re-Hire, Oxford Campus, FAPTRO			

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 form with two navigation links:

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

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

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: All Approved Go

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

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**EPAF Transactions**

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
<a href="#">Dudas, Andrew M.</a> Visiting Faculty, 997254-75	+00109490	1945	Faculty Part-Time Re-Hire, Oxford Campus	Mar 04, 2008	Mar 04, 2008	Approved	<a href="#">**Comments</a>
<a href="#">Ehritz, Andrew A.</a> Visiting Faculty, 997968-75	+00269250	1981	Faculty Part-Time Re-Hire, Oxford Campus	Mar 14, 2008	Sep 01, 2008	Pending	<a href="#">**Comments</a>

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

### EPAF Preview

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You are acting as an Originator.

**Name and ID:** Andrew A. Ehritz, +00269250      **Job and Suffix:** 997968-75, Visiting Faculty  
**Transaction:** 1981      **Query Date:** Sep 01, 2008  
**Transaction Status:** Pending      **Last Paid Date:** Jan 31, 2008  
**Approval Category:** Faculty Part-Time Re-Hire, Oxford Campus, FAPTRO

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**Faculty Part-Time Re-Hire, Oxford Campus**

Enter Changes	Current Value	New Value
<b>Jobs Effective Date:</b>	04/30/2008	09/01/2008
<b>Personnel Date:</b>	05/10/2008	08/25/2008
<b>Job Status:</b>	Terminated	Active
<b>FTE:</b>	.38	.38
<b>Job Change Reason:</b>	ENDAP	REAPT
<b>Hours per Pay:</b>	36	36
<b>Factor:</b>	4	4
<b>Pays:</b>	4	4
<b>Annual Salary:</b>	7200	7200

**New**

**Effective Date: 09/01/2008**

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
C	ENG001	000000	000037	111420	00250				100.00

**Current**

Effective Date	Earnings	Hours or Units	Per Pay	Deemed Hours	Special Rate	Shift	End Date
01-SEP-2008	FPY, Faculty Pay		36.00			1	

**End job record**

Enter Changes	Current Value	New Value
<b>Jobs Effective Date:</b>	04/30/2008	12/31/2008
<b>Personnel Date:</b>	05/10/2008	12/12/2008
<b>Job Status:</b>	Terminated	Terminated
<b>Job Change Reason:</b>	ENDAP	ENDAP

**Routing Queue**

Approval Level	Name	Required Action	Queue Status	Action Date
Chair, 45	Stephania S. Morton, MORTONSS	Approve	Pending	
Dean, 50	Celia M. Ellison, KNIGHTCM	Approve	In the Queue	
VP and Provost, 60	Janet L. Cox, COXJL	Approve	In the Queue	
HR/Academic Personnel, 90	Sandra Lee Ledger, LEDGERSL	Apply	In the Queue	

**Comments**

**Date:** Mar 14, 2008 11:22:08 AM  
**Made by:** Sandra Lee Ledger, LEDGERSL  
**Comments:** Campus: Oxford Course Number: ENG112 Section: ID, KD, PB Credit Hours: 3 credit hours for each section Contact Hours (Regional Campus Only): Day: MWF Time: 12-12:50, 1-1:50, 3-3:30

**Transaction History**

Action	Date	User Name
Created:	Mar 14, 2008	Sandra Lee Ledger
Submitted:	Mar 14, 2008	Sandra Lee Ledger

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