



**COLORADO  
COLLEGE**

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**EPAF (Electronic Personnel Action Form)**  
**Manual for Student Employment**

Office of Student Employment

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## What is an EPAF?

An EPAF is an Electronic Personnel Action Form; an online form, originated by a department to submit data changes to a student employee's Banner record.

### The Student Employment EPAFs will allow you to:

- Hire a student employee
- Promote a student employee by both title and pay rate
- Terminate student employee (end job record)

### Purpose

The purpose of the Student Employment EPAFS is to increase efficiency and accuracy in processing for student employee personnel actions. Supervisors will be able to enter, modify, and track their personnel requests.

### Advantages

With an EPAF, you can quickly find where the process is in the approval queue, or if it is complete and entered into Banner.

### Policy

- Student Employees will all be paid within the current pay steps
- Promotions will include new title, job description, and pay rate
- Do not share student information

## Helpful Terms and Definitions

- **EPAF** – Electronic Personnel Action Form (EPAF), used to quickly change information in Banner. The departments will be able to enter desired changes using Banner instead of the traditional referral forms, and watch as the form flows through the approval queue.
- **Originator** – The designated department personnel authorized to create an EPAF. The Originator will correctly input the necessary information within the EPAF. This is a very important role as the Originator is the first step in making sure that an employee’s appointment is accurately set up and maintained within Banner.
- **Approver/Applier** – Approvers are the individuals authorized to review and approve the information within an EPAF. Appliers are individuals who apply the approved EPAFs. For the purpose of student employment, the Student Employment and Communications Manager will be the only approver and applier.
- **EPAF Approval Category** – The reason for an update or change. There are three approval categories for student employment. Choosing the right EPAF Approval Category will help avoid Returns for Correction.
  - Hiring for Student Employee, SEHIRE
  - Promotion for Student Employee (Job Title and Hourly Rate), SEPROM
  - Termination for Student Employees, SETERM
- **Effective Date** - The date that the EPAF will take effect. This date must be after the last paid date; if not you will receive an error.
- **Warnings** – Potential problem with the information entered. A warning informs the originator and applier of potential issues, but will allow the EPAF to process.
- **Errors** – Will **not** allow the EPAF to progress to the approval levels. Errors must be corrected.
- **Approval Queue**- the sequence of approver/applier, in this case the Student Employment Manager
- **Last paid date**- the date payroll was last disbursed to the student. No changes can be made prior to this date as the payroll cycle has already passed.

## How to Troubleshoot and Correct Errors

- Errors- will not allow the EPAF to progress to the approval levels. Errors must be corrected.
- Warnings- informs the originator of potential issues, but will allow the EPAF to process.

<b>Warning or Error Messages</b>	<b>Solutions</b>
A duplicate transaction, xxxxx, for this person exists for this approval category at waiting status.	There is already a transaction started for this student for this position. Check the Originator Summary and delete, void, or update any existing waiting status transactions.
*ERROR* First Name, SSN/SIN or Birth Date are incomplete, or Sex code is invalid. Valid Values M(ale), F(emale), or N(ot available).	The student has not been set up as an employee because of missing student employment paperwork. Direct the student to the Office of Financial Aid and Student Employment to complete these forms.
*ERROR* A Primary Job has not been defined for this employee	The student does not have a primary job. You will need to change the contract type to Primary instead of Secondary.
This approval category does not allow the creation of a person record.	Student ID entered does not exist in the Banner System. Check that you have entered the correct number.
There are no active jobs based on the Query Date.	Student ID entered is a valid number, but they do not have an active job for the date entered.
No transactions found in your queue.	Confirm you are in the correct tab. The CURRENT tab will contain the transactions waiting for you to take an action. The HISTORY tab show all submitted transactions.
*ERROR* Eff Date must be greater than Last Paid Date of DD-MMMYYYY.	You are trying to change a date that has already been processed for payroll. To correct the error you must enter a date greater than last paid date or date of submitted student employment paperwork. Contact the Office of Financial Aid if a retro payment is required.
User Id must be entered for Routing Queue	Refer back to the Set Up Approval Queue, as this step has not been completed for this approval queue type. This is a onetime set up. Unfortunately, banner will not recognize you have corrected the Approval Queue for any in progress. You will need to delete any in progress EPAFs and begin again.
*ERROR* Begin Date must equal the first Jobs Detail Effective Date.	A transaction for the position already exists. You must delete/void the transaction and create a new transaction under the correct position or suffix
*ERROR* The activity code must be filled in for approval type STLBR	In the Job Labor Distribution section you must enter INST under the activity field

*ERROR* First Labor Dist Effective Date must equal the Job Begin Date	The student was not set up as an employee by the date entered. The earliest you can set up the new position is stated as the current hire date. All dates must match to submit successfully.
*ERROR* Current hire date must be later than original hire date.	The student was not set up as an employee by the date entered. The earliest you can set up the new position is stated as the current hire date
*ERROR* ID is not defined as employee.	The student has not been set up as an employee because of missing student employment paperwork. Direct the student to the Office of Financial Aid and Student Employment to complete these forms.
*ERROR* Invalid Date for Current Hire Date. Format is MM/DD/YYYY	Date was not entered correctly. Return to incorrect date and reenter in the correct format of MM/DD/YYYY
*ERROR* Not a valid active position.	The position code entered does not exist or has been deactivated. Please contacted the Student Employment Manager at ext. 6908
*ERROR* User cannot be listed more than once in same level with same required action indicator	There are two entries in the approval queue. Remove one of the entries. There should only be one name under each approval queue.
*ERROR* First Labor Dist Effective Date must equal the Job Begin Date	The effective date entered for the Job Labor Dist section does not equal the Job Begin date entered for the position under the Job Record section
*ERROR* This employee already has a primary job.	If the student already has a primary job set up in Banner no other job can be listed as primary. You must correct the contract type by selecting "Secondary"
*ERROR* Base Job record must exist to create a new job.	DELETE or VOID the transaction. Return to the New EPAF screen and create a new EPAF transaction using your position code and the suffix 01 or the next consecutive suffix.
*ERROR* Job Detail record must exist to create a new job.	DELETE or VOID the transaction. Return to the New EPAF screen and create a new EPAF transaction using your position code and the suffix 01 or the next consecutive suffix.

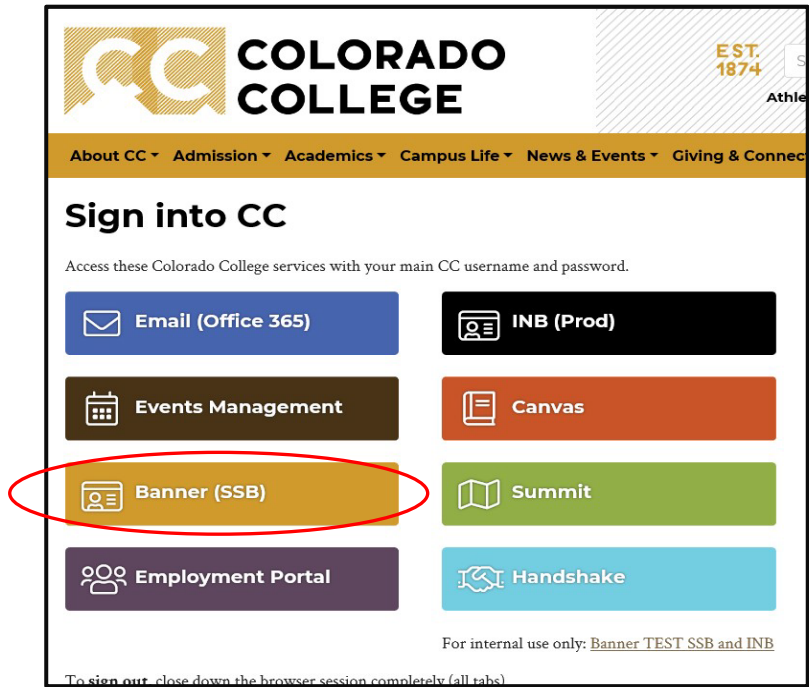
## Set Up Approval Queue

Approval Queue set up is required in order to have the submitted EPAFs sent to the Student Employment Manager for approval. **This is a onetime set up.**

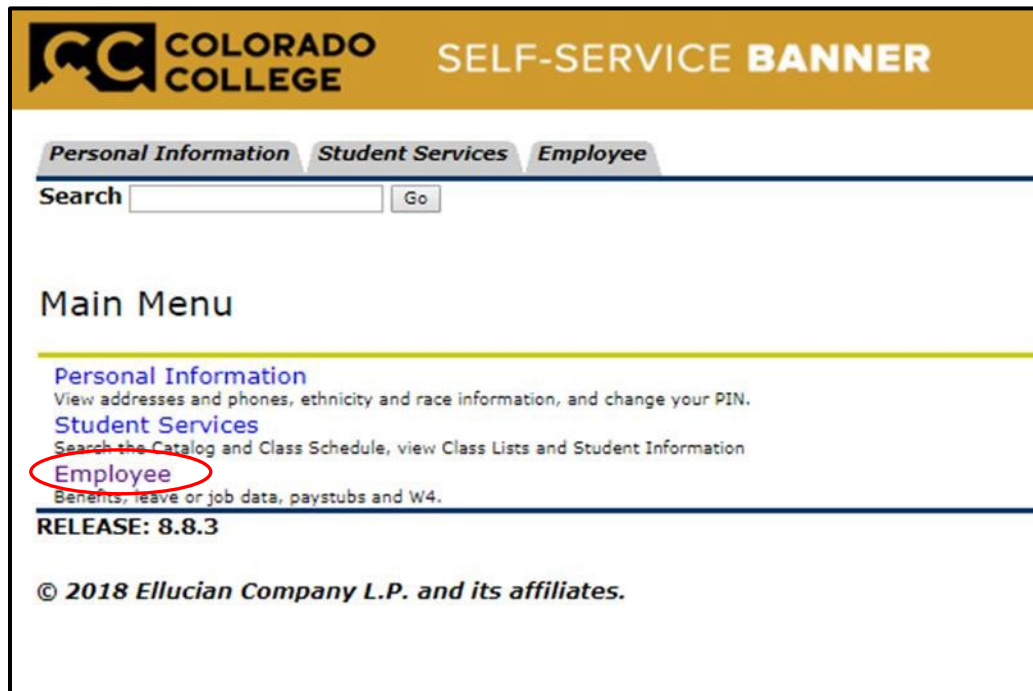
- 1) Enter the Sign Into CC icon on the Colorado College main homepage



2) Once on the Sign Into CC page select the Banner (SSB)



3) On the next screen select the Employee link



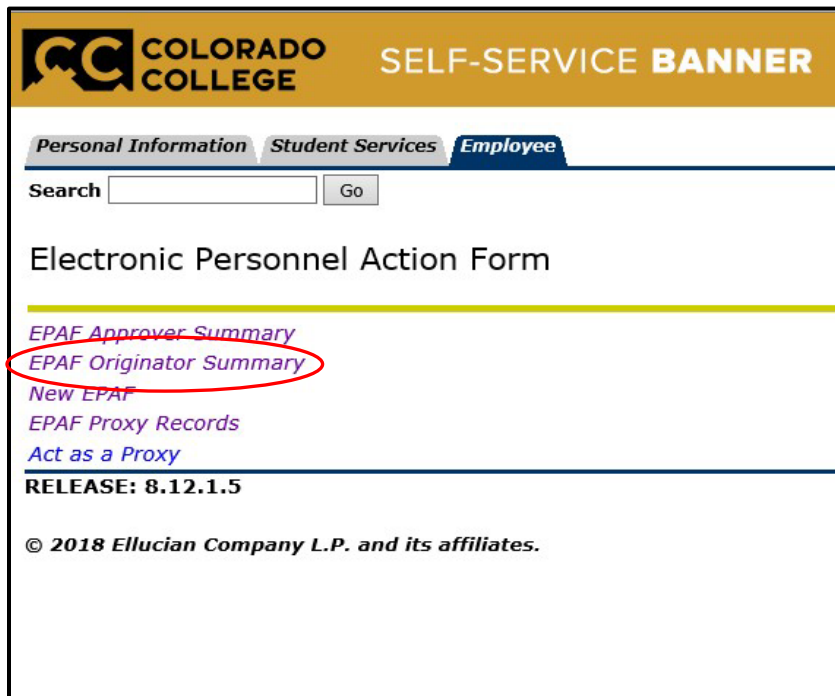


4) Select the EPAF link



The screenshot shows the Colorado College Self-Service Banner interface. At the top, there is a logo for Colorado College and the text "SELF-SERVICE BANNER". Below this, there are three tabs: "Personal Information", "Student Services", and "Employee", with "Employee" being the active tab. A search bar with a "Go" button is present. The main heading is "Employee". A list of links is provided, including "Pay Information", "Leave Balances", "Benefits and Deductions", "Tax Information", "Current Job", "Time Sheet", "Leave Report", "Supervisor Leave Report", and "EPAF". The "EPAF" link is circled in red. Below the links, it says "Employee Personnel Action Form" and "RELEASE: 8.8".

5) Select EPAF Originator Summary



The screenshot shows the Colorado College Self-Service Banner interface. At the top, there is a logo for Colorado College and the text "SELF-SERVICE BANNER". Below this, there are three tabs: "Personal Information", "Student Services", and "Employee", with "Employee" being the active tab. A search bar with a "Go" button is present. The main heading is "Electronic Personnel Action Form". A list of links is provided, including "EPAF Approver Summary", "EPAF Originator Summary", "New EPAF", "EPAF Proxy Records", and "Act as a Proxy". The "EPAF Originator Summary" link is circled in red. Below the links, it says "RELEASE: 8.12.1.5" and "© 2018 Ellucian Company L.P. and its affiliates."

- 6) In the next screen, you will see a review of all currently outstanding EPAF transactions. On the bottom of the screen, select “Default Routing Queue”. \*\*If you have **not** completed an EPAF before you may not show any transactions

**COLORADO COLLEGE SELF-SERVICE BANNER**

Personal Information | Student Services | **Employee**

Search  Go

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: All  Return for Correction

New EPAF | Default Routing Queue | Search | Superuser or Filter Transactions  
Return to EPAF Menu

1 - 2 of 2  
Jump to Bottom

**EPAF Transactions**

Name	ID	Transaction	Type of Change	Submitted Date	
Student Shop Crew, IS0015-00	174981	9881	Promotion for Student Employee (Job Title & Hourly Rate)	May 14, 2018	M
Clinton, Kristen E. Student Employment & Communica,	03072369	9962	Hiring for Student Employee		Ju

1 - 2 of 2  
Return to Top  
\*\*Comments Exist

New EPAF | **Default Routing Queue** | Search | Superuser or Filter Transactions  
Return to EPAF Menu

RELEASE: 8.12.1.5

- 7) This screen is where you will set up the approver of all submitted student employment EPAFs. Use the drop down option for Approval Category to select each EPAF then select Go:

The approval categories:

- Hiring for Student Employee, SEHIRE
- Promotion for Student Employee (Job Title & Hourly Rate), SEPROM
- Termination for Student Employees, SETERM

You will need to use the drop down option to select and set up **each** approval category.



Search  Go

### EPAF Default Routing Queue

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

Approval Category:  Go

#### Approval Queue

Approval Level	User Name	Required Action
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

Save and Add New Rows

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

RELEASE: 8.8

8) Once the Go option is selected, the screen will appear as below. The drop down box under **Approval Level** should be selected to say "75 - (FINAPP)" and the **Required Action** should be selected to say "Apply". Select the magnifying glass icon under username. This will provide a list of approvers.

**COLORADO COLLEGE SELF-SERVICE BANNER**  
 Personal Information Student Services **Employee**  
 Search  Go RETURN TO EMPLOYEE MENU SITE MAP H  
**EPAF Default Routing Queue**  
 Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.  
**Approval Category:** Hiring for Student Employee, SEHIRE   
**Approval Queue**  

Approval Level	User Name	Required Action
75 - (FINAPP) FA Student Worker Apply	<input type="text"/> <input type="button" value="Q"/>	Apply
Not Selected	<input type="text"/> <input type="button" value="Q"/>	Not Selected
Not Selected	<input type="text"/> <input type="button" value="Q"/>	Not Selected
Not Selected	<input type="text"/> <input type="button" value="Q"/>	Not Selected
Not Selected	<input type="text"/> <input type="button" value="Q"/>	Not Selected

 Mandatory Levels defaulted from Electronic Approval Category Form (NTRACAT).

9) The box below will appear in which you will highlight Strawbridge, Lisa M. (LSTRAWBRIDGE) then click Select

**User Names,**  
**75 - FA Student Worker Apply**  
  
  
  
[Exit Window](#)

- 10) Be sure that the Required Action section is set to “Apply”
  - a. Now that your approver has chosen then click the “Save and Add New Rows” button below the Approval Queue section.

### EPAF Default Routing Queue

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

Approval Category:

#### Approval Queue

Approval Level	User Name	Required Action
75 - (FINAPP) FA Student Worker Apply	LSTRAWBRIDGE Lisa Marley Strawbridge	Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

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

- 11) Now that the selection has been saved you will receive the message shown below

### EPAF Default Routing Queue

Your change was saved successfully.

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

Approval Category:

#### Approval Queue

Approval Level	User Name	Required Action	Remove
75 - (FINAPP) FA Student Worker Apply	LSTRAWBRIDGE Lisa Marley Strawbridge	Apply	<input type="checkbox"/>
Not Selected		Not Selected	<input type="checkbox"/>
Not Selected		Not Selected	<input type="checkbox"/>
Not Selected		Not Selected	<input type="checkbox"/>
Not Selected		Not Selected	<input type="checkbox"/>

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

12) You will need to do this for all three EPAFs ensuring that there is an approver selected. Otherwise, the completed EPAF will not go to anyone for approval. Using the Approval Category drop down arrow select the other categories of SETERM and SEPRM and select Go. This will bring you to a fresh page where you will set up the Approval Queue.

### EPAF Default Routing Queue

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

**Approval Category:** Promotion for Student Employee (Job Title & Hourly Rate), SEPRM Go

#### Approval Queue

Approval Level	User Name	Required Action
75 - (FINAPP) FA Student Worker Apply	LSTRAWBRIDGE Lisa Marley Strawbridge	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Mandatory Levels defaulted from Electronic Approval Category Form (NTRACAT).

Save and Add New Rows

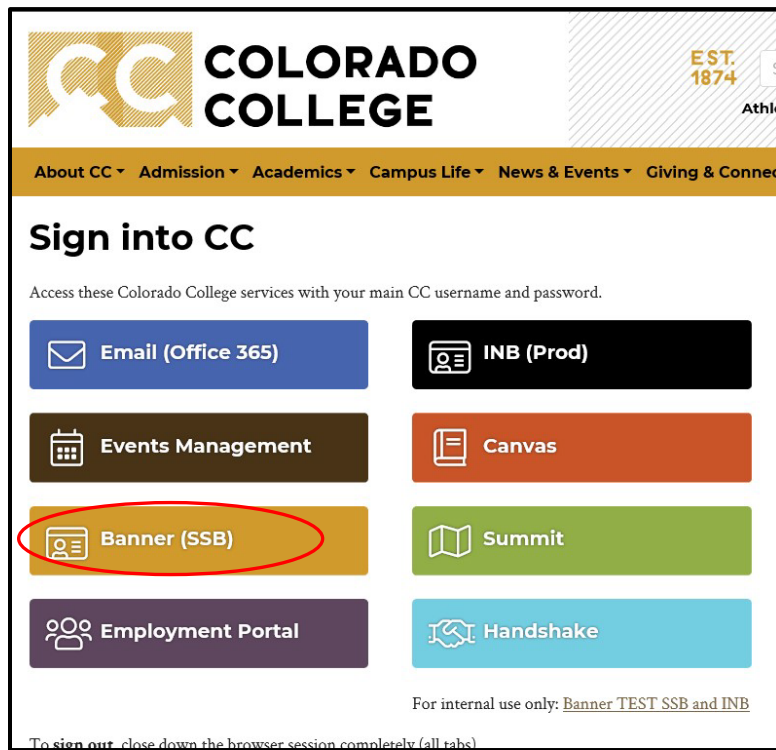
[EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

# New Hire EAPF

1) Enter the Sign Into CC icon on the Colorado College main homepage



2) Once on the Sign Into CC page select the Banner (SSB)



3) On the next screen select the Employee link

**CC COLORADO COLLEGE SELF-SERVICE BANNER**

**Personal Information Student Services Employee**

Search  Go

### Main Menu

**Personal Information**  
View addresses and phones, ethnicity and race information, and change your PIN.

**Student Services**  
Search the Catalog and Class Schedule, view Class Lists and Student Information

**Employee**  
Benefits, leave or job data, paystubs and W4.

RELEASE: 8.8.3

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4) Select the last link labeled EPAF

**CC COLORADO COLLEGE SELF-SERVICE BANNER**

**Personal Information Student Services Employee**

Search  Go

### Employee

**Pay Information**  
Pay stubs and earnings/deductions history.

**Leave Balances**

**Benefits and Deductions**  
Retirement, health, flexible spending, miscellaneous, benefit statement.

**Tax Information**  
W2 Forms and W4 Data.

**Current Job**

**Time Sheet**

**Leave Report**

**Supervisor Leave Report**  
Lists all employees current leave balances.

**EPAF**  
Employee Personnel Action Form

RELEASE: 8.8




5) Select the link for New EPAF

The screenshot shows the Colorado College Self-Service Banner interface. At the top left is the Colorado College logo. To its right, the text 'SELF-SERVICE BANNER' is displayed in a large, bold, sans-serif font. Below this, there are three navigation tabs: 'Personal Information', 'Student Services', and 'Employee'. The 'Employee' tab is currently selected and highlighted in a darker blue. Underneath the tabs, there is a search bar with the label 'Search', an input field, and a 'Go' button. The main heading of the page is 'Electronic Personnel Action Form'. Below this heading, a list of links is provided: 'EPAF Approver Summary', 'EPAF Originator Summary', 'New EPAF', 'EPAF Proxy Records', and 'Act as a Proxy'. The 'New EPAF' link is circled in red. At the bottom of the page, the text 'RELEASE: 8.12.1.5' and '© 2018 Ellucian Company L.P. and its affiliates.' are visible.

- 6) Find your student's ID number.
- If you know your student's ID number skip to step 7**
  - If you do not know the student's ID number, click the 'Search' button at the far right of the ID field. **Do not** click the 'Generate ID' button. i.

ID: \*

'Generate ID' button  
**Do not click**


**COLORADO COLLEGE**
**SELF-SERVICE BANNER**

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Personal Information Student Services **Employee**
SITE MAP HELP EXIT

---

Search

### Person Search

Check the box to limit the search to an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

**Search Criteria**

Employee:

Last Name:

First Name:

Or

ID:

Or

SSN/SIN/TIN:

Records per Page: 25

The following *Person Search* query screen will display:

- Check the 'Employee' box**
- Enter the last name and/or first name
- Click the 'Go' button

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

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- 7) Input the student employee's ID number, query date (Student's first working day format MM/DD/YYYY), and approval category (Hiring for Student Employee, SEHIRE)
  - a. Once the information is complete, select the GO button.

**COLORADO COLLEGE** **SELF-SERVICE BANNER**

Personal Information
Student Services
**Employee**

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

### 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\*

05/18/2018

Approval Category: \*

Hiring for Student Employee, SEHIRE

**Employee Job Assignments**

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	CS0002	00	Student Intern I FA	180051, Financial Aid Office	Sep 25, 2017		Apr 21, 2018	Active

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

This is the student's first working day

- 8) On the new screen that comes up there will be a field to enter your student's position number and suffix. Then select the 'Go' button.
- Any positions that the student currently has will show up under Employee Job Assignments
  - Suffix**- the next sequential number
    - For Example:** If the student is being hired for a new position in the Financial Aid Office the position code is still CS0002 and but the suffix is now 01. If this were a new position outside of the currently held positions such as the Worner desk, the suffix would then be 00.

Type in your department's unique position number

SELF-SERVICE BANNER

---

Personal Information   Student Services   **Employee**
RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

---

Search

### New EPAF Job Selection

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

**ID:** XXXXXXXXXX

**Query Date:** May 18, 2018

**Approval Category:** Student Employment Hire, SEHIRE

Enter the appropriate suffix

**Job Record, STNWJB**

Search	Type	Position	Suffix	Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job	<input type="text"/>	<input type="text"/>								<input checked="" type="radio"/>
	Primary	CS0002	00	Student Intern I FA	180051,	Financial Aid Office	Sep 25, 2017		Apr 21, 2018	Active	<input type="radio"/>

Next Approval Type

New EPAF  
[Return to EPAF Menu](#)

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9) The next screen of the EPAF will provides fields that are enterable and some that already have a default.

COLORADO COLLEGE
SELF-SERVICE BANNER

Personal Information
Student Services
Employee

Search   RETURN TO EMPLOYEE MENU | SITE MAP | HELP | EXIT

## Electronic Personnel Action Form

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

**Name and ID:** XXXXXXXXXX      **Transaction:** XXXXXXXXXX      **Query Date:** May 18, 2018

**Transaction Status:** XXXXXXXXXX

**Approval Category:** Hiring for Student Employee, SEHIRE

[Approval Types](#) | [Account Distribution](#) | [Routing Queue](#) | [Comments](#) | [Transaction History](#)  
[New EPAF](#) | [EPAF Originator Summary](#)

[Jump to Bottom](#)

\* - indicates a required field.

### New Student Employee Record

Item	Current Value	New Value
Current Hire Date: MM/DD/YYYY*	09/25/2017	<input type="text" value="05/18/2018"/>
I9 Form Indicator: (Not Enterable)	Received	<input type="text"/>
Home Organization: *(Not Enterable)	180051, Financial Aid Office	<input type="text"/>
Home COAS: *(Not Enterable)	T	<input type="text" value="T"/>
Employee Class Code: *(Not Enterable)	SS, Students	<input type="text" value="SS"/>
Employee Status: *(Not Enterable)	Active	<input type="text" value="A"/>

Job Record, CS0002-01 Student Worker

Confirm date of personnel action matches first working day

**I9 Form Indicator Status Key:**

Has completed paperwork:

- T- temporary
- R- received

Has not completed paperwork:

- Blank
- Not received

Confirm Dates (They should all be the same)

Enter job title

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		05/18/2018
Jobs Effective Date: MM/DD/YYYY*		05/18/2018
Title: *		Test
Step: *		1
Timesheet Orgn: *		Secondary
Contract Type: *		1
Salary Grade: *(Not Enterable)		00001
Job Change Reason: *(Not Enterable)		A
Job Status: *(Not Enterable)		P
Workers Comp Code: *(Not Enterable)		

Job Labor Distribution, CS0002-01 Student Worker

Current  
Effective Date: 05/18/2018

COA	Index	Fund	Organization Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
T		110002	180051	614001	SS	INST			100.00			
<b>Total:</b>									100.00			

Default from Index Save and Add New Rows

Specify Step (Step 1 = \$12.00/hr, Step 2= \$12.40/hr)

Confirm timesheet org as this is where the timesheet will display

**Contract Type:** identifies the primary and secondary position.

- **Primary Positions:** are the first active position. If there are no other active position then the position is primary.
- **Secondary Positions:** if student already holds a primary positions then all other held positions are secondary

Type 'INST' under activity

Confirm Fund and Organization code

**FOAP defaults from the entered position code**

- Verify correct FOAP numbers before continuing
- Recommendation:** confirm these are the correct fund codes because this will determine the funding source of the student's wages

**Ensure the routing queue is correctly designated. This tells the EPAF where to go for approvals.**

If these fields are blank, manually type in the information shown below. To have this information default automatically refer back to the Set Approval Queue instructions on page 7.

Routing Queue

Approval Level	User Name	Required Action
75 - (FINAPP) FA Student Worker Apply	LSTRAWBRIDGE Lisa Marley Strawbridge	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Save and Add New Rows

Comment

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

Save

**You are able to comment in the box that displays below the Routing Queue information. This is not a requirement and should only be used for pertinent information, like FOAP changes!**

Comment

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

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

[Return to Top](#)

10) Click on Save button at bottom of screen

- a. Look for the message at the top of page 5 stating “The transaction has been successfully submitted” with the green check mark
- b. **Click on Submit** – If there are errors in the EPAF you will see them now. Refer to the troubleshooting section on page 5, correct your errors, then Save and Submit again.

**Name and ID:** [REDACTED]  
**Transaction:** 9900  
**Transaction Status:** Waiting  
**Approval Category:** Hiring for Student Employee, SEHIRE

Approval

- c. If the warnings below appear your transaction has successfully completed and these warnings can be ignored

Errors and Warning Messages		
Type	Message Type	Description
Job Record	WARNING	*WARNING* Total FTE for this position is greater than budgeted FTE.
Job Record	WARNING	*WARNING* Encumbrance has been set to 0, because method is Value Input.

\* - indicates a required field.

11) When EPAF has been submitted correctly, your status should move from Waiting, to Pending or Approved. You have now successfully completed the new hire EPAF

**COLORADO COLLEGE SELF-SERVICE BANNER**

Personal Information | Student Services | **Employee**

Search  Go RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

### Electronic Personnel Action Form

**✓ The transaction has been successfully submitted.**

Enter the information for the EPAF and either Save or Submit

**Name and ID:** [REDACTED] **Job and Suffix:** CS0002-01, Student Worker  
**Transaction:** 9900 **Query Date:** May 18, 2018  
**Transaction Status:** Approved **Last Paid Date:**  
**Approval Category:** Hiring for Student Employee, SEHIRE

[Approval Types](#) | [Account Distribution](#) | [Errors](#) | [Routing Queue](#) | [Comments](#) | [Transaction History](#)  
[New EPAF](#) | [EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

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Errors and Warning Messages		
Type	Message Type	Description
Job Record	WARNING	*WARNING* Total FTE for this position is greater than budgeted FTE.
Job Record	WARNING	*WARNING* Encumbrance has been set to 0, because method is Value Input.

\* - indicates a required field.

**You must save and SUBMIT an EPAF for it to come to student employment for approval**

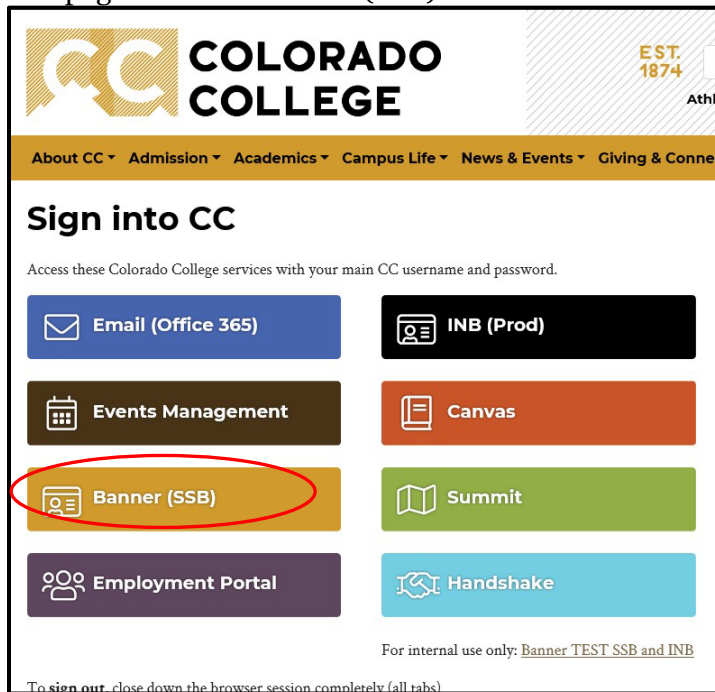


# Promotion EPAF

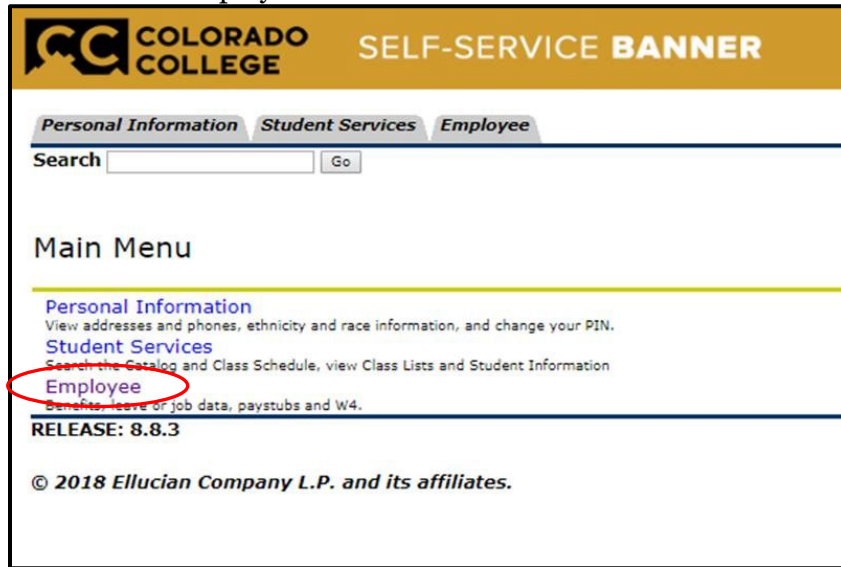
1) Enter the Sign Into CC icon on the Colorado College main homepage



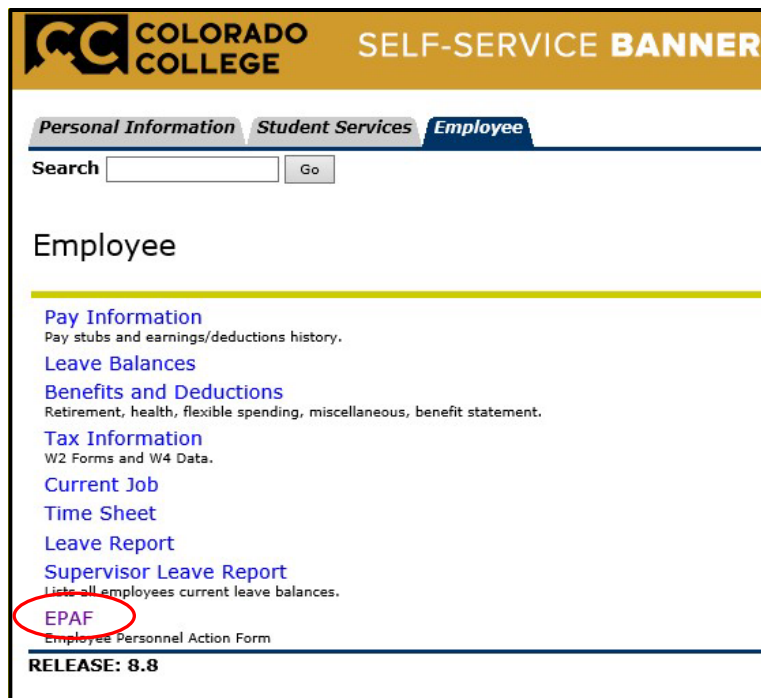
2) Once on the Sign Into CC page select the Banner (SSB)



3) On the next screen select the Employee link



4) Select the last link labeled EPAF



5) Select the link for New EPAF

The screenshot shows the Colorado College Self-Service Banner interface. At the top, there is a header with the Colorado College logo and the text 'SELF-SERVICE BANNER'. Below the header, there are three tabs: 'Personal Information', 'Student Services', and 'Employee', with 'Employee' being the active tab. A search bar with a 'Go' button is located below the tabs. The main content area is titled 'Electronic Personnel Action Form'. Below this title, there is a list of links: 'EPAF Approver Summary', 'EPAF Originator Summary', 'New EPAF' (circled in red), 'EPAF Proxy Records', and 'Act as a Proxy'. At the bottom of the content area, there is a release date 'RELEASE: 8.12.1.5' and a copyright notice '© 2018 Ellucian Company L.P. and its affiliates.'

- 6) Input your ID number, query date (date the action is to take effect), and the Approval Category.
  - a. Approval Category Options (Select the action)
    - i. **Promotion for Student Employee (Job Title & Hourly Rate), SEPRM**
  - b. **If you know your student's ID number skip to step 7**
  - c. If you do not know the student's ID number, click the 'Search' button at the far right of the ID field. **Do not** click the 'Generate ID' button.

ID: \*

'Generate ID' button  
Do not click

**COLORADO COLLEGE** SELF-SERVICE BANNER

---

Personal Information Student Services **Employee**
SITE MAP HELP EXIT

---

Search

### Person Search

Check the box to limit the search to an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

**Search Criteria**

Employee:

Last Name:

First Name:

Or

ID:

Or

SSN/SIN/TIN:

Records per Page: 25

The following *Person Search* query screen will display:

- Check the 'Employee' box.**
- Enter the last name and/or first name or SSN if known.

Click the 'Go' button.

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

---

RELEASE: 8.12.1.5

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- 7) Input the student employee's ID number, query date (Student's first working day format MM/DD/YYYY), and approval category (Promotion for Student Employee Job Title and Hourly Rate, SEPRM)
- Once the information is complete, select the GO button.

- 8) The next screen to appear will display all currently active jobs. Select the position you wish to promote by selecting the radio dial to the right of the position under Select. Then select Go.

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job									<input type="radio"/>
	Primary	CS0002	00	Student Intern I FA	180051, Financial Aid Office	Sep 25, 2017		Apr 21, 2018	Active	<input checked="" type="radio"/>
	Secondary	CS0002	01	Test	180051, Financial Aid Office	May 18, 2018			Active	<input type="radio"/>

- 9) On the next screen, you will have the option to change the title for this promotion. As there are only two pay bands, there is no other option than to promote to step 2. While on this screen, confirm/review the effective date.
- a. For more information on the pay Step, please review the page on Helpful Terms and Definitions
  - b. Be sure the Routing Queue is set up as seen below
    - i. Approval Level: 75-(FINAPP) FA Student Worker Apply
    - ii. User Name: **LSTRAWBRIDGE**

Electronic Personnel Action Form

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

**Name and ID:** [REDACTED]      **Query Date:** May 30, 2018  
**Transaction:** [REDACTED]      **Last Paid Date:** Apr 21, 2018  
**Transaction Status:** [REDACTED]  
**Approval Category:** Promotion for Student Employee (Job Title & Hourly Rate), SEPRM

[Approval Types](#) | [Routing Queue](#) | [Comments](#) | [Transaction History](#)  
[New EPAF](#) | [EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

[Jump to Bottom](#)

\* - Indicates a required field.

Student Employee Promotion, CS0002-00 Student Intern I FA, Last Paid Date: Apr 21, 2018

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	12/22/2017	05/30/2018
Title: *	Student Intern I FA	Student Intern II
Step: *(Not Enterable)	0	2
Job Change Reason: *(Not Enterable) 00021		00005

**Routing Queue**

Approval Level	User Name	Required Action
75 - (FINAPP) FA Student Worker Apply	<del>KCLINTON</del> Kristen Elizabeth Clinton	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Comment

username is:  
LSTRAWBRIDGE

**You are able to comment in the box that display below the Approval Level section. This is not a requirement and should only be used for pertinent information**

Comment

[Approval Types](#) | [Account Distribution](#) | [Routing Queue](#) | [Comments](#) | [Transaction History](#)  
[New EPAF](#) | [EPAF Originator Summary](#)

[Return to Top](#)

- 10) Then select the Save button first then the Submit button. Look for the message at the top of page stating “The transaction has been successfully submitted”
- Click on Submit – If there are errors in the EPAF you will see them now. Refer to the trouble-shooting section on page, correct your errors, then Save and Submit again.
  - If only warnings appear your transaction has successfully completed and these warnings can be ignored

**COLORADO COLLEGE SELF-SERVICE BANNER**

Personal Information | Student Services | **Employee**

Search   [RETURN TO EMPLOYEE MENU](#)

### Electronic Personnel Action Form

The transaction has been successfully submitted.  
 Enter the information for the EPAF and either Save or Submit

**Name and ID:** [REDACTED] Lockerham, 175722      **Job and Suffix:** CS0002-00, Student Intern I FA  
**Transaction:** 9940      **Query Date:** May 30, 2018  
**Transaction Status:** Approved      **Last Paid Date:** Apr 21, 2018  
**Approval Category:** Promotion for Student Employee (Job Title & Hourly Rate), SEPROM

[Approval Types](#) | [Errors](#) | [Routing Queue](#) | [Comments](#) | [Transaction History](#)  
[New EPAF](#) | [EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

[Jump to Bottom](#)

#### Errors and Warning Messages

Type	Message Type	Description
Student Employee Promotion	WARNING	*WARNING* Encumbrance Method is Value Input and salary has changed. * - indicates a required field.

Student Employee Promotion, CS0002-00 Student Intern I FA, Last Paid Date: Apr 21, 2018

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	12/22/2017	<input type="text" value="05/30/2018"/>
Title: *	Student Intern I FA	<input type="text" value="Student Intern II"/>
Step: *(Not Enterable)	0	<input type="text" value="2"/>
Job Change Reason: *(Not Enterable) 00021		<input type="text" value="00005"/>

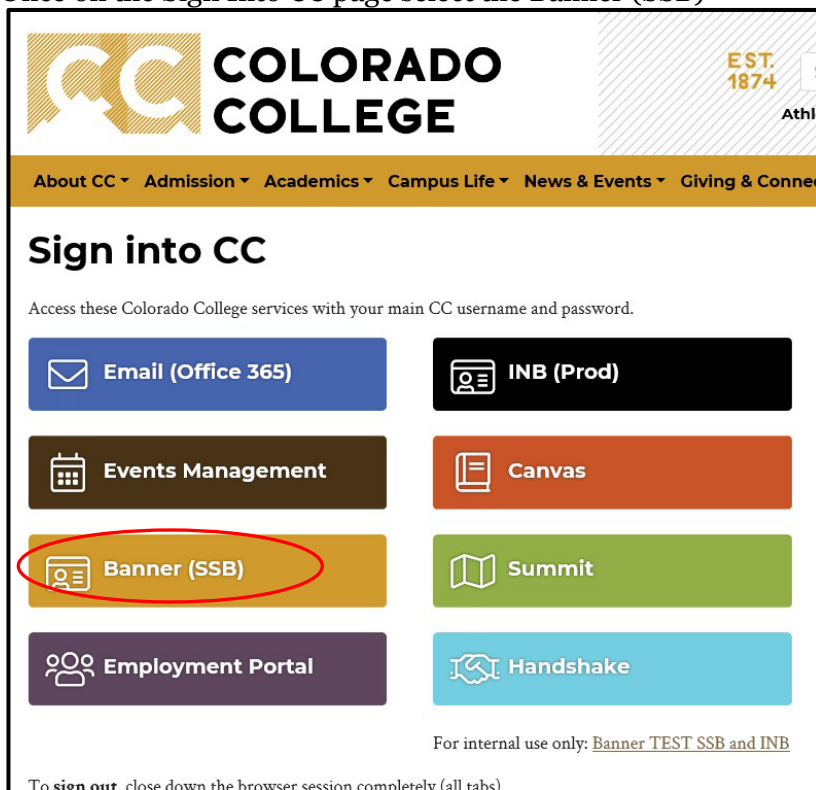
[Routing Queue](#)

# Termination EPAF

1) Enter the Sign Into CC icon on the Colorado College main homepage



2) Once on the Sign Into CC page select the Banner (SSB)





3) Enter your Self-Service Banner and select Employee link

**CC COLORADO COLLEGE SELF-SERVICE BANNER**

*Personal Information Student Services Employee*

Search  Go

### Main Menu

- [Personal Information](#)  
View addresses and phones, ethnicity and race information, and change your PIN.
- [Student Services](#)  
Search the Catalog and Class Schedule, view Class Lists and Student Information
- [Employee](#)  
Benefits, leave or job data, paystubs and W4.

RELEASE: 8.8

4) Select the last link labeled EPAF

**CC COLORADO COLLEGE SELF-SERVICE BANNER**

*Personal Information Student Services Employee*

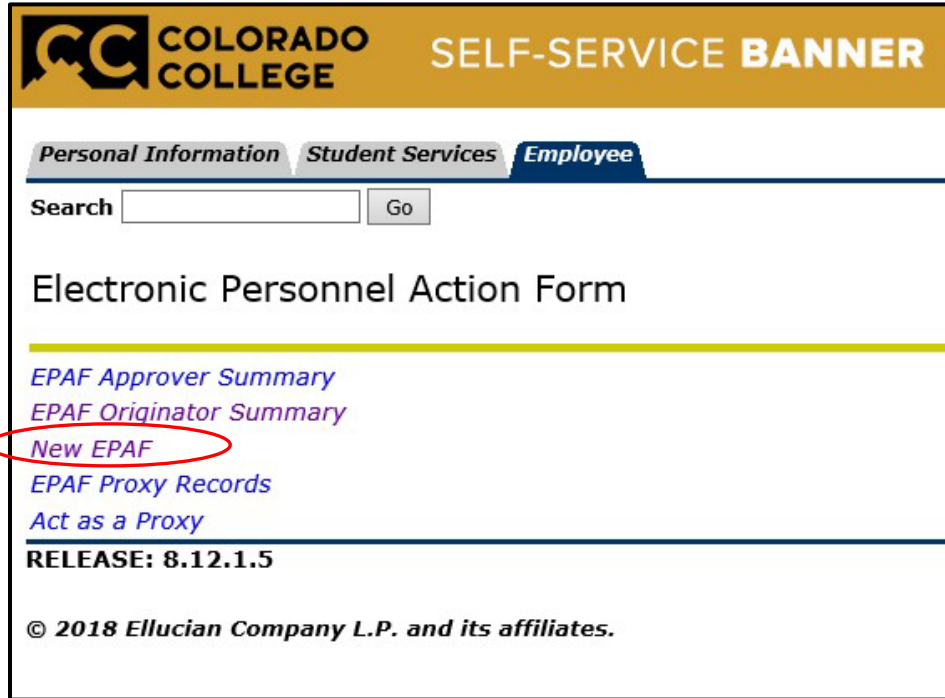
Search  Go

### Employee

- [Pay Information](#)  
Pay stubs and earnings/deductions history.
- [Leave Balances](#)
- [Benefits and Deductions](#)  
Retirement, health, flexible spending, miscellaneous, benefit statement.
- [Tax Information](#)  
W2 Forms and W4 Data.
- [Current Job](#)
- [Time Sheet](#)
- [Leave Report](#)
- [Supervisor Leave Report](#)  
Lists all employees current leave balances.
- [EPAF](#)  
Employee Personnel Action Form

RELEASE: 8.8

5) Select the link for New EPAF



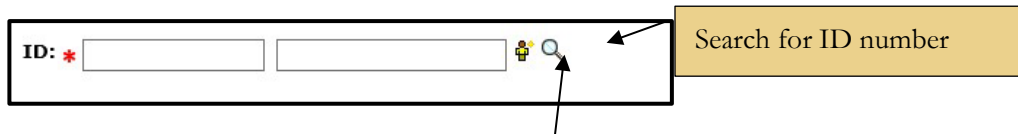
6) Input your ID number, query date (date the action is to take effect), and the Approval Category.

➤ Approval Category Options (Select the action)

**i. Termination for Student Employees, SETERM**

➤ **If you know your student's ID number skip to step 7**

➤ If you do not know the student's ID number, click the 'Search' button at the far right of the ID field. **Do not** click the 'Generate ID' button. i.



'Generate ID' button

**Do not click**

- 7) Input the student employee's ID number, query date (Student's last working day format MM/DD/YYYY), and approval category (Termination for Student Employees, SETERM)
  - Once the information is complete, select the GO button.

- 8) The next screen to appear will display all currently active jobs. Select the position you wish to terminate by selecting the radio dial to the right of the position under Select. Then select Go.

**COLORADO COLLEGE**    **SELF-SERVICE BANNER**

Personal Information
Student Services
**Employee**

Search   [RETURN TO EMPLOYEE MENU](#)

### New EPAF Job Selection

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

**ID:** XXXXXXXXXX

**Query Date:** May 31, 2018

**Approval Category:** Student Employment Termination, SETERM

**Student Employee Termination, STTERM**

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job	<input type="text"/>	<input type="text"/>							<input type="radio"/>
	Primary	CS0002	00	Student Intern I FA	180051, Financial Aid Office	Sep 25, 2017		Apr 21, 2018	Active	<input checked="" type="radio"/>
	Secondary	CS0002	01	Test	180051, Financial Aid Office	May 18, 2018			Active	<input type="radio"/>

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

**RELEASE: 8.9.0.3**

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9) On the next screen, you will have the option enter the date for this termination. Use the format MM/DD/YYYY.

- Be sure the Routing Queue is set up as seen below
  - Approval Level: 75-(FINAPP) FA Student Worker Apply
  - User Name: **LSTRAWBRIDGE**

PERSONAL INFORMATION Student Services Employee

Search [ ] Go

Electronic Personnel Action Form

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

Name and ID: [ ]  
Transaction: [ ] Query Date: May 31, 2018  
Transaction Status: [ ] Last Paid Date: Apr 21, 2018  
Approval Category: Termination for Student Employees, SETERM

Save

Approval Types | Routing Queue | Comments | Transaction History  
New EPAF | EPAF Originator Summary  
Return to EPAF Menu

Jump to Bottom

\* - indicates a required field.

Student Employee Termination, CS0002-00 Student Intern I FA, Last Paid Date: Apr 21, 2018

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	12/22/2017	05/31/2018
Job Status: (Not Enterable)	Active	T
Job Change Reason: (Not Enterable) 00021		00012

Student's last working day.  
\* Must be after last paid date.

Routing Queue

Approval Level	User Name	Required Action
75 - (FINAPP) FA Student Worker Apply	KCLINTON	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Save and Add New Rows

Comment

Save

Return to Top

Approval Types | Routing Queue | Comments | Transaction History

username is:  
LSTRAWBRIDGE

**You are able to comment in the box that display below the Approval Level section. This is not a requirement and should only be used for pertinent information.**

Comment

Save

Return to Top

Approval Types | Account Distribution | Routing Queue | Comments | Transaction History  
New EPAF | EPAF Originator Summary

10) Then select the Save button first then the Submit button. Look for the message at the top of page stating “The transaction has been successfully submitted”

- Click on Submit – If there are errors in the EPAF you will see them now. Refer to the trouble-shooting section on page 5, correct your errors, then Save and Submit again.

Personal Information
Student Services
Employee

Search

### Electronic Personnel Action Form

✔ *The transaction has been successfully submitted.*

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

**Name and ID:** XXXXXXXXXX  
**Transaction:** 9941  
**Transaction Status:** Approved  
**Approval Category:** Termination for Student Employees, SETERM

**Job and Suffix:** CS0002-00, Student Intern I FA  
**Query Date:** May 31, 2018  
**Last Paid Date:** Apr 21, 2018

[Approval Types](#) | [Routing Queue](#) | [Comments](#) | [Transaction History](#)  
[New EPAF](#) | [EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

[Jump to Bottom](#)

\* - indicates a required field.

**Student Employee Termination, CS0002-00 Student Intern I FA, Last Paid Date: Apr 21, 2018**

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	12/22/2017	<input type="text" value="05/31/2018"/>
Job Status: (Not Enterable)	Active	<input type="text" value="T"/>
Job Change Reason: (Not Enterable) 00021		<input type="text" value="00012"/>

**Routing Queue**

Approval Level	User Name	Required Action	Remo
75 - (FINAPP) FA Student Worker Apply	<input type="text" value="KCLINTON"/> Kristen Elizabeth Clinton	<input type="text" value="Apply"/>	
Not Selected	<input type="text" value=""/>	<input type="text" value="Not Selected"/>	<input type="text" value=""/>
Not Selected	<input type="text" value=""/>	<input type="text" value="Not Selected"/>	<input type="text" value=""/>
Not Selected	<input type="text" value=""/>	<input type="text" value="Not Selected"/>	<input type="text" value=""/>
Not Selected	<input type="text" value=""/>	<input type="text" value="Not Selected"/>	<input type="text" value=""/>

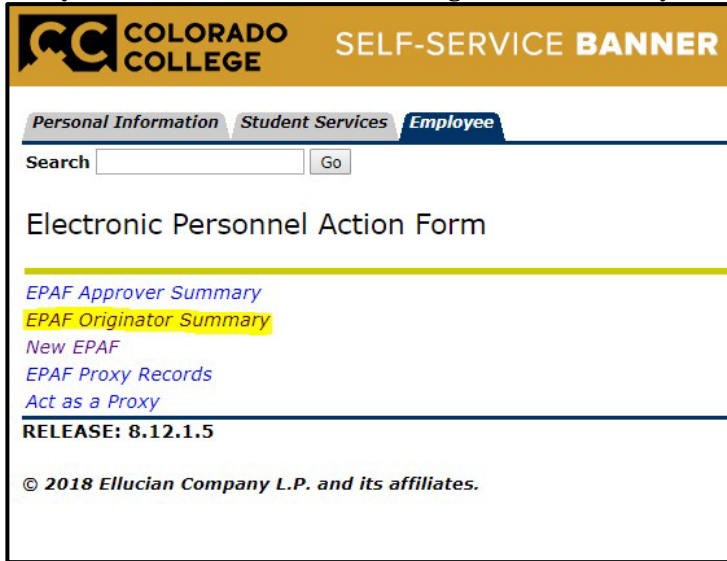
**Comment**

**Transaction History**

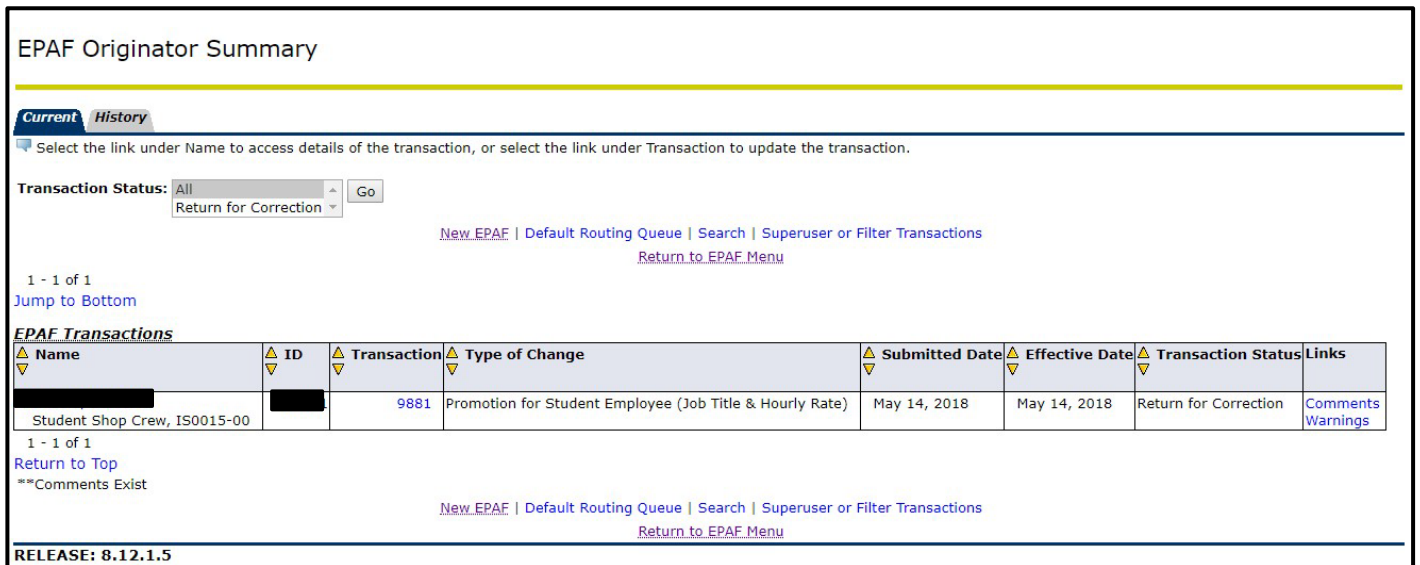
Action	Date	User Name
Created:	May 31, 2018	Kristen Elizabeth Clinton
Submitted:	May 31, 2018	Kristen Elizabeth Clinton

# How do I know what I have submitted?

- 1) From the EPAF menu, you can click on the EPAF Originator Summary, or if you have just submitted an EPAF, you can click on the EPAF Originator Summary link at the bottom of the page.



- 2) You will see the following screen showing the current transactions pending approval or returned for correction



- 3) To view transactions that have been approved
  - a. Click on History Tab
  - b. Then click on the Go button to continue
  - c. The list will default to All. If you want to see a different status, then choose a different Transaction Status from the drop down and click on the Go button.
  
- 4) You will then be able to see for whom you created an EPAF, and the transaction number, type of EPAF, date you submitted the EPAF, date the EPAF will take effect, status of the EPAF, and if there are comments, warnings, errors, etc.
  - a. If you see a Transaction Status of Completed, the form has been applied in Banner.

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status Links
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Oct 29, 2014	Oct 29, 2014	Completed <a href="#">Warnings</a>
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Oct 29, 2014	Oct 29, 2014	Completed <a href="#">Warnings</a>
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Oct 29, 2014	Oct 29, 2014	Completed <a href="#">**Comments</a> <a href="#">Warnings</a>
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Oct 30, 2014	Aug 17, 2015	Completed <a href="#">Warnings</a>
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Oct 30, 2014	Aug 17, 2015	Approved <a href="#">Comments</a> <a href="#">Errors</a>

- If you see a link with the word Errors, (see example above), you can click on the word and see an error description.

If you want detailed information, click on the employee's name, and you will get a detailed list of all actions taken, error and warning messages, date the EPAF was submitted, and where the EPAF is in the routing queue.



## EPAF Transaction Status Chart

<b>Status</b>	<b>Definition</b>
Waiting	Transaction has been created, but not submitted. A waiting status transaction can be deleted on the Originator Summary Page.
Pending	Waiting for Approver to take action.
Return for Correction	Allows the Approver/Applier to return a transaction to the Originator for correction. Be sure to check for comments. <b>Originators will be emailed for notification of EPAF return.</b>
Approved	The transaction has been approved and is waiting to be applied
Complete	The transaction has been approved and applied to the Banner database. The process is complete. No further action is necessary.
Disapproved	The approver disapproved the transaction
Void	It is no longer a valid transaction. Only the originator may void the transaction.
In the Queue	The transaction is waiting action. Transactions must be approved/applied. To correct this you will need to enter the EPAF and click Submit