

EPAF (Electronic Personnel Action Form) Manual for 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)

<u>Purpose</u>

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

- <u>EPAF</u> 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.
- <u>Approver/Applier</u> 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.
- <u>EPAF Approval Category</u> 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
- <u>Effective Date</u> The date that the EPAF will take effect. This date must be after the last paid date; if not you will receive an error.
- <u>Warnings</u> Potential problem with the information entered. A warning informs the originator and applier of potential issues, but will allow the EPAF to process.
- <u>Errors</u> Will <u>not</u> allow the EPAF to progress to the approval levels. Errors must be corrected.
- <u>Approval Queue</u>- the sequence of approver/applier, in this case the Student Employment Manager
- <u>Last paid date</u>- 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.

Warning or Error Messages	Solutions
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 Dare 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 exits. 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

COLLEGE SELF-SERVICE BANNER		
Personal Inform	ation Student Services Employee	
Search	Go	
Main Menu Personal Inform View addresses and p Student Servic Search the Catalog at	Nation hones, ethnicity and race information, and change your PIN. 2S Id Class Schedule, view Class Lists and Student Information	
Employee		
Benefits, leave or job	data, paystubs and W4.	
RELEASE: 8.8.3 © 2018 Ellucian	Company L.P. and its affiliates.	

4) Select the EPAF link

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 List all employees current leave balances.
Employee Personnel Action Form
RELEASE: 8.8

5) Select EPAF Originator Summary

SELF-SERVICE BANNER
Personal Information Student Services Employee
Search Go
Electronic Personnel Action Form
EPAE Approver Summary
EPAF Originator Summary
New EPAF
Act as a Proxy
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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 **<u>not</u>** completed an EPAF before you may not show any transactions

COLORADO S	ELF-SE		ANNER		
Personal Information Student Serv	ices Emplo	yee			
Search Go					
EPAF Originator Summa	ary				
Current History					
Select the link under Name to acces	s details of t	he transaction,	or select the link under Transaction to update t	ne transaction.	
Transaction Status: All Return for Corre	Gettion	D			
		New EPAF	Default Routing Queue Search Superuser o	r Filter Transactions	
			Return to EPAF Menu		
1 - 2 of 2					
Jump to Bottom					
EPAF Transactions	1.				
▲ Name ▼		▲ Transactior ▼	VATYPE of Change	A Submitted Dat ▼	e≜ ⊽
Student Shop Crew, IS0015-00	174981	9881	Promotion for Student Employee (Job Title & Hourly Rate)	May 14, 2018	м
Clinton, Kristen E. Student Employment & Communica,	03072369	9962	Hiring for Student Employee		Ju
1 - 2 of 2			•		
Return to Top					
Comments Exist		New FPAF	Default Routing Queue Search Superuser o	r Filter Transactions	0
			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:

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

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

PETLIDN TO EMDLOYEE MENILL STTE MAD HELD
REPORT TO EMPEOTEE MENO SITE MAP THEF
Required Action
Not Selected
Not Selected
Not Selected
Not Selected
Not Selected V

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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.

Search	Go	RETURN TO EMPLOYEE MENU SITE M
EPAF Default Rou	ting Queue	
" Select an Approval Catego	ry and Go. Once the page refreshes, select the Approval Level, U	iser ID and action.
pproval Category: Hiring	for Student Employee, SEHIRE	Go
pproval Queue		
Approval Queue Approval Level	User Name	Required Action
Approval Queue Approval Level 75 - (FINAPP) FA Student W	orker Apply	Required Action
Approval Queue Approval Level 75 - (FINAPP) FA Student W Not Selected	orker Apply	Required Action Apply ~ Not Selected ~
Approval Queue Approval Level 75 - (FINAPP) FA Student W Not Selected Not Selected	orker Apply	Required Action Apply Not Selected Not Selected
Approval Queue Approval Level 75 - (FINAPP) FA Student W Not Selected Not Selected Not Selected	orker Apply	Required Action Apply Not Selected Not Selected Not Selected
Approval Queue Approval Level 75 - (FINAPP) FA Student W Not Selected Not Selected Not Selected Not Selected	v Q	Required Action Apply Not Selected Not Selected Not Selected Not Selected Not Selected

9) The box below will appear in which you will highlight Lane, Roger D. (RLANE2024) then click Select

User Names,	
75 - FA Student Worker	
Apply	
Lane, Roger D. (RLANE2024)	
Select	
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

Approval Category: Hiring fo	r Student Employee, SEHIRE	✓ Go	
Approval Queue			
Approval Level	User Name		Required Action
75 - (FINAPP) FA Student Work	ker Apply 🗸 🤍 RLANE2024		Apply
Not Selected	~ Q		Not Selected
Not Selected	~ Q		Not Selected
Not Selected	 Q		Not Selected
Save and Add New Rows			
Save and Add New Rows		EPAF Originato	r Summary
		Return to EP	AF Menu

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

EPAF Default Routing Queue

Approval Category: Hiring for	r Student Employee, SEHIRE	▼ Go	
Approval Queue			
Approval Level	User Name		Required Action
75 - (FINAPP) FA Student Work	er Apply 🗸 🔍 RLANE2024	Roger Douglass Lane	Apply 🗸
Not Selected	 ✓ Q 		Not Selected 🗸
			Not Selected
Not Selected	→ Q		
Not Selected Not Selected	Q Q		Not Selected V

Save and Add New Rows

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 SEPROM and select Go. This will bring you to a fresh page where you will set up the Approval Queue.

Approval Category: Promotion for S	tudent Employee (Job Title & Hourly Rate), SEPRO	M 🗸 😡		
Approval Queue				
Approval Level	User Name		Required Action	Remove
75 - (FINAPP) FA Student Worker App	ly 🗸 🔍 RLANE2024	Roger Douglass Lane	Apply	▼ □
Not Selected	✓ Q		Not Selected	~
Not Selected	 ♥ Q 		Not Selected	~
Not Selected	✓Q		Not Selected	~
Not Selected			Not Selected	~

Save and Add New Rows

EPAF Originator Summary Return to EPAF Menu

New Hire 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)

	LDO E
About CC Admission Academics Ca	npus Life 🔻 News & Events 👻 Giving & Connec
Sign into CC	
Access these Colorado College services with your mai	n CC username and password.
Email (Office 365)	©्ि≣ INB (Prod)
Events Management	Canvas
Banner (SSB)	Summit
COO Employment Portal	ISI Handshake
	For internal use only: <u>Banner TEST SSB and INB</u>
To sign out close down the browser session complet	elv (all tabs)

3) On the next scre<u>en select the Employee link</u>

yee					
-	_			 	
han	nge y	our PI	IN.		
ent	1010	rmatic	n		
_	-				

4) Select the last link labeled EPAF

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
EPAF Brance Lating Form
RELEASE. 0.0

5) Select the link for New EPAF

	COLORADO SELF-SERVICE BANNER
	Personal Information Student Services Employee
	Search Go
	Electronic Personnel Action Form
	EPAF Approver Summary
	EPAF Originator Summary
\langle	New EPAF
	EPAF Proxy Records
	Act as a Proxy
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- 6) Find your student's ID number.

 - a. If you know your student's ID number skip to step 7
 b. 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: * Search for ID number	
'Generate ID' button	
Do not click	

COLLEGE SELF-SERVICE BANNER	
Personal Information Student Services Employee	
Search Go	SITE MAP HELP EXIT
Person Search	
Check the box to limit the search to an Employee. Enter the Last Name and or First Name, or enter wildcard.	an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a
Search Criterie Employee: Last Name: First Name: Or ID: Or SSN/SIN/TIN: Records per Page: 25 V	 The following <i>Person Search</i> query screen will display: Check the 'Employee' box Enter the last name and/or first name Click the 'Go' button
Go New EPAF Return to FPAF M	2011
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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.

		mpioyee				
Search	Go		RETURN TO EM	IPLOYEE M	1ENU SITE MAP	HELP EXIT
	on Selection	ID, or generate an ID. Enter the O	uery Date and sele	ct the Ap	oproval Category.	Select Go.
 indicates a required 	d field.					
 indicates a required indicates a required	d field.	2∢] ở Q		This is the first work	e studen ing day
Indicates a required The second sec	d field.	dent Employee, SEHIRE] ಕ್ Q	¥	This is the first work	e studen ing day
indicates a required to: * uery Date: MM/DD/N Approval Category: * Go mployee Job Assign	d field.	dent Employee, SEHIRE] ₽ Q	•	This is the first work	e studen ing 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.
 - a. Any positions that the student currently has will show up under Employee Job Assignments
 - b. Suffix- the next sequential number

T d

u n i. **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.

			ORADO	SI	ELF-SERVICE	BANNER					
	Persona	al Informa	tion Studer	at Servio	ces Employee						
	Search			Go		RETURN TO EMP	LOYEE MENU SI	TE MAP HE	LP EXIT		
	New	EPAF	Job Sele	ction							
	🗬 Enter	or search	for a new pos	ition nu	mber and enter the su	ffix, or select the link under Title					
ype in your	ID:										
epartment's	Query Approv	Date: /al Cater	May 18 Iory: Studer	8, 2018 t Emple	ovment Hire, SEHIRE	Enter the	appropriat	e suffix			
nique position	Tippion	ur cute <u>r</u>		it Empi							
umber	Job Red	cord, ST	NWJB	0.00				- - - - -			
	Search	New Job	Rosition	Sumix	Little	Time Sneet 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	0
	All Job Next A	5 pproval Ty	/pe Go			New	EPAF	1		t	
	RELEAS	SF: 8.9.0	.3			Return to E	PAF 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 SEL	F-SERVICE BANNER						
Personal Information Student Services Employee							
Search Go	RETURN TO EMPL	OYEE MENU SITE MAP HELP EXIT					
Electronic Personnel Action Form							
Renter the information for the EPAF and e	ither Save or Submit.						
Name and ID:							
Transaction:	Query Date: May 18, 2018						
Transaction Status:							
Approval Category: Hiring for Student En	nployee, SEHIRE						
Save							
	Approval Types Account Distribution Routir	g Queue Comments Transaction History					
	New EPAF EPAF Or	iginator Summary					
	n to El	PAF Menu					
Jump to Bottom	Confirm date of personnel						
+ - indicates a required field	action matches first						
	working day						
New Student Employee Record	working day						
Itom	Current Value						
Current Hire Date: MM/DD/YYYY		<u>19 Form Indicator Status Key</u> :					
IO Form Indicator: (Not Enterable)	Deceived	Has completed paperwork:					
		- T- temporary					
Home Organization: *(Not Enterable)		- R- received					
Home COAS: *(Not Enterable)	T T	Has not completed paperwork:					
Employee Class Code: *(Not Enterable) SS, Students SS	- Blank					
Employee Status: * (Not Enterable)	Active	- Not received					
Job Record, CS0002-01 Stude	nt Worker						



FOAP defaults from the entered position code

- a. Verify correct FOAP numbers before continuing
- b. <u>Recommendation</u>: 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	n
75 - (FINAPP) FA Student Worker Apply	RLANE2024	Roger Douglass Lane	Apply	
Not Selected	٩		Not Selected	~
Not Selected 🗸	٩		Not Selected	~
Not Selected	٩		Not Selected	~
Not Selected	٩		Not Selected	~

Save and Add New Rows

Comment

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	
Save	Approval Types Account Distribution Routing Queue Comments Transaction History
teturn to top	New EPAF EPAF Originator Summary

- 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:	
Transaction:	9900
Transaction State	us: Waiting
Approval Categor	ry: Hiring for Student Employee, SEHIRE
Save Submit	Delete
	Approval

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

Туре	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

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

COLORA COLLEG	SELF-SERV	CE BANNER
Personal Information	Student Services Employee	
Search	Go	RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT
Electronic Perso	onnel Action Form	
The transaction has The transaction has Enter the Information Name and ID: Transaction: 994 Transaction Status: Ap Approval Category: Hir	been successfully submitted for the EPAF and either Save or 9 00 proved ing for Student Employee, SEHII	Submit Job and Suffix: C50002-01, Student Worker Query Date: May 18, 2018 Last Paid Date: RE
	Аррго	New EPAF EPAF Originator Summary
2		Return to EPAF Menu
Jump to Bottom		
Errors and Warning I	Messages	
Type Message T	*WARNING* Total ETE for	r this position is greater than budgeted ETE
Job Record WARNING	*WARNING* Encumbran	re 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



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



3) On the next screen select the Employee link

earch	Go	
4ain Menu		
Personal Inform View addresses and p Student Service Search the Catalog an	Iation hones, ethnicity and race information, and change your PIN. 25 Id Class Schedule, view Class Lists and Student Information	
Employee	data, paystubs and W4.	

4) Select the last link labeled EPAF

COLORADO COLLEGE	SELF-SERVICE BANNER
Personal Information Student	Services Employee
Search Go	
Employee	
Pay stubs and earnings/deductions history	<i>.</i>
Leave Balances	
Benefits and Deductions Retirement, health, flexible spending, miss	cellaneous, benefit statement.
Tax Information W2 Forms and W4 Data.	
Current Job	
Time Sheet	
Leave Report	
Supervisor Leave Report Liste all employees current leave balances	
EPAF	
Employee Personnel Action Form	
RELEASE: 8.8	

5) Select the link for New EPAF

SELF-SERVICE BANNER
Personal Information Student Services Employee
Search Go
Electronic Personnel Action Form
EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy
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- 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), SEPROM
 - 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.



$\mathbf{D}0$	not	CHCK	

Personal Information Student Services Employee Search Go	SITE MAP HELP EXIT
Person Search	
Check the box to limit the search to an Employee. Enter the Last Name and or First Name, or enter wildcard.	er an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a
Search Criteria Employee: Last Name: First Name: Or ID: Or SSN/SIN/TIN:	 The following <i>Person Search</i> query screen will display: Check the 'Employee' box. Enter the last name and/or first name or SSN if known. Click the 'Go' button.
Records per Page: 25 V Go New EPAF	Menu

- 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, SEPROM)
 - > Once the information is complete, select the GO button.

COLORADO SELF-SERVICE BANNER
Personal Information Student Services Employee
New EPAF Person Selection
Renter 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: * Promotions must go in effect at the beginning of a new pay period
Query Date: MM/DD/YYYY * 05/30/2018
Approval Category: * Not Selected
EPAF Approver Summary EPAF Originator Summary
Return to EPAF Menu
RELEASE: 8.9.0.3
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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.

	COLC	RADO EGE	SEL	-F-SERVICE	BANI	NER					
Persona	al Informati	on Student S	Services	Employee							
Search		Go							RETU	RN TO EN	IPLOYEE MI
New	EPAF Jo	b Select	ion								
🔍 Enter	or search fo	r a new positio	on numb	er and enter the suffix	, or select	t the link under Title.					
ID:											
Ouerv	Date:	May 30. 2	2018								
Approv	al Catego	ry: Student E	mployr	ment Promotion, SEI	ROM						
	-	•									
Studen	t Employe	e Promotior	n, STPI	ROM							
Search	Туре	Position	Suffix	Title	Time Sh	eet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job										0
-	Primary	CS0002	00	Student Intern I FA	180051,	Financial Aid Office	Sep 25, 2017		Apr 21, 2018	Active	
	Secondary	CS0002	01	Test	180051,	Financial Aid Office	May 18, 2018			Active	0
All Jobs	s										
Go	- 17										
						New ED	AF				
						Return to EP/	AF Menu				
RELEAS	E: 8.9.0.3										

- 9) On the next screen, you will have the option the 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:**RLANE2024**

	Enter the information for the EPAF and	d either Save or Subm	nit.						
	Name and ID:								
	Transaction:			Query Date: May 30, 2018					
	Transaction Status:			Last Paid Date: Apr 21, 2018					
	Approval Category: Promotion for Stud	Jent Employee (Job 11	itle & Hourly Rate), S	SEPROM					
	Jave								
		Ap	pproval Types Routi	ing Queue Comments Transaction History					
			New EPA	AF EPAF Originator Summary					
	Jump to Bottom			Return to EPAF Menu					
	Jump to Bottom								
	 indicates a required field. 	* - indicates a required field.							
	Student Employee Promotion	n, CS0002-00 S	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 F	FA Student Intern I	II					
	Step: *(Not Enterable)	0	2						
	Joh Change Beagens - (Not Enterable	2) 00021	00005						
	Job change Reason. *(Not Enterable								
	Job Change Reason. *(Not Enterable								
	Routing Queue								
	Routing Queue	User Name			Required Actio	n			
ame is:	Approval Level 75 - (FINAPP) FA Student Worker Apply	User Name		Kristen Elizabeth Clinton	Required Actio	n			
ame is: JE2024	Approval Level 75 - (FINAPP) FA Student Worker Apply Not Selected	User Name Q K <u>KCLINTON</u>		Kristen Elizabeth Clinton	Required Actio	n V			
ame is: 1E2024	Approval Level 75 - (FINAPP) FA Student Worker Apply Not Selected Not Selected	User Name		Kristen Elizabeth Clinton	Required Actio Apply Not Selected Not Selected	n ~			
ame is: VE2024	Approval Level 75 - (FINAPP) FA Student Worker Apply Not Selected Not Selected Not Selected	User Name Q KCLINTON VQ VQ		Kristen Elizabeth Clinton	Required Actio Apply Not Selected Not Selected	n ~ ~			

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

Comment	
Save	Approval Types Account Distribution Routing Queue Comments Transaction History
Return to Top	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"
 - a. 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.
 - b. If only warnings appear your transaction has successfully completed and these warnings can be ignored

COLORADO SE	LF-SERVICE	BANNER	
Personal Information Student Service	s Employee		
Search Go			RETURN TO EMPLOYEE MENU
Electronic Personnel Actio	on Form		
✓ The transaction has been successf ■ Enter the information for the EPAF and	<i>ully submitted.</i> I either Save or Submit		
Anne and 1D. Jerreir Hichael Cock	kerham, 175722	Job and Suffix: CS0002-00, Student Inter	n I FA
Transaction: 9940		Query Date: May 30, 2018	
Transaction Status: Approved		Last Paid Date: Apr 21, 2018	
Approval Category: Promotion for Stud	ent Employee (Job Title	& Houriy Rate), SEPROM	
	Approval	Types Errors Routing Oueue Comments Transaction History	
		New EPAF EPAF Originator Summary	
		Return to EPAF Menu	
Jump to Bottom			
Errors and Warning Messages			
Type Messag	je Type Description		
Student Employee Promotion WARNI	NG *WARNING*	Encumbrance Method is Value Input and salary has changed.	
 Indicates a required field. 			
Student Employee Promotion	, CS0002-00 Stu	udent 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	
Pouting 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)

	ADO 1874 s E Athle
About CC Admission Academics Ca	mpus Life 🔻 News & Events 👻 Giving & Connec
Sign into CC	
Access these Colorado College services with your mai	n CC username and password.
Email (Office 365)	ਹਿ≣ INB (Prod)
Events Management	E Canvas
ब्रिड Banner (SSB)	Summit
CON Employment Portal	ा्र्ा Handshake
To sign out , close down the browser session complet	For internal use only: <u>Banner TEST SSB and INB</u> elv (all tabs)

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

COLORADO SELF-SERVICE BANNER
Personal Information Student Services Employee
Search Go
Main Menu
Personal Information
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

COLORADO 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
EPAF
Employee Personnel Action Form
RELEASE: 8.8

5) Select the link for New EPAF

	COLORADO SELF-SERVICE BANNER
	Personal Information Student Services Employee
	Search Go
	Electronic Personnel Action Form
	EPAF Approver Summary
	EPAF Originator Summary
\langle	New EPAF
	EPAF Proxy Records
	Act as a Proxy
	RELEASE: 8.12.1.5 © 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.

- > 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.



COLORADO SELF-SERVICE BANNER	
Personal Information Student Services Employee	
Search Go	SITE MAP HELP EXIT
Person Search	
Check the box to limit the search to an Employee. Enter the Last Name and or First Name, o wildcard.	or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a
Search Criteria Employee: Last Name: First Name: Or ID: Or SSN/SIN/TIN: Records per Page: 25 V	 The following <i>Person Search</i> query screen will display: Check the 'Employee' box. Enter the last name and/or first name or SSN if known. Click the 'Go' button.
Go New Return to I	EPAF EPAF Menu
RELEASE: 8.12.1.5	
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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) \triangleright

Personal Information Student Services Employee Search Go New EPAF Person Selection	
Search Go New EPAF Person Selection	
New EPAF Person Selection	
The enter an ID, select the link to search for an ID, or generate an ID. En	ter the Query Date and select the Approval Category. Select C
+ - indicates a required field.	
ID: *	
Ouery Date: MM/DD/YYYY* 05/30/2018	Student's last working day
Approval Category: * Not Selected	
Go	
EPA	F Approver Summary EPAF Originator Summary
	Return to EPAF Menu

*If the TERM EPAF is being submitted a significant period of time (months-years) after the student has stopped working, there are likely new job records that will prohibit the TERM EPAF from submitting properly. If you receive an error message when trying to submit contact student employment.

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 SELF-SERVICE BANNER									
Persona Search	Personal Information Student Services Employee Search Go RETURN TO EMPLOYEE MENT									
New	New EPAF Job Selection									
👎 Enter	Renter or search for a new position number and enter the suffix, or select the link under Title.									
ID:	Data	May 21	2018							
Approv	Query Date: May 31, 2018 Approval Category: Student Employment Termination, SETERM									
Studen	t Employe	e Terminat	tion, ST	TERM			- 10 1			
Search	New Job	Position	Sumix	Title	Time Sneet Organization	Start Date	End Date	Last Paid Date	Status	Select
-	Primary	CS0002	00	Student Intern I FA	180051, Financial Aid Office	Sep 25, 2017		Apr 21, 2018	Active	•
	Secondary	CS0002	01	Test	180051, Financial Aid Office	May 18, 2018			Active	0
All Job	s	12				ŝ.	3			
Go										
					New EP	AF				
					Return to EP/	AF Menu				
RELEAS	SE: 8.9.0.3	3								
© 2018	© 2018 Ellucian Company L.P. and its affiliates.									

- 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:RLANE2024

	COLORADO SELF-SE	RVICE BANNER		
	Personal Information Student Services Emplo	yree		
	Search			
	Electronic Personnel Action For	m		
	Enter the information for the EPAF and either Same	ve or Submit.		
	Name and ID: Transaction:	Query Date: May	31, 2018	
J	Transaction Status: Approval Category: Termination for Student Emp	Last Paid Date: Apr 2	21, 2018	
·	Save			
			Approval Types Routing Queue Comments Transaction New EPAF EPAF Originator Summary Return to EPAF Menu	History
	Jump to Bottom			
	* - indicates a required field.	coco oo chidaat Intera I E	· · · · · · · · · · · · · · · · · · ·	
	Student Employee Termination, CSU	J002-00 Student Intern I F	A, Last Paid Date: Apr 21, 2018	
	Item Current Jobs Effective Date: MM/DD/YYYY 12/22/20	Value New Value 017 05/31/2018	Student's last working day.	
	Job Status: (Not Enterable) Active	T	* Must be after last paid date.	
	JOD Change Reason. (Not Enterable) 00022	00012		_
username is:	Routing Queue			
ubername is.	Approval Level User N 75 - (FINAPP) FA Student Worker Apply	lame	en Flizabeth Clinton	Required Action
RLANE2024	Not Selected			Not Selected V
	Not Selected			Not Selected V
	Not Selected			Not Selected V
	Not Selected			Not Selected *
There should only	Save and Add New Kows			
be ONE row rilled	Comment			
out for the Approval		0		
Level.			Accurate Turses Positing Queue Comments Transaction	Paten
, Q	Save		Abbrover Libber Livering Greeke Loommenter Liveringereen.	history

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	Approval Types Account Distribution Routing Queue Comments Transaction History
Return to Top	New EPAE EPAE 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 Go							
	Electronic Personnel Action Form							
	The transaction has been successfully submitted Enter the information for the EPAF and either Save or Submit							
	Name and ID: Job and Suffix: CS0002-00, Student Intern I FA Transaction: 9941 Query Date: May 31, 2018 Transaction Status: Approved Last Paid Date: Apr 21, 2018 Approval Category: Termination for Student Employees, SETERM							
	Approval Types Routing Queue Comments Transaction History New EPAF EPAF Originator Summary Return to EPAF Manu							
	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							
	Approval Level User Name	Required Action Rem						
isername is:	75 - (FINAPP) FA Student Worker Apply	Apply						
RLANE2024	Not Selected VQ	Not Selected V						
	Not Selected VQ	Not Selected V						
	Not Selected	Not Selected V						
	Not Selected VQ	Not Selected V						
	Comment							

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.

COLLEGE SELF-SERVICE BANNER
Personal Information Student Services Employee
Search Go
Electronic Personnel Action Form
EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy RELEASE: 8.12.1.5
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2) You will see the following screen showing the current transactions pending approval or returned for correction

A REAL PROPERTY AND A REAL							
EPAF Originator Sun	nmary						
Current History							
Select the link under Name to	access det	ails of the transact	ion, or select the link under Transaction to update the tran	nsaction.			
Transaction Status: All Return for	Correction	Go					
		N	lew EPAF Default Routing Queue Search Superuser or	Filter Transactions			
			Return to EPAF Menu				
1 - 1 of 1							
Jump to Bottom							
EPAF Transactions							
<mark>▲ Name</mark> ▼	▲ ID ▼	A Transaction ▼	▲ Type of Change ▼	A Submitted Date ▼	▲ Effective Date	▲ Transaction Status ▼	, Links
Student Shop Crew, IS0015-00		9881	Promotion for Student Employee (Job Title & Hourly Rate)	May 14, 2018	May 14, 2018	Return for Correction	Comments Warnings
1 - 1 of 1							
Return to Top							
**Comments Exist							
		N	lew EPAF Default Routing Queue Search Superuser or	Filter Transactions			
			Return to EPAF Menu				
RELEASE: 8.12.1.5							

- 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.

1 - 13 01 13						
Jump to Bottom EPAF Transactions						
≜ Name ⊽	A ID ▼	▲ Transaction ▲ Type of Change	▲ Submitted Da	te≜ Effective Dat ⊽	$e \stackrel{\triangle}{\nabla}$ Transaction S	Status Links
			Oct 29, 2014	Oct 29, 2014	Completed	Warnings
			Oct 29, 2014	Oct 29, 2014	Completed	Warnings
			Oct 29, 2014	Oct 29, 2014	Completed	**Comments Warnings
			Oct 30, 2014	Aug 17, 2015	Completed	Warnings
			Oct 30, 2014	Aug 17, 2015	Approved	Comments Errors

□ 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

Status	Definition
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. Originators will be emailed for notification of EPAF return.
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