Electronic Personnel Action Forms

STOCKTON UNIVERSITY

Table of Contents

Types of ePAFs 1

Frequently Asked Questions & Helpful Hints 2

ORIGINATORS

How to Set Up Default Routing 4

Viewing the Payroll Calendar 5

Supplemental Payment Request Guidelines 6

Employee/Staff Supplemental ePAF 9

Student New Hire ePAF 12

Student Rehire/Reactivate/Change in Pay Rate ePAF 15

Federal Work Study New Hire ePAF 18

Federal Work Study Rehire/Reactivate/Change in Pay Rate ePAF 21

Student Grant Position New Hire ePAF 24

Student Grant Position Rehire/Reactivate/Change in Pay Rate ePAF 27

Terminating a Non-Federal Work-Study Student Employee ePAF 30

Submitting a Saved ePAF or Resubmitting a Returned ePAF 31

APPROVERS

Approving an ePAF 32

How to Set Up a Proxy 35

What is an ePAF?

The Electronic Personnel Action Form (ePAF) allows the university to process paperless personnel actions with an electronic approval process through Self Service Banner. The ePAF replaces the TES form for student workers, and an end user will have the ability to create specific ePAFs depending on their role/group within the system. There are different levels of approvals depending on the type of ePAF that is being submitted. This manual provides instruction and information on student worker ePAFs and employee supplemental ePAFs only.

Participants in the ePAF Process

- Originator – the end-user that begins the process by filling out a new ePAF.
- Approver – reviews and takes action on the ePAF. An Approver can move the ePAF forward towards completion or take other necessary actions to have the ePAF corrected or stopped.
- Applier – this will always be someone from Payroll. The Applier applies the approved ePAF to the Banner database.
- Proxy – is assigned by an Approver or Superuser to do their work for them while they are absent.

Types of ePAFs

- Student New Hire (STNWHR) – has NEVER worked on campus before
- Student Rehire/Reactivate (STRSPT) – student who does/has worked on campus before
- Federal Work Study New Hire (WSTDYN)
- Federal Work Study Rehire/Reactivate (WSTUDY)
- Student Grant Position New Hire (STGRNW)
- Student Grant Position Rehire (STGRRE)
- Faculty/Staff/Adjunct Supplemental BW – 12-month employee (SUPPBW)
- Faculty/Staff Supplemental BT – 10-month employee (SUPPBT)
- Supplemental for Grant Fund BW – 12-month employee (SUPGBW)
- Supplemental for Grant Fund BT – 10-month employee (SUPGBT)
- Terminating a job from a student employee (STTNRM)

Frequently Asked Questions & Helpful Hints

When is an ePAF due?

Review the Payroll calendar, locate the specific pay period you want your ePAF to be effective by, and the due date will be listed under the column titled "Fully Approved ePAFs Due."

How do I view an ePAF that has been submitted?

Once logged into the ePAF Main Menu, click on the ePAF Originator Summary. Any ePAFs listed in the Current tab are ePAFs that have not been submitted or returned to you. Click on the History tab to view ePAFs that have been submitted. Click on the person's name to open the ePAF to view the details and Routing Queue.

What do the different statuses of an ePAF mean?

- **Waiting**: The ePAF has not been submitted and needs to be updated and submitted or deleted.
- **Pending**: The ePAF has been submitted but has not yet been fully approved.
- **Disapproved**: The ePAF cannot move forward.
- **Voided**: The ePAF has been removed from all approval queues and will remain in the originator's history.
- **Returned for Correction**: The ePAF must be corrected and resubmitted.
- **Approved**: The ePAF has been fully approved but not yet applied by Payroll.
- **Completed**: The ePAF has been fully approved and applied by Payroll.

What do I do when I receive warning messages after submitting my ePAF?

All warning messages can be ignored as your ePAF will be submitted regardless of any warning messages that are received. Only error messages will prevent you from submitting your ePAF.

I submitted an ePAF then realized I need to make a change to it. What do I do?

From your ePAF Originator Summary, click on your History tab and open the ePAF that needs to be corrected. Click on the Return for Correction button. The ePAF will then be moved to the Originator Summary > Current tab. The Originator can then update the ePAF/make changes and then resubmit.

Who should I select for some of the approval levels?

In addition to your Budget Unit Manager and Divisional Executive, there are additional approvers that will need to be selected depending on the type of ePAF you are submitting.

Employee/Staff Supplemental BW & BT (includes grants)

- Grant Accounting Manager – Ann Marie White (only needed for grants)
- Supplemental Reviewer – Academic Affairs: Kelly Oquist, All Other Depts: Terricita Sass
- Human Resources – Tristan Stoltzfus
- Payroll Appr Review – Thomas Morgenweck
- Payroll – Thomas Morgenweck

Student New Hire/Returning Student

- Budget Department – Diane Garrison
- Human Resources TA – Diane Lamezec (only needed for new hires)
- Payroll Student – Thomas Morgenweck

New Hire Federal Work Study/Federal Work Study Reactivate

- Budget Department – Diane Garrison
- Financial Aid – Angelica Velez
- Human Resources – Diane Lamezec (only needed for new hires)
- Payroll Student – Thomas Morgenweck

Student Grant Position New Hire/Returning

- Grant Accounting Manager – Ann Marie White
- Human Resources TA – Diane Lamezec (only needed for new hires)
- Payroll Student – Thomas Morgenweck

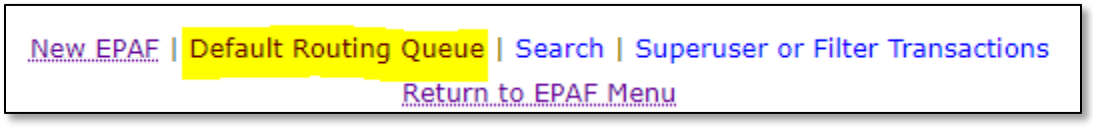
Terminate/Remove Student in Position

- Payroll Student – Thomas Morgenweck

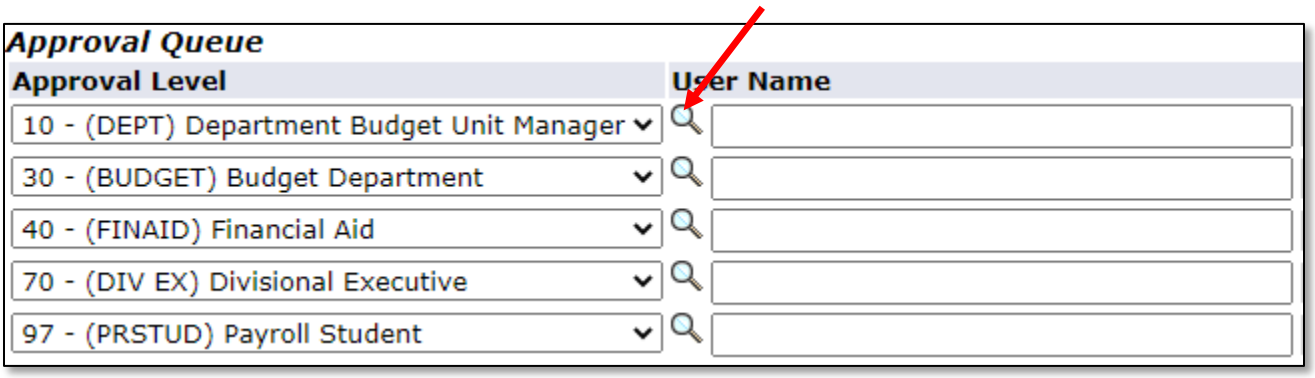
How to Set Up Default Routing

All ePAFs are routed electronically for approval and the approval levels are dependent upon the type of ePAF being submitted. The last step for all ePAFs is for Payroll to apply the requested change.

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab > ePAF Main Menu > ePAF Originator Summary.
3) Click on Default Routing Queue.



4) Select the Approval Category from the drop-down menu then click Go.
5) The Approval Level fields will populate based on the chosen Approval Category.
6) Select the appropriate person for each approval level by clicking on the magnifying glass, click on a name, and then click Select. Refer to the FAQ to see who should be selected for some of the approval levels.



7) Click on Save and Add New Rows. You will receive a message that your change was saved successfully.

Viewing the Payroll Calendar

Refer to the payroll calendar in order to assign the effective date and end date on an ePAF, as well as check when the ePAF is due for a specific pay period.

1) Log into the Stockton portal, click on the Employee tab, then click on the link for the Payroll Calendar under the "Other Links" section.

2) Review the "From" column under the heading *Pay Period* to ensure you are selecting an appropriate effective date on the ePAF.

   a. **Effective Date**: First Day of Pay Period

PR	PAY PERIOD	
	From	To
1	12/19/2020	1/1/2021
2	1/2/2021	1/15/2021
3	1/16/2021	1/29/2021

   b. If you are submitting an ePAF to terminate a job from a student employee, your effective date will be the last day of the pay period (listed in the "To" column).

3) Review the "Fully Approved ePAFs Due" column to see the due date of your ePAF for a specific pay period.

SUPPLEMENTAL PAYMENT REQUEST GUIDELINES

Step 1. Identify the type of supplemental payment.

A. Supplemental payment for completing a project or guest speaker

BEFORE employee starts the project, the following must be completed:

- Written approval from BUM, DE and immediate supervisor;
- Written approval from HR confirming compensation rate calculations is correct and no conflicts with the employee's union contract;
- Funding must be secured.

B. Supplemental payment for taking on "out of title" extra duties for an employee who is on leave

BEFORE employee performs extra duties, the following must be completed:

- Written approval from BUM, DE and immediate supervisor;
- Written approval from HR confirming compensation rate calculations, supplemental timeframe, and compliance with the employee's union contract. Please note, if extra duties are within the scoop of the employees' current position, the employee will not qualify for a supplemental payment;
- Funding must be secured.

C. Supplemental payment for performing "out of title" extra duties for a vacant position currently being searched

BEFORE employee starts the project, the following must be completed:

- Written approval from BUM, DE and immediate supervisor;
- Written approval from HR confirming compensation rate calculations, supplemental timeframe, and compliance with the employee's union contract. Please note, if extra duties are within the scoop of the employees' current position, the employee will not qualify for a supplemental payment;
- Funding must be secured.

D. Supplemental payment for Grant related work

BEFORE employee starts the project, the following must be completed:

- Must go through the Office of Sponsored Research and Programs (postaward@stockton.edu).

E. Supplemental payment for teaching a non-credit class or training course

BEFORE employee starts the project, the following must be completed:

- Approval from BUM, DE and immediate supervisor;
- Funding must be secured.

F. Supplemental payment for summer institutes and summer orientation (covered by MOA)

- No pre-approval required, ePAF can be submitted (in comment section of ePAF you must note **"request # not required due to payment being covered under union negotiated MOA).**

G. <u>Supplemental payment for Managers</u>

BEFORE employee starts the project, the following must be completed:

- Written approval from BUM, DE, immediate supervisor;
- Written from President or Executive Vice President & Chief of Staff (does not require HR approval);
- Funding must be secured.

Once you have identified the type of supplemental payment, secured the required written approval, funding is in place, and you have your position number, you can submit the supplemental payment request form through the payroll website.

Step 2. Submit a supplemental payment request form

Log into your Stockton portal, click on employee tab > payroll > forms > supplemental pay request form.

A. Employee Information

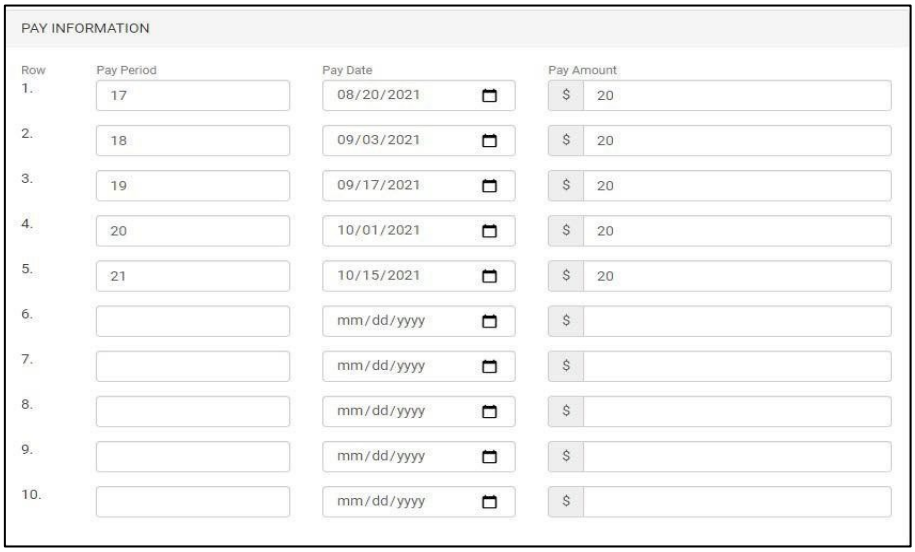
- Enter the employees name who will receive the supplemental payment;
- Enter the employee Z#;
- Enter the Divisional Executive who will be responsible for the funding - select from the drop-down;
- Enter the Budget Unit Manager's email who is responsible for the funding;
- If the BUM entered is not the employee's immediate supervisor, you MUST copy their direct supervisor by clicking on "add another cc address" and enter their email address;
- If supplemental is grant funded, you must check the box (an email will go to the postaward@stockton.edu).
- If supplemental will be paid by foundation, you must check the box (an email will go to Dan Nugent (DE for foundation) & Sandy Leone (processor).

B. Purchase Information

- Select the employee's union affiliation (if you do not know the employee's union affiliation, please contact Human Resources);
- Enter the rate amount, which is either hourly rate, per credit rate, or one lump sum rate;
- Enter the hours/credit/# of pay period(s) amount (if lump sum, enter 1);
- Select the semester from the drop-down;
- Enter the fiscal year;
- Enter the total amount to be paid (ex: 5 payments of $20, total amount to enter = $100);
- Enter the FOAPAL (ex: 110005/110001/613306/60);
- Enter the position number;
- In the justification for supplemental pay field, **you must provide description of project or job duties with the dates performed and completed.**

C. Pay Information

- Reference the payroll calendar to obtain deadlines for PP and pay date(s)
- Enter the pay period number;
- Enter the pay date;
- Enter the amount (amount to be paid for that specific pay period) see example below:


PAY INFORMATION

Row	Pay Period	Pay Date	Pay Amount
1.	17	08/20/2021	$ 20
2.	18	09/03/2021	$ 20
3.	19	09/17/2021	$ 20
4.	20	10/01/2021	$ 20
5.	21	10/15/2021	$ 20
6.		mm/dd/yyyy	$
7.		mm/dd/yyyy	$
8.		mm/dd/yyyy	$
9.		mm/dd/yyyy	$
10.		mm/dd/yyyy	$

D. Attach PDF file

- Upload any backup related to the supplemental payment request (ex: HR written approval, job duties, President's written approval).

E. Submit Request

- Click on the blue Submit Request button.

Step 3. Once submitted, you will receive an email confirmation and your request will be reviewed and approved by the following:

- Budget Unit Manager (BUM)
- Employee's direct supervisor (if BUM is not direct supervisor)
- Divisional Executive
- Human Resources (if required)
- Supplemental Reviewer (Kelly Qquist for Academic Affairs and Theresa Marinelli for President's office)

Step 4. Once all above email approvals are provided, submit a supplemental ePAF. Please refer to the ePAF manual for instructions; the link is provided below.

https://www.stockton.edu/payroll/documents/ePAF_Manual.pdf

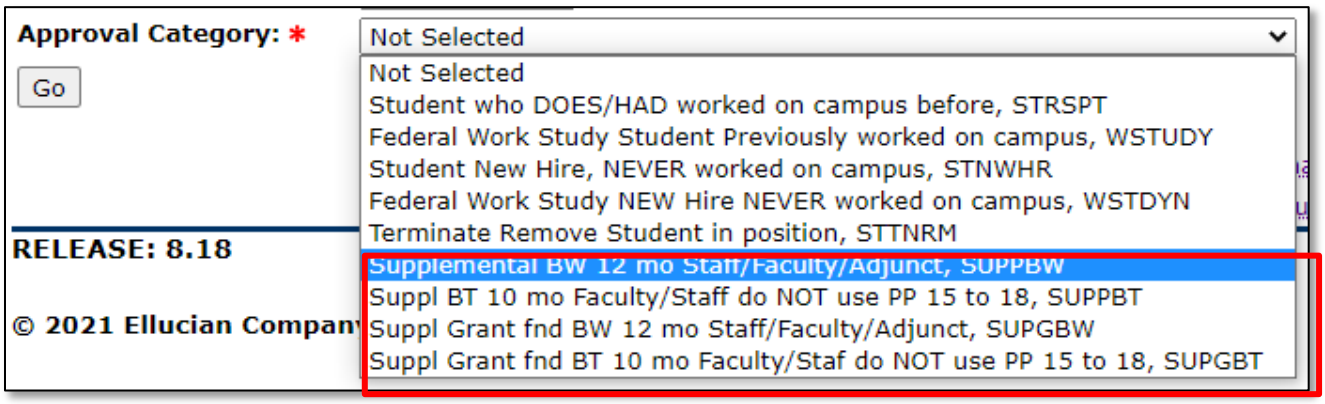
Employee/Staff Supplemental ePAF

What information is needed to complete the ePAF?

- ✓ Effective Date - this is the start date of the pay period the employee will be compensated. This date must be the first day of the current pay period or for future pay periods.
- ✓ End Date – first day of the next pay period
- ✓ Request number generated from your approved supplemental pay request form
- ✓ Employee name or Z#
- ✓ Position Number – must be a valid position number. ePAFs with wrong position numbers will be disapproved and a new ePAF will need to be created.
- ✓ Total amount to be paid per period

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab > ePAF Main Menu > New ePAF.
3) Input the Z# (include the Z) or click on the magnifying glass to use the search function to search by name.
4) Query date defaults to the date you are starting the form. **YOU MUST CHANGE THE YEAR TO THE PREVIOUS YEAR.**

5) On the Approval Category field, select the appropriate supplemental category and click Go.
Note – All employees should be entered as BW (12-month) for pay periods 15 – 18.



6) Click All Jobs and all previous position numbers for this employee will populate. Check to see if the position number you are looking for is listed.

7) If this is a new position number for the employee, input the position number and **the suffix, which will always be 00**, then click Go, or…

Supplemental BW 12 mo Staff / Faculty, SUPPBW

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									

…select an existing position number and click Go.

Supplemental BW 12 mo Staff / Faculty, SUPPBW

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									
	Secondary	GH0572	S3	Special Session	330005, Admissions	Jul 04, 2020	Aug 15, 2020	Aug 14, 2020	Active	
	Secondary	GH0598	00	Adjunct Supplemental	440005, Institutional General	Aug 29, 2020	Dec 19, 2020	Dec 18, 2020	Active	

Selecting an existing position number

8) Refer to the current payroll calendar to fill in the jobs effective date, which is the first day of the pay period the employee will be compensated.

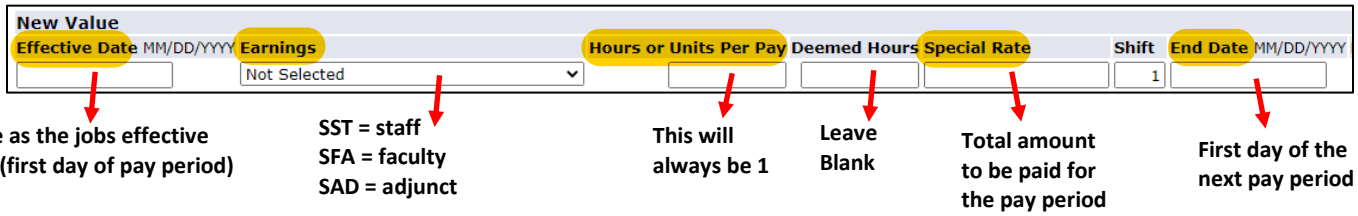
   a. <u>The Job Begin Date is required if you entered a new position number and must be the same as the Jobs Effective Date</u>. If you did not enter a new position number, leave this field blank.

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		
Jobs Effective Date: MM/DD/YYYY*		
Contract Type: *(Not Enterable)		S
Job Status: *(Not Enterable)		A
Employee Class Code: (Not Enterable)		
COA Code: *(Not Enterable)		1
Payroll Id: *(Not Enterable)		BW
Accrue Leave: *(Not Enterable)		N
Hours per Pay: *(Not Enterable)		1
Annual Salary: *(Not Enterable)		0
Regular Rate: *(Not Enterable)		0
Time Entry Method: *(Not Enterable)		P

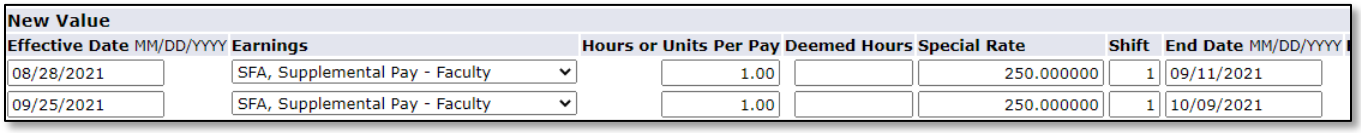
Only required if a NEW position number was entered

First day of pay period the employee will be compensated

9) Scroll down to the Default Earning section and input the following:



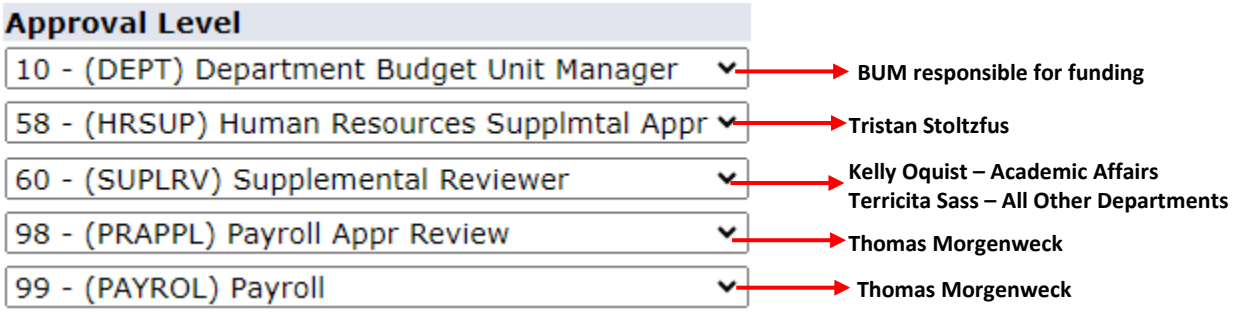
You may enter additional lines for payments to be made for future pay periods (see example below), but please email Payroll and cc your BUM and Supplemental Reviewer if a payment ever needs to be cancelled.



New Value

Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY
08/28/2021	SFA, Supplemental Pay - Faculty	1.00		250.000000	1	09/11/2021
09/25/2021	SFA, Supplemental Pay - Faculty	1.00		250.000000	1	10/09/2021

10) Scroll down to the Routing Queue and select the routing information shown below. If you have set up default routing for this type of ePAF, your approvers should have prepopulated, but you can still make changes if needed by using the Search option. The Grant Accounting Manger approver (Ann Marie White) will only appear if you chose a grant Approval Category.



11) **Comments are required**. The fully approved pre-approval request number must be noted in the comment section or the ePAF will be returned.

12) After you have added your comments, click Save – <u>you must always save your EPAF before submitting it</u>.

13) If you are ready to send the ePAF, click on Submit. <u>Any warning messages can be ignored, but any ERROR messages must be corrected</u>. If you receive an error message, make the necessary corrections, click Save then Submit. You will see the message below confirming the ePAF was successfully submitted, and the transaction status will show as pending.

Student New Hire (has never worked on campus) ePAF

Steps that need to be taken prior to completing the Student New Hire ePAF:

- ✓ Student completes application
- ✓ Department emails Human Resources with the names of the student(s).
- ✓ HR sends an email to the student(s) with a link to the onboarding forms.
- ✓ Students complete first part of I-9, department completes second part of 1-9.
- ✓ Process ePAF

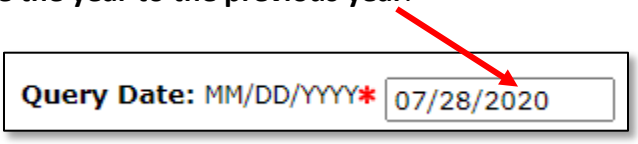
What information is needed to complete the ePAF?

- ✓ Student Z# or name
- ✓ Date the I-9 was verified
- ✓ Job effective date (first day of the pay period the student will start working)
- ✓ Position number (received from Budget Dept.)
- ✓ Rate of pay
- ✓ Timesheet org
- ✓ Time entry method

Creating a Student New Hire ePAF

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab > ePAF Main Menu > New ePAF.
3) Input the Z# (include the Z) or use the search function to search by name.

4) The query date defaults to the date you are starting the form. <u>The query date must be earlier than or equal to the effective date for the job</u>. To ensure that the query date is earlier than the effective date, **change the year to the previous year**.



5) On the Approval Category field, select code **STNWHR** for a student new hire, then click Go.

6) Input the position number, **suffix will always be (00)**, then click GO.

7) Input the required information highlighted below.

Employee Time Entry via Web = Web Time Entry
Third Party with Approvals = Timeclock Plus

Hourly rate of pay

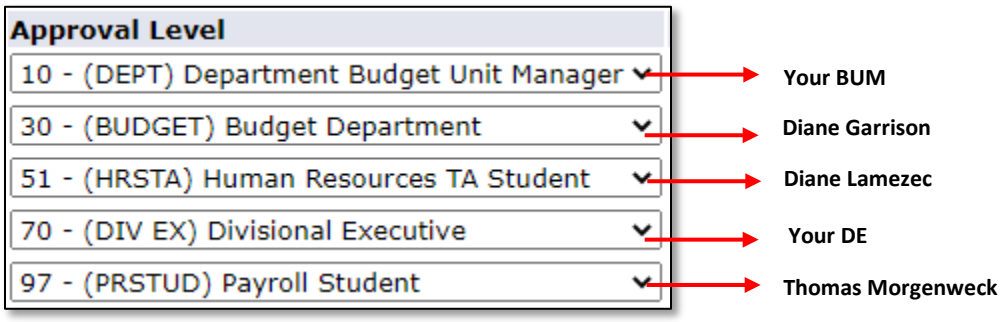
Select Received

Date the I9 was verified

Item	Current Value	New Value
Employee Status: *(Not Enterable)		A
Regular Rate: *		
Employee Class Code: *(Not Enterable)		SA
Timesheet Orgn: *		
Time Entry Method: *		Not Selected
I9 Form Indicator: *		Not Selected
I9 Date: MM/DD/YYYY*		
Current Hire Date: MM/DD/YYYY*		
Benefit Category: *(Not Enterable)		IN
Leave Category Code: *(Not Enterable)		IB
Home COAS: *(Not Enterable)		1
Distribution COA: *(Not Enterable)		1
Distribution Orgn: *		
Home Organization: *		
District Code: *		Not Selected
Location Code: *		Not Selected
Original Hire Date: MM/DD/YYYY*		
Adjusted Serv. Date: MM/DD/YYYY*		
Job Begin Date: MM/DD/YYYY*		
Step: *(Not Enterable)		0
Seniority Date: MM/DD/YYYY*		
FT/PT Status: *(Not Enterable)		O
Jobs Effective Date: MM/DD/YYYY*		
Job Status: *(Not Enterable)		A
Contract Type: *(Not Enterable)		P

The current hire date, original hire date, adjusted service date, job begin date, seniority date, and jobs effective date <u>must all be the same date</u> – the first day of the pay period the student will start working.

8) Scroll down to the Routing Queue and select the routing information shown below. If you have set up default routing for this type of EPAF, your approvers should have prepopulated, but you can still make changes if needed by using the Search option.



9) **Comments are required.** Input the name of the person who will be approving the student's timesheet. After you have added your comments, click Save – <u>you must always save your EPAF before submitting it</u>.

10) If you are ready to send the ePAF, click on Submit. Any warning messages can be ignored, but <u>any ERROR messages must be corrected</u>. If you receive an error message, make the necessary corrections, click Save then Submit. You will receive the message below confirming the ePAF was successfully submitted, and the transaction status will show as pending.

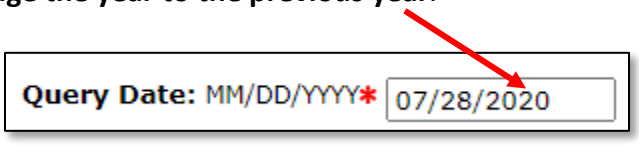
Student Rehire/Reactivate/Change in Pay Rate ePAF

What information is needed to complete the ePAF?

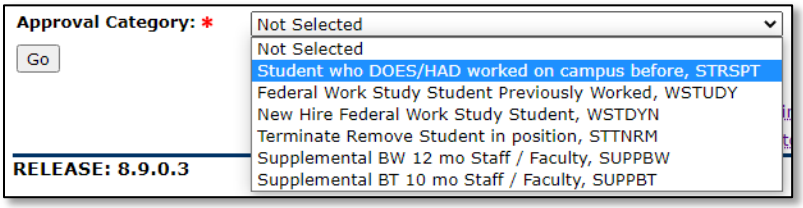
- ✓ Student Z# or name
- ✓ Job effective date (first day of the pay period the student will start working)
- ✓ Position Number (received from Budget Dept.)
- ✓ Rate of pay
- ✓ Timesheet org
- ✓ Time entry method

Creating a Student Rehire ePAF

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab > ePAF Main Menu > New ePAF.
3) Input the Z# (include the Z) or use the search function to search by name.
4) The query date defaults to the date you are starting the form. The query date must be earlier than or equal to the effective date for the job. To ensure that the query date is earlier than the effective date, **change the year to the previous year**.



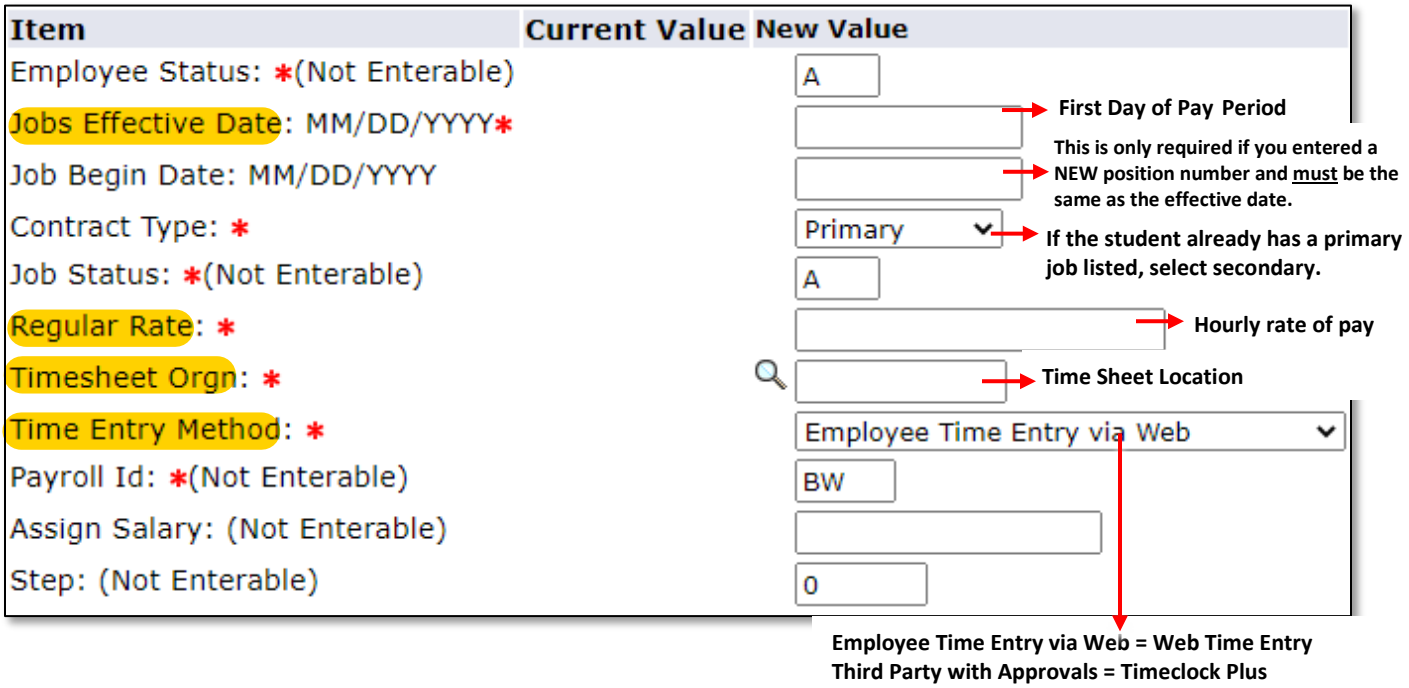
5) On the Approval Category field, select code **STRSPT** for a student who has worked on campus before, then click Go.



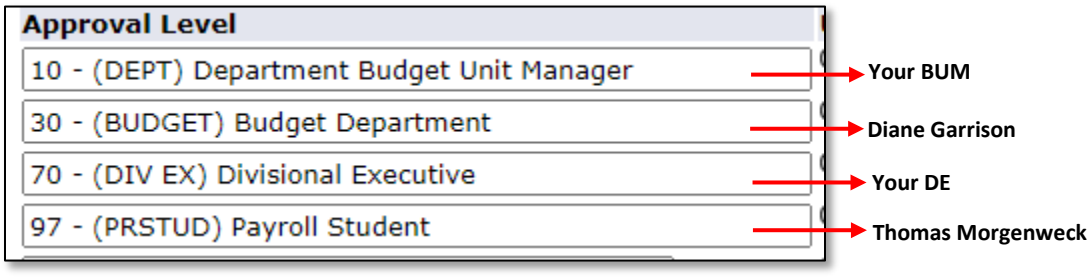
6) Click All Jobs to view all previous position numbers. Check to see if the position number you are looking for is listed.

7) Select the position number you would like to reactivate, or if this is a new position for the student, input the new position number, **suffix will always be (00)**, then click Go.

8) Input the required information highlighted below.



9) Scroll down to the Routing Queue and select the routing information for each approval level. If you have set up default routing for this type of ePAF, your approvers should have pre-populated, but you can still make changes if needed by using the Search option.



10) **Comments are required.** Input the name of the person who will be approving the student's timesheet.

11) After you have added your comments, click Save – you must always save your EPAF before submitting it.

12) If you are ready to send the ePAF, click on Submit. Any warning messages can be ignored, but any ERROR messages must be corrected. If you receive an error message, make the necessary corrections, click Save then Submit. *If you put in a **new position number** and receive the error shown below after submitting, you must input the Job Begin Date (first day of pay period) in order to correct the error.*

Description
ERROR First Jobs Detail Effective Date must equal the Job Begin Date.
ERROR The Begin Date and Step must be entered for a new job.

13) After correcting any errors, click Save then Submit. You will receive the message below confirming the ePAF was successfully submitted, and the transaction status will show as pending.

Federal Work Study New Hire (has never worked on campus) ePAF

Steps that need to be taken prior to completing the Student New Hire ePAF:

- ✓ Interview and select prospective FWS employee.
- ✓ Department emails Office of Financial Aid with the name of the student.
- ✓ Student is given a link to apply for position.
- ✓ HR sends an email to the student with a link to the onboarding forms.
- ✓ Students complete first part of I-9, department completes second part of 1-9.
- ✓ Process ePAF

What information is needed to complete the ePAF?

- ✓ Student Z# or name
- ✓ Date the I-9 was verified
- ✓ Job effective date (first day of the pay period the student will start working)
- ✓ Position number (received from Financial Aid)

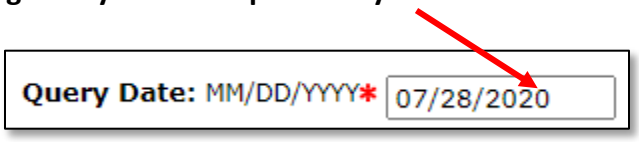
FWS Student	900628 – replaces 900614
FWS Community Service, Off-Campus	900629 – replaces 900615
FWS Community Service, On-Campus	900630 – replaces 900616

- ✓ Rate of pay
- ✓ Timesheet org
- ✓ Time entry method

Creating a Federal Work Study New Hire ePAF

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab > ePAF Main Menu > New ePAF.
3) Input the Z# (include the Z) or use the search function to search by name.

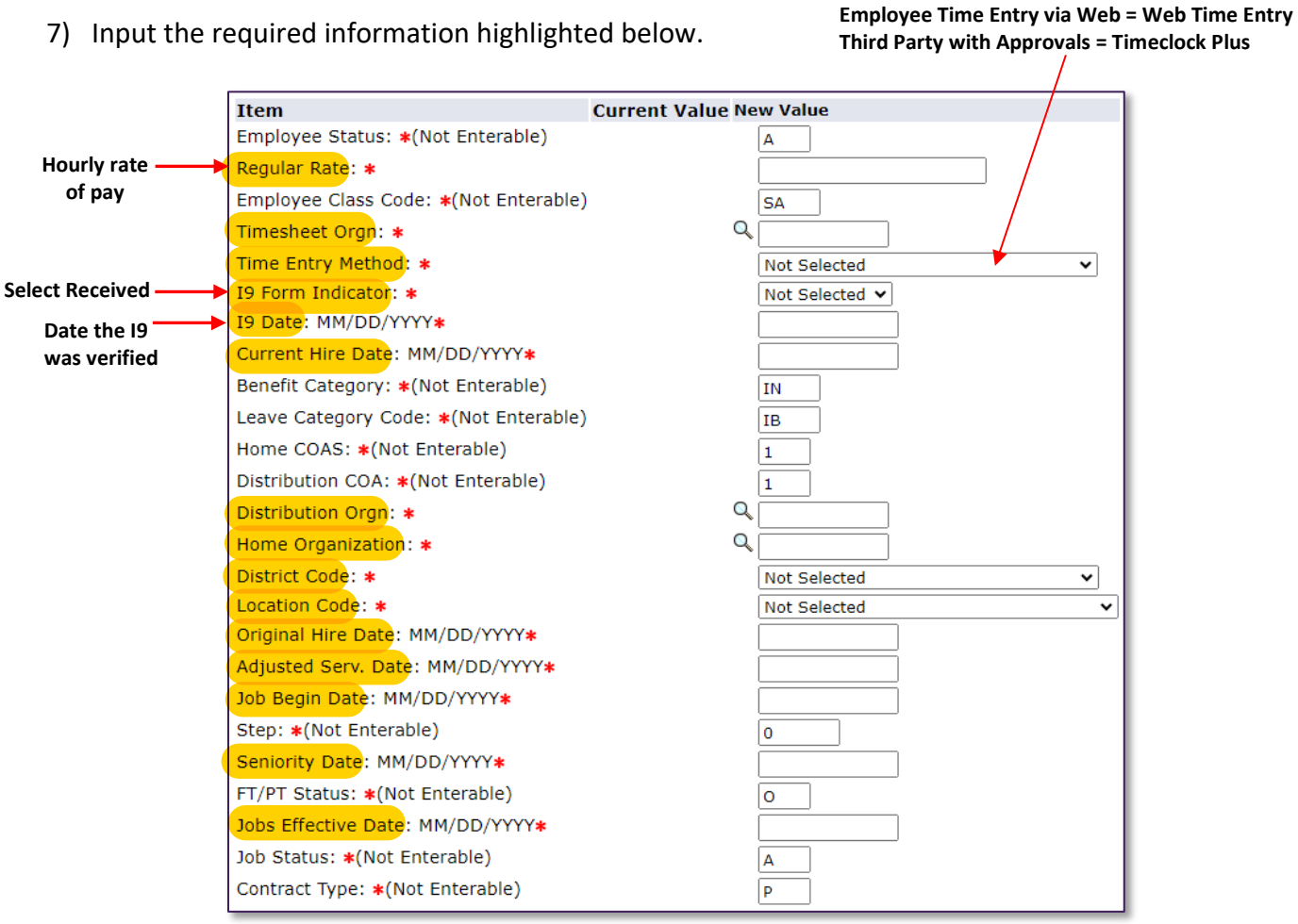
4) The query date defaults to the date you are starting the form. <u>The query date must be earlier than or equal to the effective date for the job</u>. To ensure that the query date is earlier than the effective date, **change the year to the previous year**.



5) On the Approval Category field, select code **WSTDYN** for a new hire federal work study student, then click Go.

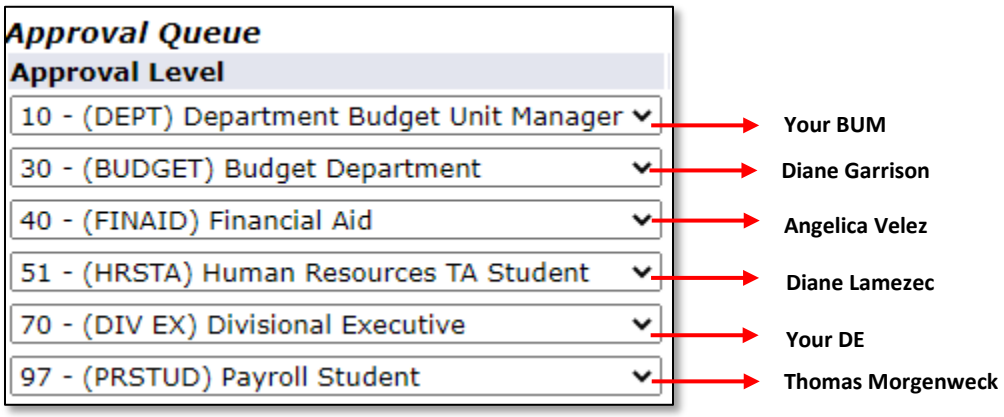
6) Input the position number, **suffix will always be (00)**, then click Go.

7) Input the required information highlighted below.



The current hire date, original hire date, adjusted service date, job begin date, seniority date, and jobs effective date <u>must all be the same date</u> – the first day of the pay period the student will start working.

8) Scroll down to Routing Queue and select the routing information shown below. If you have set up default routing for this type of ePAF, your approvers should have prepopulated, but you can still make changes if needed by using the Search option.



9) **Comments are required**. Input the name and contact information (email and extension) of the person in your office who oversees the student worker. After you have added your comments, click Save – you must always save your EPAF before submitting it.

10) If you are ready to send the ePAF, click on Submit. Any warning messages can be ignored, but any ERROR messages must be corrected. If you receive an error message, make the necessary corrections, click Save then Submit. You will receive the message below confirming the ePAF was successfully submitted, and the transaction status will show as pending.

Federal Work Study Rehire/Reactivate/Change in Pay Rate ePAF

What information is needed to complete the ePAF?

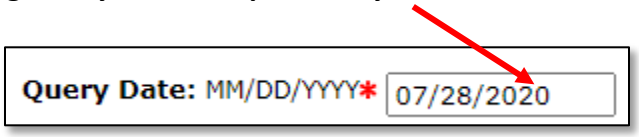
- ✓ Student Z# or name
- ✓ Job effective date (first day of the pay period the student will start working)
- ✓ Position Number (received from Financial Aid)

FWS Student	900628 – replaces 900614
FWS Community Service, Off-Campus	900629 – replaces 900615
FWS Community Service, On-Campus	900630 – replaces 900616

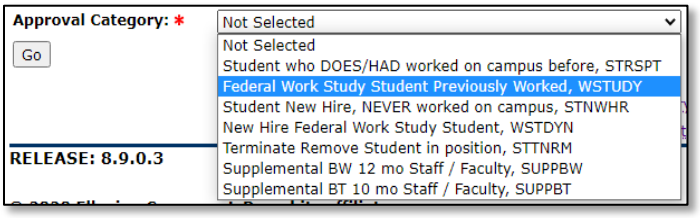
- ✓ Rate of pay
- ✓ Timesheet org
- ✓ Time entry method

Creating a Federal Work Study Rehire/Reactivate/Change in Pay Rate ePAF

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab > ePAF Main Menu > New ePAF.
3) Input the Z# (include the Z) or use the search function to search by name.
4) The query date defaults to the date you are starting the form. The query date must be earlier than or equal to the effective date for the job. To ensure that the query date is earlier than the effective date, **change the year to the previous year.**



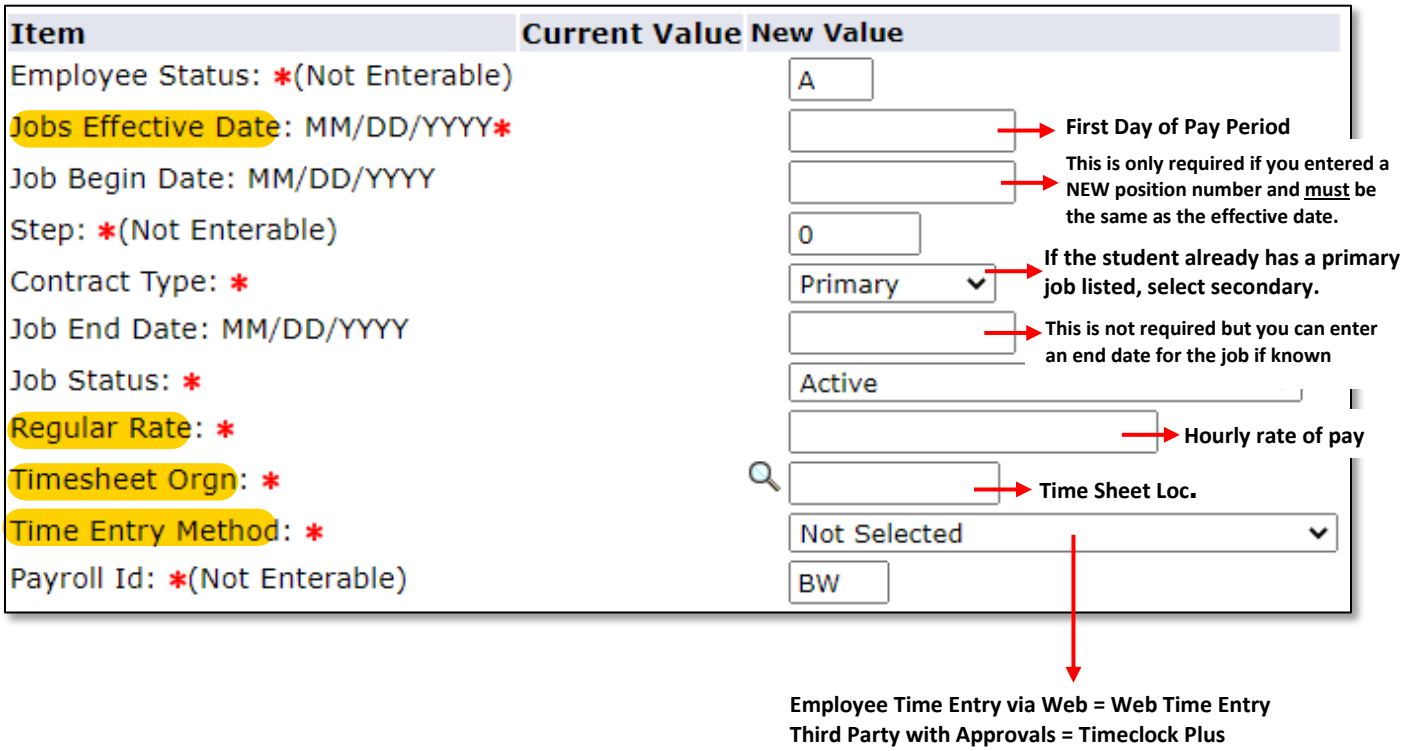
5) On the Approval Category field, select code **WSTUDY** for a federal work study student who has previously worked, then click Go.



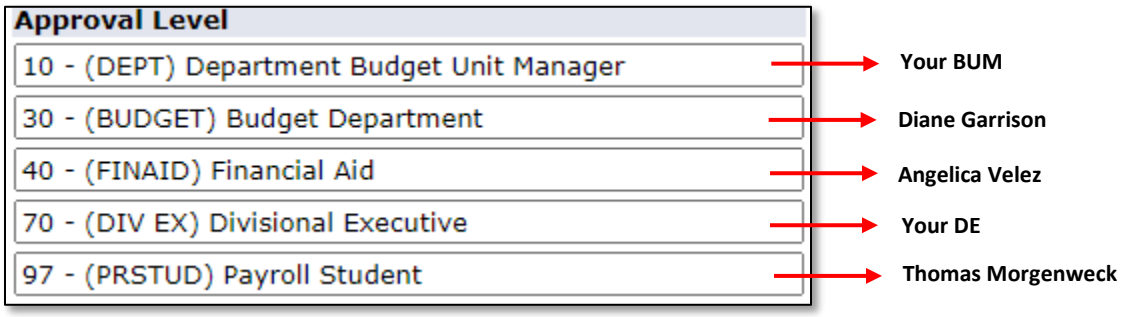
6) Click All Jobs to view all previous position numbers. Check to see if the position number you are looking for is listed.

7) Select the position number you would like to reactivate, or if this is a new position for the student, input the position number, **suffix will always be (00)**, then click Go.

8) Input the required information highlighted below.



9) Scroll down to the Routing Queue and select the routing information shown below. If you have set up default routing for this type of ePAF, your approvers should have prepopulated, but you can still make changes if needed by using the Search option.

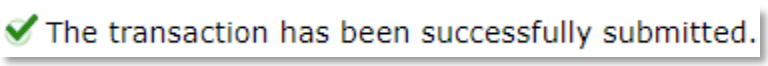


10) **Comments are required**. Input the name and contact information (email and extension) of the person in your office who oversees the student worker. After you have added your comments, click Save – you must always save your EPAF before submitting it.

11) If you are ready to send the ePAF, click on Submit. Any warning messages can be ignored, but any ERROR messages must be corrected. If you receive an error message, make the necessary corrections, click Save then Submit. *If you put in a **new position number** and receive the error shown below after submitting, you must input the Job Begin Date (first day of pay period) in order to correct the error.*

Description
ERROR First Jobs Detail Effective Date must equal the Job Begin Date.
ERROR The Begin Date and Step must be entered for a new job.

12) After correcting any errors, click Save then Submit. You will receive the message below confirming the ePAF was successfully submitted, and the transaction status will show as pending.



Student Grant Position New Hire (has never worked on campus) ePAF

Steps that need to be taken prior to completing the Student New Hire ePAF:

- ✓ Student completes application
- ✓ Department emails Human Resources with the names of the student(s).
- ✓ HR sends an email to the student(s) with a link to the onboarding forms.
- ✓ Students complete first part of I-9, department completes second part of 1-9.
- ✓ Process ePAF

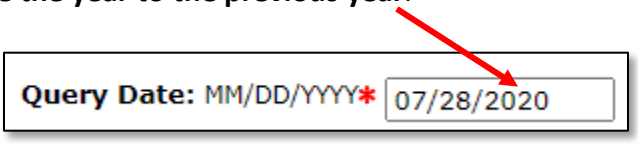
What information is needed to complete the ePAF?

- ✓ Student Z# or name
- ✓ Date the I-9 was verified
- ✓ Job effective date (first day of the pay period the student will start working)
- ✓ Position number
- ✓ Rate of pay
- ✓ Timesheet org
- ✓ Time entry method

Creating a Student Grant Position New Hire ePAF

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab > ePAF Main Menu > New ePAF.
3) Input the Z# (include the Z) or use the search function to search by name.

4) The query date defaults to the date you are starting the form. <u>The query date must be earlier than or equal to the effective date for the job</u>. To ensure that the query date is earlier than the effective date, **change the year to the previous year**.



5) On the Approval Category field, select code **STGRNW**, then click Go.

6) Input the position number, **suffix will always be (00)**, then click GO.

7) Input the required information highlighted below.

Employee Time Entry via Web = Web Time Entry
Third Party with Approvals = Timeclock Plus

Hourly rate of pay

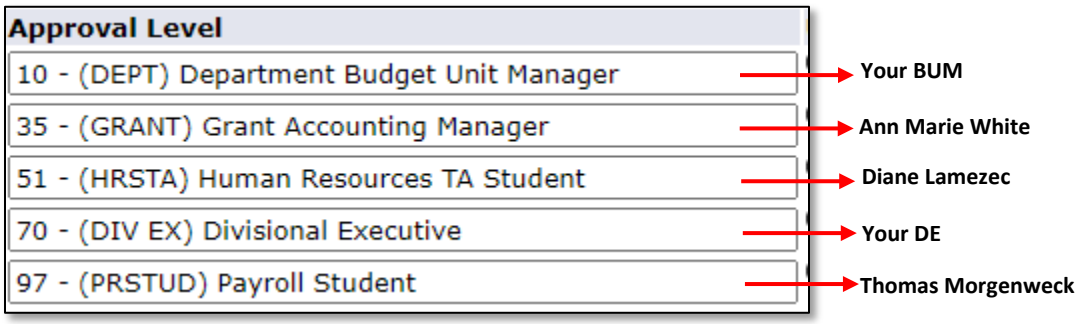
Select Received

Date the I9 was verified

Item	Current Value	New Value
Employee Status: *(Not Enterable)		A
Regular Rate: *		
Employee Class Code: *(Not Enterable)		SA
Timesheet Orgn: *		
Time Entry Method: *		Not Selected
I9 Form Indicator: *		Not Selected
I9 Date: MM/DD/YYYY*		
Current Hire Date: MM/DD/YYYY*		
Benefit Category: *(Not Enterable)		IN
Leave Category Code: *(Not Enterable)		IB
Home COAS: *(Not Enterable)		1
Distribution COA: *(Not Enterable)		1
Distribution Orgn: *		
Home Organization: *		
District Code: *		Not Selected
Location Code: *		Not Selected
Original Hire Date: MM/DD/YYYY*		
Adjusted Serv. Date: MM/DD/YYYY*		
Job Begin Date: MM/DD/YYYY*		
Step: *(Not Enterable)		0
Seniority Date: MM/DD/YYYY*		
FT/PT Status: *(Not Enterable)		O
Jobs Effective Date: MM/DD/YYYY*		
Job Status: *(Not Enterable)		A
Contract Type: *(Not Enterable)		P

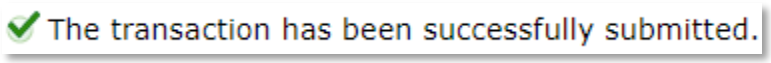
The current hire date, original hire date, adjusted service date, job begin date, seniority date, and jobs effective date <u>must all be the same date</u> – the first day of the pay period the student will start working.

8) Scroll down to the Routing Queue and select the routing information shown below. If you have set up default routing for this type of EPAF, your approvers should have prepopulated, but you can still make changes if needed by using the Search option.



9) **Comments are required.** Input the name of the person who will be approving the student's timesheet. After you have added your comments, click Save – <u>you must always save your EPAF before submitting it</u>.

10) If you are ready to send the ePAF, click on Submit. Any warning messages can be ignored, but <u>any ERROR messages must be corrected</u>. If you receive an error message, make the necessary corrections, click Save then Submit. You will receive the message below confirming the ePAF was successfully submitted, and the transaction status will show as pending.



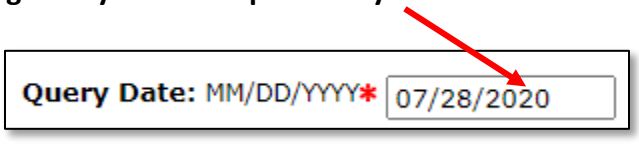
Student Grant Position Rehire/Reactivate/Change in Pay Rate ePAF

What information is needed to complete the ePAF?

- ✓ Student Z# or name
- ✓ Job effective date (first day of the pay period the student will start working)
- ✓ Position Number
- ✓ Rate of pay
- ✓ Timesheet org
- ✓ Time entry method

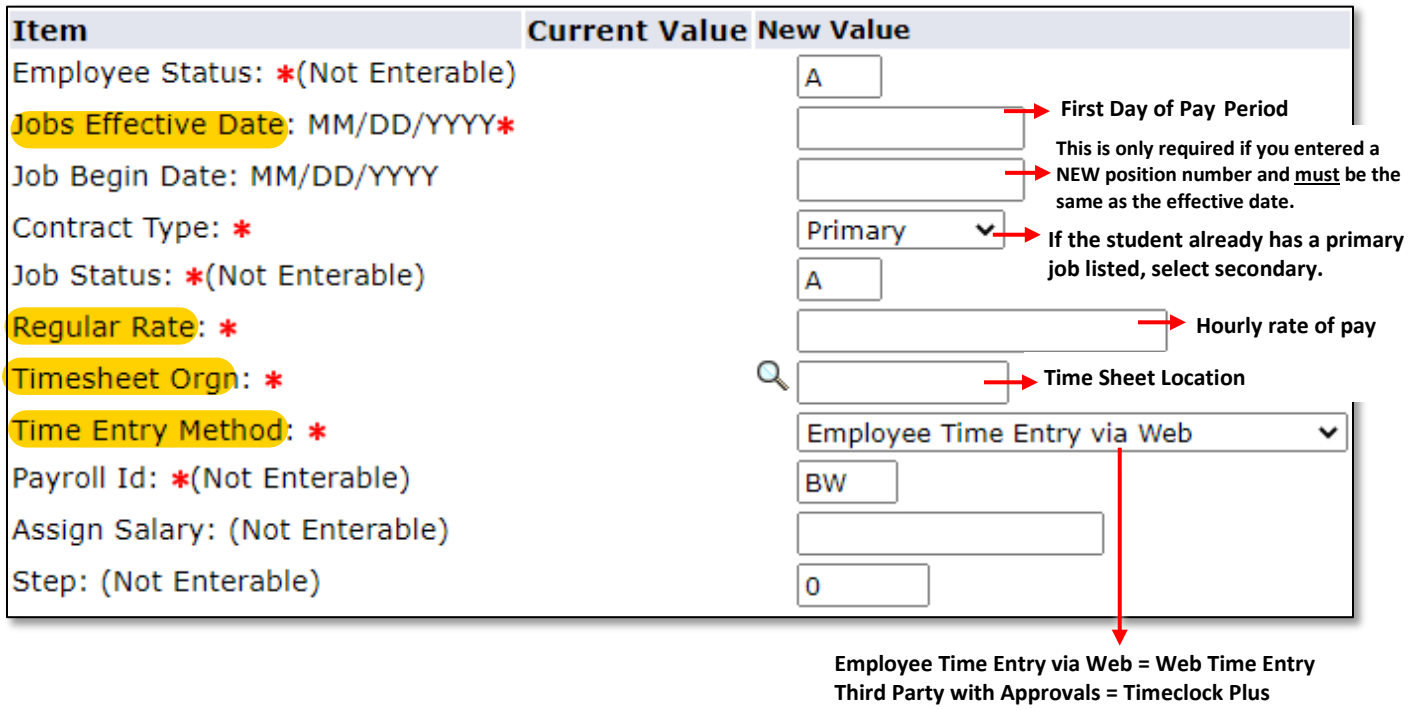
Creating a Grant Position Student Rehire/Reactivate/Change in Pay Rate ePAF

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab > ePAF Main Menu > New ePAF.
3) Input the Z# (include the Z) or use the search function to search by name.
4) The query date defaults to the date you are starting the form. The query date must be earlier than or equal to the effective date for the job. To ensure that the query date is earlier than the effective date, **change the year to the previous year**.

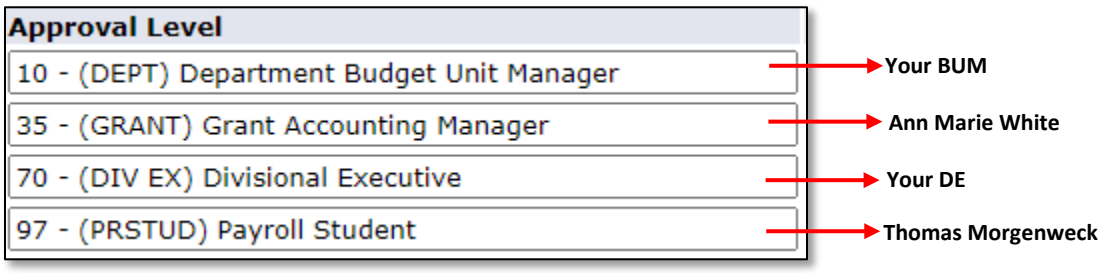


5) On the Approval Category field, select code **STGRRE** for a student grant position rehire, then click Go.
6) Click All Jobs to view all previous position numbers. Check to see if the position number you are looking for is listed.
7) Select the position number you would like to reactivate, or if this is a new position for the student, input the position number, **suffix will always be (00)**, then click Go.

8) Input the required information highlighted below.



9) Scroll down to the Routing Queue and select the routing information shown below. If you have set up default routing for this type of ePAF, your approvers should have prepopulated, but you can still make changes if needed by using the Search option.



10) **Comments are required.** Input the name of the person who will be approving the student's timesheet. After you have added your comments, click Save – you must always save your EPAF before submitting it.

11) If you are ready to send the ePAF, click on Submit. Any warning messages can be ignored, but any ERROR messages must be corrected. If you receive an error message, make the necessary corrections, click Save then Submit. You will receive the message below confirming the ePAF was successfully submitted, and the transaction status will show as pending.

Terminating a Student Position ePAF

All Federal Work Study student terminations will be handled by the Office of Financial Aid. These instructions are for terminating Non-Federal Work Study students. All student worker positions will be automatically terminated if the student hasn't been paid from that position number in 60 days.

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.

2) Click on the Employee tab > ePAF Main Menu > New ePAF.

3) Input the Z# (include the Z) or use the search function to search by name.

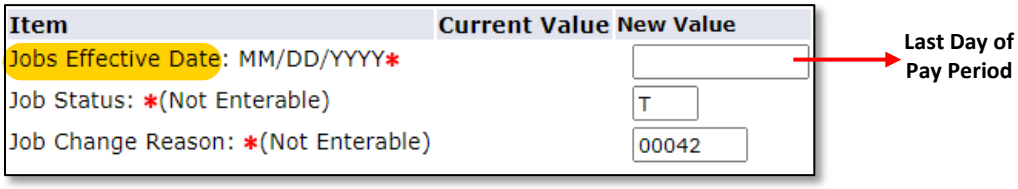
4) Query date defaults to the date you are starting the form and can be left as is.

5) On the Approval Category field, select code **STTNRM** to terminate/remove a student from a position, then click Go.

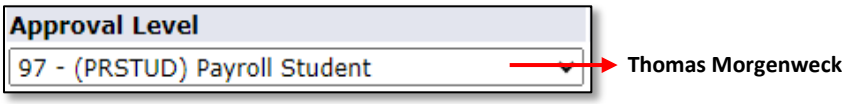
6) Select the position you would like to terminate then click Go.

    a. If you do not see the position number listed, that position has already been terminated.

7) Input the Jobs Effective Date which is the last day of the pay period (listed in the "To" column on the payroll calendar). If the student has not/will not post any hours for the current pay period, you can use the end date of the previous pay period as your effective date.



8) Scroll down to the Routing Queue and select the routing information shown below, if necessary. If you have set up default routing for this type of ePAF, your approver should have pre-populated.



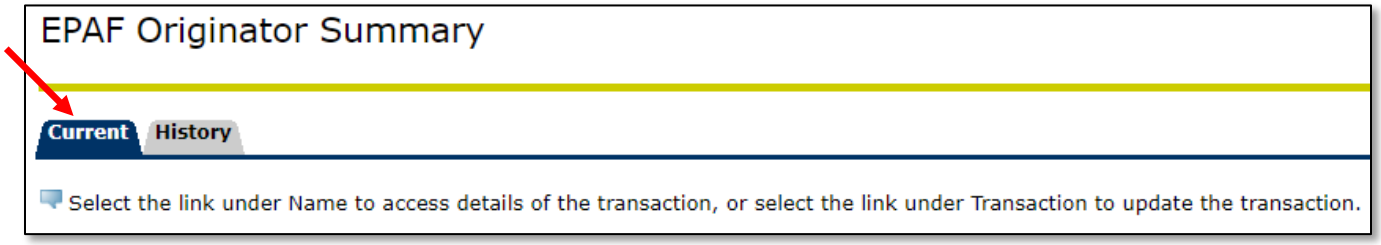
9) If you are ready to send the ePAF, click on Submit. Any warning messages can be ignored, but <u>any ERROR messages must be corrected.</u> If you receive an error message, make the necessary corrections, click Save then Submit.

Submitting a Saved ePAF or Resubmitting a Returned ePAF

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.

2) Click on the Employee tab > ePAF Main Menu > ePAF Originator Summary.

3) All ePAFs that have been returned to you or have not been submitted will be listed under your Current tab.



4) Click on a name to open the specific ePAF.

5) Click on Update.

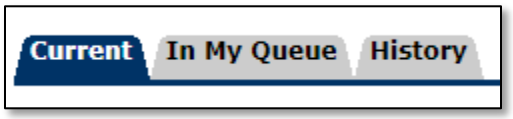
6) Make any necessary changes/updates then click Save.

7) Click on Submit. You will receive the message show below confirming your ePAF was successfully submitted.

Approving an ePAF

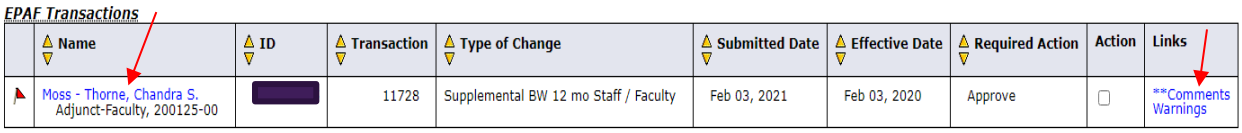
Approvers receive email notification when an ePAF is assigned to them for approval.

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab > ePAF Main Menu > ePAF Approver Summary.
3) You will land on the "current" tab. All ePAFs that are ready for you to approve will be listed.



- **Current:** ePAFs awaiting your approval.
- **In My Queue**: ePAFs that will eventually be in your current tab. You cannot take action on these ePAFs as they are either assigned to another approver or have not yet been submitted.
- **History**: A list of ePAFs you have already taken action on.

4) Review the ePAFs listed in your current tab.
   - Anything in blue is linked. All submitted ePAFs will have a comment from the Originator, indicated by **. Click on a name to open and view the ePAF.

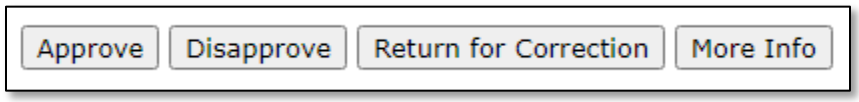


EPAF Transactions

	Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
	Moss - Thorne, Chandra S. Adjunct-Faculty, 200125-00	[redacted]	11728	Supplemental BW 12 mo Staff / Faculty	Feb 03, 2021	Feb 03, 2020	Approve	☐	**Comments Warnings

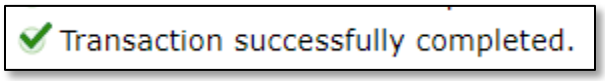
- What to look for on the ePAF
  - ✓ Approval Category = the type of ePAF being submitted
  - ✓ Rate of pay per hour if it's a student ePAF
  - ✓ Special rate for supplemental payments = total to be paid for that pay period
  - ✓ Read comments for additional pertinent information

5) After reviewing, you make take one of the following actions:



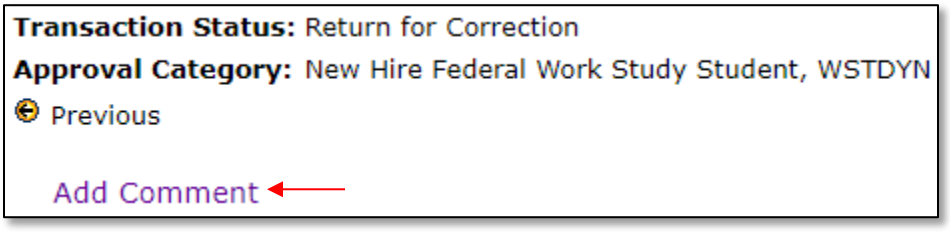
- **Approve**: Used to approve the ePAF transaction.
- **Disapprove:** Used to stop the ePAF from progressing forward.
- **Return for Correction**: Used to return the ePAF to the originator for correction.
- **More Info:** Used when the approver wants to show they accessed the ePAF, but they are waiting to get more information before taking action on the ePAF.

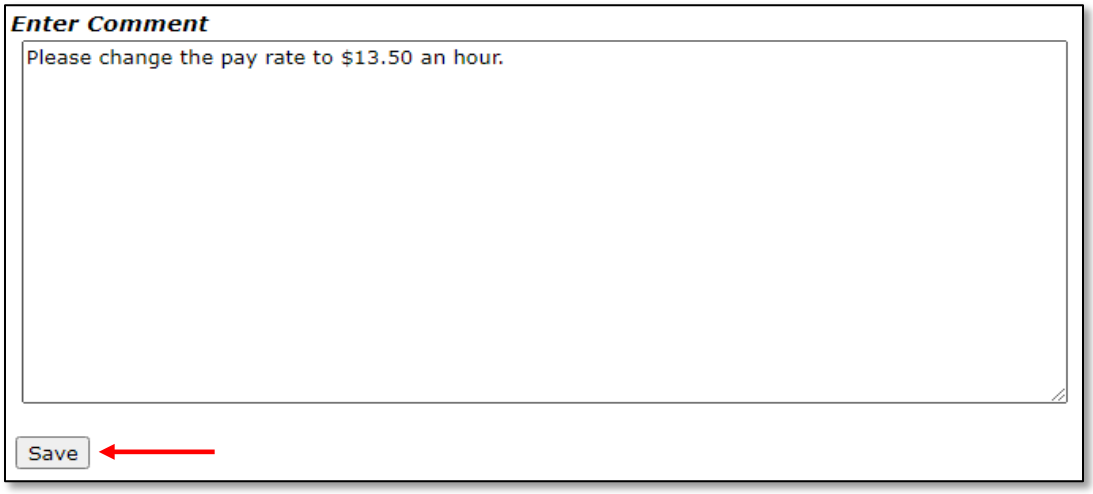
6) **To approve the ePAF**, click Approve and you will receive the message shown below.



Click on *Add Comment* and input "Approved." Click Save, then proceed to step #7 or…

To disapprove or return for correction, click on the appropriate action and the Transaction Status will update. Click on *Add Comment* to include why the ePAF is being returned or disapproved, and then click Save. <u>Keep in mind that Disapproving stops the ePAF from moving forward and changes cannot be made to it.</u>





7) Click on the Next arrow to view the next report in your queue OR click on ePAF Approver Summary to go back to your list; do not use the back arrow on your browser to go back as your list will not refresh.

How to Set up a Proxy

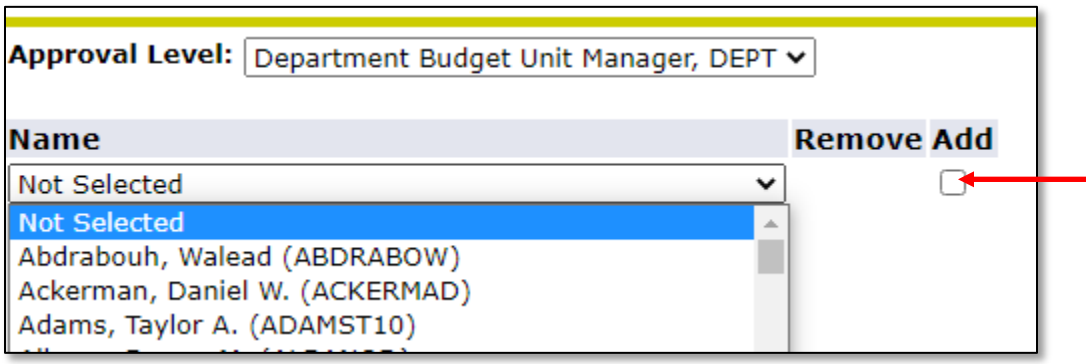
1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.

2) Click on the Employee tab > ePAF Main Menu > New ePAF Approver Summary.

3) Click on Update Proxies.

4) If you are in multiple approval levels, select the appropriate approval level.

5) Select a name from the drop-down menu then click Add.



6) Click Save.