

SAN MATEO COUNTY
COMMUNITY
COLLEGE DISTRICT

EPAF User Guide



College of San Mateo



San Mateo County Community College District
November 2021
Edition I

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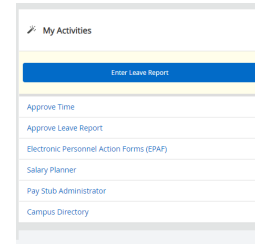
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Access and Security

Access to EPAFs in Banner Self Service will be granted to individuals after completion of EPAF training. Before requesting training, please check your access to banner.smccd.edu/. - Report any additional needs at the time that you request your EPAF training.

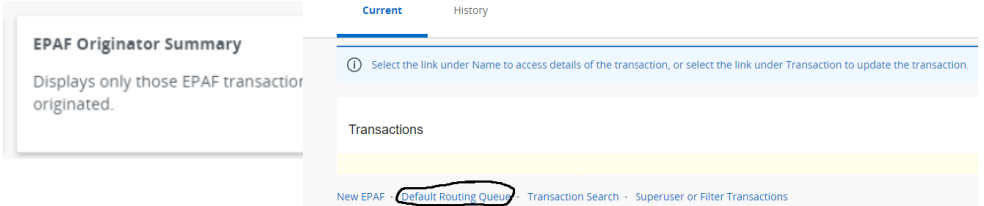
Getting to the EPAF page in Banner Self Service

- Navigate to <https://banner.smccd.edu/> from Firefox
- Choose Self-Service (Employee Self-Service)
- Choose Electronic Personnel Action Forms (EPAF) from the My Activities portion of your employee dashboard



Setting up your Default Routing Queue – for Originators

- Go to the Electronic Personnel Action Form page
- Choose EPAF Originator Summary
- Choose Default Routing Queue
- Select the Approval Category from the drop down list 1
- Click Go 2 > Required Approval Levels populate 3
- Select the appropriate approvers for your department (use the drop down to see the list of approvers)
- Repeat set up process for each Approval Category.



Approval Category

Transfer / Reassignment, TRANSF 1

Go 2

Approval Queue

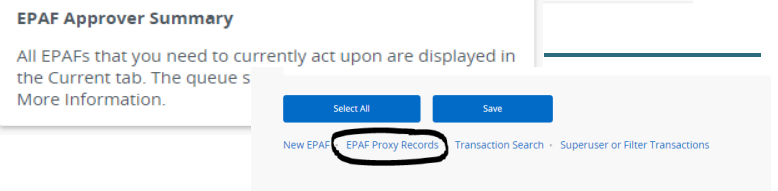
Mandatory Levels defaulted from Electronic Approval Category Form (NTRACAT).

Approval Level 3	User Name
10 - (LVL10) Org Administrator/Designee	Bailey, Mitchell A. (BAILEYM) 4
20 - (LVL20) VPI/VPSS/Designee	Not Selected
25 - (LVL25) Chancellor/President	Not Selected
40 - (LVL40) VPAS/CBO/Designee	Not Selected
99 - (LVL99) HR Applier	Not Selected

Appointing Authorities are assigned by the Administration and the list is maintained by HR. If you need any changes to the appropriate approvers, please let HR know.

Setting up your Proxy – for Approvers

- Go to the Electronic Personnel Action Form page
- Choose EPAF Approver Summary
- Choose Update Proxies
- Select the Approval Category from the drop down list¹
- Select Proxy's name from drop down list²
- Be sure name shows on list³
- To remove a proxy click **Remove** box⁴
- Repeat set up process for each Approval Level.



EPAF Proxy Records

Proxies

Approval Level Human Resources (LVL50) 1

Sampior, George P. (SAMPIORG) 3

Remove Selected 4 Add Proxy...

New EPAF - Creating an Electronic Personnel Action Form

- Go to the Electronic Personnel Action Form page
- Choose New EPAF

New EPAF Person Selection

- Enter Employee's ID (G#)¹ and Tab> the name will populate
- Double check the name²
- Enter first day of work for this job action into the Query Date field³ (format must be MM/DD/YYYY)
- Choose Approval Category⁴
- Click **GO**⁵

ID *
G00879933 **1**

Dimitrios George Vlahos **2**

Generate new ID

Query Date *
12/01/2021 **3**

Approval Category *
Student Hire, STHIRE **4**

Go **5**

Do not use Generate ID!!!

- Be very cautious if you use the Search icon
- You must verify the middle name and birth date - many duplicate names exist in Banner and you are creating a new hire document for the individual you are hiring.
- Contact HR if you have trouble finding the G# for the employee you are processing.

Job Selection Screen

- Click **All Jobs** > this will show you all jobs the employee has had in Banner. (Note: clicking Active Jobs will return results as of the Query Date that you entered on the prior screen...you should have entered the start date of this job action.)
- If the position that you are hiring into is listed, you may select it by checking the **Select** button² on the left.

(Remember: the position must have the correct **Work Area Code, Org, and Employee Class**. If the employee previously held this position, you will see the title that was assigned to the position instead of the work area - org - eclass.)

➤ **If there are no jobs listed, or if you are unsure of which position to use, you should use the Search**  **feature⁴.**

- If your position is not listed, but you know the position number, enter it and tab to the suffix field
- Enter the suffix 00. Tab. Check that the suffix was accepted as 00.
- Click **Go**³ (do not click Next Approval Type)
 - If you don't need to search for a position number you can skip to [Completing the EPAF](#).

Details

ID	Query Date	Approval Category
Tangsang Tumbahangphe, G01053894	12/01/2021	Student Hire, STHIRE

Update Job, STJOB

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
<input checked="" type="checkbox"/> 2	New Job	<input type="text" value=""/>	<input type="text" value=""/>						
<input type="checkbox"/>	Primary	151036	00	INTL SA - Human Resources	1036, Human Resources	09/26/2016	06/30/2019	05/31/2019	Terminated
<input type="checkbox"/>	Secondary	151039	00	SA- Auxiliary Services	10391, Aux. Svcs Operations-District	05/01/2017	07/28/2017	07/31/2017	Terminated

Active Jobs Next Approval Type Go **3**

Choosing the Correct Position

About Pooled Positions for Hourly and Student Employees

For budgeting purposes, **pooled positions** mean a group of employees with jobs in the same work area, org, and employee class **will share a common position number**.

Finding Position Numbers for Hiring

The three things you must know to select the right position number for an hourly or student employee are:

the work area code, the org, and the employee class.

Each position is set up in Banner based on these three elements, so choosing the correct position is crucial.

SAMPLE POSITION NUMBERS

Choosing the Correct Employee Class

The **student employee classes** are:

ST- Student – Regular Student

SW- Student - Work Study

SB - Student - Bridge / Tutor

The **short-term employee classes** are:

6T- Temporary - Short-Terms/Subs

MH - Temporary - Miscellaneous Hire

Employee Class for a Student position

- I. Verify Units Enrolled
 - a. Spring: 6 units (ST)
 - b. Fall: 6 units (ST)
 - c. Summer Regular Student: 3 units (ST)
 - d. Summer Bridge Student: 0 units, if enrolled in Spring and Fall semesters (SB)
 - e. Federal Work Study (SW)

Employee Class for a Temporary/Hourly position

Human Resources can help you choose from the following Temporary/Hourly Employee Classes.

- 6T- Short-term, Substitute, Retiree
 - Short-Term employment requires Board Approval (AB 500)
 - 80% of regular salary schedule
- 6T - Substitute
 - Substitutes do not need Board Approval
 - 100% of regular salary schedule
 - Substitutes can only replace an employee absent from work
 - Substitutes replacing someone in a vacant position can only substitute for 60-Days during recruitment period
 - Substitutes cannot replace someone detailing in another position
- MH - Miscellaneous
 - Short-Term employment requires Board Approval

Positions are pooled so it's ok for more than one person to have the same position number.

When Multiple Position Numbers Match Your Criteria

In some cases you may find two position numbers with the same work area code, same org, and same employee class. **Either position can be used - (they are set up the same way in Banner).** The reason for multiple position numbers per org and approver:

- Sometimes an employee has **two simultaneous jobs** that have the same work area code, same org, and same employee class, but they have different titles or pay.
- When this happens the employee needs to have a new suffix.
- Having two suffix's is what enables them to have **two different timesheets**...one for each job.
- **You do not need to** select a new position to make job changes unless the position has a change in work area, org, or employee class.

Completing the EPAF

Before you begin to complete the EPAF, review the information that has populated at the top.

- Verify that the Name and ID are correct¹.
- Verify that the **Query Date**² is the date of the job action you are submitting (ex. the date of the hire or the extension date).
- Verify that you have selected the correct Approval Category³ (ex. Student Action Form, or Temporary/Hourly Action Form).

Name and ID Tangsang Tumbahangphe, G01053894	Transaction	Transaction Status	Approval Category Student Hire, STHIRE
Query Date 12/01/2021			

If any of these items are incorrect select Return to EPAF menu from the bottom of the page and begin again. If everything is correct you may continue by filling out the fields in each section.

General Information About EPAF Fields

***** - indicates a field that you are required fill in
(Not Enterable) - indicates that you cannot fill in this field, you can just look

***(Not Enterable)** - if it's required and not enterable, then it's already filled in for you

Current Value column - will be filled in if there are already records for that section (ex. there is already an employee record for *this employee*, or there is already a job record for *this person on this position number*)

Current Value column - will be blank if there are not already values in Banner for this employee or position.

New Value column - where you will fill in all required fields.

Job Begin Date	12/01/2021	Old Value:
Jobs Effective Date *	12/01/2021	Old Value:
Title		
Salary Group	FY2122	Old Value:
Salary Table	ST	Old Value:
Salary Grade		

(Hint: Required fields vary by epaf type. If the current value is correct and the field is not required, then you should leave it as is.)

Approval Categories: Student Action Form & Short-Term Action Form

Create/ Update Employee Record

Item	Current Value	New Value
Home COAS: (Not Enterable)	I	1
Employee Class Code	ST, SW, SB, 6T, MH	Fill in Employee Class of this job
Home Organization		Fill in your departments organization number
Original Hire Date	If populated, do not change	If empty, use query date
Adjusted Serv. Date	If populated, do not change	If empty, use query date
Current Hire Date	If populated, do not change	If empty, use query date
District Code	370,371,372,373	Select campus that employee is located at

Create/ Update Job Record

Item	Current Value	New Value
Base Job Begin Date: MM/DD/YYYY	?	<ul style="list-style-type: none"> Select old value if you are rehiring an employee Use query date if Current Value is blank
Jobs Effective Date: MM/DD/YYYY	?	Fill in the start date of this job or this extension
Title		Add in the job title
Salary Grade	A-D or 10 - 37	Select the grade of pay using the salary schedule for either student employees or short-term employees (ST / 6T)
Step	1-2 or 1-6	Select the step placement for the employee
Timesheet Orgn		Select the ORGN that will be approving the timesheet
Time Entry Method	Time Entry Via Web	If employee will enter time on websmart, do not change.
Job Change Reason	NEWHR	NEWHR, for new hire; REHRE, for re-hire; CSTEP for step changes
Contract Type	Primary	Use Primary. If you get the message "employee has primary job" then switch to Secondary
Labor Distribution	Defaulted	Please update the labor distribution required
Labor Distribution #2	Add Row	Add additional rows as needed

Terminate Job Record

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY *	?	Fill in the end date of this job or this extension




Comments


Add who you would like to approve the timesheet and any FYIs, example:

Comments

Approver: Gina Dizon [000677501]
FYI: Ingrid Melgoza [000579695]

Routing Queue - required approval levels differ according to EPAF type. This is an example of ST queue.

Approval Level (cannot change these)	User Name	Required Action
10 - (LVL 10) Org Administrator/Designee	 <input type="text"/>	Approve
30 - (LVL 40) VPAS/CBO/Designee	 <input type="text"/>	Approve
99 - (LVL 99) HR Applier	 <input type="text"/>	Apply

~Your Routing/Approval Queue will be filled in if you have set up your defaults.
~You can make changes to the names if they are appropriate.
~Use the  to search for names.

Definitions

Query Date: Banner searches will return the records active as of the Query Date. When you begin a new EPAF you should query on the date of the job action (hire, rate of pay change, etc.) This date will default into various fields so please be cautious with your entry. Once the EPAF is initiated you will be able to select all jobs to see an employee's position history.

Employee Class Code: An alpha numeric code to distinguish the type of employee. *For students you will enter the employee class that matches the position you are hiring, ST, SB, SW.*

Current Hire Date: Employee's initial date of hire in their current classification. If an employee changes classification there will be a new Current Hire Date.

Base Job Begin Date: The date that the employee was first assigned this position number. If there is a current value for the position you are hiring into, you will need to copy it, or leave this field blank if it is not required on your EPAF. If this is the first time the employee has held this position number you will fill in the date that the employee begins this position.

Job Effective Date: The date that the employee begins working, or the first date of this extension or job action. The effective date should be within the current or future pay period. This is the effective date of this job action (hire, title change, extension, etc.) for payroll. New records entered to NBAJOBS cannot be made with an effective date prior to the 'Last Paid Date' on the NBAJOBS record.

Contract Type: This indicates the type of job - P Primary, S Secondary. *For students this is non-essential and many students have multiple jobs, none of which are more primary by definition. You should choose primary first, then switch to secondary if you receive an error.*

Job Status: This indicates the status of the job for each record in the EPAF - A Active, T Terminated

- The first job record in an EPAF is generally A Active status and indicates the start date of the job, raise, extension, etc.
- The second job record in an EPAF is generally T Terminated and indicates the end date of the job, extension, etc.

After Completing the EPAF – for Originators

EPAF Buttons:

Save – will save the work you have done.

Submit – when you have completed an EPAF you can submit it for approval.

Delete – will completely remove an EPAF that has not been submitted. It will be removed from the history.

Void – will remove the EPAF from the queue, but the voided EPAF will still be visible in the history.

Return for Correction – will allow an originator to remove the EPAF from the approval queue and make corrections.

After corrections it will need to be saved and submitted a second time.

Cancel – does not cancel a job action or end a job. The cancel button is available after an EPAF has been applied.

The job action is already in Banner and the cancel button will have no effect on the job record. It is only intended to be an informational marker to show that an EPAF was incorrect and the job action was reversed by HR.

EPAF Originator Summary

To see your EPAFs select the EPAF Originator Summary link from the Electronic Personnel Action Form page.

Tabs:

Current – this tab will hold your saved, but not submitted EPAFs

History – this tab will hold your submitted EPAFs and any EPAFs that have been returned to you for correction.

You should monitor the transaction status of your EPAFs until they reach completed status. You can click on the employee name to open the EPAF and review the approval queue status, and view comments that have been added during the approval process.

Approving the EPAF – for Approvers

EPAF Approver Summary

To see your EPAFs select the EPAF Approver Summary link from the Electronic Personnel Action Form page. EPAFs that are ready for your approval will be listed in the Current tab. Click on the name to see the details of the EPAF. After you have reviewed the EPAF for accuracy and approved it, the EPAF will move to your History tab.

Tabs:

Current – this tab will hold the EPAFs that are ready for your action.

In My Queue – this tab will hold EPAFs that are in your queue, but still need lower level approvals before you can take action on them.

History – this tab will hold EPAFs that you have already acted on.

EPAF Buttons:

Approve – will add your approval and move the EPAF to the next person in the queue.

Disapprove – will remove an EPAF from the queue. The originator can go to their history tab to open the EPAF and can either void the EPAF or make corrections and resubmit.

Acknowledge – you can acknowledge an EPAF if you are listed as an FYI in the approval queue.

Return for Correction – will allow an originator to remove the EPAF from the approval queue and make corrections. After corrections it will need to be saved and submitted a second time.

Error and Warning Messages

Errors and Warning Messages		
Type (indicates which section of the EPAF has an error)	Message Type	Description
Recommended Action to Resolve Error		
1	Create/ Update Job Record ERROR	*ERROR* This employee already has a primary job. Switch Contract Type to Secondary. Save. Submit.
2	Create/ Update Job Record WARNING	*WARNING* Future changes exist - starting on DD-MMM-YYYY. The EPAF cannot be applied. Review your entries for correct dates, then contact HR about the future dated record.
3	Job Change Reason and Date WARNING	*WARNING* Future changes exist - starting on DD-MMM-YYYY. It is ok to have this warning on a Job Change Reason and Date Record. The future term date will be removed when the Early Termination EPAF is processed.