EPAF (Electronic Personnel Action Forms) TRAINING for ORIGINATORS

Business Centers

December 2015
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**Tasks Using the EPAF Process**

Which tasks use the EPAF process?

- **OSCAR Tasks (Log in to OSCAR)**
  - Single Job Transactions
    - Graduate Hires and Job Changes
    - Student Hires (Suffix 00/55)
    - Student Job Changes (Suffix 00/55)
    - Temporary Staff Hires
    - Job Terminations
    - Welcome Emails
    - FR Suffix Jobs
    - Supervisor Update
  - Labor Distribution Changes

- **Multiple Transactions**
  - Graduate and Instructor Term-by-Term
  - Batched Student Job Terminations
  - Batched Supervisor Updates

- **Multiple Month Labor Distribution Changes**

- **Online Services Tasks (Log in to Employee Online Services)**
  - Job Location Change
  - AW 9 month Returning Retiree

*...OR...*
OSCAR Tasks

Log in to OSCAR at https://oscar.oregonstate.edu/.

Log in, using your ONID username and ONID password. (You must have EPAF authorization in order to send EPAFs.)
Select “Business Center Tasks.”

Select either “Job Tasks” or “Letter/Email Tasks” under “Business Center Tasks.” (Spreadsheet tasks are only available during a designated time in the spring.)

Important Note: In order to see the “Business Center Jobs” option, you must be logged in.
Job Tasks

Select either “Single Job Transaction” or “Multiple Transactions.” It defaults in as “Single Job Transaction.”

**Note:** For multiple labor distributions, select “Single Job Transaction.” Once in the task, there is an option to add additional months.

To see all jobs for this employee as of this Action Date, select “display options.” To select by “Appointment Type,” click the down arrow to display choices, make a selection; then select “display options.” Options will display on the same page, below the “display options” button (scroll down to view).

For “Single Job Transactions,” enter the “Action Date” (the “true” date of the action to be processed) and the University ID of the employee.
# Single Job Transactions

Changes can be made to an existing job by selecting the desired position or you can choose to start a new job.

<table>
<thead>
<tr>
<th>Select</th>
<th>Position</th>
<th>Suffix</th>
<th>TS Orgn Desc</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Note</th>
<th>Effective Date</th>
<th>Last Paid Date</th>
<th>Job Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>C18121</td>
<td>00</td>
<td></td>
<td>303089 - ESE - Sth ElectEngg/Comm Sci</td>
<td>01/17/2008</td>
<td>01/17/2008</td>
<td>A</td>
<td></td>
<td>01/17/2008</td>
<td>01/17/2008</td>
<td>P</td>
</tr>
</tbody>
</table>

After selecting, click “next” to continue.

If selecting an existing job, additional options will be displayed after clicking “next.”

After selecting an action, click “Go to Task” to be redirected to a specific task or task area.

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If electing to start a new job, enter the new position number, and click "display options."

Select the appropriate suffix; then click "next" to be redirected to the task.
For "Multiple Transactions", enter the "Action Date," click "Display Options" and select the appropriate action.

Once the appropriate action is selected, fill in any additional information requested; then click "Go To Task."
General Task Information

Completing the Task

For any task, complete all information requested.

Lines will wrap automatically. Do not enter returns.

Click "continue" to proceed.
Electronic Processing

After completion of the task, if the transaction will process electronically, a message pops up allowing the opportunity to “Cancel” to review the information again, or to click “Submit Electronically” to send the update through the appropriate electronic routing, and then directly to Banner.

Note: It may take a short amount of time to process the electronic transaction. Please do not click “Submit Electronically” again. Once it has finished processing, it will go to the instructions page.

Data is applied to Banner nightly once approved, and electronic forms are generated. A copy of the form is automatically placed in the employee’s file in Nolij; and a copy of the form is emailed to the task originator as confirmation that the action was processed.
Manual Processing

For changes that do not process electronically, a message pops up allowing the opportunity to “Cancel” to review the information again, or to click “Manual Form” to continue to the print-ready form. (Note: Some manual tasks will go directly to the print-ready form without showing the pop-up box.)

The manual process will generate a print-ready form. Once printed, the paper form must be routed appropriately for signatures; then sent to the Human Resources staff in your Business Center.
The task will then exit to the instructions page*, and the task is complete. You can log out, if finished; or continue with other tasks. You can check the status of any EPAFs submitted electronically by logging in to Employee Online Services at http://infosu.oregonstate.edu/login.

*Note: This page contains instructions for both electronic and manual routing. Therefore, please read carefully.
Task-Specific Samples and Instructions

FR Suffix Positions

To set up an FR Suffix job for tuition remissions, enter position number C69999 and click “Display Options.” The FR suffix will default in already selected. These positions will not generate pay and are only used for payroll to distribute the tuition remission charges to pay index or cost share accounts. Click “Next” to continue.

An error message will appear if an incorrect action date is used.

Action Date for a C69999 position must be 10/01/20XX OR 01/01/20XX OR 04/01/20XX OR 07/01/20XX based on appointment begin date. For additional information, please click on help button next to this error message.

Fill in, and/or select, information necessary for the task.

Click “Continue” to proceed, or “Reset Form” to start over.

Note: The FR suffix task will not generate forms. Data will go directly to Banner.
### Graduate Hires and Job Changes

**Fill in, and/or select, information necessary for the task.**

**Note:** If you are changing the Check Distribution Org, you must have a Pay Delivery Authorization documenting the request for the change. The Pay Delivery Authorization is then submitted to Payroll for recordkeeping purposes.

**Additional Note:** When completing a Graduate Job Change on a position that is in terminated status and you are not renewing that position, the job form will need to be routed manually and will not run through the electronic process.
### Job Terminations

#### Single Terminations (for all classifications)

On the Job Tasks Main Menu, after selecting an existing job, select “Terminate a Job,” then “Go To Task.”

Fill in, and/or select, information necessary for the task.

Click “Continue” to proceed, or “Reset Form” to start over.

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**Base Information**

- **ID Number:** 836079345
- **Name:** Ernie HR-CES
- **Position:** C50209
- **Suffix:** 00
- **Timesheet Organ:** 251000-960 - Geosciences
- **Current Job End Date:** 9/1/2010
- **New Job End Date:** 9/1/2010
- **Effective Date:** 9/1/2010
- **Personnel Date:** 9/30/2010

**Reason for job termination** (will be permanently recorded in Banner): (500 characters max)

**Employee Information**

- **Will the employee be retiring from OSU?**
  - [ ] Yes
  - [ ] No

**Additional information** (will be permanently recorded in Banner) (500 characters max)

**WARNING:** Please remember to include a letter of resignation in employee’s files. (not required for hourly student, Emeritus, and Courtesy appointments) Employee Information

Click **Continue** button if you want to go back and make changes.
**Batch Terminations (for Students only)**

After selecting "Multiple Tasks" on the Job Tasks Main Menu, select "Student Terminations" and fill in the position number; then click "Go To Task."

You can choose to "Select All" for termination, or to select individual names from the list.

Click "Continue" to proceed, or "Reset Form" to start over.

If future records exist, you can still complete the task, but the future record(s) from Banner will need to be removed before the transaction is applied in the nightly run.
**Default Labor Distribution Change (NBAJOBS)**

The Default Labor Distribution Change is used when changing only the labor distribution; and is used exclusively for current and/or future effective dates.

Please select one of the following actions:
- Change, Respoint, Renew or Extend Existing Job
- Change Default Labor Distribution (NBAJOBS only)
- Terminate a Job
- Other (go back to main menu)

On the Job Tasks Main Menu, select “Change Default Labor Distribution (NBAJOBS only),” then click “Go To Task.”

Fill in, and/or select, information necessary for the task.

Click “Add Additional Month” for more Labor Distributions for this person (maximum of 4), or “Continue” to proceed.

Note: Work Study changes are the only Default Labor Distribution Changes that will run manually (and cannot run multiples). The manual process for Default Labor Distribution Changes will generate a print-ready form. Once printed, the paper form must be routed appropriately for signatures; then sent to Central Payroll.
Student Hires

Student Hires – Electronic or Manual

Electronic process

- Work study
- C50XXX and C55XXX positions with suffix 00/55
- Hourly pay exceeds maximum allowed, with or without associated graduate job
- Student level = Grad, Citizenship = ‘N’ or ‘S’ and there are no current term credits
- Special circumstances regarding student employment eligibility

Manual process

- C59XXX jobs
Fill in, and/or select, information necessary for the task.

The student task is divided into sections. At certain intervals you will need to click a “continue” button to move to the next section.

To proceed, click “Continue.” To edit, click “Reset Form.”
Student Job Changes

Student Job Changes – Electronic or Manual
(All Student Job Changes originate in OSCAR.)

Electronic process

- pay increase or correction
- hourly pay exceeds maximum allowed but there is an associated "graduate assistant" job
- changes where the hourly rate exceeds the maximum rate and there is no associated "graduate assistant" job
- timesheet org change
- labor distribution (if no future labor distribution exists) changes for positions with 55 suffix

Manual process

- changes from system to non-system students, and vice versa
- decrease in pay

Once the suffix is designated, select all applicable changes. (Note: If selecting multiple actions, all must have the same effective date.)

Click "next" to proceed.
Fill in, and/or select, information necessary for the task.

Click “continue” to proceed.
Temporary Hires

For multiple hires, select the corresponding name from the dropdown list.

<table>
<thead>
<tr>
<th>Doe, Jane</th>
<th>Doe, John</th>
<th>Smith, Mary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doe, Jane</td>
<td>Doe, John</td>
<td>Smith, Mary</td>
</tr>
</tbody>
</table>

To proceed, click "Continue." To edit, click "Reset Form."

Note: The TS901 will not process electronically. It will automatically redirect to the manual task.

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Supervisor Update

Individual Update (No Form in Nolij)

On the Job Tasks Main Menu, after selecting an existing job, select “Update Supervisor,” then “Go To Task.”

Enter New Supervisor ID Number and “Click to Select Posn/Suff” to display the new supervisor’s information. Make a selection from the list and continue with the task.

Click Continue Button to proceed with task.
Supervisor Update

Batch Updates (No Form in Nolij)

On the Job Tasks Main Menu, after select Multiple Transactions, enter the Action Date and click Display Options.

Select Supervisor Update and enter Current Supervisor ID#, Position and Suffix and then click on Go To Task.

Enter New Supervisor ID# and Click to Select Posn/Suff. This will return valid supervisor positions to select from. Next, choose which employees need to have the supervisor updated, enter any comments, click the Continue button and Submit Electronically.

Note: The Individual Supervisor and Batch Supervisor tasks do not have any additional routing levels and will go directly to the Apply routing level to be applied to Banner in the nightly process. They are not put into Nolij, therefore there is no originator PDF. The status of the Supervisor Updates can be checked in Self-Service or in Banner.
After selecting “Welcome Email,” select either “Send Email To Employee” or “Get Report.”

If “Send Email To Employee” is selected, enter the employee’s ID number.
The task determines which letter will be sent based on the answers selected in response to various questions.

Click “Continue” to preview the Welcome Letter, then “Submit” to send the email (or “Cancel” to stop the process). The email will be sent to the employee and to the originator of the process. Emails will also be sent to the ID Center and/or Benefits, as applicable.
Get Report

If “Get Report” is selected, choose either a unit report by date and Business Center, or an individual report.

Fill in requested information (either ID, or Date and Business Center) and click “Continue” to show report.

Select “Back to Menu” at any time to return to the Letter/Email Tasks header page.
Online Services Tasks

Log in to OSU Online Services at http://infosu.oregonstate.edu/login, using your ONID username and password.

Select “Employee Information.”
Select “EPAF Main Menu.”

Select “New EPAF.”
Job Location Change

After selecting “New EPAF” and getting to the “New EPAF Person Selection” page, enter the employee ID, and the effective date of the change. [Important: The effective date must be the 1st of the current month, or the 1st of a future month (no retroactive changes). If the change is effective in the current month, it must be entered on, or before, the 10th of the month. If it is entered after the 10th of the month, the effective date must be the first of the next month or later.]

Select “Job Location” from the dropdown list.

Click “Go” to continue.

Select the job to be updated.
Select the appropriate information from the dropdown list.

Click "Save" when finished entering data.
Once saved, you must click “Submit” to process the transaction.

Once successfully submitted, you can log off by clicking “Exit,” or continue by selecting one of the options at the bottom of the page.
Type in the ID of the employee in the ID field and hit tab and the Employee Name with populate. If you do not have the Employee ID you can use the magnifying glass to search.

Enter the Personnel Date as the Effective date in the Effective Date box. If you are using IE, you might have to enter the date again once you click Go.

The Approval Category should be Academic Wage: Hire New Job 9 month appt, AWHS1 if you have an end date and AWHS2 if you do not have an end date. Then click Go.
You will be entering in a new Position/Suffix. You will need to contact Jennifer Short to set up a new position for this task. Once you enter the position/suffix, click Go.

Any items marked with a * require entry. If there is no * then entry in that field is optional or can be left blank. Some items will default in and cannot be changed, such as Employee Class Code.

You need to enter the Benefit Category. Even if it is the staying the same, you’ll want to re-enter it here.
Here you will see some items will default in and but because there is a drop down they can be changed, such as Job Type will default in as Secondary, but if you know their Primary Job has already been changed you can change this to Primary.

The Encumbrance Dates should be entered per the Encumbrance Start/End Date Inputting Chart.

This is the section where the majority of the information will be entered by you. Unlike OSCAR there is no logic to determine if what you are entering is correct. IMPORTANT: Accuracy is essential. Make sure that the information is correct, and in the right places. This is an EPAF so any information you enter will be uploaded directly into Banner once the EPAF Completes. For example, make sure you enter both the FTE and Appointment Percent. Entering one will not automatically fill-in the other.

A spreadsheet will be provided to you to help you make some of these calculations and to check your work before you submit your EPAF.

If you selected the AWHS1 a Termination Date is required. If you select AWHS2, you would not need to complete this.
Labor Distribution

If the labor information is not changing then you do not need to enter anything. You can click Default from Index to upload the default index for the Org. Code, but by doing this your screen will jump to the top and you will get an error to enter the Account Code. Enter the account code. The screen will again jump to the top of the screen but the error should now be gone. Scroll back down to finish your EPAF.

Routing Queue

Your normal routing queue that you have set up for your EPAFs should default in here and you should not need to change anything.

Comments

The comments section is just like the Comments section on an OSCAR EPAF. Any information you enter will show on the FormFusion document that uploads into NOLIJ and will load into Banner.
The last step is to Save and Submit. When you click Save the form will jump up to the top of the screen again. If you see any errors you will want to fix them before proceeding. Warnings are just that and the form can be submitted.

If no errors need to be fixed, scroll back down to the bottom and click Submit. If you are not sure if you are ready to Submit you can click Save and exit out of the EPAF and to complete it at another time when you log back in to your EPAF Originator Summary, under Transaction Status select Waiting and Go and you will see any EPAFs that are waiting to be Submitted. You would select the EPAF and then click either Void if it is no longer needed or Update to finish. Save and Submit your EPAF.

Just like with OSCAR EPAFs, if you want to see which EPAFs you have in process within the last 90 days to your Current tab in the EPAF Originator Summary for any in process EPAFs and History tab for any EPAFs that are Complete or have be Voided in the last 90 days. The Transaction Status column will tell you where the EPAF is in the queue.

Pending means it is still waiting to be approved. You can select the EPAF and scroll down to the Routing Queue to see whose queue it is in.

Approved means that has gone through the entire Routing Queue and the EPAF should Complete the next time the EPAF process runs unless any errors occur.

EPAFs in Waiting, Pending and Approved status can be voided.

Complete means the EPAF has uploaded into Banner and a Nolij form has been produced and loaded to Nolij, and an Originator copy has been sent to the Originator of the EPAF via email, if applicable. Once and EPAF is Complete it cannot be voided.
Checking the Status of Electronic Transactions

To check the status of an electronic transaction, log in to Employee Online Services at [http://infosu.oregonstate.edu/login](http://infosu.oregonstate.edu/login).

Select “Employee Information.”
Select “EPAF Main Menu.”

Select “EPAF Originator Summary.”
EPAF Originator Summary

The "Current" tab shows you the EPAFs for which you need to take action so the only EPAFs that will appear here would be a Job Location Change or AW 9 month which has not been submitted yet.

Click on the "History" tab to view the status of transactions submitted. Transactions will remain on the History page for three months.
EPAF History

Explanation of “Transaction Status” notations:
- Waiting – The transaction has been saved, but not submitted (“waiting” status does not apply to EPAFs generated in OSCAR; only Online Services tasks).
- Pending – The transaction was submitted to an approver and is awaiting their action.
- Approved – The transaction was approved and is waiting to be applied by the nightly batch process.
- Completed – The transaction was applied in the nightly batch upload, and the job record changes are applied.
- Voided – Only the originator and the 'apply' level person can void a transaction.
- Disapproved – An approver is indicating that he/she does not agree with the action. No further action will or can be taken. The transaction will remain in history as disapproved at whatever level it was stopped.

Click on the employee name to go to the EPAF Preview page to view more detail, or to void a transaction.

Click “Comments” to add additional Comments, or to view previous Comments.
EPAF Preview

Click “Void” if you want to void the transaction prior to reaching “Completed” status.

Click “Add Comment” to go to the Comment page.
You can log off, at any time, by clicking “EXIT.”
Errors or Warnings

Online Services Tasks

Error messages (i.e., **Invalid Query Date. Format is MM/DD/YYYY.**) require that the error be corrected before continuing.

Warning messages (i.e., ![Warning Message](image)) will not prevent you from proceeding, but will advise you regarding pertinent information.

If the date is entered incorrectly (i.e., entering “10” for the year rather than “2010”), you will see an error message and a description of the error message.
No error message or warning will appear, but the date will default in as the current date. You must change the “Query Date” to the effective date of the change.

If the “C” is not capitalized in a position number or if a position number is not valid, you will see an error message and a description of the error.
If you inadvertently create a duplicate transaction, you will see a warning message.
If more than one transaction is in the queue for the same person, there is a possibility that there may be conflicting information, or a duplication of transactions, etc. It is recommended that you wait until the first transaction clears before processing another for the same person.
Multiple Hires in Temporary Hire Task

Some recruitments may have multiple hires. This is just to verify that you are aware that this is the case for this task. (This warning would appear on the Job Tasks Main Menu.) Click “Yes” to continue; or “No” if this is not correct.

Action Date Does Not Match Job Begin Date in Temporary Hire Task

Occasionally, the dates may differ due to a specific situation. In most cases, however, the dates should match. If the Action Date needs to be corrected, return to the Job Tasks Main Menu and start over.
Banner Name Does Not Match Social Security Card in Temporary Hire Task

Does the name on the Social Security Card exactly match the name as it appears below?

☐ Yes
☐ No

WARNING: Update PEAEMPL/United States Regulatory Social Security Name as it appears on the Social Security Card.

Correct this in Banner.

PPAIDEN Information Missing or Incorrect in Temporary Hire Task

ERROR: Biographical Information for this employee is incorrect, you may not continue.

This Error message will appear when PPAIDEN information is missing or incorrect (one reason would be if “No” is selected in the task, as noted below). You cannot continue in the task until the error is corrected.

Does the Social Security Number match the card presented?

☐ Yes
☐ No
Contact Information

For technical assistance, contact:

Center for HR Systems & Technology

OSCAR.Mail@oregonstate.edu

541-737-8300