Student Second Hire or TSECPH EPAF
Example

This is used to hire a student in a secondary position who has already been employed by Reed.

EPAF Menu Item in Banner Self – Service /GPS

Banner Self-Service

| Personal Information | GPS - Griffin Payroll/Human Resources Services |

Search [ ] [Go]   RETURN TO MENU SITE MAP HELP EXIT

GPS - Griffin Payroll/Human Resources Services

Time Sheet

Leave Balances

Electronic Personnel Action Forms (EPAF)

Benefits and Deductions
Retirement, health, flexible spending, miscellaneous Benefit Summary.

Pay Information
Earnings and deductions history, pay stubs.

Tax Forms
W4 information, W2 Form.

Jobs Summary

Select "New EPAF" to create (originate) a new EPAF

Banner Self-Service

Personal Information | GPS - Griffin Payroll/Human Resources Services

Search [   ] Go   RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

Electronic Personnel Action Form

To create an EPAF, select 'New EPAF'. To view EPAFs created by you, select 'EPAF Originator Summary'. Proxy setup not available for EPAFs.

EPAF Originator Summary
New EPAF
Act as a Proxy

RELEASE: 8.9

Enter the student employee ID number that you want to Hire. If there is a letter in the ID number, it must be capitalized.

Personal Information | GPS - Griffin Payroll/Human Resources Services

Search [   ] Go   RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

New EPAF Person Selection

Enter an ID and hit 'Tab' to fill in name in adjacent field. Values displayed under current values will be as of the Query Date, which defaults to today's date. Enter the desired current-values-as-of date in the Query Date field and select the requested action (Approval Category). Select Go.

Must use
UPPER CASE
in ID Number

* - indicates a required field.

ID: * [   ]

Query Date: MM/DD/YYYY* [07/15/2016]

Approval Category: * [Not Selected]

Go

Once you have entered the ID number, click tab, enter, or return and the student's name will come up.

Under Query Date, enter the effective date of the transaction. Click the drop down on Approval Category to select the correct EPAF. In this circumstance we are choosing to hire a student that is already in the system so you would select "Student Secondary Position Hire, TSECPH".

Personal Information	GPS - Griffin Payroll/Human Resources Services

Search [＿＿＿＿＿＿] [Go]   RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

New EPAF Person Selection

💬 Enter an ID and hit 'Tab' to fill in name in adjacent field. Values displayed under current values will be as of the Query Date, which defaults to today's date. Enter the desired current-values-as-of date in the Query Date field and select the requested action (Approval Category). Select Go.

* - indicates a required field.

ID: * M29899   Avril Sharon Carrillo

Query Date: MM/DD/YYYY***** 07/15/2016

Approval Category: * Stu Secondary Position Hire, TSECPH

[Go]

When you select an Approval Category, The Employee Job Assignments table should appear, showing all active jobs in the system for the student as of the date in the Query Date field.   If you see the Employee Jobs Assignment table, Click Go.

Student Secondary Hire vs. Student Initial Hire:

If there are no active jobs for the student as of the Query Date, you will see the following instead of the Employee Jobs Assignment table:

If a student has no current active jobs, you'll want to make sure they have been hired before in order to determine whether you should use the Secondary Hire or Initial Hire Approval Category. Click the 'All Jobs' button to see if the student has worked at Reed in the past. If jobs appear, click Go to move on to the Job Selection screen.

If clicking the 'All Jobs' button does not bring up any jobs for the student, you need to change the Approval Category choice to 'Initial Student Employee Hire, TNEWEH' and follow the steps in the Student New Hire document to hire the student into their first job at Reed.

If you know the Position number of the new position, type it into the Position field in the 'New Job' row and press the Tab key to fill in the Job details in the rest of the row. Skip to page 10 for information on how to fill in the Suffix field.

If you do not know the position number of the new position, click on the magnifying glass in the 'New Job' row to access the search form so you can find and select the new position.

| Personal Information | Student Account | Financial Aid | GPS - Griffin Payroll/Human Resources Services |

Search [ ] [Go]   RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

New EPAF Job Selection

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

ID: Avril Sharon Carrillo, M29899
Query Date: Jul 15, 2016
Approval Category: Stu Secondary Position Hire, TSECPH

Student Secondary Position Hire, TSECPH

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									●
	Secondary	TR0003	00	Office Asst Business Office	05040, BUSINESS OFFICE	Feb 22, 2016		Mar 06, 2016	Active	○

[All Jobs]

[Go]

You can use any or all of the Search Criteria fields to help you narrow the search results. All student positions will have an Employee class of 'ST, Student' and the COA of '1, Reed College'. To search by your budget organization, select the correct budget in the Budget Organization field. If you put your cursor in the Budget Organization field and begin typing the numbers of your Org, the list will go to your Budget Org. This will save you time.

If you know part of the position number, you can type in the part you know in the Position Number field using the percent sign (%) as a wildcard. For example, if you know the position number starts with 'TR80' but you can't remember the last two numbers, type TR80% into the Position Number field and click Go, and you will see a list of results that begin with TR80.

Personal Information	Student Account	Financial Aid	GPS - Griffin Payroll/Human Resources Services

Search [＿＿＿＿] [Go]   RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

New Position Selection

Enter search criteria and select Go. Then select the link under Position to select it.

Search Criteria
Position Number: [＿＿＿＿]

Employee Class:
All
ST, Student

COA:
All
1, REED COLLEGE

Budget Organization:
07610, ADMINISTRATIVE COMPUTING SERVICES
08070, LIBRARY
08080, INSTRUCTIONAL MEDIA CENTER
~~00005, PERFORMING ARTS RESOURCE CENTER~~

[Go]

Click Go to search by the Search Criteria you've chosen.

If you are searching by budget organization, your budget organization selection will bring up all positions for that organization number.

Search Criteria

Position Number:

Employee Class:
```
All
ST, Student
```

COA:
```
All
1, REED COLLEGE
```

Budget Organization:
```
07421, FACULTY RETREAT JUNE 2016
07610, ADMINISTRATIVE COMPUTING SERVICES
08070, LIBRARY
```

Go

Jump to Bottom

Return to EPAF Menu

Search Results

▲ Position ▼	▲ Title ▼	▲ Employee Class ▼	▲ COA ▼	▲ Budget Organization ▼	Begin Date	End Date
TR8069	Student Reg PARC	ST, Student	1	08070, LIBRARY	Apr 01, 2013	
TR8070	Student Reg-Library Admin	ST, Student	1	08070, LIBRARY	Jul 01, 2012	
TR8071	Student Reg-Libr Acquisitions	ST, Student	1	08070, LIBRARY	Jul 01, 2012	
TR8072	Student Reg-Library Cataloging	ST, Student	1	08070, LIBRARY	Jul 01, 2012	
TR8073	Student Reg-Lib Circ/Reserves	ST, Student	1	08070, LIBRARY	Jul 01, 2012	
TR8074	Student Reg-Lib Serials/Gov't	ST, Student	1	08070, LIBRARY	Jul 01, 2012	
TR8075	Student Reg-Lib Resrce Sharing	ST, Student	1	08070, LIBRARY	Jul 01, 2012	
TR8076	Student Reg-Library Serials	ST, Student	1	08070, LIBRARY	Jul 01, 2012	
TR8077	Student Reg-Libr Summit/Stacks	ST, Student	1	08070, LIBRARY	Jul 01, 2012	
TR8078	Student Reg-Library Computers	ST, Student	1	08070, LIBRARY	Jul 01, 2012	
TR8079	Student Reg-Lib Electronic Res	ST, Student	1	08070, LIBRARY	Jul 01, 2012	

Return to Top

Click the correct red position number.

Search [＿＿＿＿＿＿] [Go]   RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

New EPAF Job Selection

For actions that involving hiring into a new job: if you know the Position Code of the new job, enter it in the correct space of the blank Job row. If you don't know the Position Code, click the magnifying glass in the blank Job row to access the search form. Enter the suffix (see **documentation** on suffix usage).

For actions that involve a currently active job, select the link under Title.

ID: Avril Sharon Carrillo, M29899
Query Date: Jul 15, 2016
Approval Category: Stu Secondary Position Hire, TSECPH

Student Secondary Position Hire, TSECPH

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job	TR8072		Student Reg-Library Cataloging	08070, LIBRARY					●
	Secondary	TR0003	00	Office Asst Business Office	05040, BUSINESS OFFICE	Feb 22, 2016		Aug 21, 2016	Active	○

[All Jobs] ←

[Go]

New EPAF
Return to EPAF Menu

RELEASE: 8.9.0.3

To determine the correct suffix value, click the 'All Jobs' button to see if this student has been hired into a job with this position number at any time in the past.

Search [   ] [Go]   RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

New EPAF Job Selection

💬 For actions that involving hiring into a new job: if you know the Position Code of the new job, enter it in the correct space of the blank Job row. If you don't know the Position Code, click the magnifying glass in the blank Job row to access the search form. Enter the suffix (see **documentation** on suffix usage).

For actions that involve a currently active job, select the link under Title.

ID: Avril Sharon Carrillo, M29899
Query Date: Jul 15, 2016
Approval Category: Stu Secondary Position Hire, TSECPH

> **Check to see if this student has another currently active or terminated job with position number TR8072. She does not, so enter 00 in Suffix field**

Student Secondary Position Hire, TSECPH

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job	TR8072		Student Reg-Library Cataloging	08070, LIBRARY					🔵
	Secondary	TF0106	00	LASER	24762, OFF-CAMPUS WORK STUDY	Apr 04, 2016	May 13, 2016	Apr 17, 2016	Terminated	○
	Secondary	TR0003	00	Office Asst Business Office	05040, BUSINESS OFFICE	Feb 22, 2016		Aug 21, 2016	Active	○
	Primary	TR0031	00	Phonathon Caller	05602, DEV-ANNUAL FUND	Nov 16, 2015	Feb 10, 2016	Feb 07, 2016	Terminated	○

[Active Jobs]

[Go]

New EPAF

Return to EPAF Menu

The suffix is used to identify a unique student-job connection. If the student has had any job with this same position number in the past, you will need to figure out the next available suffix. For example, to hire this student into a new job with positiion number TR0003, you would use '01' as the suffix.

Since you are hiring this student into a job with a position number that she has not worked in before, you can enter '00' (two zeroes) in the New Job Suffix field. Click Go.

Personal Information | GPS – Griffin Payroll/Human Resources Services

Search [_____] Go

RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

New EPAF Job Selection

For actions that involving hiring into a new job: if you know the Position Code of the new job, enter it in the correct space of the blank Job row. If you don't know the Position Code, click the magnifying glass in the blank Job row to access the search form. Enter the suffix (see **documentation (link to be added)** on suffix usage).

For actions that involve a currently active job, select the link under Title.

ID: Avril Sharon Carrillo, M29899
Query Date: Jul 15, 2016
Approval Category: Stu Secondary Position Hire, TSECPH

Student Secondary Position Hire, TSECPH

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job	TR8072	00	Student Reg-Library Cataloging	08070, LIBRARY					●
	Secondary	TF0106	00	LASER	24762, OFF-CAMPUS WORK STUDY	Apr 04, 2016	May 13, 2016	Apr 17, 2016	Terminated	○
	Secondary	TR0003	00	Office Asst Business Office	05040, BUSINESS OFFICE	Feb 22, 2016		Aug 21, 2016	Active	○
	Primary	TR0031	00	Phonathon Caller	05602, DEV-ANNUAL FUND	Nov 16, 2015	Feb 10, 2016	Feb 07, 2016	Terminated	○

[Active Jobs]

[Go]

New EPAF
Return to EPAF Menu

RELEASE: 8.9.0.3

12

This brings up the attached EPAF to complete.

Personal Information | GPS – Griffin Payroll/Human Resources Services

Search [   ] [Go]   RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

Electronic Personnel Action Form

💬 Enter the information for the EPAF and either Save or Submit. The **Student Pay Scale** can help you determine which Grade and/or Step to request.

If you are creating a Primary or Secondary Hiring EPAF, please remember to enter the names of the **timesheet approver** for this position (even if the approver is you/the same person as the supervisor), as well as the name of the approver's **proxy**.

If you don't know who will be the proxy, please note that in the comments box as well.

Name and ID: Avril Sharon Carrillo, M29899
Transaction: **Query Date:** Jul 15, 2016
Transaction Status:
Approval Category: Stu Secondary Position Hire, TSECPH
[Save]

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

You need to fill out all fields with the red *, except for those that say "Not Enterable".

* - indicates a required field.

Student Secondary Position Hire, TR8072-00 Student Reg-Library Cataloging

Item	Current Value	New Value
Timesheet Orgn: *	🔍	08070
Title: *		Cataloguing
Salary Grade: *		1
Step: *		1
Job Begin Date: MM/DD/YYYY*		07/15/2016
Jobs Effective Date: MM/DD/YYYY*		07/15/2016
Supervisor ID: *		V20928
Job Status: *(Not Enterable)		A
Contract Type: *(Not Enterable)		S
Accrue Leave: *(Not Enterable)		Y

If you have your Default Routing Queues set up correctly, Dawn Derry's Username (DERRYD) should already be in place in the 'User Name' column of the first record in the Routing Queue table:

Routing Queue

Approval Level		User Name		Required Action	
60 - (EMPST) Student Employment	🔍	DERRYD	Dawn Derry	Apply	
Not Selected	🔍			Not Selected	
Not Selected	🔍			Not Selected	
Not Selected	🔍			Not Selected	
Not Selected	🔍			Not Selected	

Save and Add New Rows

(To set up your Default Routing Queues, follow the steps in the <u>Setting Default Routing Queues</u> document.)

If your Default Routing Queues have not been set up, complete the Routing Queue section by using the magnifying glass under 'User Name' to select Dawn Derry's name in the popup window.

Routing Queue

Approval Level		User Name		Required Action
60 - (EMPST) Student Employment	🔍			Apply
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected

Save and Add New Rows

Select Dawn's Name in the 'Valid Values' popup window. Click the Select button.

Valid Values

Search: [   ] Go

User Names,
60 - Student Employment

Derry, Dawn (DERRYD)

Select Dawn's name then click the Select button.

Select

Exit Window

Whether by default or manually, once the Routing Queue is correctly set it will appear like this.

Routing Queue

Approval Level	User Name		Required Action
60 - (EMPST) Student Employment	🔍 DERRYD	Dawn Derry	Apply
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected

[Save and Add New Rows]

Comment

In the comment box please list the name of the person who will be approving the time sheets for this position as well as the name of the person who will proxy for this position

Approval Types | Routing Queue | Comments | Transaction History

[Save]

In the comment box please list the person who will be approving this time sheet as well as the proxy for this approver.

Once you have completed this form, click Save.

Verify that the webpage message is "Your change was saved successfully".

| Personal Information | GPS – Griffin Payroll/Human Resources Services |

Search [ ] [Go]   RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

Electronic Personnel Action Form

✔ Your change was saved successfully.

💬 Enter the information for the EPAF and either Save or Submit. The **Student Pay Scale** can help you determine which Grade and/or Step to request.

If you are creating a Primary or Secondary Hiring EPAF, please remember to enter the names of the **timesheet approver** for this position (even if the approver is you/the same person as the supervisor), as well as the name of the approver's **proxy**.

If you don't know who the proxy will be, please note that in the comments box as well.

Name and ID: Avril Sharon Carrillo, M29899
Transaction: 8483   **Query Date:** Jul 15, 2016
Transaction Status: Waiting
Approval Category: Stu Secondary Position Hire, TSECPH

[Save] [Submit] [Delete]

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

If you are ready to submit this Personnel Action Request to Student Payroll, click the Submit button.

<u>You must click to Submit button</u> to submit this change request to Student Payroll for Application, otherwise the change will not be applied in the system.

Verify that the webpage message is "The transaction has been successfully submitted". The Transaction Status should say 'Approved'.

| Personal Information | GPS – Griffin Payroll/Human Resources Services |

Search [   ] [Go]   RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

Electronic Personnel Action Form

✔ The transaction has been successfully submitted.

💬 Enter the information for the EPAF and either Save or Submit. The **Student Pay Scale** can help you determine which Grade and/or Step to request.

If you are creating a Primary or Secondary Hiring EPAF, please remember to enter the names of the **timesheet approver** for this position (even if the approver is you/the same person as the supervisor), as well as the name of the approver's **proxy**.

If you don't know who the proxy will be, please note that in the comments box as well.

Name and ID: Avril Sharon Carrillo, M29899
Transaction: 8483   **Query Date:** Jul 15, 2016
Transaction Status: Approved
Approval Category: Stu Secondary Position Hire, TSECPH

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

You are now done with this EPAF.

Warnings and Errors: If you encounter <u>Warnings</u> **when you submit the EPAF, don't be concerned. The EPAF has successfully been submitted and will be Applied to the system despite warnings.**

A common Warning you may see:

Errors and Warning Messages

Type	Message Type	Description
Student Secondary Position Hire	WARNING	*WARNING* Encumbrance has been set to 0, because method is Value Input.

If you encounter <u>Errors</u> **when you submit the EPAF, please contact Dawn Derry at payroll@reed.edu x7549 or x7505. If you can, take a screenshot of the webpage and the Error text as it could help with troubleshooting.**