

Electronic Personnel Action Forms (EPAF)

Student Job Change, JSCHG

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## Document Updates

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## Information Non-Disclosure at NMSU

New Mexico State University maintains the confidentiality and security of records in compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA), the Health Insurance Portability and Accountability Act (HIPAA), and the Gramm-Leach-Bliley Act (GLBA), in addition to other federal and state laws. These laws pertain to the security and privacy of personal academic, medical and financial information, along with identifying information such as social security numbers.

### **Family Educational Rights and Privacy Act of 1974 (FERPA) Policy:**

<http://research.nmsu.edu/compliance/IRB/resources.html#3>

FERPA protects students' records. FERPA requires post-secondary educational institutions and agencies to conform to fair information practices in their handling of student data. Among the provisions of the act are the requirements that data be used only for intended purposes and that those responsible for student data take reasonable precautions to prevent misuse of it. Examples include Social Security Numbers, grades, date of birth, etc.

### **Health Information and Portability Accountability Act (HIPAA):**

<http://research.nmsu.edu/compliance/IRB/resources.html#7>

HIPAA protects all medical records and other individually identifiable health information used or disclosed in any form, whether electronically, on paper, or orally.

### **Gramm-Leach-Bliley (GLB) Act:**

<http://www.nmsu.edu/manual/documents/07-29-09-policy-manual-final020110.pdf>

GLBA protects private, non-public information of individuals. Private, non-public information consists of information such as name, Social Security Number, date and location of birth, gender, credit card numbers and driver's license numbers.

Within NMSU, employees are authorized access to University records only to the extent necessary to perform their official university duties, and are responsible for protecting such information against unauthorized access or disclosure.

The New Mexico State University Policy Manual, **Chapter 2** General Operating Policies, Section 2.90 contains specific information related to disclosure of records and information.

Examples in this manual may have personal data altered or blacked out to ensure privacy.

## What is an EPAF?

An Electronic Personnel Action Form (EPAF) is used to originate electronic documents needed to process personnel actions, such as hiring transactions and changes to existing job data.

EPAF is a Banner module that was designed to accommodate a more efficient approval signature process for centralized and decentralized HR operations or actions. It improves and simplifies the process for completing and approving a wide range of Personnel Action Forms (PAFs) for all employee types.

EPAF actions are originated electronically by the various departments within the university to communicate employment decisions about their employees to the HR and Payroll department. They are then electronically routed to the appropriate approvers. Once approved, they are applied to Banner directly by a central process.

EPAF is fully electronic (Web-based) and EPAF actions can be created and routed using Banner Employee Self-services (ESS) which is accessible through myNMSU. Access to EPAF is not granted to all NMSU employees; it is only for those employees who have been designated in the system as EPAF originators and/or approvers.

The type of EPAF you create depends on the change you are making. Additional EPAFs will become available in the system as they are developed. The different types of EPAFs are classified as “Approval Categories”. In addition to general functions of EPAF, this document describes how to process student employee hiring actions in the HSHIR Approval Category.

## EPAF key features

### Default values

The EPAF system populates default field values based on the EPAF category selected as well as information obtained from Banner, such as previous job and employee record information.

Most default values can be changed if needed, however some values are automatically populated and cannot be changed. Fields that cannot be changed are indicated as **not enterable** next to the field label.

Default values are a benefit because they save time when completing EPAFs for the most common types of transactions.

### Lookup fields

Lookup fields are used to search and select appropriate values for a field. EPAF integrates with Banner data in order to help find a variety of values, such as values related to employees, organizations, and positions. Lookup fields are indicated by a magnifying glass icon .

### Field validation (error checking)

EPAF uses a two stage validation check that examines entered values to determine if the values are valid given information about the transaction that you have provided. For example, EPAF validates effective and personnel dates based on the job change reason you have selected.

If an EPAF transaction fails validation a message will display indicating the details about the failed validation and how to resolve the issue. There are three types of validation messages, *Error* messages, *Validation* messages and *Warning* messages. Validation messages indicated as **ERROR** or **VALIDATION** must be corrected in order to submit the EPAF for approval. Validation messages indicated as **WARNING** should be noted; however you may submit the EPAF for approval if a warning message exists.

An error will prevent you from submitting the EPAF until the error is corrected, but you can still save the EPAF if errors are present.

## How to access EPAFs

### What you should know before you begin the EPAF process

As you begin an EPAF the system will require specific information about the transaction that you should gather ahead of attempting to originate an EPAF. Specifically, you should know the following details about the transaction, or obtain this information, before you create a new EPAF.

1. Aggie ID (ex. 800XXXXXX)
2. Personnel date of the change
3. The position number for the position that will be updated
4. Access is required to use the EPAF system. Please download, complete, and route the security form to gain access to the system:
  - o Electronic Personnel Security Request Form (<http://hr.nmsu.edu/forms/>)

### Some job aids and tools will also help:

**Processing Toolkit** – The Processing Toolkit is a collection of resources that provides details about hiring student employees, including information about regular and work-study employment processing using EPAF.

<http://hr.nmsu.edu/toolkits/>

Salary Tables – The student (Regular) Salary table is available at

<http://hr.nmsu.edu/employment/salary/>

**Work-study Resources** – Provides information about Federal, State and Crimson Scholar Work-study Programs at NMSU.

Work-study Handbook: <http://fa.nmsu.edu/work-study/handbook/>

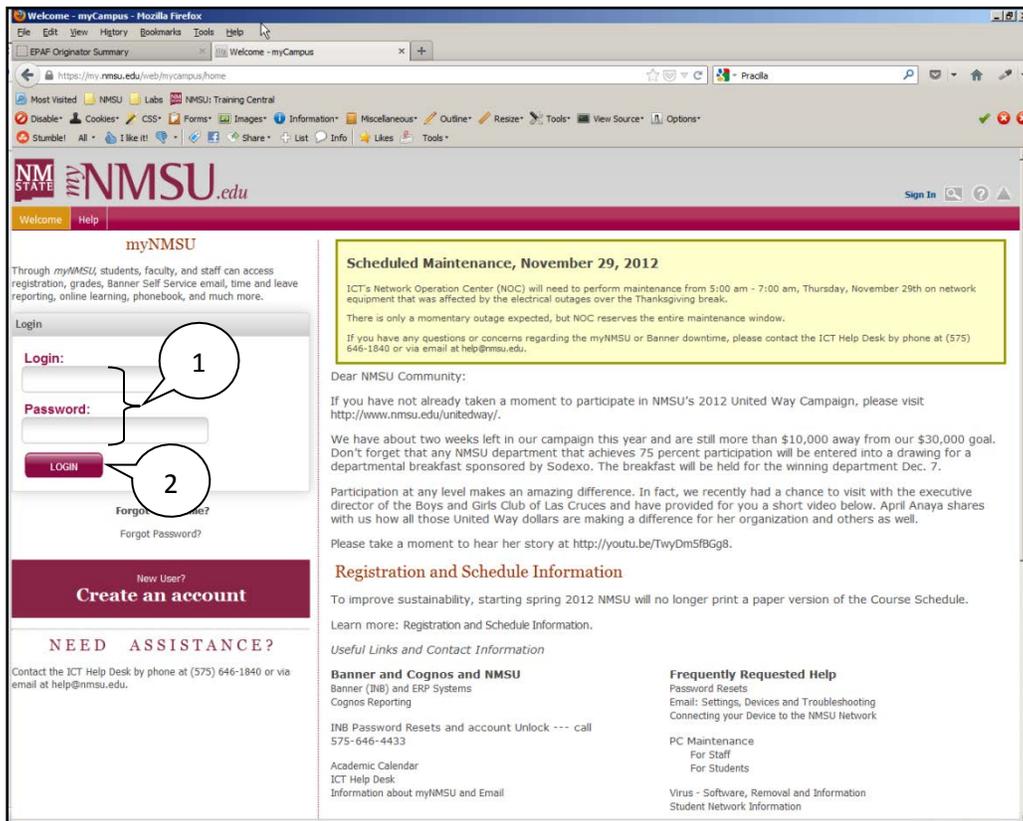
Work-study Employer Responsibilities: <http://fa.nmsu.edu/work-study/employers/>

## Access EPAF through my.nmsu.edu using your browser

*Please Note:*

*Internet Explorer is not supported. We recommend utilizing an alternate browsers such as the latest versions of Mozilla Firefox, Google Chrome, or Apple Safari.*

The EPAF system is accessible through myNMSU. The myNMSU portal allows you to use a single user name and password to access many of the electronic services at NMSU.



<https://my.nmsu.edu>

1. Enter your NMSU User Name and Password.
2. Click on the **Login** button.

The screenshot shows the myNMSU.edu website. At the top, there is a navigation bar with tabs for 'Home', 'Student', 'Employee', and 'Workflow'. A callout bubble with the number '3' is positioned over the 'Employee' tab. Below the navigation bar, the page is divided into a left sidebar and a main content area. The sidebar contains a 'QuickLaunch Navigation' section with links for 'Edit Preferences', 'LaunchPad', 'QuickLinks', and 'Self Service'. Below this is a 'Quick Links' section with links for 'Reset Password', 'NMSU Phonebook', 'Banner Self Service', 'E-Bill/Make a Payment', and 'Digital Measures'. The main content area is titled 'What's New?' and features three announcements: 'MS Office 365 ProPlus Software for all active students', 'OneDrive: One place for all of your documents!', and 'AggieAir Wireless Expanded to Housing'.

3. Once logged into myNMSU, click on the **Employee** tab.

**Personal Information** **Student** **Financial Aid** **Employee** **Finance** **Proxy Access**

Search

## Main Menu

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Welcome, Sally A. Rel, to the WWW Information System! Last web access on Nov

[Personal Information](#)  
Update addresses, contact information or marital status; review name or social security number change

[Student](#)  
Apply for Admission, Register, View your academic records.

[Financial Aid](#)  
Apply for Financial Aid; View financial aid status and eligibility, accept award offers, and view loan applic

[Employee](#) 4  
Time sheets, time off, benefits, leave or job data, paystubs, W2 and T4 forms,W4 data.

4. Click on **Employee** to open Self-Service Banner in a new window or tab.

**NM STATE** New Mexico State University

**Personal Information** **Student** **Financial Aid** **Employee**

Search   [RETURN TO MENU](#) [SITE MAP](#) [HELP](#)

## Employee

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[Time Sheet](#)

[Leave Report](#)

[Request Time Off](#)

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[Benefits and Deductions](#)  
Retirement, health, miscellaneous and benefit statement.

[Pay Information](#)  
Direct deposit allocation, earnings and deductions history, or pay stubs.

[Tax Forms](#)  
W4 and W2 information.

[Jobs Summary](#)

[Leave Balances](#)

[Direct Deposit](#)

[Effort Certification and Labor Redistribution](#)

[Salary Letter](#)

[Tuition Waiver - Dependents](#)

[Tuition Waiver - Employee/Spouse](#)

[Update Preferred First Name](#)

RELEASE: 8.8.1

5. Select **Electronic Personnel Action Forms**.

## EPAF Categories

Categories are used to select specific data entry forms related to the personnel action you want to perform. In the following section we detail the Student Job Change/JSCHG category, describing each field that is available on the form including a basic description of acceptable values and relevant examples.

### Student Job Change/JSCHG

This section describes the process of completing a **Student – Job Change information** approval category to change Regular and Work-study students.

The Student Job Change/JSCHG EPAF has a single purpose; it is used to change student jobs in the Banner system. As such, there is only one form and section to complete, the NBAJOBS form job transactional information.

This EPAF will be submitted to make changes to student job title, base, FTE and department.

### Creating a new TSTRM EPAF

1. From the Electronic Personnel Action Form screen, click **New EPAF**.

### New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

2. Enter the Banner **ID** of the employee.
  - You can do a search for the Banner **ID** by clicking on the magnifying glass. Employees can be looked up using their first and last names, Banner IDs and/or SSNs.

3. Enter the **Query Date** (defaults to today’s date). See the section labeled “How to determine the query date” for additional details about how to select the appropriate query date for the transaction.
  - How to determine the query date
    1. The query date is used to find jobs and display the job status for each job as of the query date entered. The query date entered should be the effective date of the change requested.
    2. Caution: The query date defaults to the current date and this may not always be what you want.
    3. For example, if an employee title will change 02/17/2017, set the query date to 02/17/2017.
4. Select the **Approval Category** as appropriate. In this case we are creating a *Student – Job Change, JSCHG*
5. Click **Go**.

### Position Number Selection

1. Select the position number for the position that will be updated. If there are multiple jobs, be sure to select the position that belongs to your department.
2. Click **Go**.

#### New EPAF Job Selection

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 **ID:** [REDACTED]  
**Query Date:** Feb 17, 2017  
**Approval Category:** Change Student Job, JSCHG

**Student Job Change, JOBTRL**

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	Primary	999992	01	Student Aide	T10106, TS VPBF AUX ADMIN CCSU FACILITIES	Jul 02, 2016		Jan 31, 2017	Active	<input checked="" type="radio"/>

## Electronic Personnel Action Form

## Student Job Change

**Student Job Change, 999992-01 Student Aide, Last Paid Date: Jan 31, 2017**

Item	Current Value	New Value
<b>Job Status:</b> *(Not Enterable)	Active	<input type="text" value="A"/>
<b>Jobs Effective Date:</b> MM/DD/YYYY*	07/02/2016	<input type="text"/>
<b>Personnel Date:</b> MM/DD/YYYY*	07/02/2016	<input type="text"/>
<b>Title:</b>	Student Aide	<input type="text" value="Not Selected"/>
<b>Regular Rate:</b>	7.5	<input type="text"/>
<b>FTE:</b>	.5	<input type="text"/>
<b>Hours per Day:</b> (Not Enterable)	4	<input type="text"/>
<b>Hours per Pay:</b> (Not Enterable)	43.34	<input type="text"/>
<b>Job Location:</b>	520950, CORBETT CENTER	<input type="text" value="Not Selected"/>
<b>Timesheet Orgn:</b>	T10106	<input type="text"/>
<b>Job Change Reason:</b> *	HSHIR	<input type="text" value="Not Selected"/>
<b>Contract Number:</b>	328074	<input type="text" value="352211"/>

A "Job Change Reason" is required for all transactions. The personnel date is required to be completed for each EPAF along with one of the following Job Change Reasons.

- **BASE:** the Regular Rate must be changed; the FTE and/or Title fields can optionally be changed as well but no other enterable field.
- **DEPT:** the Job Location must be changed and Timesheet Orgn may be changed. No other enterable field is changed.
- **FTE:** the FTE must be changed. No other enterable field is changed.
- **TITLE:** the Title must be changed. No other enterable field is changed.

NOTE: Only the fields that are changing are enterable.

### Routing Queue Section

The routing queue specifies the approval levels and approvers for the EPAF transaction.

You can default the routing queue used for each EPAF Category to specify the approvers used for future transactions. If you set-up the default routing queue you can still specify different approvers if necessary for each transaction. See the *Default Routing Queue* section (pg. 31) for additional details.

The Student Job Change EPAFs have three routing queue levels including:

HR Services – Performs initial review of the transaction

Dean/VP – Approves the transaction

Payroll – Applies the transaction to the database The Payroll level does not approve or review the transaction in any way, rather the Payroll level simply loads the EPAF records into Banner.

Only the approver selected for the HR Services and Dean/VP level will review and approve the transaction.

#### Routing Queue

Approval Level	User Name	Required Action	Remove
5 - (HR1) HR Services	<input type="text"/>	Approve	
20 - (D/VP) Dean/VP	<input type="text"/>	Approve	
99 - (PAY) Payroll	<input type="text"/>	Apply	
Not Selected	<input type="text"/>	Not Selected	
Not Selected	<input type="text"/>	Not Selected	
Not Selected	<input type="text"/>	Not Selected	
Not Selected	<input type="text"/>	Not Selected	

1. Enter the User Name for each level of approver
  - a. The search function can be used by clicking on the magnifying glass to the left of user name
  - b. For the HR Services approval level choose the HR designated student approver from the list
  - c. For the Dean/VP level, choose the approver in your organization that is designated to approve your department’s transactions.
  - d. For the Payroll approval level you may select any available approver on the search screen

Click **Save and Add New Rows** button to save your changes and populate the name of the approver

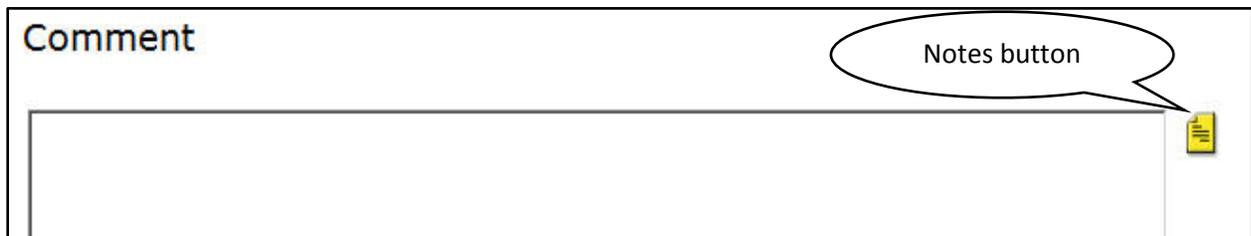
**Comment**

Originators add comments to the EPAF in order to provide additional information about the transaction that is not otherwise recorded in the submission form. The comments will be saved with the EPAF transaction and will be reviewed by EPAF approvers at the Dean/VP approval level. Both originators and approvers will be able to see the comments in the originator or approval summary screens respectively.

**Adding comments to an EPAF**

You can add multiple comments to an EPAF transaction; however comments cannot be deleted once the form is saved.

If the EPAF has already been saved with comments the comment contents will not display in the comment field. In order to see previously saved comments click the note button next to the comment field.



Comments may also be added to an EPAF by approvers. If an EPAF is returned for correction, the approver comments will provide information about why the EPAF was returned. See the section titled *Viewing Comments and Warnings* (pg. 26) for additional information about viewing EPAF comments.

**Note:** Comments cannot be deleted.

**Save then Submit**

Before you can submit an EPAF for approval you must save the EPAF.

After you click submit the EPAF will validate. If errors or warnings are generated, you will see the error messages displayed at the top of the EPAF detail screen. You will not be able to submit the EPAF until the **VALIDATION** or **ERROR** message type errors have been corrected.

Ignore error and warning messages with the message type **WARNING**. In particular, you will often see an encumbrance method warning message upon submission (pictured below). No action is required for WARNING type messages.

If the EPAF has been successfully submitted you will see a success message at the top of the EPAF detail screen.

Upon successful submission the EPAF will be routed to HR for review. The EPAF will now be on your EPAF Originator Summary screen under the History tab.