Electronic Personnel Action Forms (EPAFs)

Special Payment Processing Instructions

for Supervisors Approving

Events and Conferences Employee Assignments

Departments of

Human Resources

and

Information Technology Services

September 2014
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Part 1 – Email Notification

When an approval action is required the Approver will receive an email announcing that fact. The subject line will be “Special Payment Notification” and sent from epaf@ramapo.edu

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From: epaf@ramapo.edu [mailto:epaf@ramapo.edu]
Sent: Monday, September 08, 2014 2:31 PM
To: rjans@ramapo.edu
Cc: RJANS@ramapo.edu
Subject: Special Payment Notification.

Dear Roger Jans,

A special payment form has been submitted for the employee listed below. You can acknowledge/approve the form by clicking on the link below and signing in:

Payee ID: R00300325
Payee Name: Stephen Roma
Payee Ssn: 34015 92001 6078 90
Amount/Rate: $ 25
Units/Hours: 2
Originator ID: SROMA
Payment Details: 06/20/2014 Mahwah High Graduation in Bradley Center TESTTESTTEST

Please log into Self Service Banner at https://sib.ramapo.edu/pls/RCNU/twbclcbit.P_GenMem?name=homepage

You will see the emails include the key details of the transaction. A link is provided that will take you to Employee Self Service to sign into the system.

Part 2 - Access Employee Self Service
Please enter your **Email User Name and Password**.

Be sure to use all lowercase letters in the User Name field.

When finished, select Login.

To protect your privacy, please Exit and close your browser when you are finished.

**User Name:** [ ]

**Password:** [ ]

[Login]  [Click Here for Help with Login?]
Part 3 - Access the EPAF Menu

Click on to Employee tab

Main Menu


- Personal Information: Update contact information; review name or social security number change information; Change your PIN.
- Student Services & Financial Aid: Register, View your academic records; Account Summary, Make a Payment, Payment Plan; Financial Aid
- Faculty & Advisors: Enter grades and registration overrides, View class lists and student information
- Employee: Time sheets, time off, benefits, leave or job data, pay stubs, W2 and W4 data
- Finance: Create or review financial documents, budget information, approvals.
- Sign Up / Update Alert-Me-Now Information
- Sign Up / Update Alert-Me-Now Information

Click on to EPAF: Employee Personnel Action Forms

Employee

Your employee information has been gathered and updated on an ongoing basis via various employee please attempt to correct them via Employee Self Service. In the event that you are not able to co-7230 or 7502 regarding Benefits Deductions and Leave Balance discrepancies, Employee Services at the Payroll Office at ext 7782 for pay and tax form information.

- Time Sheet
- Benefits and Deductions: Retirement, health, flexible spending, miscellaneous, beneficiary.
- Pay Information: Direct deposit allocation, earnings and deductions history, or pay stubs.
- Tax Forms: W4 information or W2 Form.
- Jobs Summary
- Leave Balances
- Surveys, Ballots and Such...
- Leave Request Form
- EPAF: Employee Personnel Action Forms

Click on EPAF Approver Summary
Enter your password for security

Part 4 – Select Employee

The queue status of "ALL" will display all of the EPAF transactions.
If you click on Pending Queue Status you will only see transactions requiring action. (See arrow below) This will give you transactions with a Required Action of Approve

EPAF Approver Summary

You can view the transaction details by clicking on the link of the employee’s name. (See arrow below)

EPAF Approver Summary

If you scroll through the form you will able to see all the transaction details
Part 5 - Approving the EPAF

After viewing the details you have three choices for action:

Approve the transaction

Disapprove the transaction

Return for Correction

This means you return the transaction to the Originator for updated information or correcting a mistake.

More Info provides similar information as scrolling down the form.

When you click one of the action buttons you will see a confirmation message.
Part 6 – Adding Comments

In the Comments section of the form you will see details provided by the originator on the work performed.

If you Disapprove the transaction you should explain why in the box. This ends the transaction. The originator would have to start a new transaction if any payment is due.

If you Return for Correction you should explain the issue here also. The originator will be able to see the comments and take appropriate action to update the transaction and re-submit it for approval. For example if the Originator failed to provide enough detail on the assignment you may request it in the Comment. The Originator will be able to provide these additional details or correct mistakes and re-submit the transaction for approval. This is the preferred method of dealing with incorrect submissions.

Click on the Add Comments link and type into the box.

Comments

[Image of Comments section]

Previous Comments

Date: Aug 19, 2014 12:15:18 PM
Made by: Stephen J Roma, SROMA
Comments: 07/17/2014 Set up for adopt a pet charity rental show in Bernie center

Enter Comment

Provide more details on duties.

[Image of text box for comments]

Save
When you click the **Save** button you will see the information added to the transaction.

### Comments

**Name and ID:** Robin N Keller, R00301024  
**Transaction:** 1444  
**Job and Suffix:** 282001-00, Events & Conf Special Payment  
**Approval Category:** Special Pay Events & Conf, SPLPA

#### Previous Comments

- **Date:** Aug 20, 2014 12:54:18 PM  
  **Made by:** Robert L Brown, RL BROWN  
  **Comments:** Provide more details on duties.

- **Date:** Aug 19, 2014 12:15:18 PM  
  **Made by:** Stephen J Roma, SROMA  
  **Comments:** 07/17/2014 Set up for adopt a pet charity rental show in Berrie center

#### Save

### Part 7 - Returning for Correction

After clicking on the **Return for Correction** button if you return the EPAF Preview or EPAF Approver Summary you will see the **Transaction Status** has changed from “Pending” to “Return for Correction”.

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**EPAF Special Payments For Events and Conferences**  
**Human Resources & Information Technology Services**  
P:\Shared\HR\AA Records\HR System\Banner\EPAF\Training Materials\Events Conferences EPAF Approver handbook.doc
When the Originator re-submits the corrected transaction it will return to your Pending list. At that time you should see the details in the Comments Section.

If you are satisfied with the explanation you may select to Approve the transaction.

**Part 8 – Disapproving a Transaction**

You may select to Disapprove the transaction.

By Disapproving the transaction it will not be able to move forward.
Part 9 – Setting a Proxy

You may designate someone to serve as your proxy. That is to approve transactions on your behalf. The system will record who actually processed the transaction.

Select the **EPAF Proxy Records** link.

![EPAF Proxy Records](image)

Enter your password for security.

Select the proxy level. In this case **Unit Head - Events & Conf**

![Select Proxy Level](image)

And click the **Go** button.
Select the drop down list

Select the desired Proxy

If the individual you would like to serve as a Proxy is not on the list contact Human Resources.
Click the **Add** box.

Then click the **Save** button.

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You will then see the Proxy’s name listed.

You may have more than one proxy.

If you ever want to remove a proxy return to the **EPAF Proxy Records** link and click the Remove box beside that proxy’s name and click **Save**.
Part 10 – Glossary

**Approver** – Employee that can approve an EPAF transaction; typically a supervisor or manager.

**Earning Code** – Characterizes the type of pay an employee receives. For this purpose we always use “SPR” Special Payment Regular.

**Effective Date** – The first day of a pay period, to be entered in the EPAF, using values from the payroll calendar.

**End Date** – The day following the end of a pay period, using values from the payroll calendar. End the payment transaction.

**EPAF** – Acronym for “Electronic Personal Action Form”. In this case an on-line form used to process special payments for employees that work Events & Conferences assignments

**FOAP** – Acronym for “Fund, Organization, Account, Program”. The budget identification number which is where the money spent for the Special Payment will be charged.

**Hours** – the time worked for payment.

**Originator** – The employee that starts the EPAF transaction. This can be the employee themselves or someone on their behalf.

**Proxy** – An employee designated by an Approver to process a transaction, or take approval actions, in their place.

**Rate** – The value in money to be paid.

**Routing Queue** – Identifies the individuals required to approve a transaction and their level.