Electronic Personnel Action Forms (EPAFs)

Special Payment Processing

for Employees (Originators)

Working Events and Conferences Assignments

Departments of

Human Resources

and

Information Technology Services

September 2014
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Part 1 - Accessing Employee Self Service

**Enter Secure Area**
- Apply for Admission
- General Financial Aid
- Campus Directory
- Class Schedule
- Course Catalog
- Back to Ramapo Guide

**Help | Exit**

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 2 – Accessing the EPAF Menu

Click on to Employee tab

Welcome, Stephen J. Roma, to the Ramapo College Information System! Last web access on Aug 13,

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, paystubs, W2 and W4 data

Finance
Create or review financial documents, budget information, approvals.

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 employ 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 a 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
Reports Menu
Click on New EPAF

Electronic Personnel Action Form

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

RELEASE: 8.9

Enter your password for security

Verification

- Enter your PIN or Password and select Submit, or select Exit to be redirected to the User Logout page.

Passwords: *********

Submit

Part 3 - Entering an Employee to be Paid

Enter the employee identification or “R” number

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.

ID: R00301024

Query Date: 08/13/2014

Approval Category: Not Selected

Go
If you do not know the Employee’s R Number you can click on the magnifying glass icon to search.

You may then do a search by employee name.

Enter the name. Click “Go”.

Search Criteria

Last Name: Keller

Go
Click on the R Number link to select the desired employee.

NOTE: Employees will have a Name Type of “Legal LEGL”

Click on the Approval Category drop down list

Select Special Pay Events & Conf
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.

ID: R00301024  |  Robin N Keller

Query Date: MM/DD/YYYY: 08/13/2014

Approval Category: Special Pay Events & Conf, SPLPA

Part 4 - Selecting an Employee’s Position Number

You will see a listing of the employee’s available positions.

We want to use position number 282001 only. This will default in the Events & Conferences FOAP and reduce your manual entry of data.

DO NOT use position 222222.

If you do not see this position listed contact Human Resources. (Stephen Roma x-7507)
When you click on [Go] you will come to the “New EPAF Job Selection”

Select the radio button alongside position 282001 at the far right margin of the line.

Then Click “Go” button: [Go] This selects the position for payment.

**Part 5 - Entering Assignment Details**

After assigning the position number you will need to enter the following information items:

- Effective date
- End Date
- Earning Code
- Hours
- Rate
- Approval Routing Queue

You will need to scroll down to see all the components of the form.

The first part displays information about the employee. You may not change any data here.
Part 6 - Entering Effective Dates

Must enter the **Effective Dates**. The effective date is the start date of the pay period we will pay the employee. You must only enter the dates listed on the Payroll Schedule.

Special Payments can only be entered for current or future payrolls. You may not make retroactive payments. Any payment for work performed in the past must be entered in the current pay period or future pay period. This field is for the effective date of the payroll. The field that records when the work was actually performed comes later.
# EPAF Special Payments For Events and Conferences

[Image of a table with columns: Effective Date, Earnings, Hours or Units Per Pay, Deemed Hours, Special Rate, Shift, End Date, Remove.]

- **Effective Date (MM/DD/YYYY)**
  - Not Selected
  - Not Selected
  - Not Selected
  - Not Selected

- **Earnings**
  - Not Selected
  - Not Selected
  - Not Selected

- **Hours or Units Per Pay**
  - Not Selected
  - Not Selected
  - Not Selected

- **Deemed Hours**
  - Not Selected
  - Not Selected
  - Not Selected

- **Special Rate**
  - 1
  - 1
  - 1

- **Shift**
  - Not Selected
  - Not Selected
  - Not Selected

- **End Date (MM/DD/YYYY)**
  - End Date

- **Remove**
  - Not Selected

[Save and Add New Rows button]
Part 7 - Entering Earning Types and Rates

Using the drop down list, select the “Earnings” code of “SPR, Special Payments Regular”. DO NOT select any other earning code.

Enter an “Hours or Units Per Pay”.  
If the assignment is payed at a flat rate, enter a “1”. A flat rate means a fixed amount of money for a specific task. 
If the assignment is payed by the hour enter the number of hours worked here.

Enter the “Special Rate”  
If the assignment is payed at a flat rate, enter the total to be paid.  
If the assignment is payed by the hour enter the hourly rate here. (The system will calculate the total later.)
You will also have to enter an **End Date**. This stops the payment from repeating. Again, use only the end date from the payroll schedule. The end date is the start of the pay period after the current payment.

### Part 8 - Entering Routing Queues

You then need to designate who will electronically approve the work performed and money paid. This is referred to as the **Routing Queue**. You may set up a default approval routing queue. See Part – 9.

For this EPAF there are five levels of approval in the routing queue.

- A Unit head to confirm the work was done.
  
  > If you normally work for Athletics, you will select an approver from your unit.
  
  > If you normally work for Contemporary Arts/Berrie Center you will select an approver from your unit.

- An Events & Conferences approver approves the assignment

- Budget confirms the funding

- HR reviews the rate paid

- Payroll applies the payment to the appropriate check.
Routing queues can be entered manually. You must select from the approved users listed in the dialogue box provided when you click on the magnifying glass alongside User Name.

Select the desired Approver. Their name will populate the line.

You will also notice there are different types of Approval under Required Actions. “Approve” means the approver must electronically sign the transaction. “FYI” means the approver is just notified of the transaction.

If you do not see the unit level approver you expected contact your supervisor/manager.
Repeat this process until all the lines with an Approval Level entry are filled. No data is required to be entered in the lines that read “Not Selected”.

### Part 9 - Creating Default Routing Queues

You need to designate who will electronically approve the work performed and money paid. This is referred to as the Routing Queue. If you repeatedly perform similar assignments and the Approval Routing Queue is the same each time you may create a Default Routing Queue.

From the Electronic Personnel Action Form screen, select EPAF Originator Summary

You will be asked for your password for security purposes.

Select the Default Routing Queue link
From the “Approval Category” drop down list, select “SPLPAA”

Then click
The Approval Category and Required Actions columns will populate with data.

### EPAF Default Routing Queue

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 - (SUATHD) Unit Head - AD &amp; CA</td>
<td></td>
<td>Approve</td>
<td></td>
</tr>
<tr>
<td>13 - (SUACHE) Unit Head - Events &amp; Conf</td>
<td></td>
<td>Approve</td>
<td></td>
</tr>
<tr>
<td>30 - (BUDGET) Budget/Grants</td>
<td></td>
<td>FYI</td>
<td></td>
</tr>
<tr>
<td>50 - (HR) Human Resources</td>
<td></td>
<td>Approve</td>
<td></td>
</tr>
<tr>
<td>75 - (PATROL) Payroll</td>
<td></td>
<td>Apply</td>
<td></td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
<td>Not Selected</td>
<td></td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
<td>Not Selected</td>
<td></td>
</tr>
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</tr>
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<td></td>
<td>Not Selected</td>
<td></td>
</tr>
</tbody>
</table>

You must select from Approvers listed in the dialogue box provided when you click on the magnifying glass alongside User Name.
Select the desired Approver. Their name will populate the line.

### EPAF Default Routing Queue

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 (GUARDIAN) Unit Head - AD &amp; CA</td>
<td>CGORDON7</td>
<td>Approve</td>
<td>✗</td>
</tr>
<tr>
<td>13 (GUARDIAN) Unit Head - Events &amp; Conf</td>
<td>JGORDON7</td>
<td>Approve</td>
<td>✗</td>
</tr>
<tr>
<td>30 (BUDGET) Budget/Grants</td>
<td>LKAVAN</td>
<td>Approve</td>
<td>✗</td>
</tr>
<tr>
<td>50 (HR) Human Resources</td>
<td>KSTANTHES</td>
<td>FYI</td>
<td>✗</td>
</tr>
<tr>
<td>75 (PAYROLL) Payroll</td>
<td>MJMURRAY</td>
<td>Approve</td>
<td>✗</td>
</tr>
<tr>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>✗</td>
</tr>
<tr>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>✗</td>
</tr>
<tr>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>✗</td>
</tr>
</tbody>
</table>

If you do not see the unit level approver you expected contact your supervisor/manager.

Repeat this process until all the lines with an Approval Level entry are filled. No data is required to be entered in the lines that read “Not Selected”.

---

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

### EPAF Default Routing Queue

<table>
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<tr>
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<td>Approve</td>
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</tr>
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<td>JGORDON7</td>
<td>Approve</td>
<td>✗</td>
</tr>
<tr>
<td>30 (BUDGET) Budget/Grants</td>
<td>LKAVAN</td>
<td>Approve</td>
<td>✗</td>
</tr>
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<td>FYI</td>
<td>✗</td>
</tr>
<tr>
<td>75 (PAYROLL) Payroll</td>
<td>MJMURRAY</td>
<td>Approve</td>
<td>✗</td>
</tr>
<tr>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>✗</td>
</tr>
<tr>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>✗</td>
</tr>
<tr>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>✗</td>
</tr>
</tbody>
</table>
When you click the [Save and Add New Rows] button your entries will be saved.

You will get a message at the top of the screen confirming the save.

Now when you enter an SPLPAA EPAF the Approval Routing Queue you saved will populate each time. You may change the Defaults if personnel changes occur. You may also override defaults on a particular transaction by clicking on the [Browse] and selecting another Approver from the list.

**Part 10 – Adding Comments**

In the Comments section of the form you are required to enter specific details about the reasons for the special payment. The form allows you to type Information free style in the box however certain data must always be included.
The first line should always be the dates the hours were worked or when the task was completed.

The following lines should detail the type and purpose of the work.

Comment

When you click the **Save** button the information entered is saved.

**Electronic Personnel Action Form**

You will notice a message at the top of the form, telling you the save was successful.

A **Transaction Number** will be assigned.

A **Transaction Status** of “Waiting” will appear.

If you scroll to the bottom of the form you will see your comment has been saved along with a date/times stamp.
You will also see a transaction history was created recording your entry.

**Part 11 - Submitting an EPAF**

The EPAF may not move forward until you **Submit** the transaction.

You must click the submit **Submit** button to move the EPAF to approval and processing.

The submit button is available at the top of the page:

**Electronic Personnel Action Form**

Or at the bottom of the page - Either button only needs to be clicked once, they do the same thing.
When you have submitted your transaction you will get a message. The transaction status will change to **Pending**.

---

**Part 12 – Reviewing EPAF Status**

An originator can review the status of a transaction by using the **EPAF Originator Summary**.

From the EPAF main menu select the link.

**Electronic Personnel Action Form**

**EPAF Originator Summary**

Enter your password for security.
EPAF Special Payments For Events and Conferences

EPAF Originator Summary

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Transaction #</th>
<th>Type of Change</th>
<th>Submitted Date</th>
<th>Effective Date</th>
<th>Transaction Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keller, Robin N</td>
<td>R00301024</td>
<td>1442</td>
<td>Special Pay Events &amp; Conf</td>
<td>Jul 12,2014</td>
<td></td>
<td>Waiting</td>
<td></td>
</tr>
</tbody>
</table>

You can click on the employee name link for details.

Electronic Personnel Action Form

Name and ID: Robin N Keller, R00301024  
Job and Title: Events & Conf Special Payment
Transaction: 1442  
Query Date: Jul 12,2014
Transaction Status: Waiting  
Last Paid Date: Jul 11,2014
Approval Category: Special Pay Events & Conf, SLPAA

Special Pay Events & Conf, 282001-00 Events & Conf Special Payment, Last Paid Date: Jul 11,2014
If you click on the **Comments** button you will see the comments and transaction identifiers.

**Comments**

```
Name and ID: Robin N Keller, R00301024
Transaction: 1442
Job and Suffix: 282001-00, Events & Conf Special Payment
Approval Category: Special Pay Events & Conf, SPLPA

Previous Comments
Date: Aug 14, 2014 04:58:07 PM
Made by: Stephen J Roma, SRoma
Comments: 6/28/2014 Completed set up for Mahwah High School graduation ceremony in Bradley Center Main Gym.
```

Enter Comment

Save
You can make changes to the transaction by clicking the **Update** link.

If you want to add additional descriptions of the service use the **Add Comment** link.

**Part 13 - Returning for Correction**

If your approver or their proxy requires a change to the payment the transaction will be returned to you for correction. Update the transaction and resubmit for approval. Look to see if the Approver has included guidance on the **Comments** section of the form. You will be alerted by an email message that the Approver/Proxy requires a change to the EPAF.
Part 14 – Deleting or Voiding a Transaction

Before a transaction is submitted you may **Delete** it.

Similar to the Submit button, there is one at the top and bottom of the form. You only need to press one, they have the same function.

After Submission If you decide to cancel a transaction or payment you may **Void** it.
Part 15 – Disapproving a Transaction

If your approver, or their proxy, does not approve a payment the EPAF will be **Disapproved**. Speak with your Approver about the reason. An explanation should be included on the Comments section of the form by the Approver.

Part 16 – 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.