



Updated June 2020

# Web4U EPAF Training

HR Information Systems Team

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# Learning Objectives

- ▶ Define EPAF
- ▶ When Should I Complete an EPAF?
- ▶ General information needed to successfully submit ALL EPAFs
- ▶ Accessing EPAF home screen from Web4U
- ▶ Complete all EPAFs (from beginning to end)
- ▶ Common Errors: Problems and their solutions
- ▶ Checking and Interpreting EPAF Statuses
- ▶ Setting Up Default Routing Queues
- ▶ Human Resources Contact Information

# What Can an EPAF Originator Do?

- ▶ The Electronic Approvals Module uses Banner's Electronic Personnel Action Form (EPAF) to process a variety of transactions for student employees.
- ▶ As an EPAF Originator, you can:
  - ▶ Route transactions
  - ▶ Create and void EPAF transactions
  - ▶ Track the EPAF through its process

# When Should I Complete an EPAF?

EPAFs are used to ADD, CHANGE, or END student jobs in Banner

## ADD

- Student New Employee (Department or Work Study)
- Student New Job (Department or Work Study)
- Student Rehire (Department or Work Study)

## CHANGE

- Funding Change, GFUND
- Time Entry Change (ADD/CHANGE Override Approver), WEBCHG
- Student Rate/ Title Change (NON Work Study), RATE
- Work Study Rate-Title Change, WKRATE

## END

- Terminate Job, TERM

# General Information Needed to Complete ALL EPAFs

- ▶ W #
- ▶ First and Last Name of Student Employee
- ▶ Query Date= “Effective Date”
- ▶ Approval Category Codes
- ▶ Position Number & Suffix
- ▶ Funding Information
- ▶ Title of Student Employee
- ▶ Hourly Rate

**NOTE:** If you don't know employees position number or funding information, BEFORE starting an EPAF, contact:

- ▶ Dept. Funded Student Employee: contact your Department Budget Authority.
- ▶ Work Study Student Employee: contact Student Employment Center.
  - ▶ (360) 650-3158

STEP 1: Click Web4U on MyWestern

STEP 2: Click “Employee” Button

Accessing  
New EPAF  
Home Screen  
from WEB4U

Web4U@WWU

Student Financial Aid Employee

Search

## Main Menu

### Student

Register for classes; Display class schedule; View holds; Make online payment; View grades; Order official transcripts.

### Financial Aid and Scholarships

Access your financial aid and scholarships; view your award; view messages about your financial aid application and award.

### Employee

Access to Pay Stubs, W2, Leave Balances, Deduction and Benefit information, Electronic Time sheets, Enter Leave in Advance, Time sheet approvals, EPAF.



# STEP 3: Click “EPAF MENU” button

Accessing  
New EPAF  
Home Screen  
from WEB4U



**Student** **Financial Aid** **Employee**

Search

## Employee Services Menu

### [Benefits and Deductions](#)

View your retirement plans, health insurance information, and other deductions.

### [Pay Information](#)

Direct Deposit Enrollment; View your earnings and deductions history; View your pay stubs.

### [Tax Forms](#)

View W-4 information; View your W-2 form; Electronic W2 Consent

### [View Leave Balances](#)

### [Time Entry Instructions](#)

Instructions for entering and submitting electronic time sheets.

### [Time Sheets](#)

Access Time Sheets for Electronic Time Entry. Time Sheet Approvals.

### [Leave Entry in Advance Instructions](#)

Instructions on using your electronic Leave sheet.

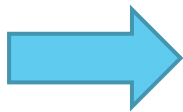
### [Leave Entry in Advance](#)

Enter Leave hours up to 3 months in advance.

### [EPAF Menu](#)

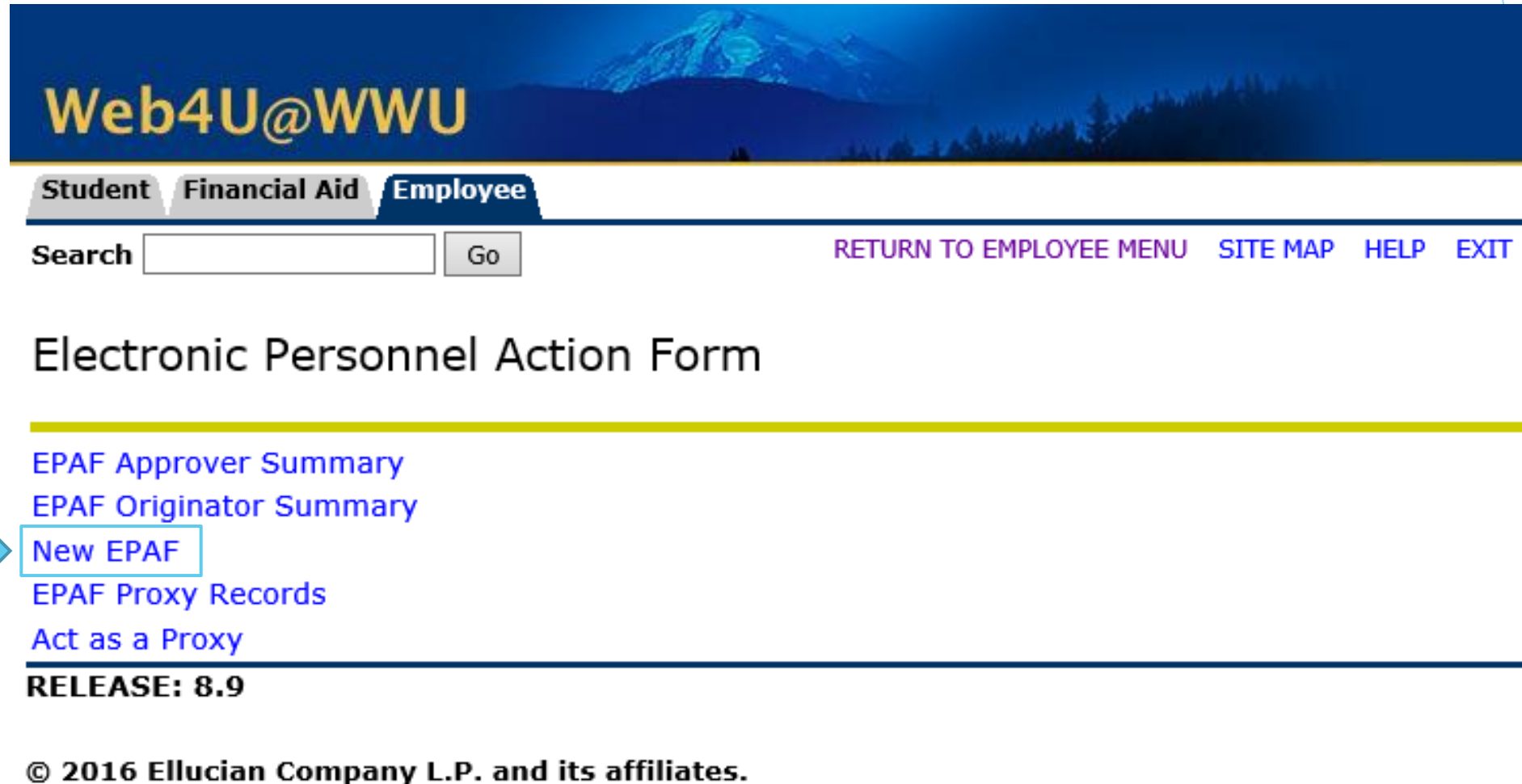
### [Effort Certification](#)

Effort Certification for Federal Grants



# STEP 4: Click “New EPAF” button

Accessing  
New EPAF  
Home Screen  
from WEB4U



**Web4U@WWU**

**Student** **Financial Aid** **Employee**

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

## Electronic Personnel Action Form

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- [EPAF Approver Summary](#)
- [EPAF Originator Summary](#)
- [New EPAF](#)
- [EPAF Proxy Records](#)
- [Act as a Proxy](#)

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**RELEASE: 8.9**

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# STEP 1: Enter ID with “W”, then Employee Number

Start-off  
ALL EPAFs

The employee’s name will auto-fill in this field

\* - indicates a required field.

ID: \*   

Query Date: MM/DD/YYYY\*

Approval Category: \*

[EPAF Approver Summary](#) | [EPAF](#)  
[Return to EPAF](#)

### Person Search

Check the box to limit the search to an Employee. Enter the Last Name and or First Name, or enter an ID, wildcard.

**Search Criteria**

Employee:

Last Name:

First Name:

Or

ID:

Or

SSN/SIN/TIN:

Records per Page:

[New EPAF](#)  
[Return to EPAF Menu](#)



## NOTE: If W # is unknown:

- Click on magnifying glass (new screen will appear/pop up)
- In the new pop-up screen, type in employee’s first and last name
- Click “Go” & you’ll be brought back to EPAF Home Screen

## STEP 2: Enter Query Date in format mm/dd/yyyy

- ▶ Query Date= Effective date, the date on which employee started working

\* - indicates a required field.

ID: \*    

Query Date: MM/DD/YYYY\*

Approval Category: \*  

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

## STEP 3: Select Approval Category by clicking on arrow for drop down menu

- ▶ **NOTE:** Next slide has list of approval category & codes of all EPAFs, plus hyperlinks to take you to the EPAF you need

# Approval Category Codes



ACTION What do you want to do? ↓	WHO What type of student?	CATEGORY CODE
Funding Change	Any Hourly Student	GFUND
Terminate Job	Any Hourly Student	TERM
Time Entry Method (Add/Change Override Approver)	Any Hourly Student	WEBCHG
New Employee (NEVER worked for WWU before)	Department Funded Student Work Study Student	STU100 WKS100
New Job (new position, NOT new employee to WWU)	Department Funded Student Work Study Student	STU110 WKS110
Rate or Title Change	Department Funded Student Work Study Student	RATE WKRATE
Rehire (EXACTLY same job, same position # & suffix)	Department Funded Student Work Study Student	STU120 WKS120

# STEP 1: New EPAF Home Screen

New JOB,  
Department  
Funded or Work  
Study

- ▶ Select “New Job” (Department Funded or Work Study) in approval category drop-down menu
- ▶ Click “All jobs” and you’ll be able to see every job the employee has held. STOP - review your Approval Category and make sure it’s correct based on the jobs listed.
- ▶ Click “Go”

\* - indicates a required field.

ID: \*    

Query Date: MM/DD/YYYY\*

Approval Category: \*

## Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	S50000	00	Program Support Staff 4	5410, Human Resources	03/31/2016			Active
Primary	WSIWSP	00	Program Support Staff 2	5410, Human Resources	10/23/2015		04/15/2016	Active

# STEP 2: Position Number & Suffix

New JOB,  
Department  
Funded or Work  
Study

- ▶ Click “All jobs” and the system will show the employee’s job history
  - ▶ \*If you see the position # & suffix you want to use for this new job, STOP. You must either pick a new position number OR use a different Approval Category Code (120)
- ▶ Select job you wish to make changes to
- ▶ Click “Go”

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

**ID:** Allison Carrie Page, W01089116  
**Query Date:** 05/02/2016  
**Approval Category:** S-Dept Funded Student New Posn, STU110

### New Posn for current employee, NPS110

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	F50001	01	Instructor	5230, Institutional Budget					<input checked="" type="radio"/>
	Secondary	S50000	00	Program Support Staff 4	5410, Human Resources	03/31/2016			Active	<input type="radio"/>
	Primary	WSIWSP	00	Program Support Staff 2	5410, Human Resources	10/23/2015		04/15/2016	Active	<input type="radio"/>

All Jobs

Go

**NOTE:** if position number and suffix are unknown, BUT you know employee class and name of budget organization then click the magnifying glass to search position number and suffix. Otherwise, contact your department budget authority or for work study contact Student Employee Center.


# STEP 3: Fill in All fields with \*

New JOB,  
Department  
Funded or Work  
Study

- ▶ Title: Choose an appropriate title for the hourly rate you wish to pay
- ▶ Enter Hourly Rate
- ▶ Notice the field “Timesheet Orgn” and click on magnifying glass
  - ▶ New window will appear titled “valid values” and choose Organization Code
- ▶ Press “select” and you will be brought back to original screen

\* - indicates a required field.

New Posn for current employee, F50001-01 Instructor

Item	Current Value	New Value
Effective Date: MM/DD/YYYY*	(Not Enterable)	05/02/2016
Title: *		Select Job Title
Hourly Rate: *		
Primary/Secondary: *		Primary
Timesheet Orgn: *		<input type="text"/> 
Time Entry Method: *		Employee Time Entry via Web
Time In/Out Y/N: *		Yes
Override Approver:		
Accrue Leave: (Not Enterable)		N
Job Status: (Not Enterable)		A
Step: (Not Enterable)		0
Personnel Date: MM/DD/YYYY*	(Not Enterable)	05/02/2016
FTE: *(Not Enterable)		0
Job Change Reason: (Not Enterable)		EAREH
Job Begin Date: MM/DD/YYYY(Not Enterable)		05/02/2016
Salary Grade: (Not Enterable)		2
Contract Begin Date: MM/DD/YYYY(Not Enterable)		
Contract End Date: MM/DD/YYYY(Not Enterable)		
Job End Date: MM/DD/YYYY(Not Enterable)		

**Web4U@WWU**

Student Financial Aid Employee

Search  Go

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**Valid Values**

Search:  Go

**Organization Codes (COA) and Descriptions**

- 1100, (1) - President
- 1200, (1) - Legal Services
- 1415, (1) - Institutional Research
- 1500, (1) - Internal Auditor
- 2100, (1) - Provost
- 2103, (1) - VP Undergraduate Education
- 2104, (1) - Critical Junctures Institute
- 2105, (1) - Center for International Studies
- 2106, (1) - Office of Survey Research
- 2107, (1) - Facing the Future
- 2108, (1) - Mathematics Center
- 2109, (1) - Center for Service Learning
- 2110, (1) - Admissions
- 2120, (1) - Equal Opportunity Office (EOO)
- 2130, (1) - Enterprise Application Services

Select

Exit Window

# STEP 4: Funding

- ▶ If you know the fast index code, enter in the box titled “index”, & all funding information will be auto-filled

**New**  
Effective Date: MM/DD/YYYY 05/02/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
Q 1	Q [ ]	Q 10200	Q 5410	Q F601	Q 083INC	Q [ ]	[ ]	[ ]	[ ]	100.00	[ ]	[ ]
Q [ ]	Q [ ]	Q [ ]	Q [ ]	Q [ ]	Q [ ]	Q [ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Q [ ]	Q [ ]	Q [ ]	Q [ ]	Q [ ]	Q [ ]	Q [ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Q [ ]	Q [ ]	Q [ ]	Q [ ]	Q [ ]	Q [ ]	Q [ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Q [ ]	Q [ ]	Q [ ]	Q [ ]	Q [ ]	Q [ ]	Q [ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
<b>Total:</b>										100.00		

✔ Defaulting values for Labor Distribution from the Job records.

- ▶ Otherwise, fill in all funding fields codes: Fund, Organization, Account, Program

# STEP 5: Select Routing Queue

New JOB,  
Department  
Funded or Work  
Study

- ▶ For all Approval Levels (this step is not necessary if you have already set up your Default Routing Queue)
  - ▶ Click the magnifying glass
  - ▶ New window will appear, click on a name that is listed & click “Select”
  - ▶ The User Name field will auto-populate
- ▶ If someone in your department needs to see the EPAF
  - ▶ Select “30 (DEPT) Dept Level Approvals”
  - ▶ Choose Required Action “FYI” (or “Approve” if additional approval is needed)

## Routing Queue

Approval Level	User Name	Required Action
30 - (DEPT) Dept Level Approvals		FYI
95 - (SWE) Student Employment	HEFTK Kathleen Heft Nolan	Approve
99 - (HR) Human Resources	MASOND5 Donna Lorelei Mason	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Save and Add New Rows



# STEP 6: Save & Submit EPAF

New JOB,  
Department  
Funded or Work  
Study

- ▶ After you click “save”, you must click “submit”
- ▶ Saving an EPAF does not mean your EPAF was submitted
- ▶ Click “submit”, then your screen will say “the transaction has been successfully submitted”
- ▶ If your screen does not say that, then you may have to fix some errors before you can submit EPAF

**Student** **Financial Aid** **Employee**

Search

## Electronic Personnel Action Form

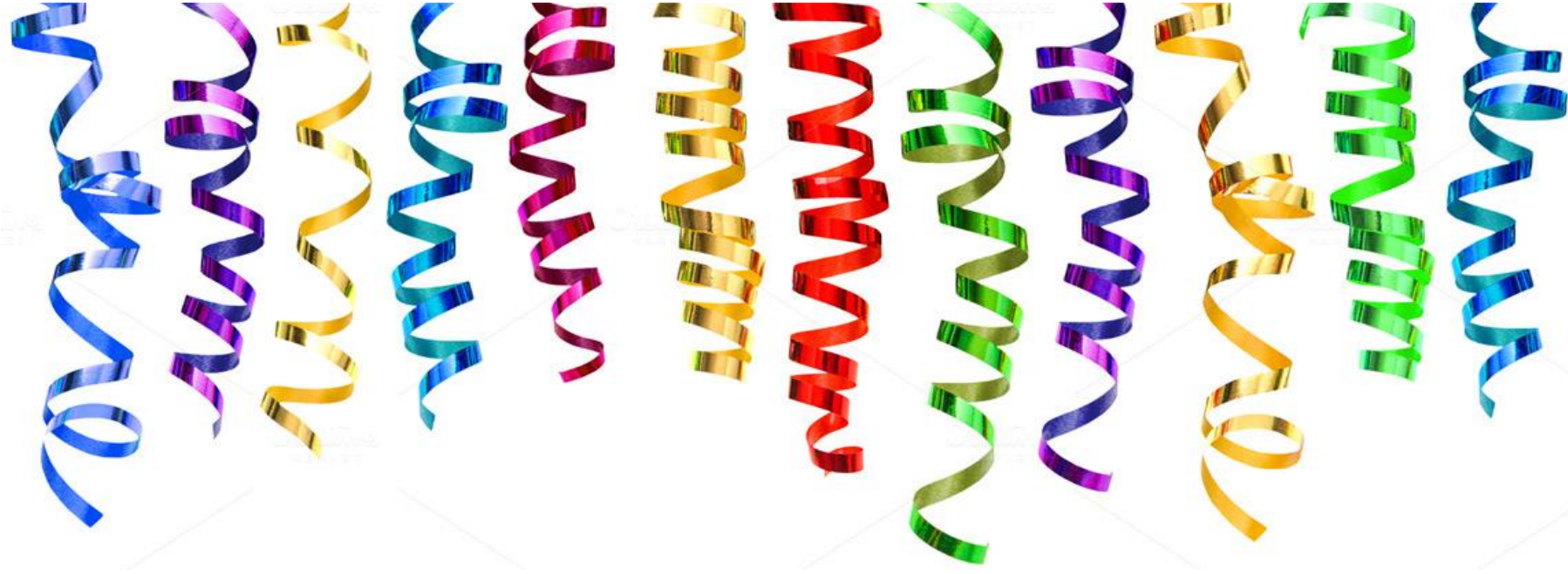
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✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

**Name and ID:** Allison Carrie Page, W01089116  
**Transaction:** 192293 **Query Date:** 05/02/2016  
**Transaction Status:** Waiting  
**Approval Category:** S-Dept Funded New Job, STU110

New JOB,  
Department  
Funded or  
Work Study



NOW YOU HAVE COMPLETED AN EPAF!





# STEP 1: New EPAF Home Screen

Change the  
Funding on  
an EPAF

- ▶ Select “Funding Change” in approval category drop down menu
- ▶ Click “All jobs” and you’ll be able to see every job the employee has held. STOP - review your Approval Category and make sure it’s correct based on the jobs listed.
- ▶ Click “Go”

\* - indicates a required field.

ID: \*    

Query Date: MM/DD/YYYY\*

Approval Category: \*

## Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	S50000	00	Program Support Staff 4	5410, Human Resources	03/31/2016			Active
Primary	WSIWSP	00	Program Support Staff 2	5410, Human Resources	10/23/2015		04/15/2016	Active

# STEP 2: Position Number & Suffix

Change the Funding on an EPAF

- ▶ Click “All jobs” and the button will change to “active jobs” to show employee’s job history
- ▶ Select job you wish to make changes to
- ▶ Click “go”

**NOTE:** if position is new, enter position number and suffix then click “Go” OR if position number and suffix are unknown, BUT you know employee class and name of budget organization then click magnifying glass to search position number and suffix. Otherwise, contact your dept. budget authority or for work study contact Student Employee Center

**ID:** Allison Carrie Page, W01089116  
**Query Date:** 05/02/2016  
**Approval Category:** G-Funding Change, GFUND

## Change in FOAPAL, FUND

Search Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job								<input checked="" type="radio"/>
	Secondary	S50000	00	Program Support Staff 4	5410, Human Resources	03/31/2016		Active	<input type="radio"/>
	Primary	WSIWSP	00	Program Support Staff 2	5410, Human Resources	10/23/2015	04/15/2016	Active	<input type="radio"/>

All Jobs

Go

New EPAF  
 Return to EPAF Menu

# Change the Funding on an EPAF

## STEP 3: Funding

- ▶ If you know the fast index code, enter in the box titled “index”, & all funding information will be auto-filled

**New**  
 Effective Date: MM/DD/YYYY

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="10200"/>	<input type="text" value="5410"/>	<input type="text" value="F601"/>	<input type="text" value="083INC"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="100.00"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Total:</b>										<b>100.00</b>		

Defaulting values for Labor Distribution from the Job records.

- ▶ Otherwise, fill in all funding fields codes: Fund, Organization, Account, Program

# STEP 4: Select Routing Queue

Change the Funding on an EPAF

- ▶ For all Approval Levels (this step is not necessary if you have already set up your Default Routing Queue)
  - ▶ Click the magnifying glass
  - ▶ New window will appear, click on a name that is listed & click “Select”
  - ▶ The User Name field will auto-populate
- ▶ If someone in your department needs to see the EPAF
  - ▶ Select “30 (DEPT) Dept Level Approvals”
  - ▶ Choose Required Action “FYI” (or “Approve” if additional approval is needed)

## Routing Queue

Approval Level	User Name	Required Action
99 - (HR) Human Resources	MASOND5 Donna Lorelei Mason	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Save and Add New Rows

## STEP 5: Save & Submit EPAF

- ▶ After you click “save” you must click “submit”
- ▶ Saving EPAF does not mean your EPAF was submitted
- ▶ Click “submit”, then your screen will say “the transaction has been successfully submitted”
- ▶ If your screen does not say that, then you may have to fix some errors before you can submit EPAF

**Student** **Financial Aid** **Employee**

Search

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### Electronic Personnel Action Form

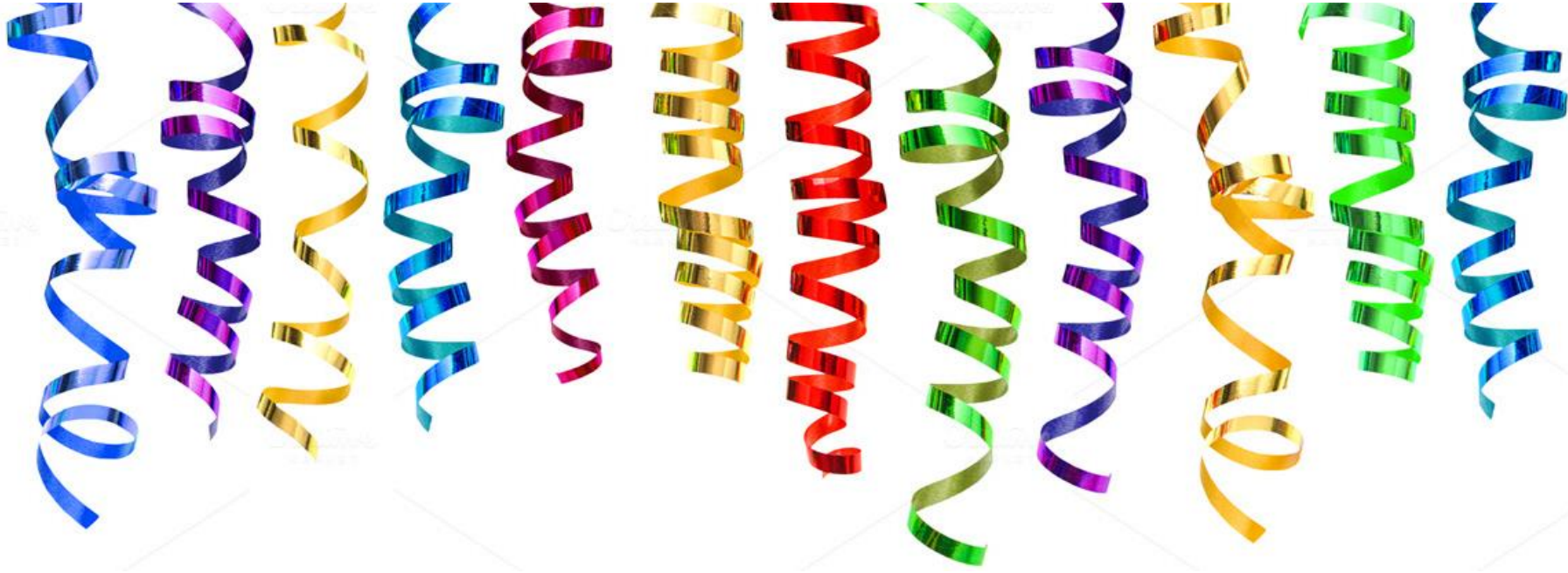
---

✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

**Name and ID:** Allison Carrie Page, W01089116  
**Transaction:** 192293 **Query Date:** 05/02/2016  
**Transaction Status:** Waiting  
**Approval Category:** S-Dept Funded New Job, STU110

Change the  
Funding on  
an EPAF



NOW YOU HAVE COMPLETED AN EPAF!







# STEP 1: New EPAF Home Screen


Terminate  
Job

- ▶ Select “Terminate Hourly Job” in approval category drop down menu
- ▶ Click “All jobs” and you’ll be able to see every job the employee has held. STOP - review your Approval Category and make sure it’s correct based on the jobs listed.
- ▶ Click “Go”

\* - indicates a required field.

ID: \*    

Query Date: MM/DD/YYYY \*

Approval Category: \*  

Go

## Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	S50000	00	Program Support Staff 4	5410, Human Resources	03/31/2016			Active
Primary	WSIWSP	00	Clerk 3	5410, Human Resources	10/23/2015		04/15/2016	Active

All Jobs

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)

[Return to EPAF Menu](#)

# STEP 2: Position Number & Suffix

- ▶ Click “All jobs” and the button will change to “active jobs” to show employee’s job history
- ▶ Select job you wish to make changes to
- ▶ Click “Go”

## New EPAF Job Selection

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

**ID:** Allison Carrie Page, W01089116  
**Query Date:** 02/05/2016  
**Approval Category:** G-Terminate Hourly Job, TERM

### Terminate Job, TERM

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job	<input type="text"/>	<input type="text"/>							<input checked="" type="radio"/>
	Secondary	S50000	00	Program Support Staff 4	5410, Human Resources	03/31/2016			Active	<input type="radio"/>
	Primary	WSIWSP	00	Clerk 3	5410, Human Resources	10/23/2015		04/15/2016	Active	<input type="radio"/>

All Jobs

Go

## STEP 3: Fill in All fields with \*

- ▶ All fields will auto-populate
- ▶ Verify the Job End Date is correct

\* - indicates a required field.

### Terminate Job, S50000-00 Student Hourly Department Fund

Item	Current Value	New Value
Job End Date: MM/DD/YYYY*(Not Enterable)		<input type="text" value="02/05/2016"/>
Job Status: *(Not Enterable)		<input type="text" value="T"/>
Effective Date: MM/DD/YYYY*(Not Enterable)		<input type="text" value="02/05/2016"/>
Personnel Date: MM/DD/YYYY*(Not Enterable)		<input type="text" value="02/05/2016"/>
Job Change Reason: *(Not Enterable)		<input type="text" value="EATRM"/>

# STEP 4: Select Routing Queue

Terminating  
Job

- ▶ For all Approval Levels (this step is not necessary if you have already set up your Default Routing Queue)
  - ▶ Click the magnifying glass
  - ▶ New window will appear, click on a name that is listed & click “Select”
  - ▶ The User Name field will auto-populate
- ▶ If someone in your department needs to see the EPAF
  - ▶ Select “30 (DEPT) Dept Level Approvals”
  - ▶ Choose Required Action “FYI” (or “Approve” if additional approval is needed)

## Routing Queue

Approval Level	User Name	Required Action
99 - (HR) Human Resources	MASOND5 Donna Lorelei Mason	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Save and Add New Rows

## STEP 5: Save & Submit EPAF

- ▶ After you click “save” you must click “submit”
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**Student** **Financial Aid** **Employee**

Search

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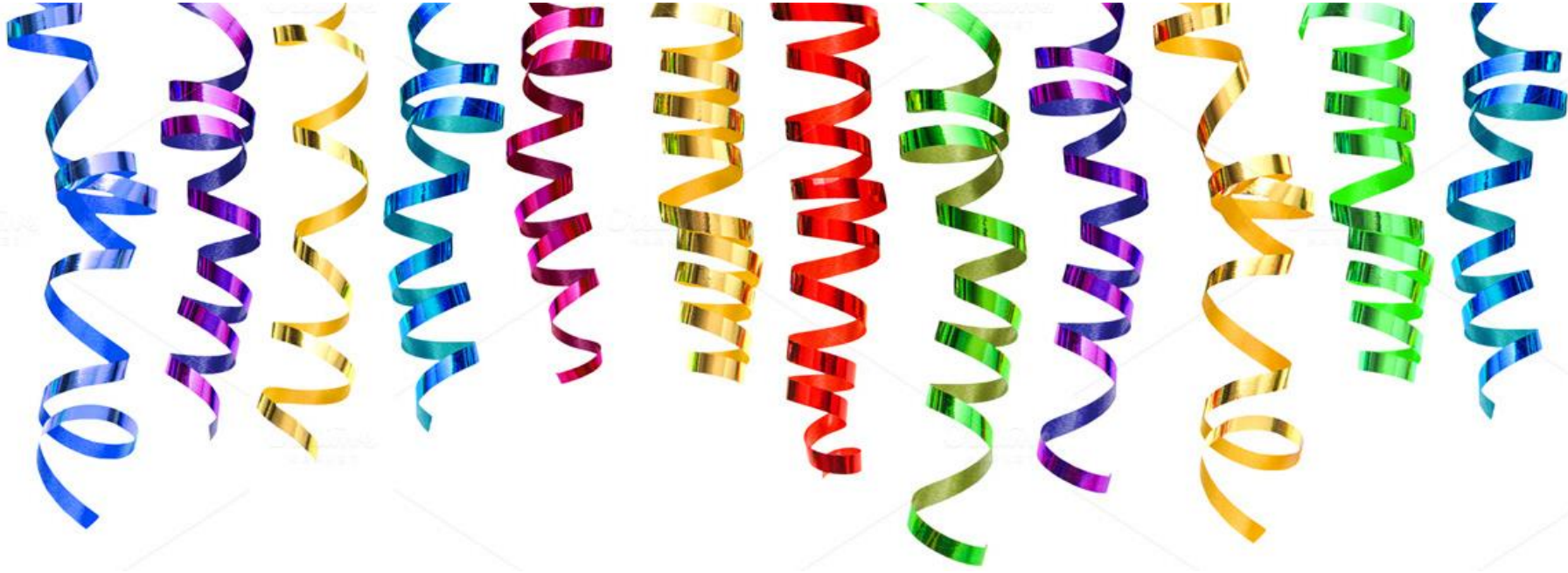
### Electronic Personnel Action Form

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✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

**Name and ID:** Allison Carrie Page, W01089116  
**Transaction:** 192293 **Query Date:** 05/02/2016  
**Transaction Status:** Waiting  
**Approval Category:** S-Dept Funded New Job, STU110



NOW YOU HAVE COMPLETED AN EPAF!





## STEP 1: New EPAF Home Screen

- ▶ Select “Time Entry Change” in approval category drop down menu
- ▶ Click “All jobs” and you’ll be able to see every job the employee has held. STOP - review your Approval Category and make sure it’s correct based on the jobs listed.
- ▶ Click “Go”

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.

**NOTE:** If your Position Number begins with the letter “W”, you **must** use the appropriate Approval Category for a Work Study (WKS100, WKS110, WKS120 or WKRATE)

\* - indicates a required field.

ID: \*    

Query Date: MM/DD/YYYY \*

Approval Category: \*

Go

### Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	S50000	00	Program Support Staff 4	5410, Human Resources	03/31/2016			Active
Primary	WSIWSP	00	Program Support Staff 2	5410, Human Resources	10/23/2015		04/15/2016	Active

All Jobs

# STEP 2: Position Number & Suffix

- ▶ Click “All jobs” and the button will change to “active jobs” to show employee’s job history
- ▶ Select job you wish to make changes to
- ▶ Click “Go”

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

**ID:** Allison Carrie Page, W01089116  
**Query Date:** 05/02/2016  
**Approval Category:** G-Funding Change, GFUND

**Change in FOAPAL, FUND**

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job	<input type="text"/>	<input type="text"/>							<input checked="" type="radio"/>
	Secondary	S50000	00	Program Support Staff 4	5410, Human Resources	03/31/2016			Active	<input type="radio"/>
	Primary	WSIWSP	00	Program Support Staff 2	5410, Human Resources	10/23/2015		04/15/2016	Active	<input type="radio"/>

All Jobs  
Go



# STEP 3: Fill in All fields with \*

Time Entry Change

\* - indicates a required field.

Student - New Hire to WWU, F50001-1X Instructor

Item	Current Value	New Value
Title: *		Faculty Assistant 2..... 9.47 to 10.60 ▾
Hourly Rate: *		10.00
Timesheet Orgn: *		<input type="text" value=""/>
Time Entry Method:		Employee Time Entry via Web ▾
Time In/Out Y/N:		Yes ▾
Override Approver:		<input type="text" value=""/>
Employee Status:	Active	Active ▾
Employee Class Code: (Not Enterable)	S5, Work Study Student Hourly	S1
Home COAS: (Not Enterable)	1	1
Home Organization: (Not Enterable)	7600, Financial Aid	7600
Distribution COA: (Not Enterable)	1	1
Distribution Orgn: (Not Enterable)	5351, Cashier	5351
District Code: (Not Enterable)	ESS, Enrollment & Student Services	ESS
Effective Date: MM/DD/YYYY(Not Enterable)		05/11/2016
Personnel Date: MM/DD/YYYY(Not Enterable)		05/11/2016
FTE: (Not Enterable)		0
Salary Group: (Not Enterable)		2016
Step: (Not Enterable)		0
Timesheet COA: (Not Enterable)		1
Accrue Leave: (Not Enterable)		
Salary Table: (Not Enterable)		
Salary Grade: (Not Enterable)		
Job Change Reason: (Not Enterable)		
Job Begin Date: MM/DD/YYYY(Not Enterable)		
Primary/Secondary: *(Not Enterable)		
Current Hire Date: MM/DD/YYYY(Not Enterable)	10/23/2015	
Original Hire Date: MM/DD/YYYY(Not Enterable)	10/23/2015	
...	...	...

Valid Values

Search:  Go

**Organization Codes (COA) and Descriptions**

- 8687, (9) - Activity Center - Operations
- 8690, (9) - AS Special Events
- 8691, (9) - AS Board Specials
- 8692, (9) - HRP Specials
- 8693, (9) - Club Specials
- 8694, (9) - FASC Specials
- 8695, (9) - PAC Specials
- 8699, (9) - AS Non-Operating
- 8705, (9) - Intramural Sports
- 8710, (9) - Sport Clubs
- 8800, (9) - Bookstore
- 8900, (9) - Athletics
- 9997, (9) - Agency
- 9998, (9) - Balance Sheet Entry
- 9999, (9) - Closing Accounts

Select

[Exit Window](#)

RELEASE: 8.9

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- ▶ Title: Choose an appropriate title for the hourly rate you wish to pay
- ▶ Enter Hourly Rate
- ▶ Notice the field “Timesheet Orgn” and click on magnifying glass
  - ▶ \*Note: New window will appear titled “valid values” and choose Organization Code
- ▶ Press “select” and you will be brought back to original screen

# STEP 4: Select Routing Queue

- ▶ For all Approval Levels (this step is not necessary if you have already set up your Default Routing Queue)
  - ▶ Click the magnifying glass
  - ▶ New window will appear, click on a name that is listed & click “Select”
  - ▶ The User Name field will auto-populate
- ▶ If someone in your department needs to see the EPAF
  - ▶ Select “30 (DEPT) Dept Level Approvals”
  - ▶ Choose Required Action “FYI” (or “Approve” if additional approval is needed)

## Routing Queue

Approval Level	User Name	Required Action
99 - (HR) Human Resources	MASOND5 Donna Lorelei Mason	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Save and Add New Rows

## STEP 5: Save & Submit EPAF

- ▶ After you click “save” you must click “submit”
- ▶ Saving EPAF does not mean your EPAF was submitted
- ▶ Click “submit”, then your screen will say “the transaction has been successfully submitted”
- ▶ If your screen does not say that, then you may have to fix some errors before you can submit EPAF

**Student** **Financial Aid** **Employee**

Search

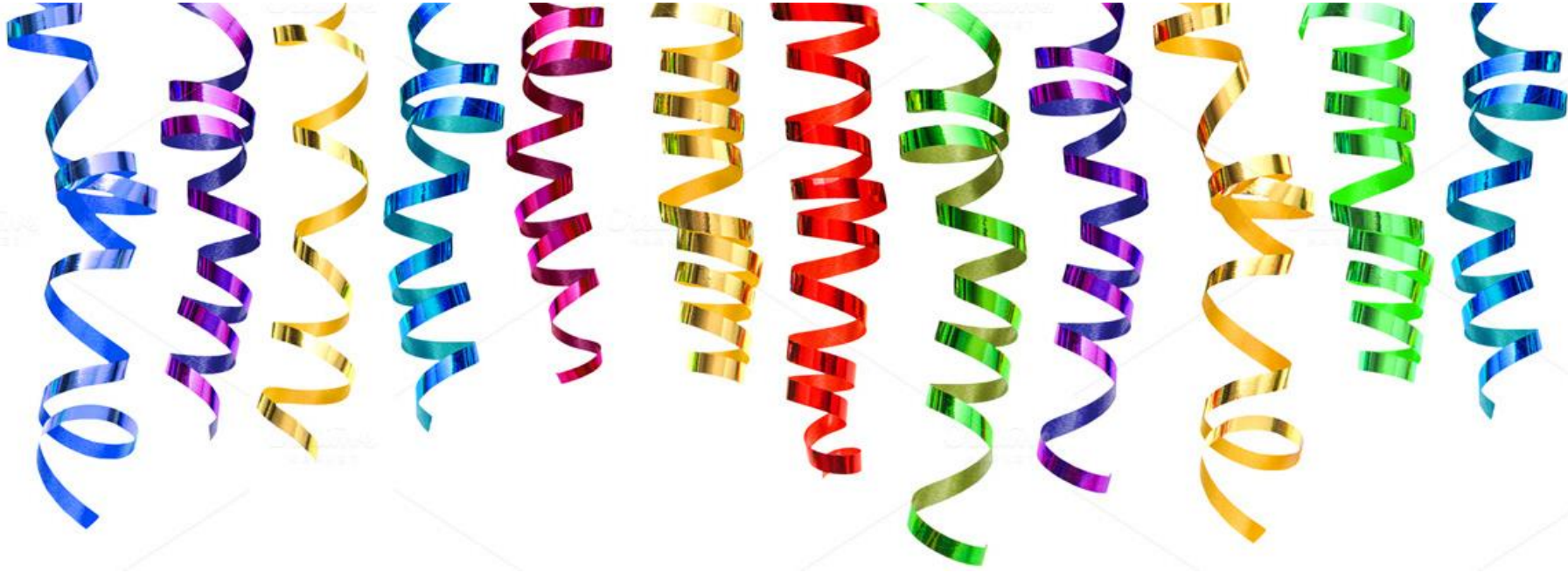
---

### Electronic Personnel Action Form

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✓ Your change was saved successfully.  
Enter the information for the EPAF and either Save or Submit

**Name and ID:** Allison Carrie Page, W01089116  
**Transaction:** 192293 **Query Date:** 05/02/2016  
**Transaction Status:** Waiting  
**Approval Category:** S-Dept Funded New Job, STU110



NOW YOU HAVE COMPLETED AN EPAF!



# STEP 1: New EPAF Home Screen



New Employee,  
Department  
Funded or  
Work Study

- ▶ Select “New Employee” (Department Funded or Work Study) in approval category drop down menu
- ▶ Click “All jobs” and you’ll be able to see every job the employee has held. STOP - review your Approval Category and make sure it’s correct based on the jobs listed.
- ▶ Click “Go”

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.

**NOTE:** If your Position Number begins with the letter “W”, you **must** use the appropriate Approval Category for a Work Study (WKS100, WKS110, WKS120 or WKRATE)

\* - indicates a required field.

ID: \*    

Query Date: MM/DD/YYYY\*

Approval Category: \*

Go

# STEP 2: Position Number & Suffix

New Employee,  
Department  
Funded or  
Work Study

- ▶ Click “All jobs” and the button will change to “active jobs” to show employee’s job history
- ▶ If a list of employee’s job history appears then you are in the **wrong approval category**. Instead, go back to approval category listing and select “new job” for department funded or work study student (New Employee should not have any listed job history)
- ▶ Click “go”

**NOTE:** if position is new, enter position number and suffix then click “Go” **OR** if position number and suffix are unknown, **BUT** you know employee class and name of budget organization then click magnifying glass to search position number and suffix. otherwise, contact your dept. budget authority or for work study contact Student Employee Center

Student Financial Aid **Employee**

Search

## New EPAF Job Selection

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

**ID:** Allison Carrie Page, W01089116  
**Query Date:** 05/02/2016  
**Approval Category:** S-New Student Employee, STU100

### Student - New Hire to WWU, SNH100

Search	Type	Position	Suffix	Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="button" value="Q"/>	New Job	<input type="text"/>	<input type="text"/>								<input checked="" type="radio"/>

### New Position Selection

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

**Search Criteria**

**Position Number:**

**Employee Class:**   
 C1, Classified FT Perm/Salaried  
 C2, Classified PT Perm/Salaried

**COA:**   
 1, Western Washington University

**Budget Organization:**   
 1100, President  
 1200, Legal Services

# STEP 3: Fill in All fields with \*

New Employee,  
Department  
Funded or  
Work Study

\* - indicates a required field.

Student - New Hire to WWU, F50001-1X Instructor

Item	Current Value	New Value
Title: *		Faculty Assistant 2..... 9.47 to 10.60
Hourly Rate: *		10.00
Timesheet Orgn: *		<input type="text"/> <input type="text"/>
Time Entry Method:		Employee Time Entry via Web
Time In/Out Y/N:		Yes
Override Approver:		<input type="text"/>
Employee Status:	Active	Active
Employee Class Code: (Not Enterable)	S5, Work Study Student Hourly	S1
Home COAS: (Not Enterable)	1	1
Home Organization: (Not Enterable)	7600, Financial Aid	7600
Distribution COA: (Not Enterable)	1	1
Distribution Orgn: (Not Enterable)	5351, Cashier	5351
District Code: (Not Enterable)	ESS, Enrollment & Student Services	ESS
Effective Date: MM/DD/YYYY(Not Enterable)		05/11/2016
Personnel Date: MM/DD/YYYY(Not Enterable)		05/11/2016
FTE: (Not Enterable)		0
Salary Group: (Not Enterable)		2016
Step: (Not Enterable)		0
Timesheet COA: (Not Enterable)		1
Accrue Leave: (Not Enterable)		N
Salary Table: (Not Enterable)		
Salary Grade: (Not Enterable)		
Job Change Reason: (Not Enterable)		
Job Begin Date: MM/DD/YYYY(Not Enterable)		
Primary/Secondary: *(Not Enterable)		
Current Hire Date: MM/DD/YYYY(Not Enterable)	10/23/2015	
Original Hire Date: MM/DD/YYYY(Not Enterable)	10/23/2015	
...	...	...

Valid Values

Search:  Go

**Organization Codes (COA) and Descriptions**

- 8687, (9) - Activity Center - Operations
- 8690, (9) - AS Special Events
- 8691, (9) - AS Board Specials
- 8692, (9) - HRP Specials
- 8693, (9) - Club Specials
- 8694, (9) - FASC Specials
- 8695, (9) - PAC Specials
- 8699, (9) - AS Non-Operating
- 8705, (9) - Intramural Sports
- 8710, (9) - Sport Clubs
- 8800, (9) - Bookstore
- 8900, (9) - Athletics
- 9997, (9) - Agency
- 9998, (9) - Balance Sheet Entry
- 9999, (9) - Closing Accounts

Select

Exit Window

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- ▶ Title: Choose an appropriate title for the hourly rate you wish to pay
- ▶ Enter Hourly Rate
- ▶ Notice the field “Timesheet Orgn” and click on magnifying glass
  - ▶ \*Note: New window will appear titled “valid values” and choose Organization Code
- ▶ Press “select” and you will be brought back to original screen

# STEP 4: Funding

- ▶ If you know the fast index code, enter in the box titled “index”, & all funding information will be auto-filled

**New**  
Effective Date: MM/DD/YYYY 05/02/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
1		10200	5410	F601	083INC					100.00			
<b>Total:</b>										100.00			

✔ Defaulting values for Labor Distribution from the Job records.

- ▶ Otherwise, fill in all funding fields codes: Fund, Organization, Account, Program



# STEP 5: Select Routing Queue

New Employee,  
Department  
Funded or  
Work Study

- ▶ For all Approval Levels (this step is not necessary if you have already set up your Default Routing Queue)
  - ▶ Click the magnifying glass
  - ▶ New window will appear, click on a name that is listed & click “Select”
  - ▶ The User Name field will auto-populate
- ▶ If someone in your department needs to see the EPAF
  - ▶ Select “30 (DEPT) Dept Level Approvals”
  - ▶ Choose Required Action “FYI” (or “Approve” if additional approval is needed)

## Routing Queue

Approval Level	User Name	Required Action
30 - (DEPT) Dept Level Approvals		FYI
90 - (HRAPVR) Human Resources Approver	LUDEMAS	Approve
95 - (SWE) Student Employment	HEFTK	Approve
99 - (HR) Human Resources	MASOND5	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Save and Add New Rows

# STEP 6: Save & Submit EPAF

New Employee,  
Department  
Funded or  
Work Study

- ▶ After you click “save” you must click “submit”
- ▶ Saving EPAF does not mean your EPAF was submitted
- ▶ Click “submit”, then your screen will say “the transaction has been successfully submitted”
- ▶ If your screen does not say that, then you may have to fix some errors before you can submit EPAF

**Student** **Financial Aid** **Employee**

Search

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## Electronic Personnel Action Form

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✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

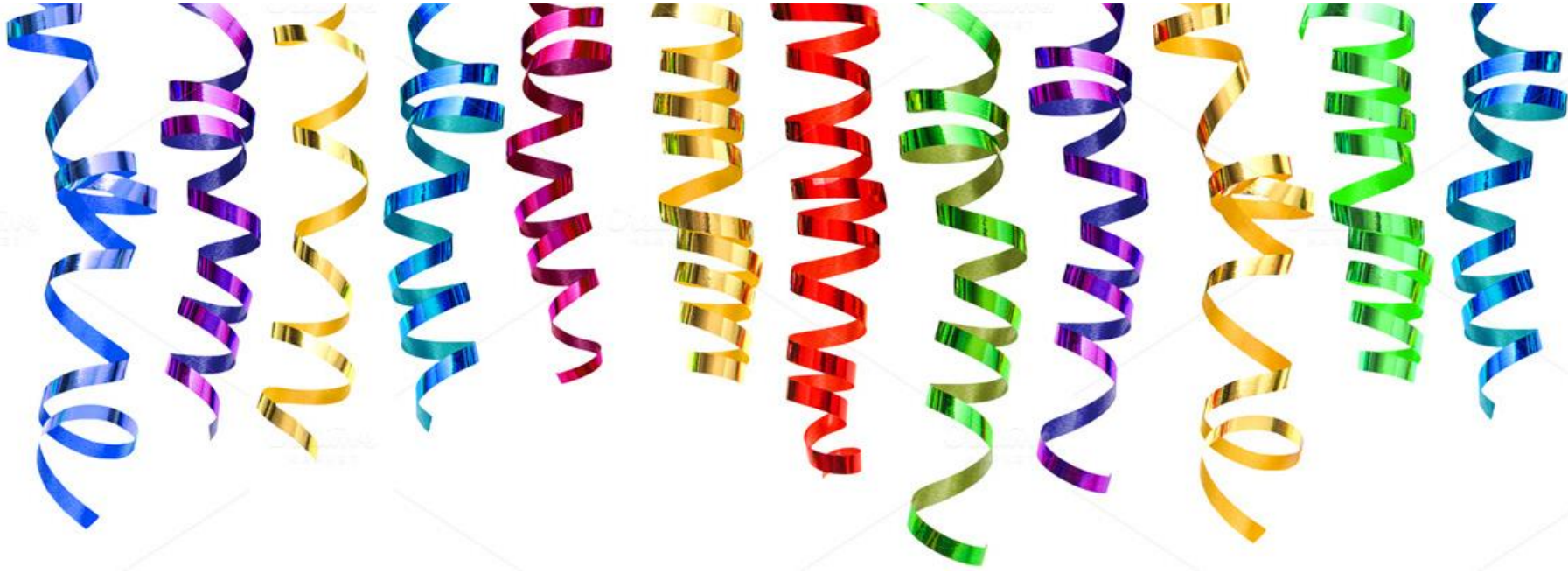
**Name and ID:** Allison Carrie Page, W01089116

**Transaction:** 192293 **Query Date:** 05/02/2016

**Transaction Status:** Waiting

**Approval Category:** S-Dept Funded New Job, STU110

New Employee,  
Department  
Funded or  
Work Study



NOW YOU HAVE COMPLETED AN EPAF!




# STEP 1: New EPAF Home Screen

Changing TITLE  
or RATE,  
Department  
Funded or  
Work Study

- ▶ Select “Rate/Title Change” in approval category drop down menu
- ▶ Click “All jobs” and the button will change to “active jobs” to show employee’s job history
- ▶ Click “Go”

\* - indicates a required field.

ID: \*    

Query Date: MM/DD/YYYY \*

Approval Category: \*  ▼

## Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	S50000	00	Program Support Staff 4	5410, Human Resources	03/31/2016			Active
Primary	WSIWSP	00	Program Support Staff 2	5410, Human Resources	10/23/2015		04/15/2016	Active

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

Changing TITLE  
or RATE,  
Department  
Funded or  
Work Study

# STEP 2: Position Number & Suffix

- ▶ Click “All jobs” and the button will change to “active jobs” to show employee’s job history
- ▶ Select job you wish to make changes to
- ▶ Click “go”

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

**ID:** Title/Rate Change  
Allison Carrie Page, wu1089116  
**Query Date:** 05/02/2016  
**Approval Category:** G-Funding Change, GFUND

## Change in FOAPAL, FUND

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job	<input type="text"/>	<input type="text"/>							<input checked="" type="radio"/>
	Secondary	S50000	00	Program Support Staff 4	5410, Human Resources	03/31/2016			Active	<input type="radio"/>
	Primary	WSIWSP	00	Program Support Staff 2	5410, Human Resources	10/23/2015		04/15/2016	Active	<input type="radio"/>

All Jobs

Go

New EPAF  
Return to EPAF Menu

Changing TITLE  
or RATE,  
Department  
Funded or  
Work Study

## STEP 3: Fill in All fields with \*

- ▶ Effective Date will fill in from Query Date
- ▶ Select Title Appropriate to Pay Rate
- ▶ Enter Rate
- ▶ Job Change Reason will autofill

\* - indicates a required field.

Student Rate/Title, WSIWSP-00 Program Support Staff 2, Last Paid Date: 04/15/2016

Item	Current Value	New Value
Effective Date: MM/DD/YYYY*	02/16/2016	<input type="text" value="05/02/2016"/>
Title:	Program Support Staff 2	<input type="text" value="Select Job Title"/>
Hourly Rate:	10	<input type="text"/>
Job Change Reason: *(Not Enterable) HRINC		<input type="text" value="EAPAY"/>

# STEP 4: Select Routing Queue

- ▶ For all Approval Levels (this step is not necessary if you have already set up your Default Routing Queue)
  - ▶ Click the magnifying glass
  - ▶ New window will appear, click on a name that is listed & click “Select”
  - ▶ The User Name field will auto-populate
- ▶ If someone in your department needs to see the EPAF
  - ▶ Select “30 (DEPT) Dept Level Approvals”
  - ▶ Choose Required Action “FYI” (or “Approve” if additional approval is needed)

Changing TITLE  
or RATE,  
Department  
Funded or  
Work Study

## Routing Queue

Approval Level	User Name	Required Action
99 - (HR) Human Resources	MASOND5 Donna Lorelei Mason	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Save and Add New Rows

# STEP 5: Save & Submit EPAF

- ▶ After you click “save” you must click “submit”
- ▶ Saving EPAF does not mean your EPAF was submitted
- ▶ Click “submit”, then your screen will say “the transaction has been successfully submitted”
- ▶ If your screen does not say that, then you may have to fix some errors before you can submit EPAF

Changing TITLE  
or RATE,  
Department  
Funded or  
Work Study

**Student** **Financial Aid** **Employee**

Search

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## Electronic Personnel Action Form

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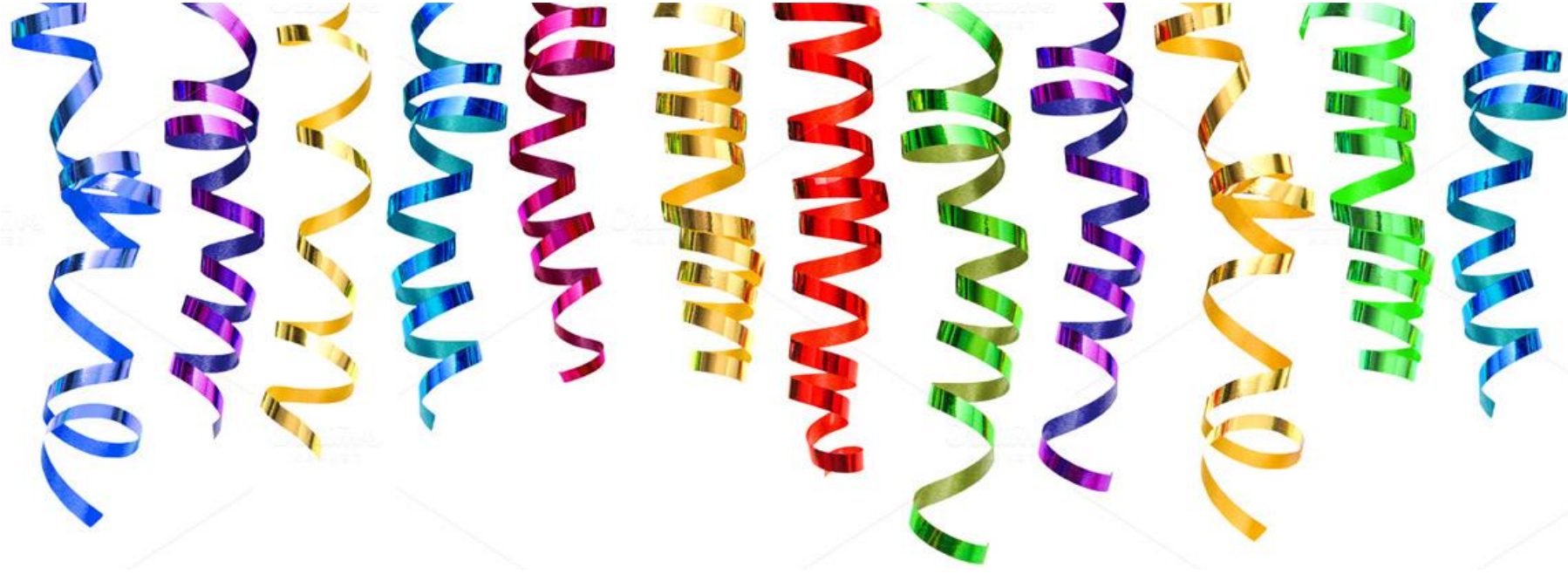
✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

**Name and ID:** Allison Carrie Page, W01089116  
**Transaction:** 192293 **Query Date:** 05/02/2016  
**Transaction Status:** Waiting  
**Approval Category:** S-Dept Funded New Job, STU110



Changing TITLE  
or RATE,  
Department  
Funded or  
Work Study



NOW YOU HAVE COMPLETED AN EPAF!





# STEP 1: New EPAF Home Screen

REHIRE,  
Department  
Funded or  
Work Study

- ▶ Select “Rehire” in approval category drop down menu
- ▶ Click “All jobs” and the button will change to “active jobs” to show employee’s job history
- ▶ Click “Go”

\* - indicates a required field.

ID: \*    

Query Date: MM/DD/YYYY\*

Approval Category: \*

Go

## Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	S50000	00	Program Support Staff 4	5410, Human Resources	03/31/2016			Active
Primary	WSIWSP	00	Program Support Staff 2	5410, Human Resources	10/23/2015		04/15/2016	Active

All Jobs

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

# STEP 2: Position Number & Suffix

REHIRE,  
Department  
Funded or  
Work Study

- ▶ Click “All jobs” and the button will change to “active jobs” to show employee’s job history
- ▶ Select job you wish to make changes to
- ▶ Click “Go”
- ▶ NOTE: Same position number, it better be there or turn around now & contact your budget authority department

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

**ID:** Allison Carrie Page, W01089116

**Query Date:** 05/02/2016

**Approval Category:** G-Funding Change, GFUND

## Change in FOAPAL, FUND

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job	<input type="text"/>	<input type="text"/>							<input checked="" type="radio"/>
	Secondary	S50000	00	Program Support Staff 4	5410, Human Resources	03/31/2016			Active	<input type="radio"/>
	Primary	WSIWSP	00	Program Support Staff 2	5410, Human Resources	10/23/2015		04/15/2016	Active	<input type="radio"/>

All Jobs

Go

New EPAF  
Return to EPAF Menu

# STEP 3: Fill in All fields with \*

REHIRE,  
Department  
Funded or  
Work Study

- ▶ Title: Choose an appropriate title for the hourly rate you wish to pay
- ▶ Enter Hourly Rate
- ▶ Notice the field “Timesheet Orgn” and click on magnifying glass
  - ▶ \*new window will appear titled “valid values” and choose Organization Code
- ▶ Press “select” and you will be brought back to original screen
- ▶ Effective Date will autofill

\* - indicates a required field.

Student - ReHire to WWU, F50001-1X Instructor

Item	Current Value	New Value
Title: *		Faculty Assistant 2..... 9.47 to 10.60
Hourly Rate: *		10.00
Timesheet Orgn: *		<input type="text"/>
Time Entry Method:		Employee Time Entry via Web
Time In/Out Y/N:		Yes
Override Approver:		<input type="text"/>
Employee Status:	Active	Active
Employee Class Code: (Not Enterable)	S5, Work Study Student Hourly	S1
Home COAS: (Not Enterable)	1	1
Home Organization: (Not Enterable)	7600, Financial Aid	7600
Distribution COA: (Not Enterable)	1	1
Distribution Orgn: (Not Enterable)	5351, Cashier	5351
District Code: (Not Enterable)	ESS, Enrollment & Student Services	ESS
Effective Date: MM/DD/YYYY(Not Enterable)		05/11/2016
Personnel Date: MM/DD/YYYY(Not Enterable)		05/11/2016
FTE: (Not Enterable)		0
Salary Group: (Not Enterable)		2016
Step: (Not Enterable)		0
Timesheet COA: (Not Enterable)		1
Accrue Leave: (Not Enterable)		N
Salary Table: (Not Enterable)		SH
Salary Grade: (Not Enterable)		2
Job Change Reason: (Not Enterable)		EANEW
Job Begin Date: MM/DD/YYYY(Not Enterable)		05/11/2016
Primary/Secondary: *(Not Enterable)		P
Current Hire Date: MM/DD/YYYY(Not Enterable)	10/23/2015	05/11/2016
Original Hire Date: MM/DD/YYYY(Not Enterable)	10/23/2015	05/11/2016
https://testadmin.www.wvu.edu/pls/pprd/bwpkefaf_P_DispEfafMenu	10/23/2015	05/11/2016

**Valid Values**

Search:

**Organization Codes (COA) and Descriptions**

- 8687, (9) - Activity Center - Operations
- 8690, (9) - AS Special Events
- 8691, (9) - AS Board Specials
- 8692, (9) - HRP Specials
- 8693, (9) - Club Specials
- 8694, (9) - FASC Specials
- 8695, (9) - PAC Specials
- 8699, (9) - AS Non-Operating
- 8705, (9) - Intramural Sports
- 8710, (9) - Sport Clubs
- 8800, (9) - Bookstore
- 8900, (9) - Athletics
- 9997, (9) - Agency
- 9998, (9) - Balance Sheet Entry
- 9999, (9) - Closing Accounts

[Exit Window](#)

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**RELEASE: 8.9**

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# STEP 4: Funding

- ▶ If you know the fast index code, enter in the box titled “index”, & all funding information will be auto-filled

**New**  
Effective Date: MM/DD/YYYY

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="10200"/>	<input type="text" value="5410"/>	<input type="text" value="F601"/>	<input type="text" value="083INC"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="100.00"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Total:</b>										<input type="text" value="100.00"/>	<input type="text"/>	<input type="text"/>

Defaulting values for Labor Distribution from the Job records.

- ▶ Otherwise, fill in all funding fields codes: Fund, Organization, Account, Program

# STEP 5: Select Routing Queue

REHIRE,  
Department  
Funded or  
Work Study

- ▶ For all Approval Levels (this step is not necessary if you have already set up your Default Routing Queue)
  - ▶ Click the magnifying glass
  - ▶ New window will appear, click on a name that is listed & click “Select”
  - ▶ The User Name field will auto-populate
- ▶ If someone in your department needs to see the EPAF
  - ▶ Select “30 (DEPT) Dept Level Approvals”
  - ▶ Choose Required Action “FYI” (or “Approve” if additional approval is needed)

## Routing Queue

Approval Level	User Name	Required Action
30 - (DEPT) Dept Level Approvals		FYI
95 - (SWE) Student Employment	HEFTK Kathleen Heft Nolan	Approve
99 - (HR) Human Resources	MASOND5 Donna Lorelei Mason	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Save and Add New Rows

## STEP 6: Save & Submit EPAF

- ▶ After you click “save” you must click “submit”
- ▶ Saving EPAF does not mean your EPAF was submitted
- ▶ Click “submit”, then your screen will say “the transaction has been successfully submitted”
- ▶ If your screen does not say that, then you may have to fix some errors before you can submit EPAF

**Student** **Financial Aid** **Employee**

Search

---

### Electronic Personnel Action Form

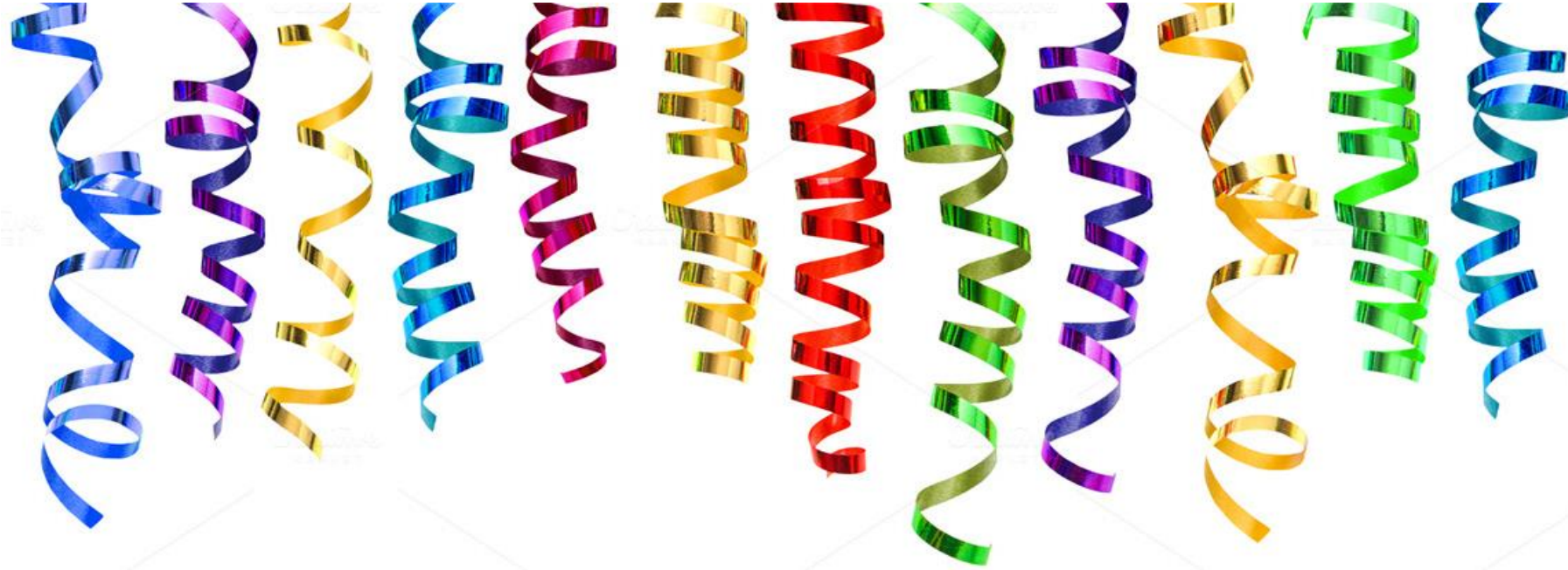
---

✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

**Name and ID:** Allison Carrie Page, W01089116  
**Transaction:** 192293 **Query Date:** 05/02/2016  
**Transaction Status:** Waiting  
**Approval Category:** S-Dept Funded New Job, STU110

REHIRE,  
Department  
Funded or  
Work Study



NOW YOU HAVE COMPLETED AN EPAF!





# Common Errors

- ▶ WARNINGS DO NOT MATTER! ERRORS must be fixed!
- ▶ Don't forget to click submit!
- ▶ Make sure your employee doesn't have a "primary" job listed already. If this is the case, you must enter new job as "secondary"
- ▶ Most errors are caused when the incorrect Approval Category is chosen.
  - ▶ Check the All Jobs listing for your employee.
  - ▶ Are you trying to use New Hire for a current employee? This will not work! Check the logic & call us if you need help.
- ▶ Some errors happen when an EPAF attempts to change a pay period that has already been paid on. Use a Query Date with the 1<sup>st</sup> day of the current pay period. You can email HRIS with a request for retro pay for your employee.

# Common Errors: Problem vs Solution Chart

PROBLEM	SOLUTION
This employee already has a primary job	Go back to the transaction and change job to "S" for Secondary
New Effective Date cannot be after Employee's Termination Date	Student Employee Status has been terminated by HR. Once hiring documents are received by HR, the EMPL will be reactivated and this update can be re-submitted (with a <u>NEW</u> effective date)
Job Begin Date cannot be after Employee's Termination Date	Please review above statement ^

# STEP 1: Check EPAF Status

Checking  
EPAF Status

Web4U@WWU

Student Financial Aid **Employee**

Search  Go



[RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

## 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.

**NOTE:** If your Position Number begins with the letter "W", you **must** use the appropriate Approval Category for a Work Study (WKS100, WKS110, WKS120 or WKRATE)

\* - indicates a required field.

ID: \*    

Query Date: MM/DD/YYYY\*

Approval Category: \*

Go

- ▶ Fill out ID, Query Date, & Approval Category
- ▶ Click "EPAF Originator Summary" at bottom of screen

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

# STEP 2: EPAF Originator Summary

## Checking EPAF Status

- ▶ This page lists all EPAFs you have submitted. Also, you can use this screen to check on previously submitted EPAFs and see what their status is on the “current” tab
- ▶ The Up and Down arrows help you sort through all EPAFs

Current History

Select the link under Name to access details of

Transaction Status:

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[Jump to Bottom](#)

### EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
<a href="#">Page, Allison C.</a> Instructor, F50001-1X	W01089116	192310	S-Dept Funded New Employee		05/11/2016	Waiting	<a href="#">Comments</a> <a href="#">Errors</a>
<a href="#">Page, Allison C.</a> Clerk 3, WSIWSP-00	W01089116	<a href="#">192297</a>	G-Funding Change		02/05/2016	Waiting	<a href="#">Comments</a> <a href="#">Errors</a>
<a href="#">Page, Allison C.</a> Instructor, F50001-1X	W01089116	192296	S-Dept Funded New Employee		05/02/2016	Waiting	<a href="#">Comments</a> <a href="#">Errors</a>
<a href="#">Page, Allison C.</a> Instructor, F50001-1X	W01089116	<a href="#">192295</a>	S-Dept Funded New Job		05/02/2016	Waiting	<a href="#">Comments</a> <a href="#">Errors</a>
<a href="#">Page, Allison C.</a> Instructor, F50001-1X	W01089116	<a href="#">192294</a>	S-Dept Funded New Job		05/02/2016	Waiting	<a href="#">Comments</a> <a href="#">Errors</a>
<a href="#">Page, Allison C.</a> Instructor, F50001-99	W01089116	<a href="#">192293</a>	S-Dept Funded New Job		05/02/2016	Waiting	<a href="#">Comments</a> <a href="#">Errors</a>
<a href="#">Page, Allison C.</a> Program Support Staff 4, S50000-00	W01089116	<a href="#">192292</a>	G-Time Entry Change (Org, Approver, Method)		05/02/2016	Waiting	<a href="#">Comments</a>
<a href="#">Page, Allison C.</a> Instructor, F50001-99	W01089116	<a href="#">192291</a>	S-Terminate Hourly Job		05/02/2016	Waiting	<a href="#">Comments</a> <a href="#">Errors</a>
<a href="#">Page, Allison C.</a> Instructor, F50001-99	W01089116	<a href="#">192290</a>	G-Funding Change		05/02/2016	Waiting	<a href="#">Comments</a>
<a href="#">Page, Allison C.</a> Instructor, F50001-99	W01089116	<a href="#">192289</a>	G-Funding Change		05/02/2016	Waiting	<a href="#">Comments</a>
<a href="#">Page, Allison C.</a> Instructor, F50001-01	W01089116	<a href="#">192288</a>	S-Dept Funded New Job		05/02/2016	Waiting	<a href="#">Comments</a>

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\*\*Comments Exist

- ▶ If your EPAFs are “waiting” in the “transaction status” column then you must review errors and resubmit

# Interpreting EPAF Status

STATUS	WHAT THIS MEANS
WAITING	Transaction is still sitting on your desktop. Check your ERRORS and WARNINGS to see what is wrong. Usually you need to submit the EPAF or there is an error keeping you from submitting it.
PENDING	You have successfully sent the transaction to the next person in your Routing Queue. It is waiting for them to approve or reject your EPAF.
APPROVED	Approval Officials have forwarded your transaction to the HR Application Process. It will be applied to the database usually on the next business morning.
COMPLETED	HRIS has applied your transaction to the database. After this status, hourly employees will have a timesheet.
RETURNED FOR CORRECTION	Approval Officials have sent the transaction back to you for a correction. Check the comments for information.

# Set Up Default Routing Queue

- ▶ In Web4U, select “Employee” tab
- ▶ Select EPAF Menu
- ▶ Select EPAF Originator Summary
- ▶ At the bottom of the screen, select “Default Routing Queue”

**Current** History

Select the link under Name to access details of the transaction, or select the link under Tra

**Transaction Status:** All

**!** No transactions found in your queue.

New EPAF | **Default Routing Queue** | Return to

# Set Up Default Routing Queue

## Setting Up Default Routing Queue

- ▶ Select approval category
- ▶ Select approval level
- ▶ Select User Name by clicking on magnifying glass
- ▶ Select action required
- ▶ Click “Save and Add New Rows” button

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

Approval Category:

### Approval Queue

Approval Level	User Name	Required Action
<input type="text" value="Not Selected"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="Not Selected"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="Not Selected"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="Not Selected"/>	<input type="text"/>	<input type="text" value="Not Selected"/>

[EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

# Human Resources Department

Human  
Resources  
Contact  
Information

► For more information or if you have any questions,  
please contact:

Tara Terry (360) 650-3565

Jamie Ross (360) 650-7664







Thank you for your time!