

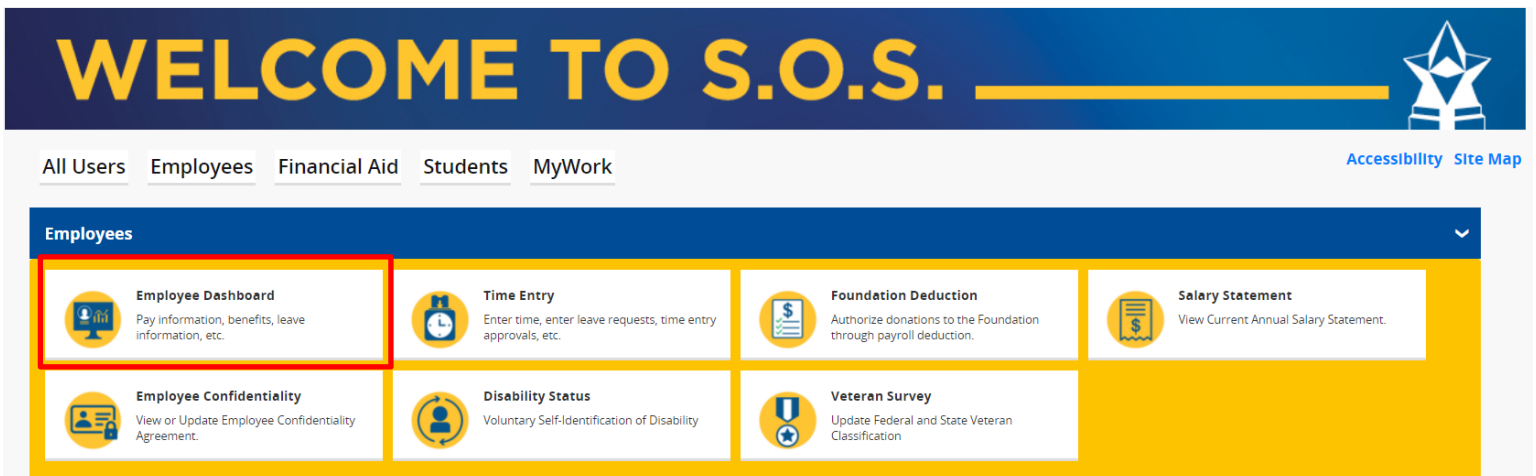
How to Originate a Part-time New Hire EPAF (PT Staff, Work-study, and Faculty)

These instructions will guide you through creating a HIRE40 EPAF used to hire new part-time staff and a HIRE50 used to hire new part-time faculty. (Part-time faculty being hired in CPD should use the HIRE51 EPAF.)

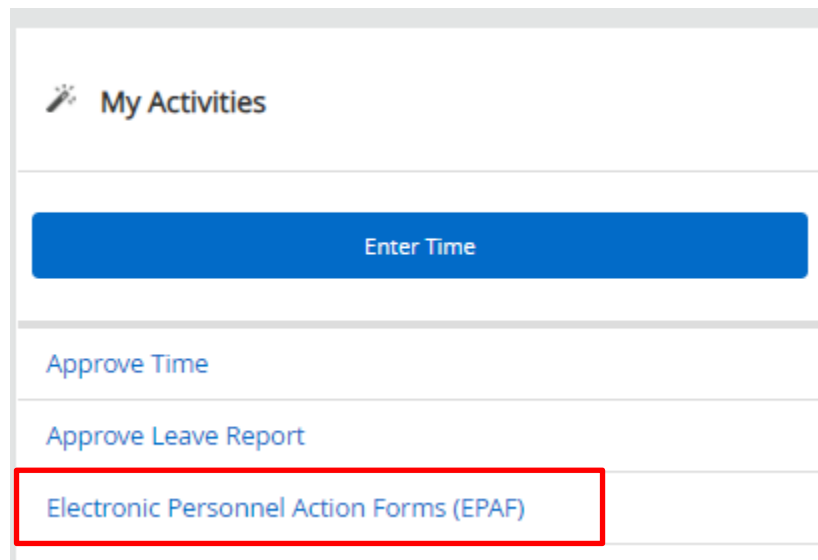
1. Sign in to SOS with network user ID and password:



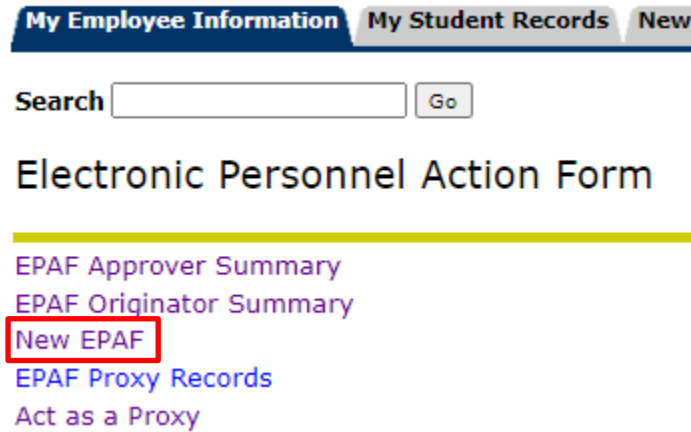
2. Click on the *Employee Dashboard* button:



3. Click on *Electronic Personnel Action Forms (EPAF)*:



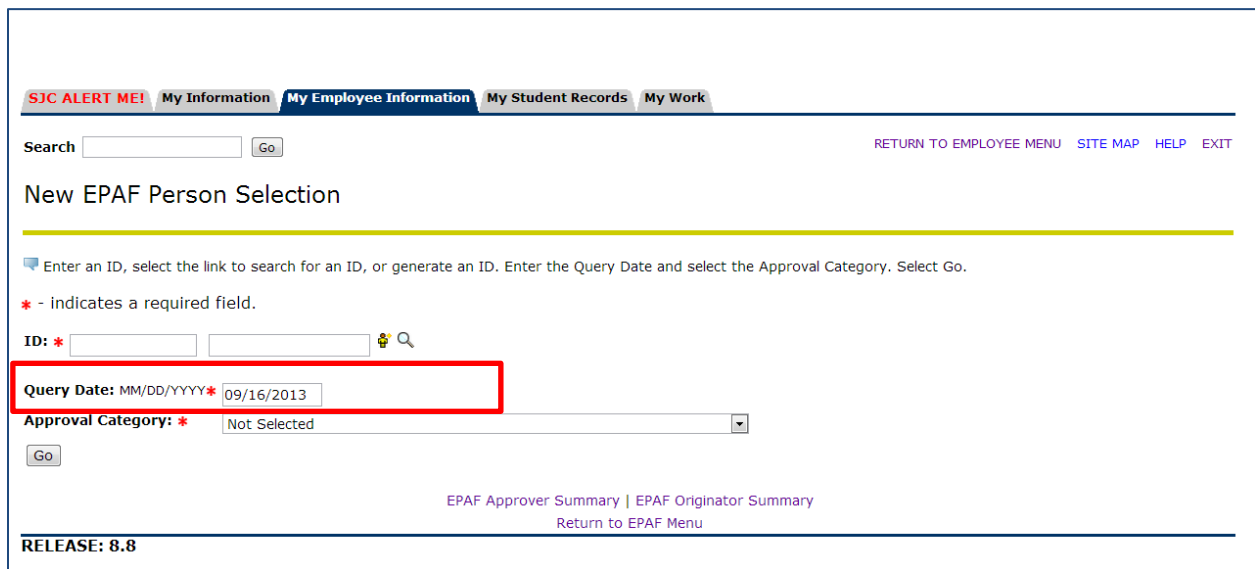
4. Click on *New EPAF*:



The screenshot shows a navigation bar with three tabs: "My Employee Information" (selected), "My Student Records", and "New". Below the tabs is a search box with a "Go" button. The main heading is "Electronic Personnel Action Form". A list of links is displayed below a yellow horizontal line: "EPAF Approver Summary", "EPAF Originator Summary", "New EPAF" (highlighted with a red box), "EPAF Proxy Records", and "Act as a Proxy".

5. Enter the G# for the new hire and update the *Query Date*:

Remember, the Query Date defaults to the current date and MUST be changed to the true effective date of the transaction.



The screenshot shows the "New EPAF Person Selection" form. At the top, there is a navigation bar with tabs: "SJC ALERT ME!", "My Information", "My Employee Information" (selected), "My Student Records", and "My Work". Below the tabs is a search box with a "Go" button and a link "RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT". The main heading is "New EPAF Person Selection". A yellow horizontal line is below the heading. Below the line is a blue icon and the text "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." Below this is a red asterisk and the text "* - indicates a required field." Below that is the "ID: *" field with a search icon. The "Query Date: MM/DD/YYYY*" field is highlighted with a red box and contains the date "09/16/2013". Below that is the "Approval Category: *" dropdown menu with "Not Selected" selected. A "Go" button is at the bottom left. At the bottom right, there are links: "EPAF Approver Summary | EPAF Originator Summary" and "Return to EPAF Menu". At the bottom left, there is a footer: "RELEASE: 8.8".

6. Select the correct *Approval Category* (EPAF type) from the drop down menu and click *Go*:

- HIRE40 – used to hire new part-time staff
- HIRE90 – used to hire new Federal work-study staff
- HIRE91 – used to hire new Texas work-study staff
- HIRE50 – used to hire a new part-time faculty
- HIRE51 – used to hire a new part-time CPD faculty



The close-up shows the "Approval Category: *" dropdown menu with "Not Selected" selected. A "Go" button is located to the left of the dropdown.

7. For the next three screen shots on addresses and phone numbers, click *Next Approval Type*:

Address Selection

To add a new record, choose New Record. Or, choose the record to be updated under Select.

ID: Beth Wilhour, G00878426
Query Date: Sep 10, 2013
Approval Category: New PT Non-Teaching Staff, HIRE40

San Jacinto Address Information

Type	From and To Date	Address	Status	Select
New Record				<input checked="" type="radio"/>

Show All Addresses

Next Approval Type

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

Telephone Selection

To add a new record, choose New Record. Or, choose the record to be updated under Select.

ID: Beth Wilhour, G00878426
Query Date: Sep 10, 2013
Approval Category: New PT Non-Teaching Staff, HIRE40

San Jacinto Telephone Information

Type	Telephone	Status	Address Type	Select
New Record				<input checked="" type="radio"/>

Show All Phones

Next Approval Type

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

Address Selection

To add a new record, choose New Record. Or, choose the record to be updated under Select.

ID: Beth Wilhour, G00878426
Query Date: Sep 10, 2013
Approval Category: New PT Non-Teaching Staff, HIRE40

Billing Address Information

Type	From and To Date	Address	Status	Select
New Record				<input checked="" type="radio"/>

Show All Addresses

Next Approval Type

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

8. Click *Go*:

Telephone Selection

To add a new record, choose New Record. Or, choose the record to be updated under Select.

ID: Beth Wilhour, G00878426
Query Date: Sep 10, 2013
Approval Category: New PT Non-Teaching Staff, HIRE40

Billing Telephone Information

Type	Telephone	Status	Address	Type	Select
New Record					<input type="radio"/>

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

9. Enter the correct position number (POSN) and suffix (00); the Title and Time Sheet Organization will automatically populate. Click *Go*:

- Part-time staff** use **PT** + last 4 digits of the ORG
- Federal work study** use **WF** + the last 4 digits of the ORG
- Texas work study** use **WT** + the last 4 digits of the ORG
- Texas work study mentorship** use **WN** + the last 4 digits of the ORG
- Part-time faculty (non-CPD)** use **AH** + the last 4 digits of the ORG
- Part-time CPD faculty** use **CEC183**

New EPAF Job Selection

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

ID: Beth Wilhour, G00878426
Query Date: Sep 10, 2013
Approval Category: New PT Non-Teaching Staff, HIRE40

Billing Telephone Information, TELE02

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

There are no active jobs based on the Query Date.

[New EPAF](#)
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New EPAF Job Selection

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

ID: Beth Wilhour, G00878426
Query Date: Sep 10, 2013
Approval Category: New PT Non-Teaching Staff, HIRE40

Billing Telephone Information, TELE02

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text" value="Q"/>	New Job	PT3079	00	Part Time Clerical	53079, Dean of Enrollment Services					<input type="radio"/>

There are no active jobs based on the Query Date.

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

10. Enter all necessary information, including required fields.

- See the EPAF Data Standards on the [EPAF webpage](#) for information regarding address and phone number data entry.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: Beth Wilhour, G00878426

Transaction: **Query Date:** Sep 10, 2013

Transaction Status:

Approval Category: Hire New Part-Time Non-Teaching Staff, HIRE40

[Approval Types](#) | [Account Distribution](#) | [Routing Queue](#) | [Transaction History](#)

* - indicates a required field.

San Jacinto Address Information

Item	Current Value	New Value
Address Type: (Not Enterable)	SJ	
Address Sequence No.: (Not Enterable)		
Address From Date: MM/DD/YYYY		
Address Line 1:		
Address Line 2:		
Address Line 3:		
City:		
State:	TX, Texas	
ZIP or Postal Code:		

San Jacinto Telephone Information

Item	Current Value	New Value
Telephone Type: (Not Enterable)	SJ	
Telephone Seq. No.: (Not Enterable)		
Area Code:		
Telephone Number:		
Phone Extension No.:		

Billing Address Information

Item	Current Value	New Value
Address Type: (Not Enterable)	BI	
Address Sequence No.: (Not Enterable)		
Address From Date: MM/DD/YYYY		
Address Line 1:		
Address Line 2:		
Address Line 3:		
City:		
State:	TX, Texas	
ZIP or Postal Code:		

Billing Telephone Information, PT3079-00 Part Time Clerical

Item	Current Value	New Value
Telephone Type: (Not Enterable)	BI	
Telephone Seq. No.: (Not Enterable)		
Area Code:		
Telephone Number:		
Phone Extension No.:		

Hire Employee, PT3079-00 Part Time Clerical

Item	Current Value	New Value
Employee Status: *(Not Enterable)		A
Employee Class Code: *		31
Campus Code: *		Not Selected
Home COAS: *(Not Enterable)		J
Home Organization: *		
Distribution COA: (Not Enterable)		J
Distribution Orgn:		
Current Hire Date: MM/DD/YYYY*		09/10/2013
Adjusted Srvc Date: MM/DD/YYYY		

Create Job Assignment - Hourly Staff, PT3079-00 Part Time Clerical

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		09/10/2013
Contract Type: *(Not Enterable)		P
Job Effective Date: MM/DD/YYYY*		09/10/2013
Personnel Date: MM/DD/YYYY		
Title:		
Step: *(Not Enterable)		0
Regular Rate: *		
Job Change Reason: *(Not Enterable)		NEW
Payroll ID:		Not Selected
Timesheet Orgn:		
Leader ID: *		
Leader Position: *		
Leader Suffix: *		

Update Job Labor Distribution, PT3079-00 Part Time Clerical

Current											
Effective Date: 09/10/2013											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
J		106200	53079	614100	520100					100.00	
									Total:	100.00	



Default from Index Save and Add New Rows

FOAP is automatically populated based on the POSN entered and shouldn't need to be edited.

Routing Queue

Approval Level	User Name	Required Action
10 - (HRREVW) HR Review	<input type="text"/>	Approve
20 - (PAYROL) Payroll Office	<input type="text"/>	FYI
99 - (HRAPLY) HR EPAF Apply	<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

Comment

All EPAFs will include a default routing queue. These cannot be changed or removed. Additional approval levels can always be added.

Different EPAFs will have various default approvers listed.

[Approval Types](#) | [Account Distribution](#) | [Routing Queue](#) | [Transaction History](#)

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

11. Once the necessary information is entered and the routing queue is added, click *Save* to save the EPAF. Once successfully saved, click *Submit*:

Electronic Personnel Action Form

Your change was saved successfully.

Name and ID: Beth Wilhour, G00878426
Transaction: 2262 **Query Date:** Sep 10, 2013
Transaction Status: Waiting
Approval Category: Hire New Part-Time Non-Teaching Staff, HIRE40

[Approval Types](#) | [Account Distribution](#) | [Routing Queue](#) | [Transaction History](#)

12. Warnings do not prohibit an EPAF from being submitted; only errors will prevent submission until corrected.

Electronic Personnel Action Form

The transaction has been successfully submitted.

Name and ID: Beth Wilhour, G00878426
Transaction: 2262 **Query Date:** Sep 10, 2013
Transaction Status: Pending
Approval Category: Hire New Part-Time Non-Teaching Staff, HIRE40

[Approval Types](#) | [Account Distribution](#) | [Errors](#) | [Routing Queue](#) | [Transaction History](#)

Errors and Warning Messages

Type	Message Type	Description
Create Job Assignment - Hourly Staff	WARNING	*WARNING* Rate for this job is outside the Table/Grade range.
Create Job Assignment - Hourly Staff	WARNING	*WARNING* Encumbrance has been set to 0, because method is Value Input.

* - indicates a required field.

13. Once an EPAF is submitted, it will be routed to the first approval level in the routing queue. To view the EPAF, click on *EPAF Originator Summary*:

14. The *Current* tab holds any EPAFs that have been saved, but not yet submitted. The *History* tab contains all EPAFs that have been submitted. To view an EPAF, click on the name (highlighted in blue).

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Wilhour, Beth Part Time Clerical, PT3079-00	G00878426	2262	Hire New Part-Time Non-Teaching Staff	Sep 16, 2013	Sep 10, 2013	Pending	Comments Warnings

15. Once an EPAF is submitted, it can only be updated when returned for correction. At the bottom of the EPAF, the routing queue can be viewed, which includes the queue status that tells you where the EPAF is pending.

Approval Level	Name	Required Action	Queue Status	Action Date
HR Review, 10	Cynthia Ann Sharpe, CMARCHUK	Approve	Pending	
Payroll Office, 20	Denise L Segelquist, DSEGELQUIST FYI		In the Queue	
HR EPAF Apply, 99 EPAF APPLIER, EPAFAPPLIER		Apply	In the Queue	

Transaction History

Action	Date	User Name
Created:	Sep 16, 2013	Anna Marie Guevara
Submitted:	Sep 16, 2013	Anna Marie Guevara

Approval Types | Account Distribution | Errors | Comments | Routing Queue | Transaction History

Return for Correction | Void | Add Comment

Next ☺

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EPAF Originator Summary
Return to EPAF Menu

16. Once an EPAF has been approved and successfully applied, the originator will receive the following email:

Completed
hrepaf@sjcd.edu
Sent: Mon 9/16/2013 3:38 PM
To: Guevara, Anna

An EPAF you submitted has been applied:

Transaction: 2262

Approval Category: Hire New Part-Time Non-Teaching Staff

Approval Category Code: HIRE40

Employee Name: Wilhour, Beth

CID: G00878426

Transaction Status: Completed

Approval Level: HR EPAF Apply

Approval Level Code: HRAPLY

Review the EPAF, login to EPAF Originator Summary via Self-Service Banner (SSB) on <http://www.sanjac.edu/soslogin>

17. Once an EPAF has been applied, the status will be changed to *Completed*.

EPAF Originator Summary

Current History

Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

Transaction Status: All (Go)
Cancelled
Completed
Pending

New EPAF | Default Routing Queue | Search | Superuser or Filter Transactions

Name	ID	Transaction	Approval Category	Status	Created Date	Submission Date
Wilhour, Beth	G00878426	2262	Hire New Part-Time Non-Teaching Staff, HIRE40	Completed	Sep 16, 2013	Sep 16, 2013