

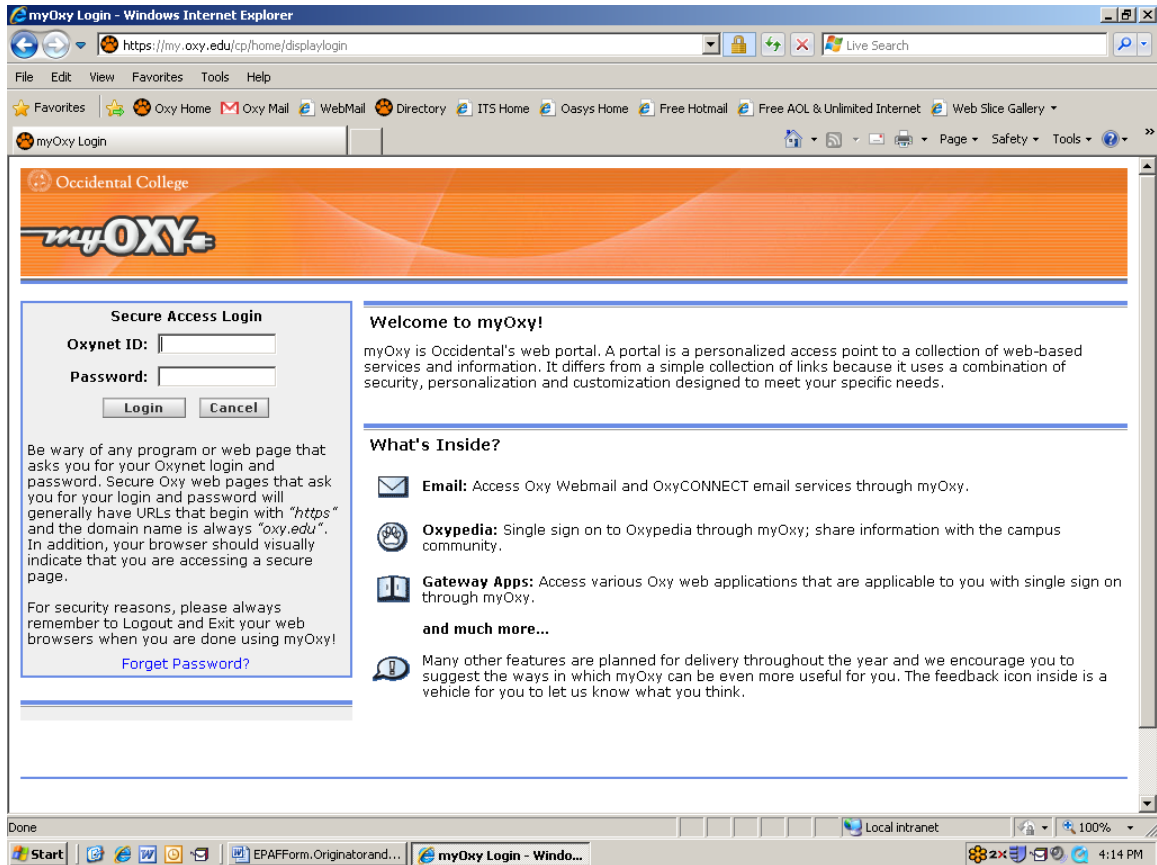
***ELECTRONIC PERSONNEL ACTION FORMS
(EPAF) HANDBOOK***
for the *SWHIR2 form and the *SWTRM2

***Instructions for:
Hourly Student Hires/Rehires;
Merit Increases; Title Changes;
Ending On-Campus Assignments***

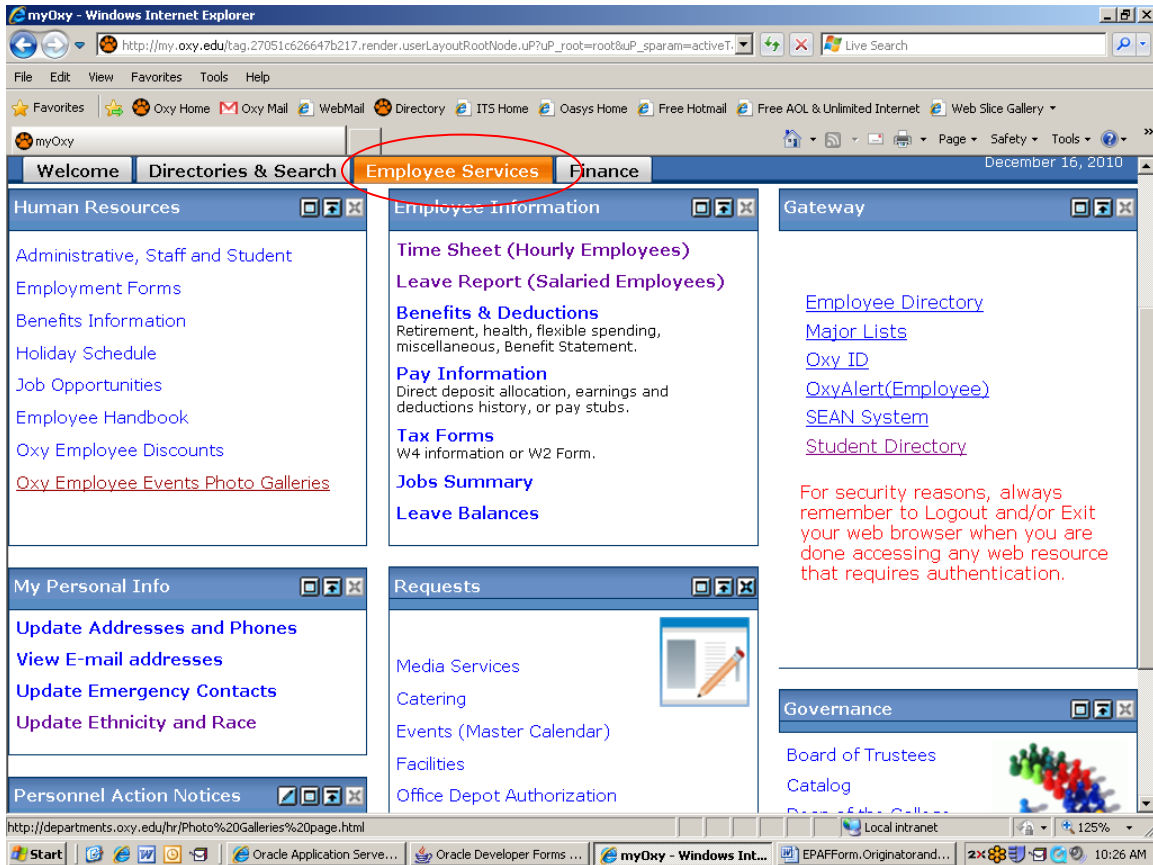
***THESE INSTRUCTIONS ARE NOT APPLICABLE
FOR STUDENT STIPEND PAYMENTS OR
HIRING/REHIRING GRANT-FUNDED
ASSIGNMENTS.**

Electronic Personnel Action Form (EPAF)

The Electronic Personnel Action Form (EPAF) channel is found in the myOxy portal (<https://my.oxy.edu/>) under the Employee Services Tab and is used for student on campus payroll records to hire, rehire, set up a wage rate or title change, and end a student's work study assignment.



After entering your Oxynet ID and Password, click the “Enter” key and click on the Employee Services tab.




Click the **CREATE NEW PAF** link found in the Personnel Action Notices Channel (Note: this is how you will always enter and/or re-enter the channel). Think of this as a “door” to enter the channel.

The screenshot shows the myOxy web application interface. The 'Personnel Action Notices' section contains a table with the following structure:

Employee	Type of Change	Effective Date	Action
			Create New PAF

The 'Create New PAF' link is circled in red. Other sections visible include 'Employment Forms', 'Benefits & Deductions', 'Pay Information', 'Tax Forms', 'Jobs Summary', 'Leave Balances', 'My Personal Info', 'Requests', 'Governance', and 'Employee Directory'.

ID #:

Type the current student worker's Employee ID (A #) **Note: The "A" in the employee ID # is case-sensitive.** If you do not know the student ID #, click the  icon to search for a person by name; type in the last name and first name; click **GO**. *For searching you can use % as a wildcard (example: Searching for John Smith can be entered as Smit% and Jo%).* On the Person Search Results click the A# to return to the EPAF page. The ID and Employee Name fields will then be populated.

Query Date for Hires, Rehires, Title Changes, Merit Increases:

The Query Date should be the **BEGINNING OF THE PAY PERIOD** for all transactions *except terminating assignments. You will need to type over the date that automatically populates this field.* For example, if hiring a student to begin working on 01/17/2011, the query date would be 01/09/2011 (*date must be entered in the DD/MM/YYYY format*). If you inadvertently forget to change the Query Date, you will need to delete the EPAF record and begin again (it is not a field that can be corrected once it has been saved).

Query Date for Ending Assignments:

The **Query Date** should be the **END OF THE PAY PERIOD** if ending a student's assignment. For example, if ending a student's assignment effective 01/17/2011, the query date would be 01/22/2011.

For a list of the hourly pay periods, log onto the Human Resources Forms page at: <http://departments.oxy.edu/hr/forms/index.html>

Approval Category for Hourly, Non-grant funded Hires/Rehires:

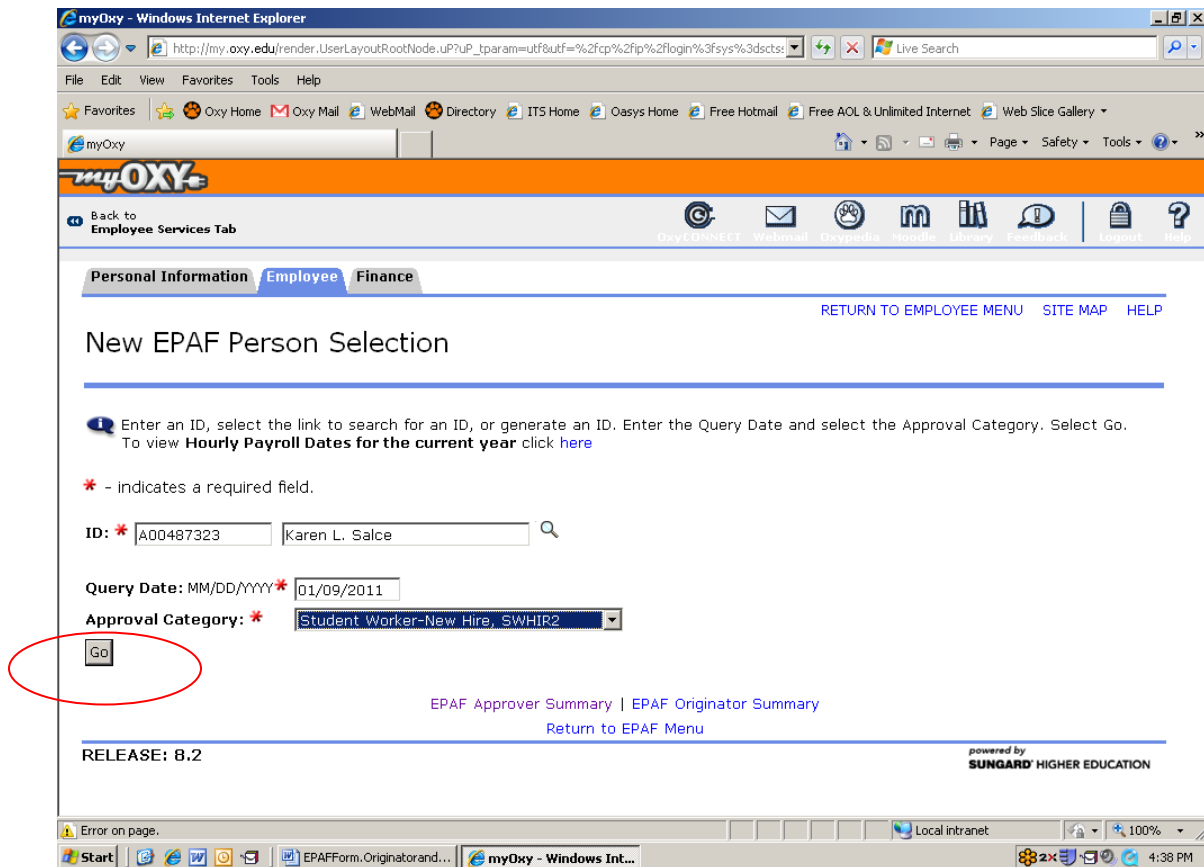
Choose the Approval Category from the dropdown list:

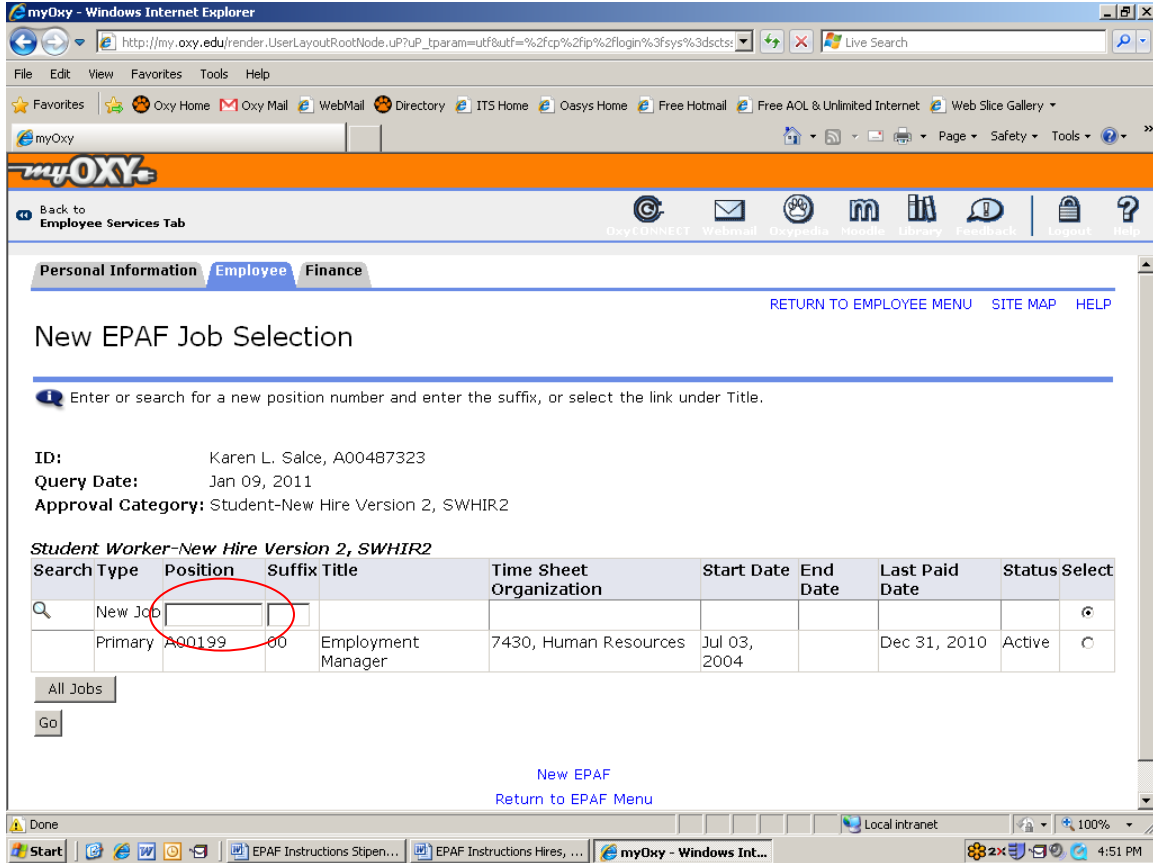
Use the Student Worker-New Hire, (**SWHIR2**) approval category for all transactions **EXCEPT** hiring/rehiring a grant-funded assignment, a stipend payment, and/or terminating a student assignment. **This form is only to be used for brand new hires, rehires, merit increases, and title changes.**

NOTE: When terminating a work award assignment, use the (SWTRM2) approval category. (See pages #19 and #20 of this document for further instructions on how to use the SWTRM2 form for ending an assignment).

If setting up a stipend payment or grant-funded assignment, please refer to the online handbook for these two categories found on the HR website (<http://departments.oxy.edu/hr/forms/index.html>).

Once you've selected the Approval Category, click **GO** (found in the bottom left-hand corner).





New EPAF Job Selection

For new hires, rehires, merit increases, or title changes: click your cursor into the “Position” field and type the position number (the **position number** should be in the format: **S0org#** (ie: **S07430**). The “S” is case-sensitive and is “S”, zero (not the letter “O”).

For departments using the Kronos system, the position number is always 10org# (ie: 109240). *Note: These are zeroes, not the letter “O.”*

Click into the Suffix field and type “00” (zero, zero). Be sure that you click the cursor in the field. If you do not click the cursor, the suffix will not “take.”

myOxy - Windows Internet Explorer

http://my.oxy.edu/render.UserLayoutRootNode.uP7uP_tparam=utf&utf=%2fcp%2fip%2flogin%3fsys%3dscts: Live Search

File Edit View Favorites Tools Help

myOxy

Back to Employee Services Tab

Personal Information Employee Finance

RETURN TO EMPLOYEE MENU SITE MAP HELP

New EPAF Job Selection

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

ID: Karen L. Salce, A00487323
Query Date: Jan 09, 2011
Approval Category: Student-New Hire Version 2, SWHIR2

Student Worker-New Hire Version 2, SWHIR2

Search Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status Select
New Job	x07430	00	HR-Student Temp Pool	7430, Human Resources				<input checked="" type="radio"/>
Primary	A00199	00	Employment Manager	7430, Human Resources	Jul 03, 2004		Dec 31, 2010	Active <input type="radio"/>

All Jobs
Go

New EPAF
Return to EPAF Menu

Click cursor in the “Select” box (located on the far right)

Select the grey “GO” button (found in the lower left-hand corner).

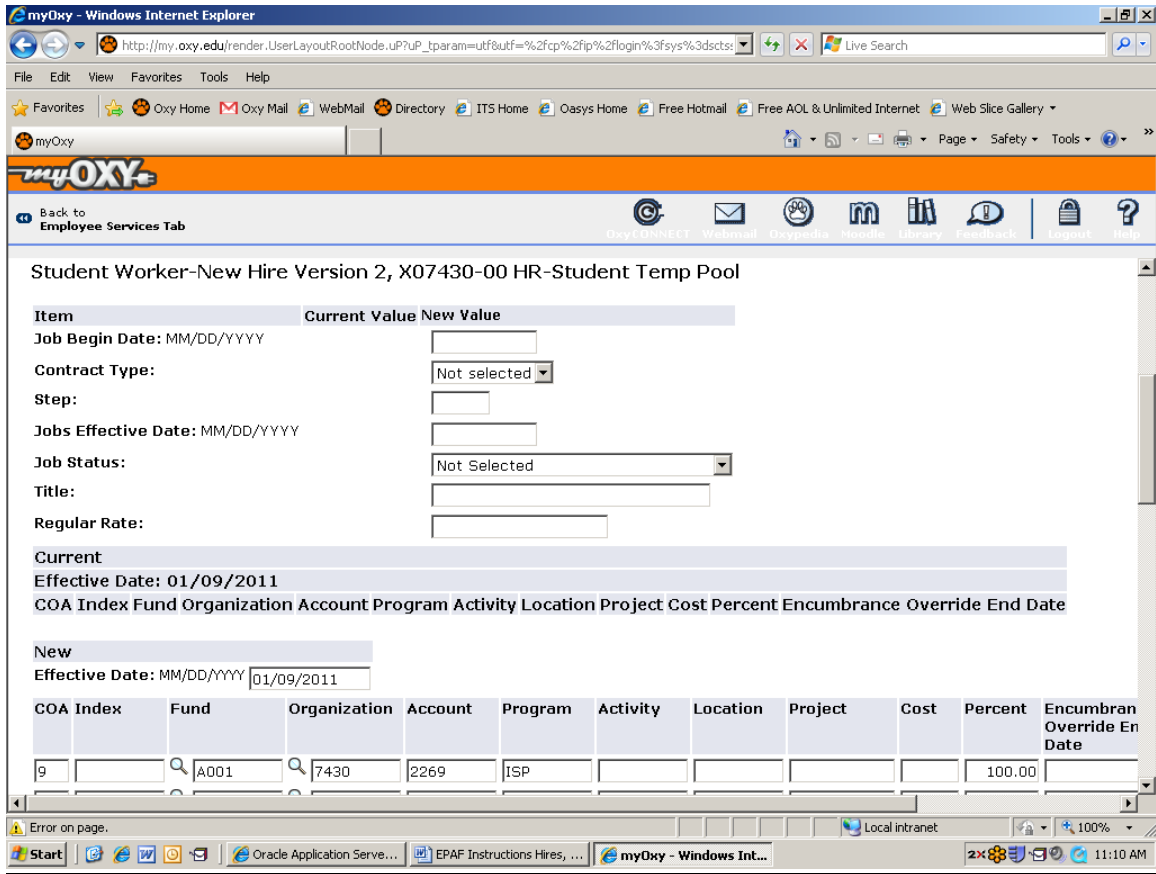
If you realize that you inadvertently typed in a position number in the incorrect format after already selecting “GO,” you will need to delete the record and re-enter the data from the beginning (the EPAF will not allow you to correct the position number).

The screenshot shows the myOxy web application interface. The page title is "New EAPF Job Selection". Below the title, there is a search instruction: "Enter or search for a new position number and enter the suffix, or select the link under Title." The user's ID is Karen L. Salce, A00487323, and the query date is Jan 09, 2011. The approval category is Student-New Hire Version 2, SWHIR2.

The table below lists job search results:

Search Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
New Job	X07430	00	HR-Student Temp Pool	7430, Human Resources					<input type="radio"/>
Primary	A00199	00	Employment Manager	7430, Human Resources	Jul 03, 2004		Dec 31, 2010	Active	<input type="radio"/>

At the bottom left of the search results area, there is a "Go" button circled in red. Other buttons include "All Jobs" and "New EAPF".



You are now ready to begin entering the data for your hire, rehire, merit increase, or title change.

Jobs Begin Date

Leave this field blank if the student has previously worked for your department in the same position number. For brand new hires that have never worked in your department, the date should be the beginning of the pay period and must be the same date as the query date. If you are rehiring your student worker, setting up a merit increase, or title change, be certain you leave this field blank.

Contract Type

Leave this field blank if the student has previously worked for your department in the same position number.

(P) Primary ~ use only if this is the first time the student has ever worked on campus

(S) Secondary ~ use if the student has previously worked in any other assignment on campus

Step

Leave this field blank if the student has previously worked for your department in the same position number.

For new hires the step is **always 0 (zero)**.

NOTE: *When setting up a rehire, merit increase, or title change, make certain you leave the “Job Begin Date,” “Contract Type,” and “Step” fields blank (do NOT enter data in these fields unless setting up a brand new hire into the respective position number.*

Jobs Effective Date

*ALWAYS the **beginning of the pay period** if using **SWHIR2** form for all transactions **except a termination.***

*ALWAYS the **end of the pay period** if using **SWTRM2** form to end an assignment*

Status

“Active” for hiring, rehiring, merit increases and title changes. “Terminated” if ending an assignment .

Title

Position job title (example: Office Assistant)

Rate

Hourly pay rate (stipends may not be entered on this form; Do not use \$ sign when entering hourly rate)

You can leave a comment if needed.

Click “**SAVE**” (the “Save and Add New Rows” button serves the same purpose).
NOTE: Only click “SAVE” one time. Multiple clicks on the “Save” button will create duplicate records.

Click “**SUBMIT**” (this will transmit the information to Human Resources for review, approval and processing).

NOTE: If you receive ERROR Messages, you must click UPDATE and correct the errors. Please disregard WARNING messages. You’ll then need to click SAVE and then SUBMIT. While it is okay to ignore WARNING messages, you must correct all ERROR messages in order for the form to transmit to Human Resources.

ERROR MESSAGE: THIS PERSON IS NOT DEFINED AS AN EMPLOYEE

If the student has not previously worked on campus, you will receive an ERROR message indicating that **“this person is not defined as an employee”** and **the EPAF form will not be transmittable to HR.**

At this time, you will need to instruct the student to see Human Resources (Karen) to complete the required I-9/W-4 forms. **The student should not be scheduled to work until both forms are complete and the EPAF has been fully completed and approved by Human Resources.**

Once the student has completed these forms with HR, you will receive an automated e-mail telling you it is okay to submit the EPAF for the student. **It is only at this time that the student may begin to work in the assignment. You will then need to resubmit the EPAF for the student** (*you do this by clicking on the student's name, click UPDATE, SAVE, and SUBMIT*)

If the form is submitted, you will see a transaction history listed on the bottom:


Transaction History

Action	Date	User Name
Created:	Apr 27, 2009	Marina Kostel
Submitted:	Apr 27, 2009	Marina Kostel

At the top you will see the message:

Electronic Personnel Action Form

The transaction has been successfully submitted.

 Enter the information for the EPAF and either Save or Submit

Name and ID: Ross Michael Arias, A00917583 **Job and Suffix:** S04030-00, ASOC-4030
Transaction: 801 **Query Date:** Apr 27, 2009
Transaction Status: Pending **Last Paid Date:** Oct 18, 2008
Approval Category: Student Worker-Rehired, SWRHIR

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

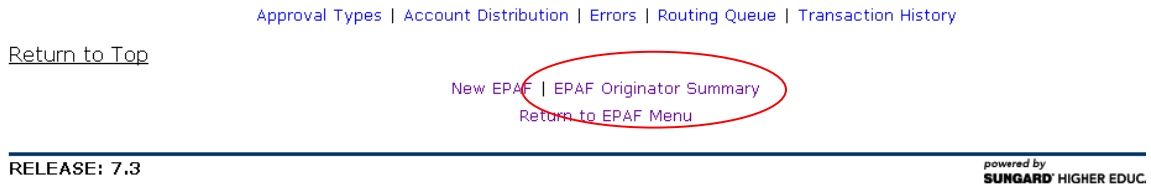
Errors and Warning Messages

Type	Message Type	Description
Student Worker-Rehired	WARNING	*WARNING* Rate for this job is outside the Table/Grade range.

VIEWING THE TRANSACTION STATUS

To view the transaction status:

1) Click **EPAF Originator Summary** at the bottom of the screen:



2) Click **History** tab:

Personal Information | Advancement Officers | **Employee** | WebTailor Administration

Search Go RETURN TO EMPLOYEE MENU | SITE MAP | HELP

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: Go

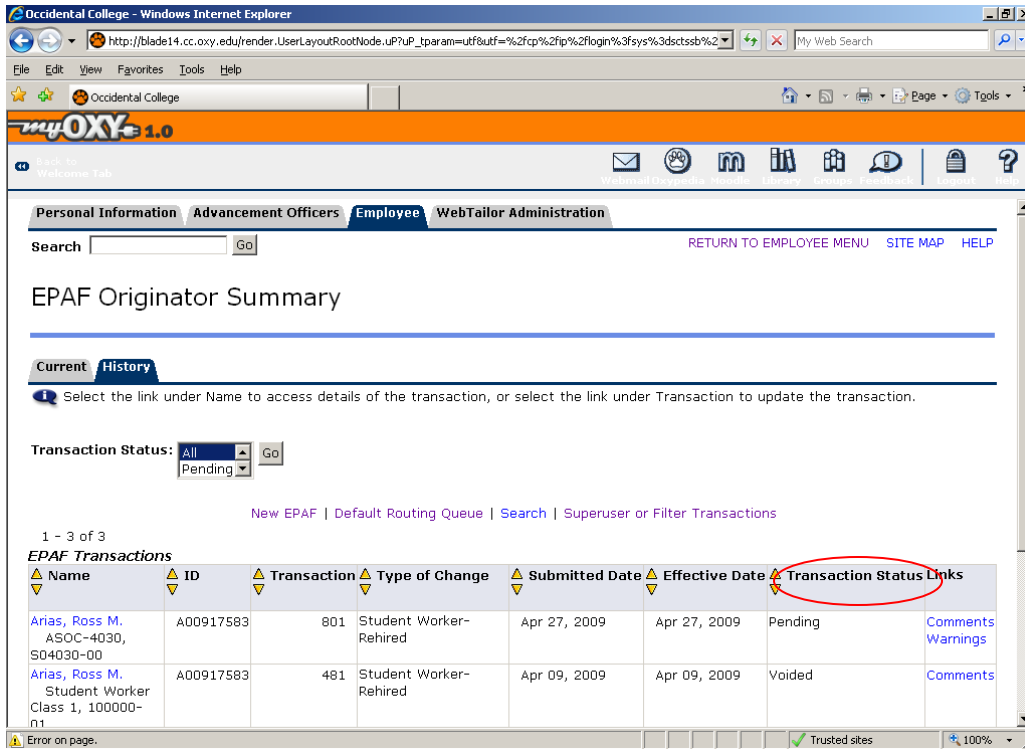
[New EPAF](#) | [Default Routing Queue](#) | [Search](#) | [Superuser or Filter Transactions](#)

1 - 3 of 3

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Arias, Ross M. ASOC-4030, S04030-00	A00917583	801	Student Worker- Rehired	Apr 27, 2009	Apr 27, 2009	Pending	Comments Warnings
Arias, Ross M. Student Worker Class 1, 100000- n1	A00917583	481	Student Worker- Rehired	Apr 09, 2009	Apr 09, 2009	Voided	Comments

Error on page. Trusted sites 100%



3) View the transaction status under the “Transaction Status” column

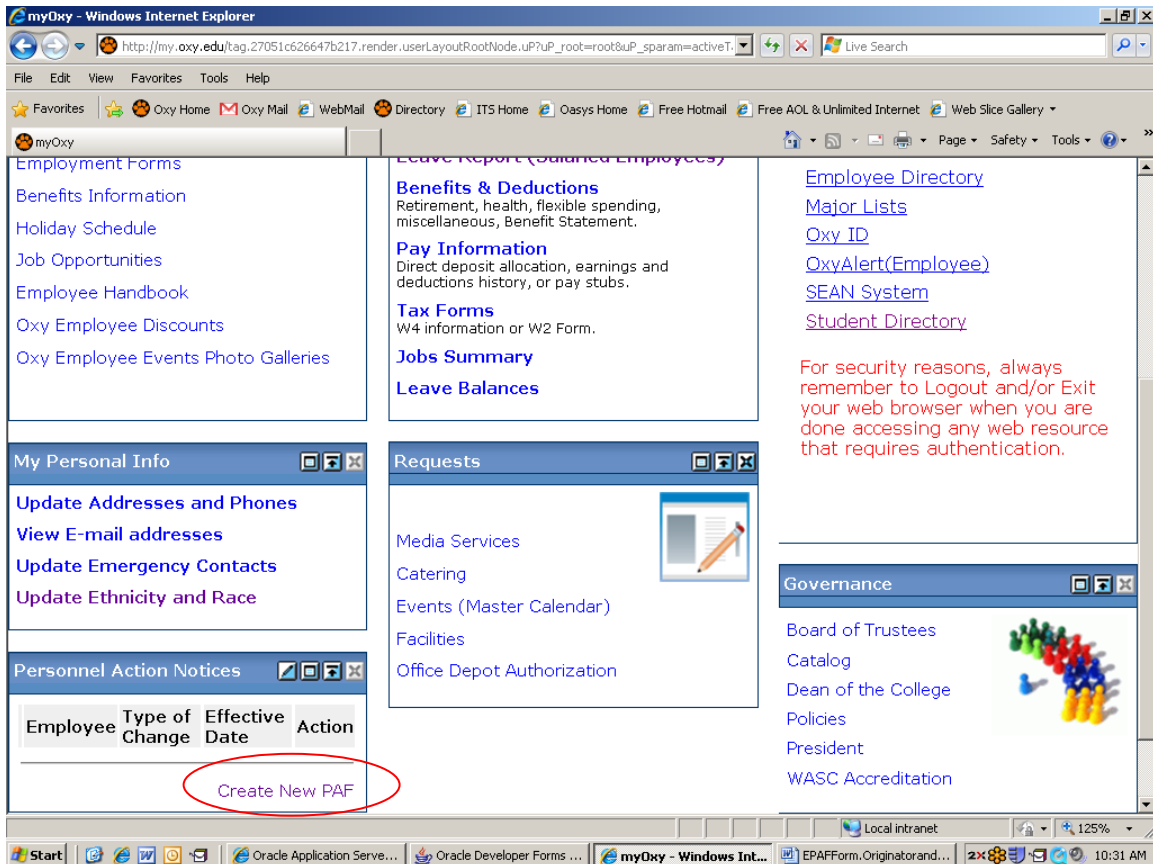
Waiting status = you’ve saved data on the form, but have not submitted the form for approval. This status will also appear if you submit a form that contains errors. In order to change the status from “Waiting” to “Pending,” you must correct the errors (by clicking UPDATE, make changes, click SAVE, and SUBMIT).

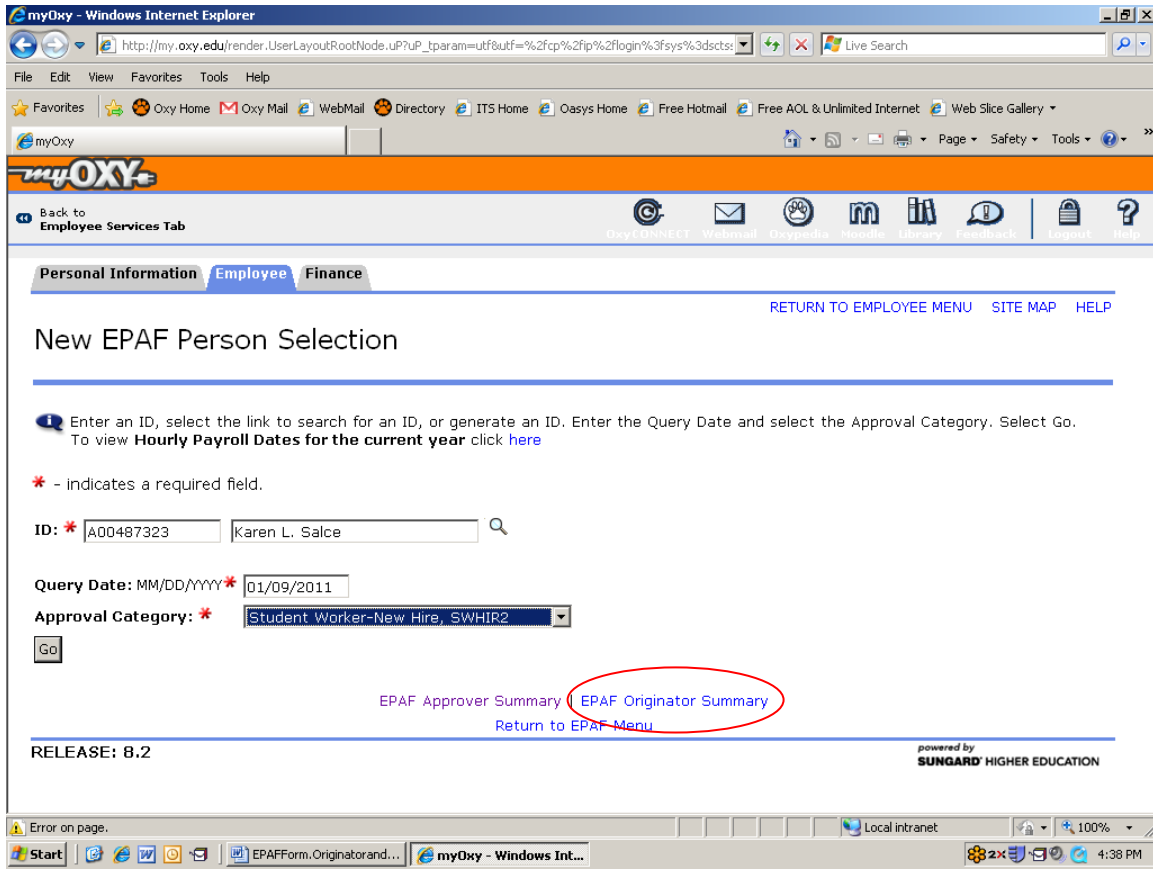
Pending status = the form is with Human Resources pending approval

Completed status = the form has been approved by Human Resources and merged into Banner. When the form has reached Completed status, the student will then be able to access his/her online timesheet.

If checking the EPAF status from the main Personnel Action Form channel, you will need to do the following:

- 1) Click on “Create New PAF”



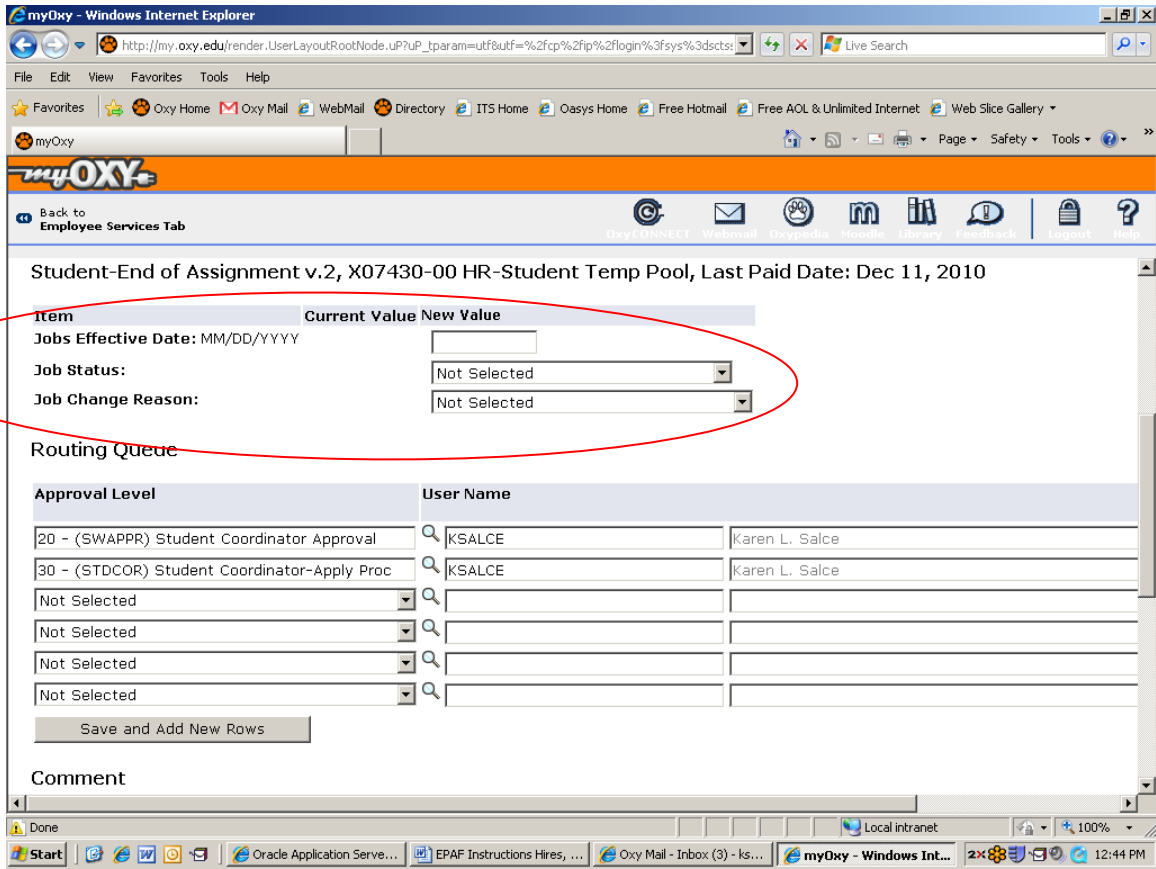


2) Click on the ORIGINATOR SUMMARY link found at the bottom, middle portion of the page

3) Click on the HISTORY tab

HOW TO TERMINATE AN ASSIGNMENT:

- 1) Click the **CREATE NEW PAF** link found in the Personnel Action Notices Channel.
- 2) Type the current student worker's Employee ID (A #) **Note: The "A" in the employee ID # is case-sensitive.**
- 3) The **Query Date** should be the ***END OF THE PAY PERIOD*** if ending a student's assignment. For example, if ending a student's assignment effective 01/17/2011, the query date would be 01/22/2011.
- 4) Select the SWTRM2 form for approval category.
- 5) Click on the grey "GO" button.



- 6) Type in the end of the pay period for the “**Job Effective Date**” (this must be the same as the query date).
- 7) **Job status** should be “Terminated.”
- 9) Use the appropriate **Job Change Reason** from the pull-down menu.
- 10) Click **SAVE** (the “Save and Add New Rows” button serves the same purpose).
NOTE: Only click “SAVE” one time. Multiple clicks on the “Save” button will create duplicate records.
- 11) Click **SUBMIT** (this will route the form to Human Resources for processing).