

Quick Sheet: Creating a Casual EPAF

Complete instructions for creating an EPAF can be found at <http://www.pcc.edu/hr/compensation/epaf/creating.html>

Notes: If you have a **new PCC employee** who does not already have an employee record in Banner, email the following information to your **HRIS Specialist FIRST**:
Employee Name, ID, Type of Employee, Org Code, and Start Date.
Employees must also have their I9 and W4 on file with HR/Payroll before you can originate an EPAF for them. For some casual employees, a Background Check is also required beforehand.

1. Access EPAF on MyPCC.

- Go to MyPCC → Employee Tab → Banweb Main Menu → Employee Services Tab → Electronic Personnel Action Forms (link)
- From here, click on **EPAF Originator Summary**.

You will see a list of EPAFs awaiting your action, if you have any. For example, your managing supervisor may return an EPAF to you for correction. If you see nothing in your queue, continue.

Before you create your first EPAF, it's recommended that you set up the **Default Routing Queue** first. This way, each time you create a new EPAF you don't need to enter the list of approvers – it will default in. *Directions are at:*

www.pcc.edu/hr/compensation/epaf/Creating_setup_approvals.html

2. Click 'New EPAF'

3. First Screen – Enter G #, First Day of Job, and Type of EPAF.

New EPAF Person Selection

Enter an ID, select the line. Type in the **G Number, Job Begin Date, and type of EPAF** you are creating. Enter the Query Date.

* - indicates a required field.

ID: * G00 xxxx James L. Healey

Query Date: MM/DD/YYYY * 05/08/2009

Approval Category: *
Create a New Casual Job, CENJOB
Not Selected
Create a New Casual Job, CENJOB
Create Student Reg Wage Job, SENJOB

Go

4. Second Screen – Position Number and Suffix Number

Follow these steps carefully!

- a. Type in the **Position Number** for the job.
- b. Click the **All Jobs** button.

You will get a list of all positions the employee has held. Look at the **position numbers** -- are there any with the **same** position number you typed for the new job?

If you DO see jobs on the list with the same position number as the one you just typed for the new job, look at the **suffix number**.

- c. For your new job, type in the suffix number that is *one above the highest suffix number listed* for that position. If the employee has never used the same position number before, type '01' for the suffix.

Create a New CE/SE Job, CEI

| Search | Type | Position | | |
|----------------------|-----------|-------------------------------------|----------------------|------------------|
| <input type="text"/> | New Job | <input type="text" value="997152"/> | <input type="text"/> | Casua |
| | Secondary | 996116 | 01 | FYI Te person |
| | Secondary | 997152 | 01 | EMT S EVALU |
| | Primary | 997152 | 02 | EMT C ASSIS |
| | Primary | 997152 | 03 | EMT C ASSIS |
| | Secondary | 998767 | 01 | TEST |

In this case, you would type **04** for the suffix number.

- d. Press the 'Go' button.

(Note: You don't have to press Tab on your keyboard anymore – just click the 'Go' button.)

5. Third Screen – Enter Details of the Job, + Approval Queue

a. Type in the fields. Use all CAPS.

All fields that say '**Not Overrideable**' should be left as they are; do not type in them.

| <i>Field</i> | <i>What to Type</i> |
|---|--|
| Timesheet Orgn | The Org. Code (budget code) for the budget that is paying for the position. |
| Total Encumbered Hours Total Contract Hours Encumbrance Hours | Maximum # of hours the employee will be authorized to work this year. Defaults to '599' (the maximum). If you change it, change all 3 hours fields so they are the same. |
| Job Location | Use the drop-down menu to choose |
| Salary Grade | CLER = Clerical / Administrative Support SERV = Service Assistant / Maintenance TECH = Technical Assistant PROF = Professional MGMT = Management |
| Regular Rate | The employee's rate of pay (example: 16 for \$16.00/hr.) |
| Title | Type in a Job Title for the job (all caps). |

The next section is about when the job will end (terminate). Only two fields need to be changed, if necessary. The job end dates will default automatically to the end of the fiscal year.

End an Hourly CE/SE Job

| Item | Current Value | New Value |
|---------------------------------------|---------------|------------|
| Job End Date: MM/DD/YYYY | | 06/13/2009 |
| Jobs Effective Date: MM/DD/YYYY | | 06/13/2009 |
| Job Status: (Not Overrideable) | | T |
| Job Change Reason: (Not Overrideable) | | EP002 |
| Encumbrance Hours: (Not Overrideable) | | 0.00 |

These two fields are the only ones you can change in this section, and you would change them **only if you want the job to be ended before the close of the current fiscal year.**

The LAST section is about who will be approving the EPAF.

If you have set up your **Default Approval Queue** beforehand, you don't have to do this part. See www.pcc.edu/hr/compensation/epaf/Creating_setup_approvals.html for details.

Use the '**Magnifying Glass**' search icon to find the login name associated with the person you're looking for.

Line 1: Type in the Banner login name of your **HR representative**

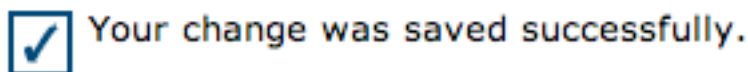
Line 2: Type in the Banner login name of the employee's **supervising manager**

Line 3: Type in in the Banner login name of the **Manager of HR systems** development (currently Julie Kinney)

You are now ready to Save and finalize your work.

- **Click 'Save' or 'Save and Add New Rows'**

Look for the message at the top of the screen.

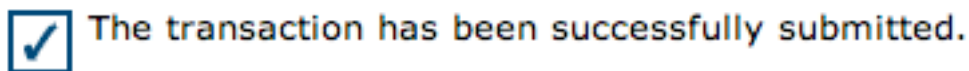


If you got **Error Messages** instead, read them and make any changes needed. (Warning Messages can be ignored.) Click 'Save' again when you've fixed the problem.

Click Submit

If you got **Error Messages** here, read them and make any changes needed. (Warning Messages can be ignored.) Click 'Save' again when you've fixed the problem, then hit 'Submit' again.

Look for this message at the top of the screen:



To navigate between screens, you can use your Browser back/next arrows OR click on the links at the bottom of each page.