Work Study Student - EPAF Guide Chapter One: Setting up Default Routing

Once default routing is set up for a particular Approval Category, you will not have to set routing up for each individual EPAF within that category.

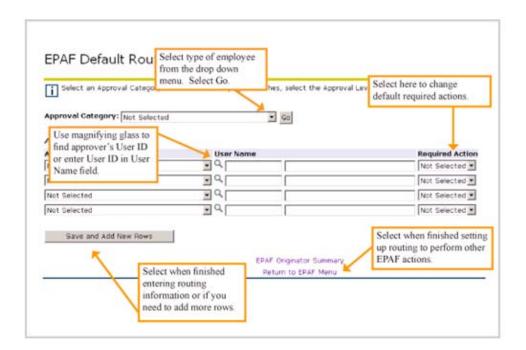
- 1. Log in to **DrexelOne**.
- 2. Select Employees tab.
- 3. Select More BannerWeb Employee Services.
- 4. Select Electronic Personnel Action Forms.
- 5. Select EPAF Originator Summary.
- 6. Select Default Routing Queue.



- 7. From the Approval Category drop down menu, select the type of employee that you want to set up in your routing for. Select Go.
- 8. Set up the routing levels. There are pre-set approval levels and required actions that correspond to each individual Approval Category, which will default into the routing fields when you select the Approval Category and select, Go. Simply input the User ID for the appropriate levels if you would like to use the default levels. If you would like to add approvers to the default levels, please use the following steps:
 - a. Select the user level for the appropriate level of the routing.
 - b. Enter User ID for approval levels under the User Name field. If you don't know the User Names for your approvers, use the magnifying glass to search for them.
 - c. Select drop down menu under Required Action to change these defaults. The following are standard approval levels for routing:

Approval Category	Action
DEPBUD	Approve
FINAID	Approve
HUMRES	Approve
HRADMIN	Apply

9. When finished entering approvers, select Save and Add New Rows.



10. The following types of EPAFs available for work study students:

Code	Туре	
SWDHR	Workstudy Timesheet Change	
SWNHR	Workstudy New Hire	
SWRHR	Workstudy Rehire	
SWTHR	Workstudy Termination	
SWWHR	Workstudy Wage Change	

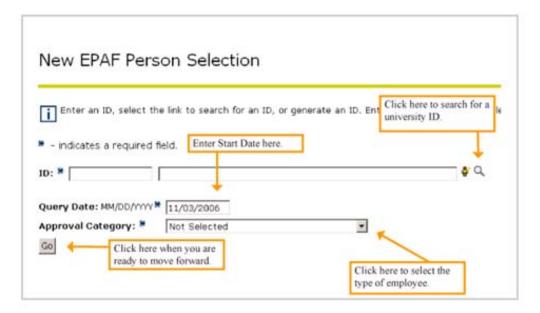
11. Repeat for as many employee types as necessary.

Work Study Student Chapter Two: New Hire (SWNHR)

This EPAF is to be used when the student has never worked for Drexel. The student will also be required to stop into Human Resources office to present appropriate identification for the completion of an I-9 form and fill out new hire paperwork. Click this link for more information: Work Study Info

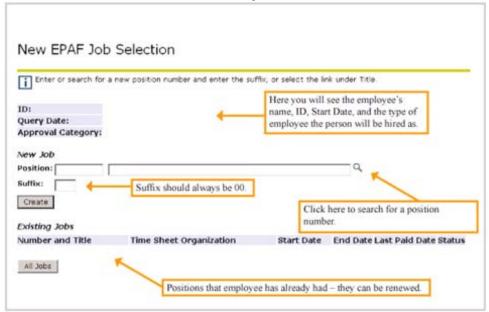
Work Study Student EPAFs must be submitted prior to the payroll cut-off dates for HRIS which is posted on the Payroll Website: Payroll

- 1. Log in to **DrexelOne**.
- 2. Select Employees tab.
- 3. Select More BannerWeb Employee Services.
- 4. Select Electronic Personnel Action.
- 5. Select New EPAF.
- 6. Enter the university ID of the person you want to create an EPAF for. If you don't know the person's university ID, click on the magnifying glass on the right to search for the person.
- 7. Enter the Start Date in the Query Date field. (Date must be in MM/DD/YYYY format).
- 8. Select the type of employee from the Approval Category drop down menu.
- 9. Once ID, Query Date, and Approval Category are selected, click Go.

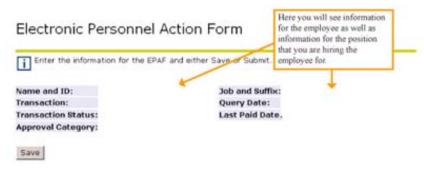


- 10. Enter position number for employee in the Position field. If you don't know the position number, click on the magnifying glass to search for it. If you are renewing a position that the employee has already had, simply select the job under Existing Jobs.
- 11. Enter Suffix as 00. (Disregard if you selected an existing job.)

12. When Position number and Suffix are completed, select Create.



13. Under the Start section, enter the information pertaining to each field in the EPAF:



Item	Current Value New Value
Home Department:	Q 3223
Distribution Orgn:	Q 3223
Hire Date: MM/DD/YYYY	02/01/2010
Job Begin Date: MM/DD/YYYY	02/01/2010
Regular Rate:	7.25
Job Effective Date: MM/DD/YYYY	02/01/2010
FTE: (Not Overrideable)	.25
Hours per Day: (Not Overrideable)	2
Hours per Pay: (Not Overrideable)	20

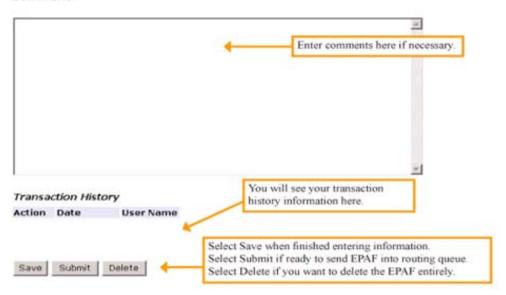
Number Pays Periods: (Not Overrideable)	26.1
Number of Pays: (Not Overrideable)	26.1
Distribution COA: (Not Overrideable)	D
Home COAS: (Not Overrideable)	D
Employee Class Code: (Not Overrideable)	SW
Employee Status: (Not Overrideable)	А
Job End Date: MM/DD/YYYY (Not Overrideable)	-
Job Change Reason: (Not Overrideable)	NEW
Step: (Not Overrideable)	0
Job Category: (Not Overrideable)	Р

- 14. There is not a termination section or end dates for work study EPAFs. The reason is that at the end of each fiscal year, all work study positions must be terminated for the current fiscal year. The HRIS department will process a mass termination for all work studies on June 30 or the end of each fiscal year. If the department wants to rehire a student employee in the next fiscal year, a rehire EPAF would need to be processed.
- 15. Enter Routing Information, if necessary. (If you set up default routing, it should automatically populate here. See the **Routing page** for instructions.)

Approval Category	Action
DEPBUD	Approve
FINAID	Approve
HUMRES	Approve
HRADMIN	Apply

- 16. Enter Comments, if necessary. (**HINT**: If you entered comments and then received an error when you saved, your comments are still saved even though you don't see them in the Comments box.)
- 17. Review the information you entered in the EPAF.
- 18. When finished entering all information in the EPAF, select Save. (*Note: You MUST save your EPAF before submitting it!*)
- 19. If you are ready to send the EPAF into your routing queue, select Submit. If you need to trash the EPAF and start over, select Delete.

Comment



HINT 1: You will know that your EPAF was submitted successfully by an alert at the top of your screen.



HINT 2: Remember to periodically review your outstanding EPAFs to ensure that they are all approved in a timely fashion. If you find that your EPAF has not been approved, check the comments section to see if there are notes as to why it has not yet been approved.

Work Study Student Chapter Three: Rehire (SWRHR)

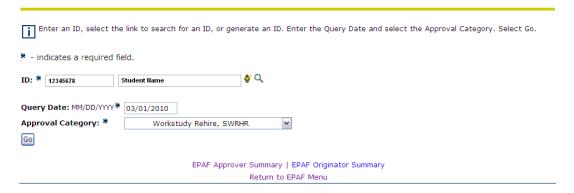
This EPAF is to be used when the student has worked for Drexel in the past. It can also be used in conjunction with a termination EPAF to terminate a position mid-fiscal year and rehire in a new position.

If the student has worked within the calendar year, there is no requirement to fill out paperwork in Human Resources. However, if the student has not worked in one calendar year or more, the student will be required to stop into Human Resources office to present appropriate identification for the completion of an I-9 form and fill out new hire paperwork for re-verification purposes. Click this link for more information: Work Study Info

Work Study Student EPAFs must be submitted prior to the payroll cut-off dates for HRIS which is posted on the Payroll Website: Payroll

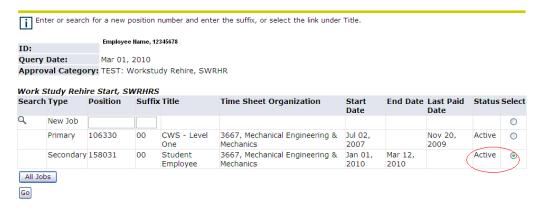
- 1. Log in to **DrexelOne**.
- 2. Select Employees tab.
- 3. Select More BannerWeb Employee Services.
- 4. Select Electronic Personnel Action.
- 5. Select New EPAF.
- 6. Enter the university ID of the person you want to create an EPAF for. If you don't know the person's university ID, click on the magnifying glass on the right to search for the person.
- 7. Enter the Start Date in the Query Date field. (Date must be in MM/DD/YYYY format).
- 8. Select the type of employee from the Approval Category drop down menu.
- 9. Once ID, Query Date, and Approval Category are selected, click Go.

New EPAF Person Selection



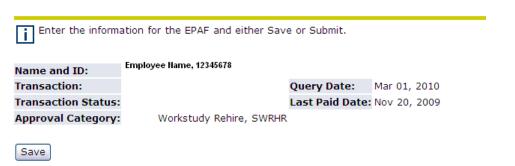
10. Select the position you would like to rehire and click Go. If the student is being rehired into a new position number type in the new position number and Suffix which should always equal 00.

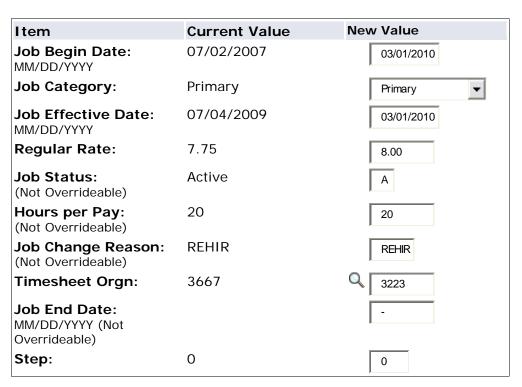
New EPAF Job Selection



11. Under the Start section, enter the information pertaining to each field in the EPAF.

Electronic Personnel Action Form



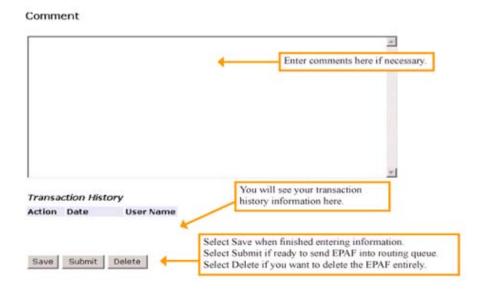


(Not Overrideable)		
FTE:	.25	.25
(Not Overrideable)		-

- 12. Each fiscal year, all work study positions must be terminated for the current fiscal year. The HRIS department will process a mass termination for all work studies on June 30 or the end of each fiscal year. If the department wants to rehire a student employee in the next fiscal year, a rehire EPAF would need to be processed.
- 13. Enter Routing Information, if necessary. (If you set up default routing, it should automatically populate here. See the **Routing page** for instructions.)

Approval Category	Action
DEPBUD	Approve
FINAID	Approve
HUMRES	Approve
HRADMIN	Apply

- 14. Enter Comments, if necessary. (**HINT**: If you entered comments and then received an error when you saved, your comments are still saved even though you don't see them in the Comments box.)
- 15. Review the information you entered in the EPAF.
- 16. When finished entering all information in the EPAF, select Save. (*Note: You MUST save your EPAF before submitting it!*)
- 17. If you are ready to send the EPAF into your routing queue, select Submit. If you need to trash the EPAF and start over, select Delete.



HINT 1: You will know that your EPAF was submitted successfully by an alert at the top of your screen.

Electronic Personnel Action Form The transaction has been successfully submitted.

HINT 2: Remember to periodically review your outstanding EPAFs to ensure that they are all approved in a timely fashion. If you find that your EPAF has not been approved, check the comments section to see if there are notes as to why it has not yet been approved.

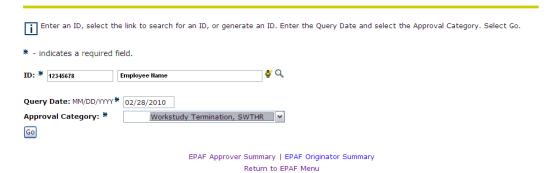
Work Study Student Chapter Four: Termination (SWTHR)

This EAF is to be used when a student needs to be terminated in the system prior to the fiscal year end (or June 30). It can also be used to terminate the student from one position in one department, and then submit a rehire EAF to set them up in a new position in another department mid-fiscal year.

Work Study Student EPAFs must be submitted prior to the payroll cut-off dates for HRIS which is posted on the Payroll Website: Payroll

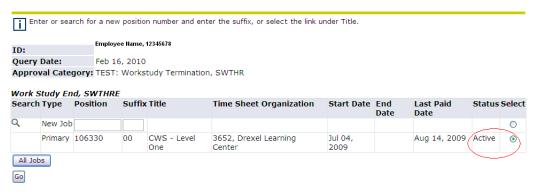
- 1. Log in to **DrexelOne**.
- 2. Select Employees tab.
- 3. Select More BannerWeb Employee Services.
- 4. Select Electronic Personnel Action.
- 5. Select New EPAF.
- 6. Enter the university ID of the person you want to create an EPAF for. If you don't know the person's university ID, click on the magnifying glass on the right to search for the person.
- 7. Enter the Start Date in the Query Date field. (Date must be in MM/DD/YYYY format).
- 8. Select the type of employee from the Approval Category drop down menu.
- 9. Once ID, Query Date, and Approval Category are selected, click Go.

New EPAF Person Selection



10. Select the position number, then click Go.

New EPAF Job Selection



11. Under the Start section, enter the Job Effective Date = the last day the student will be paid.

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

Name and ID: Employee Name, 12345678

Transaction: Query Date: Feb 16, 2010
Transaction Status: Last Paid Date: Aug 14, 2009

Approval Category: Workstudy Termination, SWTHR

Save

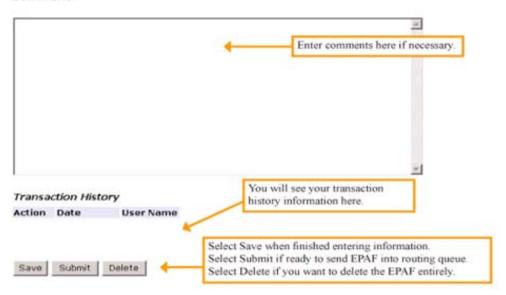
Item	Current Value	New Value
Job Effective Date: MM/DD/YYYY	07/01/2009	02/15/2010
Job Status: (Not Overrideable)	Active	Т
Job Change Reason: (Not Overrideable)	REHIR	EXPIR

12. Enter Routing Information, if necessary. (If you set up default routing, it should automatically populate here. See the **Routing page** for instructions.)

Approval Category	Action
DEPBUD	Approve
FINAID	Approve
HUMRES	Approve
HRADMIN	Apply

- 13. Enter Comments, if necessary. (**HINT**: If you entered comments and then received an error when you saved, your comments are still saved even though you don't see them in the Comments box.)
- 14. Review the information you entered in the EPAF.
- 15. When finished entering all information in the EPAF, select Save. (*Note: You MUST save your EPAF before submitting it!*)
- 16. If you are ready to send the EPAF into your routing queue, select Submit. If you need to trash the EPAF and start over, select Delete.

Comment



HINT 1: You will know that your EPAF was submitted successfully by an alert at the top of your screen.



HINT 2: Remember to periodically review your outstanding EPAFs to ensure that they are all approved in a timely fashion. If you find that your EPAF has not been approved, check the comments section to see if there are notes as to why it has not yet been approved.

Work Study Student Chapter Five: TimeSheet Change (SWDHR)

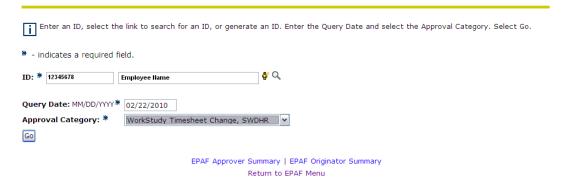
This EAF is to be used when a student needs to be transferred from one department to another department under the current area for timesheet purposes. It is meant more for correction purposes.

<u>Important Note:</u> If the student is being fully transferred from one manager or area to a completely different manager or area, a termination EPAF must be submitted by the terminating manager and a rehire EPAF must be submitted by the new hiring manager in that order. This will ensure that both departments are notified of the change and appropriate approval is obtained.

Work Study Student EPAFs must be submitted prior to the payroll cut-off dates for HRIS which is posted on the Payroll Website: Payroll

- 1. Log in to **DrexelOne**.
- 2. Select Employees tab.
- 3. Select More BannerWeb Employee Services.
- 4. Select Electronic Personnel Action.
- 5. Select New EPAF.
- 6. Enter the university ID of the person you want to create an EPAF for. If you don't know the person's university ID, click on the magnifying glass on the right to search for the person.
- 7. Enter the Start Date in the Query Date field. (Date must be in MM/DD/YYYY format).
- 8. Select the type of employee from the Approval Category drop down menu.
- 9. Once ID, Query Date, and Approval Category are selected, click Go.

New EPAF Person Selection

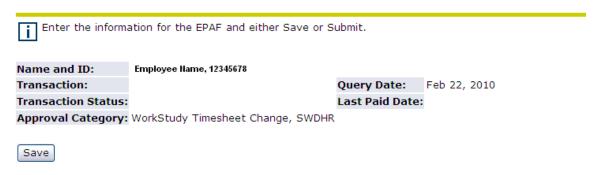


10. Select the position number, then click Go.



11. Under the Start section, enter new information:

Electronic Personnel Action Form



Item	Current Value	New Value
Job Effective Date: MM/DD/YYYY	07/01/2009	02/01/2010
Job Change Reason: (Not Overrideable)	NEW	ORCO
Timesheet Orgn:	3441	3443

12. Enter Routing Information, if necessary. (If you set up default routing, it should automatically populate here. See the **Routing page** for instructions.)

Approval Category	Action
DEPBUD	Approve
FINAID	Approve
HUMRES	Approve
HRADMIN	Apply

13. Enter Comments, if necessary. (**HINT**: If you entered comments and then received an error when you saved, your comments are still saved even though you don't see them in the Comments box.)

- 14. Review the information you entered in the EPAF.
- 15. When finished entering all information in the EPAF, select Save. (*Note: You MUST save your EPAF before submitting it!*)
- 16. If you are ready to send the EPAF into your routing queue, select Submit. If you need to trash the EPAF and start over, select Delete.

Enter comments here if necessary. You will see your transaction history history information here. Select Save when finished entering information. Select Submit if ready to send EPAF into routing queue. Select Delete if you want to delete the EPAF entirely.

HINT 1: You will know that your EPAF was submitted successfully by an alert at the top of your screen.



HINT 2: Remember to periodically review your outstanding EPAFs to ensure that they are all approved in a timely fashion. If you find that your EPAF has not been approved, check the comments section to see if there are notes as to why it has not yet been approved.

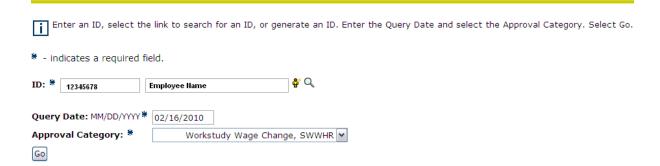
Work Study Student Chapter Six: Wage Change (SWWHR)

This EAF is to be used for salary changes to students who have already been hired. It cannot be used in combination with another action and only used for the purposes of changing hourly wage.

Work Study Student EPAFs must be submitted prior to the payroll cut-off dates for HRIS which is posted on the Payroll Website: Payroll

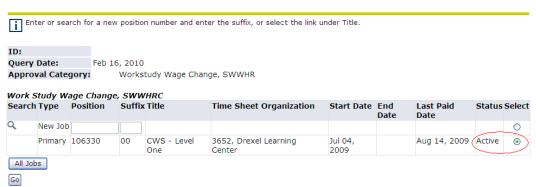
- 1. Log in to **DrexelOne**.
- 2. Select Employees tab.
- 3. Select More BannerWeb Employee Services.
- 4. Select Electronic Personnel Action.
- 5. Select New EPAF.
- 6. Enter the university ID of the person you want to create an EPAF for. If you don't know the person's university ID, click on the magnifying glass on the right to search for the person.
- 7. Enter the Start Date in the Query Date field. (Date must be in MM/DD/YYYY format).
- 8. Select the type of employee from the Approval Category drop down menu.
- 9. Once ID, Query Date, and Approval Category are selected, click Go.

New EPAF Person Selection



10. Select the position number, then click Go.

New EPAF Job Selection



11. Under the Start section, enter the information pertaining to each field in the EPAF:

Electronic Personnel Action Form

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

Name and ID: Employee Name, 12345678

Transaction: Query Date: Feb 16, 2010
Transaction Status: Last Paid Date: Aug 14, 2009

Approval Category: Workstudy Wage Change, SWWHR

Save

Item	Current Value	New Value
Job Effective Date: MM/DD/YYYY	07/01/2009	02/01/2010
Regular Rate:	15	17.10
Job Change Reason:	REHIR	SALIN, Salary Increase

Types of Job Change Reasons:

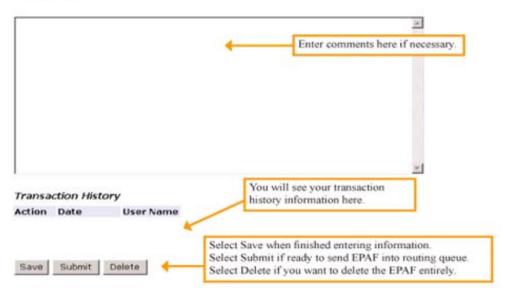
Code	Туре
SALCO	Salary Correction
SALDC	Salary Decrease
SALIN	Salary Increase

12. Enter Routing Information, if necessary. (If you set up default routing, it should automatically populate here. See the **Routing page** for instructions.)

Approval Category	Action
DEPBUD	Approve
FINAID	Approve
HUMRES	Approve
HRADMIN	Apply

- 13. Enter Comments, if necessary. (**HINT**: If you entered comments and then received an error when you saved, your comments are still saved even though you don't see them in the Comments box.)
- 14. Review the information you entered in the EPAF.
- 15. When finished entering all information in the EPAF, select Save. (*Note: You MUST save your EPAF before submitting it!*)
- 16. If you are ready to send the EPAF into your routing queue, select Submit. If you need to trash the EPAF and start over, select Delete.

Comment



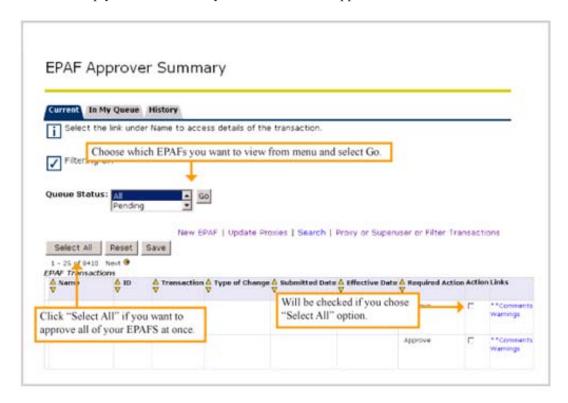
HINT 1: You will know that your EPAF was submitted successfully by an alert at the top of your screen.



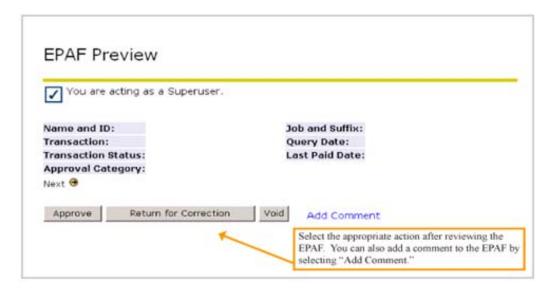
HINT 2: Remember to periodically review your outstanding EPAFs to ensure that they are all approved in a timely fashion. If you find that your EPAF has not been approved, check the comments section to see if there are notes as to why it has not yet been approved.

Work Study Student - EPAF Guide Chapter Seven: Approving an EPAF

- 1. Select Default Routing Queue.Log in to **DrexelOne**.
- 2. Select Employees tab.
- 3. Select More BannerWeb Employee Services.
- 4. Select Electronic Personnel Action Forms.
- 5. Select EPAF Approver Summary.
- 6. By choosing "All" from the Queue Status list, you will see all of the EPAFs that exist within your department. By choosing "Pending" from the Queue Status list, you will see all of the EPAFs that are waiting for your approval. You can view and approve each EPAF individually by clicking on their names, or you can approve them all at once but selecting "Select All" in the Action column.
- 7. If you chose "Select All," you should see the boxes in the Action column checked. Once this box is checked, simply select Save, and your EPAFs will be approved.



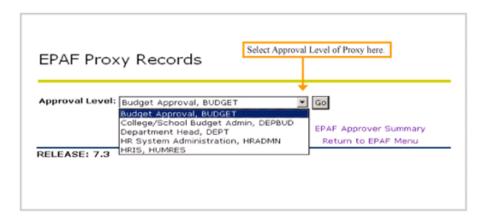
8. If you selected one EPAF to view, review the EPAF. If it is correct and you want to approve it, select Approve. If you want to return the EPAF to the originator for correction, select Return for Correction.



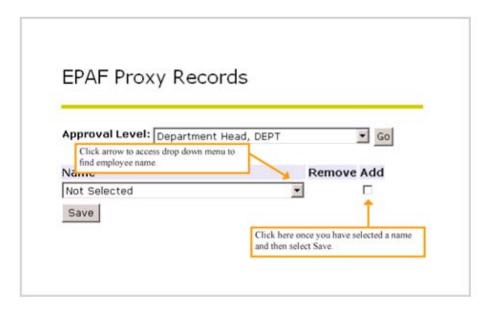
HINT: You know that your EPAF has been approved when you see "Transaction successfully completed" at the top of the screen and Transaction Status has changed to "Approved."

Work Study Student - EPAF Guide Chapter Eight: Setting Up a Proxy

- 1. Log in to **DrexelOne**.
- 2. Select Employees tab.
- 3. Select More BannerWeb Employee Services.
- 4. Select Electronic Personnel Action Forms.
- 5. Select EPAF Proxy Records.
- 6. From the Approval Level drop down menu, select the approval level of your proxy. Select Go.



- 7. From the Name drop down menu, select the name of the person you are assigning as a proxy. Check "Add" box to add proxy. Select Save.
- 8. Repeat for as many Approval Levels as necessary.



HINT: To remove a person as a proxy, go to the EPAF Proxy Records screen and check the box under remove. Select Save.

Work Study Student - EPAF Guide Chapter Nine: Acting as a Proxy

The person who you want to act as a proxy for must first set you up for access as a proxy (see **Setting Up a Proxy**).

- 1. Log in to **DrexelOne**.
- 2. Select Employees tab.
- 3. Under Payroll section, select More BannerWeb Employee Services.
- 4. Select Electronic Personnel Action Forms.
- 5. Select Act as a Proxy.
- 6. From the Proxy For drop down menu, select the name of the person you want to act as a proxy for.
- 7. Select Superuser if the person you are a proxy for is a Superuser.
- 8. Select Go.

