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Human Resources

Electronic Personnel Action Form for Unclassified Appointment Renewals

User Guide
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Document Title	Electronic Personnel Action Form for Unclassified Appointment Renewals -- User Guide
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Process Owner	Human Resources
Get help with this process	Human Resources, Barb Casher, bcasher@kent.edu, 28316
Get help with Banner Access	Contact the Help Desk, (support.kent.edu)

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1. About the ePAF for Unclassified Appointment Renewals

This ePAF is used to reappoint unclassified term employees, such as those that are funded on grants and must be renewed each year. Their initial hire was likely processed through the HR on-line hire system. This ePAF makes reappointment an easy process.

Do not try to use this form for short-term assignments or one-time payments. It is designed to extend grant and term renewals for the next year.

The information that is needed to complete an EPAF is obtained from your business manager and/or the **Human Resource Records** office (22901). Collect this information before beginning the ePAF:

- Banner ID of renewed employee
- Beginning Date of renewed appointment
- Position number for renewed appointment
- Salary for renewed appointment
- FTE for renewed appointment
- Department organization code
- Appropriate funding information

The form will go through an online approval routing process that will include the following roles:

Originator: Person originating the ePAF
Principal Investigator: Person who owns the grant and first approver
Grant Approver: Rep from Research and Sponsored Programs
Dept. Approver: Department Chair or Director, or designated proxy
Dean Approver: College and regional campus deans, or designate proxies
FYI Reviewer: view only
Final Approver: Division Approver
Applier: Person who records the reappointment in Banner

To request access to the grant ePAF, or to change individuals in current roles, contact the Human Resource Records Office at 22901.

Do not cancel or void an ePAF after the transaction has been submitted for final approval. If you need to change an ePAF at this point, contact Human Resource Records at 22901 to be sure that the assignment has not been uploaded into the payroll system.

> **Important:** ePAF does not send e-mail notification. Approvers should check the ePAF Summary view often to see if appointments are waiting to be approved. An ePAF channel can be added to an approver's FlashLine "My Action Items" tab, to display ePAFs waiting for approval.
>
> Originators should check the ePAF Summary view often to see if forms have been returned for rework. Keep in touch to ensure that forms are progressing.
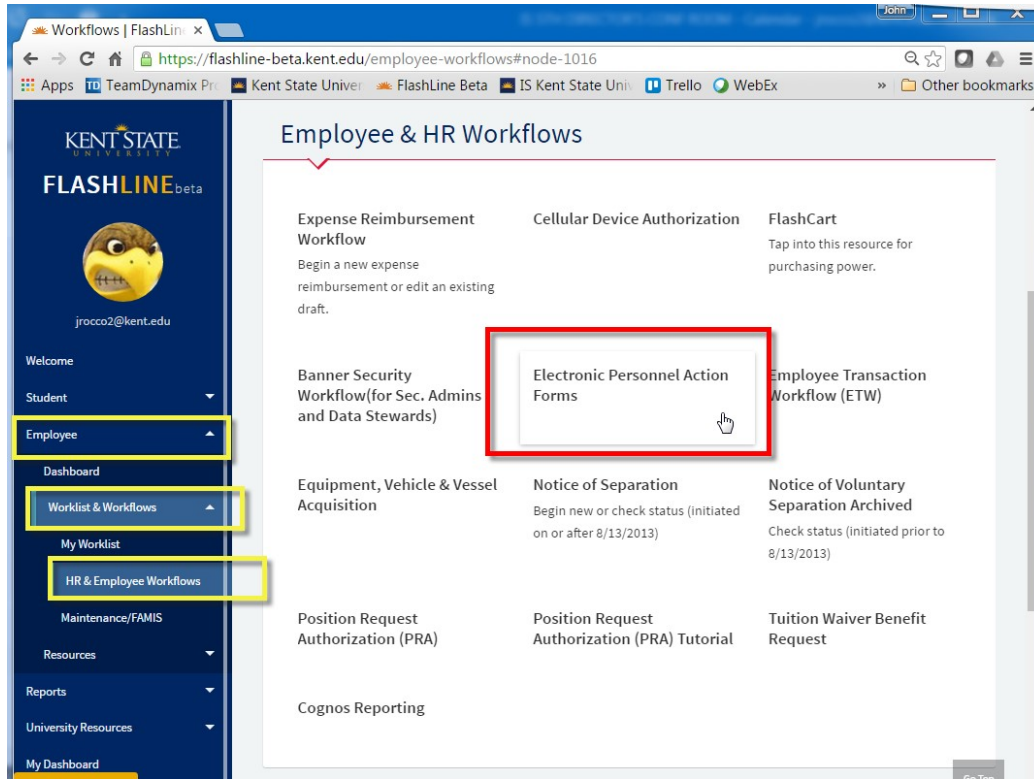
2. Set Up the Default Routing Queue for the ePAF Template

Before you create an ePAF using the Unclassified Grant Appointment Renewal template (also called the approval category), you will set up the default routing queue for this template. The routing queue will automatically populate in every ePAF form of this type that you create in the future. You are able to modify the routing queue on any appointment form if needed.

Step	Action
1	Open a web browser and go to your campus home page, or www.kent.edu
2	Log in to FlashLine.
3	Click the **Action Items** tab. Look for the **Workflow & Utilities** channel.
4	Click the link for **Electronic PAF.**
5	Click **EPAF Originator Summary** in the EPAF Menu.
6	Click **Default Routing Queue**, found at the end of the summary page.
7	In the Approval Category drop menu, choose the template named **Unclassified Grant Appointment Renewal UGRNWL** and click **Go**.
8	**If no names appear as approvers**, it means that you need to set up names for each approver role.
9	These roles are mandatory and must appear in the queue list: 5 – Grants Approval – used for grant assignments only. 20 – Dean (Required Approver – may be Assistant or Associate Dean or Budget Officer) **Choose your Dean** 25 – Compensation – **Choose Donna Sansonetti** 30 – Final Approver (Required Approver in Academic Personnel) **Choose Lynn Heller** 32 – Payroll Dept **Choose Chris Bartow** 34 – Grants Accounting **Choose Debra Leonard** 41 – Records Unclassified Staff **Choose Maria Terleckyj** 99 – Super user is the person who uploads the ePAF to Banner. **Choose Tia McKee**
10	These roles are not mandatory but may appear in your list or may need to be added to your queue. 10 – Department Head – used for chair's and director's approval at the department level. 15 – Review – used for dean's area reviewers prior to dean's approval.
11	Don't worry about the numerical order, roles will appear in the correct ranking when you save the changes. Select the role, select the appropriate name, and be sure to scroll to the far RIGHT and select the action, **Approve or FYI.**
12	**SAVE** the changes and click **Return to ePAF menu**.
Note	Call Human Resources Records at 22901 if you have questions.

3. Initiate an ePAF

3.1 Open a New Form

Step	Action
1	Open a web browser and go to your campus home page, or www.kent.edu
2	Type your FlashLine ID and password into the log in fields provided, click Go
3	Open Employee >Worklists & Workflows >HR & Employee Workflows
4	Click the link for **Electronic Personnel Action Form**
5	The Self Service screen will appear, presenting the EPAF Menu, below.
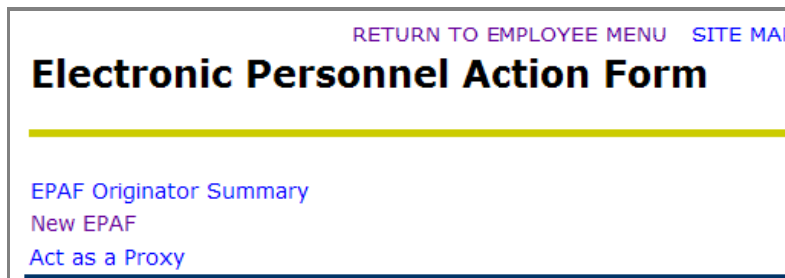
Note	EPAF approvers see two additional menu options, **Proxy Records**, and the **ePAF Approver Summary**. If you are an ePAF approver, see section ##, **Approve an ePAF**.
6	EPAF originators see the **ePAF Originator Summary** of appointment forms which they previously created.
7	Click **New EPAF** to begin a new appointment form.

3.2. Person Selection Screen

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.

✱ - indicates a required field.

ID: ✱ `800000000`   `JaneAnne Doe`   👤 🔍

Query Date: MM/DD/YYYY ✱ `07/01/2011`
Approval Category: ✱ `Unclass Grant Appt Renewal, UGRNWL` ▾
Go

EPAF Approver Summary | EPAF Originator Summary
Return to EPAF Menu

Step	Action
1	Type a Banner ID number in the **ID** field, and press the **Tab** key on your keyboard. Note: if you type an SSN, the Banner number will be returned. Note the employee's Banner number for future reference.

Search by Name when you do not know the ID number

1	Click the search icon. 🔍 Please **do not** click the Generate ID icon: 🚫
2	Type the last name or a combination of first and last names, click **Go**.
3	A list of record matches will return. Click the ID number link of the correct match.

> **Tip:** There are 4 data fields on the first setup screen.
> Note that you will always enter/change the
> information in **all 4 fields**.

Person Selection Screen, continued

Step	Action
1	The ID or search returns the individual's record in Banner.
2	Change the Query Date* to the **start date of this appointment, which is the first day of the first pay period.** This date will also appear in the funding area of the form.
3	From the Approval Category pull-down menu, select **Unclass Grant Appt Renewal, UGRNWL .** (Sample menu appears above.)
4	Click the **Go** button.

> ***Tip:** Double-check the **Query Date** you have entered. This is the most common EPAF error.

3.3. Job Selection Screen

Step	Action
1	Click the button **"All Jobs" (see above)** to view jobs previously held by the person. **This will bring up the job you are extending. (see below)**
2	Look for the appropriate job title (and end date) and then click the 'Select' button in the far right column.
3	Click **Go** to validate the entry and create a new EPAF.

3.4. Describe New Appointment

Unclass Grant Appt Renewal, 993058-00 Research Associate, Last Paid Date: Mar 31, 2011

Item	Current Value	New Value
Salary:		
FTE:		
Timesheet Orgn:	🔍	100819
Jobs Effective Date: MM/DD/YYYY		
Contract Type:		Primary
Job Status:		Active
Job Change Reason:		00060, Renew/Extend Term/Temp Assgn
Employer Code:		KSU, Kent State University
Step:		0
Factor:		24
Pays:		24
Accrue Leave:		Yes

Current
Effective Date: 10/01/2010
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New
Effective Date: MM/DD/YYYY 07/01/2011

Step	Action
1	Notice that the **Timesheet Orgn New Value** field is blank. **Enter your department org code and press the enter key, and this column will populate with the employee's previous job information.**
2	To look up your Banner Organization code: click the search icon 🔍 and type any part of your department name, using all caps and percent symbol wildcards, for example: **%SCIENCE% SPEECH%**

Describe New Appointment cont'd

Unclass Grant Appt Renewal, 991480-00 Project Manager, Last Paid Date: Mar 31, 2011

Item	Current Value	New Value	
Salary:	58348	[ ]	complete these four fields
FTE:	1	[ ]	
Timesheet Orgn:	100328	🔍 [ ]	
Jobs Effective Date: MM/DD/YYYY	06/30/2011	[ ]	
Contract Type:	Primary	Primary ▾	
Job Status:	Terminated	Active ▾	
Job Change Reason:	00062	00060, Renew/Extend Term/Temp Assgn ▾	
Employer Code:	KSU	KSU, Kent State University ▾	
Step:	0	0	
Factor:	24	24	
Pays:	24	24	
Accrue Leave:	Yes	Yes ▾	

Step	Action
1	Enter the annual salary being sure to enter a decimal point if the amount is not in whole dollars. Don't use symbols such as "$".
2	Enter the FTE. If the FTE is less than 1, enter a decimal point first.
3	If you have not previously entered the **Timesheet Orgn** field, enter your Banner Home Organization code.
4	The jobs effective date will be the first day that you wish this appointment to begin. If the previous job information shows terminated on 06/30/2011, then this appointment would begin on 07/01/2011. **This date matches the query date you used at the beginning of this process.**
5	The rest of the open fields default to the most likely value. If the default does not match the previous information in the left column, you may need to make changes.

3.5. Provide Funding and End of Assignment Information

Current
Effective Date: 12/01/2010

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
K	440487	210872	100328	61012	3101					35.00	
K	440493	210884	100328	61012	3101					35.00	
K	440529	211214	100328	61012	3101					25.00	
K	440536	211281	100328	61012	3101					5.00	

New
Effective Date: MM/DD/YYYY `07/01/2011`

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
K	440529	211214	100328	61012	3101					25.00	
K	440536	211281	100328	61012	3101					5.00	
K	440493	210884	100328	61012	3101					35.00	
K	440487	210872	100328	61012	3101					35.00	
										Total:	100.00

☑ Defaulting values for Labor Distribution from the Job records.

[Save and Add New Rows]

Unclass Grant Appt End, 991480-00 Project Manager, Last Paid Date: Mar 31, 2011

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	06/30/2011	
Job Status:	Terminated	Terminated
Job Change Reason:	00062	00062, End of Term/Temp Assignment

Step	Action
1	Funding information is provided in the "Current" section. You may change funding information as needed.
	HOWEVER, if you need to change funding information, please make sure that you have looked up the complete funding string for the index. This is very important.
	Here are two ways to find a funding string:
	a. Go to Banner INB form **FTMACCI**. Click **F7** to create a query. Enter your index and click **F8** to run the query.
	b. Use the FRS to Banner crosswalk at http://finacctlookup.uis.kent.edu/lookup.asp Type your index in the third search field "Enter FRS S/L Account to get the Banner FOP & Index" and click the **Submit Lookup** button.
2	For the **Unclass Grant Appt End** field, enter the end date of the assignment. This will likely be at the end of a month and one year after the begin date. The rest of the fields will default to the appropriate value.

3.6. Verify the Routing Queue

Routing Queue

Approval Level		User Name		Required Action
10 - (DEPTHD) Dept Head/Campus Dean Approv		Q BCASHER	Barbara A Casher	Approve
20 - (DEAN) Kent Dean or RC Approval		Q BCASHER	Barbara A Casher	Approve
30 - (FINAPP) Final Approver		Q BCASHER	Barbara A Casher	Approve
32 - (PAYROL) Payroll Dept		Q BCASHER	Barbara A Casher	FYI
35 - (ACAPER) Academic Personnel Applier		Q BCASHER	Barbara A Casher	Apply
Not Selected	▼ Q			Not Selected ▼
Not Selected	▼ Q			Not Selected ▼
Not Selected	▼ Q			Not Selected ▼
Not Selected	▼ Q			Not Selected ▼

Save and Add New Rows

Step	Action
1	Once your default approval queue has been set up for this or any other ePAF approval category (as described in section 2) the queue will populate automatically when a new form is initiated.
2	You may modify the queue for a single ePAF form if necessary. (See section 2.)
3	The Human Resources Records Office grants access to approve ePAFs, to deans, dept. heads, etc. Call 22901 to set up a new approver.

3.7. Add Comments

Comment

Supervisor has changed to Prof. Jane Smith, 800080000.

Approval Types | Account Distribution | Routing Queue | Transaction History

Save

Return to Top   New EPAF | EPAF Originator Summary

Return to EPAF Menu

Step	Action
1	In the **Comments** field, enter supervisor's name and Banner ID of the appointee if this information is changing, and any other comment you wish.
2	Click the **Save** button. This **does not** submit the form for approval, it holds the form in your **Originator's Summary List.** Continue with the next step to submit the form.

3.8. Review and Submit the ePAF

Electronic Personnel Action Form

☑ Your change was saved successfully.

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

Name and ID:	Robert Q. Doe, 800000006	**Job and Suffix:**	998355-01, Faculty - Summer
Transaction:	81	**Query Date:**	Jun 01, 2007
Transaction Status: Waiting		**Last Paid Date:**	
Approval Category: Intersession - Faculty PAF -, PTINTR			

[Save] [Submit] [Delete]

Step	Action
1	An ePAF may be saved with incomplete information by clicking the **Save** button at any time. The form is retrieved from your Originator Summary list. (See the next section.)
2	Once a form has been saved, the **Submit** button becomes available. --Always Save first, then Submit.

When you are ready to send the form to the first approver in the routing queue, review your form data carefully for accuracy, and click **Submit**.

A message appears, confirming that the form was successfully submitted. |

3.9. Locate a Draft ePAF in the Summary List

RETURN TO EMPLOYEE MENU   ST

Electronic Personnel Action Form

EPAF Originator Summary
New EPAF
Act as a Proxy
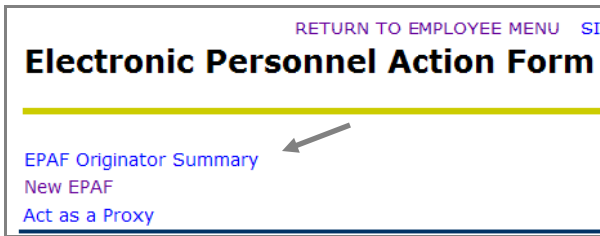
Current | **History**

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

Transaction Status: All / Cancelled   Go

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

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EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Doe, Johnson A. Project Manager, 991482-00	800000001	72267	Unclass Grant Appt Renewal	Apr 14, 2011	Jul 01, 2011	Completed	
Doe, Johnson A.	800000001	72226	Unclass Grant Appt Renewal	Apr 07, 2011	Jun 30, 2011	Voided	Comments
Doe, Johnson A.	800000001	72167	Unclass Grant Appt Renewal	Mar 25, 2011	Jun 30, 2011	Voided	**Comments
Smith, Sally Program Coordinator, 993096-00	800000004	72306	Unclass Grant Appt Renewal	Apr 18, 2011	Jul 01, 2011	Pending	**Comments

Step	Action
1	From the EPAF Menu, click the link for **EPAF Originator Summary**.
2	Click the **History** tab
3	The list of EPAFs that you have originated appears.
4	Click the **name link** to view the complete form. Click the **Comments** link at far right to view the comments that have been added to a form.
5	If you **Save** but do not **Submit** an EPAF, the form is held in *Waiting* status on your **Current** tab.
6	Submitted forms may be viewed on the **History** tab.
7	You may return to a form later to complete and submit the form, or to delete it completely. Originators may **Void** or **Delete** an EPAF even when it has been submitted for approval.
8	Forms that are returned to the Originator for changes are visible on the **Current** tab. *There is no email notification.* Check your ePAF summary regularly.

4. Approve an EPAF

Electronic Personnel Action Form

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy
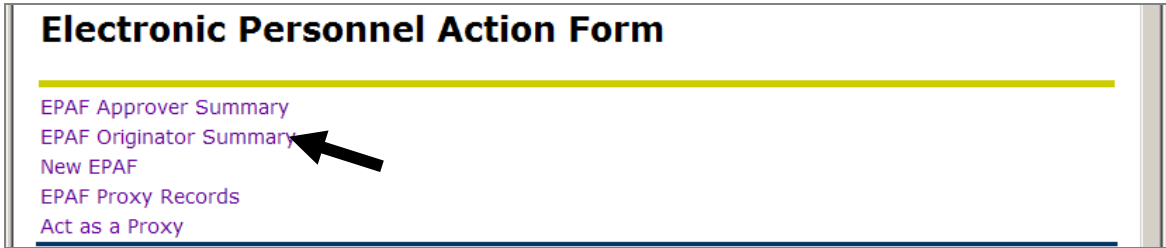
Step	Action
1	Log in to FlashLine, go to the Action Items tab, and in the Workflow menu, click the **Electronic PAF** link. From the ePAF menu, select **EPAF Approver Summary.** (above)
2	Choose any tab: Current, In My Queue, or History. (Click Help to view the difference between these displays.) You may filter a tab view by selecting status in the Queue Status menu, and clicking **Go**. (see below)
3	The forms waiting for action in your Approval queue will appear.
4	Click the **name link** in the first column to view the form detail. You may approve or disapprove, and add comments from within the form. Click **Save** to save and send your decision.
5	You may approve multiple forms very quickly from the summary list view, but this is not recommended. Click the **checkbox** in the **Action** column for the form, then click the **Save** button (found at the top or the end of the list.)
6	Comments are present if the Comments link is preceded by "**". Read/add comments from this view by clicking **Comments** in the **Links** column.

	Current	In My Queue	History

Select the link under Name to access details of the transaction.

Queue Status: All / FYI   Go

New EPAF | Update Proxies | Search | Proxy or Superuser or Filter Transactions

Select All | Reset | Save

1 - 25 of 44   Next

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Doering, John H. Instructor, 997262-01	800000004	44570	Summer Grant - Faculty PAF	Jun 11, 2009	Jun 16, 2009	FYI	☐	
Doering, John H. Assistant Professor, 999473-06	800000002	67463	Fall - PT Faculty PAF	Jul 30, 2010	Sep 01, 2010	FYI	☐	**Comments
Smith, Salina S.	800000002	60040	Spring - PT Faculty PAF	Feb 02, 2010	Jan 16, 2010	FYI	☐	**Comments

Trusted sites   100%