Electronic Personnel Action Forms - Student
Submitter’s Handbook
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Welcome to EPAFs!

The Electronic Personnel Action Forms allow supervisors to hire student workers via a secure website from any computer anywhere. The submitters request to hire is electronically submitted and sent to the SEO office where it is further processed and approved. Once approved, the EPAF is electronically sent to the Payroll Office where it is applied to the system and a Banner employee and job record is created for the hired student.

This handbook outlines the process used by campus employers to hire student employees.

If you have any questions, please call or email:

Karen Phillips  
Payroll Director  
Email: kphilli1@swarthmore.edu  
Phone: 610.328.8395

Susan Watts  
Payroll Coordinator  
Email: swatts1@swarthmore.edu  
Phone: 610.328.8677

Kimberly Fremont  
Human Resources Manager, HRIS  
Email: kfremon1@swarthmore.edu  
Phone: 610.690.2051
Getting Started – Accessing EPAFs in mySwarthmore

1. Access mySwarthmore through this link https://myswat.swarthmore.edu/pls/twbkwbis.P_WWWLogin
   a. Enter your User ID and password. Remember: never share your password!

2. Once logged in, click the Employee link

3. Click the Employee Personnel Action Form link

4. You will be taken to the EPAF main menu

Electronic Personnel Action Form

EPAF Originator Summary
New EPAF
Act as a Proxy

RELEASE: 7.3.3.1
Setting up your Default Routing Queue

In order for your EPAF to be approved and applied to Banner, you must set-up the routing queue for your EPAFs. If you have never submitted an EPAF before, follow these steps in order to set up a default routing queue. If you have submitted EPAFs before and have already set-up your default routing queue, proceed to the Creating a New EPAF section on page 7.

a. From the EPAF Menu, Click **EPAF Originator Summary**

   ![EPAF Originator Summary](image)

   a. **Click here**

   [Employee Personnel Action Form]

b. Click **Default Routing Queue**

   ![EPAF Originator Summary](image)

   b. **Click here**

   ![EPAF Default Routing Queue](image)

   c. **Select Approval Category** and then **Click Go** *(You will need to repeat this for each Approval Category listed)*

   ![EPAF Default Routing Queue](image)

   c. **Select Approval Category then Click Go**
d. Select User Names from Magnifying Lens and Save. Once you save these defaults, they will automatically be populated for every EPAF you submit with that Approval Category. Please note if the Approver/Applier changes, you will need to reset your defaults, but HR/Payroll will keep you informed of these changes.

i. Currently the User Name entered on line one “25 – (STUAPR) Student EPAF Approvers (SEO)” is JLEONE1

ii. Currently the User Name entered on line two “95 – (APPLY) EPAF Appliers” is KFREMON1

### EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

<table>
<thead>
<tr>
<th>Approval Queue</th>
<th>User Name</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>25 – (STUAPR) Student EPAF Approvers (SEO)</td>
<td>JLEONE1</td>
<td>Approve</td>
</tr>
<tr>
<td>95 – (APPLY) EPAF Appliers</td>
<td>KFREMON1</td>
<td>Apply</td>
</tr>
<tr>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
</tr>
</tbody>
</table>
Creating a New EPAF

1. From the EPAF main menu, select the ‘New EPAF’ link

2. Enter Person Information
   a. Enter Student’s ID number (obtained from Student directly)
   b. Enter the student’s start date in the QUERY Date field
   c. Select the Approval Category
      i. Note: If you are uncertain about the approval category, click ‘Active Jobs’ to review the employment history for the student
      ii. Hire a Student who has NEVER worked on campus before, NEWSTU
          1. Select this category to hire a student who has never worked on campus previously
      iii. Assign Primary Job to a Student who HAS worked on campus, STUJOB
          1. Select this category to hire a student who has worked on campus previously
      iv. Rehire a Student who has worked in the SAME position, REHRST
3. **Enter Position Information and Suffix**

a. Each Department has their own unique Position number associated with a unique Organization.

b. Position numbers can be obtained from the Student Job Listing link under Payroll at the Human Resources Website – www.swarthmore.edu/hr

c. **Enter 00 in the Suffix field** unless a student has more than one position in your department. If a student has a second job under the same Position number, the suffix will be 01, etc.

d. From this screen you will be able to determine if your student already has a Primary job on campus or if they have multiple jobs in your department. This will aid in entering the correct Suffix as well as the correct Contract Type (i.e. Secondary) on the next page.
1) Complete the fields below in order to hire a student who has never worked on campus before.

- **Enter Title (Case Sensitive)** from HR Approved Job List
- **Enter ORGN that will approve the timesheet**
- **Enter Pay Category from HR Approved Job List (1, 2, or 3)**
- **Enter End Date for Job**
- **Click on Magnifying Lens to display Approvers/Applicants Name and Select User Name Listed**
- **Modify the Fund, Organization, Account, and Program defaults if necessary**
- **This date defaults in based on the date entered on the first screen. Editing the date here may cause errors upon submission.**
- **Don’t forget to SAVE your EPAF!**
2. Submit your EPAF
   a. Once you Save your EPAF, you must Submit it

3. Once your Submit your EPAF, you should see this confirmation message
Hiring a Student who HAS worked on campus, STUJOB:

1) Complete the fields below in order to hire a student who has never worked on campus before.

- **Enter Title (Case Sensitive) from HR Approved Job List**
- **Enter ORGN that will approve the timesheet**
- **Enter Pay Category from HR Approved Job List (1, 2, or 3)**
- **Enter End Date for Job**

**NOTE:**
- To default Routing Queue, see page 5
- Don’t forget to SAVE your EPAF!
2. **Submit your EPAF**
   
   a. Once you Save your EPAF, you must **Submit** it

   ![Electronic Personnel Action Form](image1)

   **Click Submit to Finish**

3. Once your Submit your EPAF, you should see this **confirmation message**

   ![Electronic Personnel Action Form](image2)

   **Confirmation of EPAF Submission**
   - Note the transaction status changes from **Waiting** to **Pending**
Re-Hiring a Student into a Previously Held Position – REHRST

1. From New EPAF Job Selection Page (after selecting Rehire EPAF), Click the “All Jobs” button (do not enter the Position Number/Suffix Number again)

2. Select the job you’re rehiring this Student into and

3. Click “Go”

4. Fill in EPAF for a student who has worked in the SAME position, REHRST:
   NOTE: Since this is a Rehire EPAF, most items are defaulted in for you and do not have to be re-entered. If there are any changes to the funding of this position, you must contact HR/Payroll as the accounts charged last time will default in.
5. **Submit your EPAF**
   
   a. Once you Save your EPAF, you must **Submit** it
6. Once your Submit your EPAF, you should see this **confirmation message**

   **Electronic Personnel Action Form**

   ![Confirmation of EPAF Submission]

   - The transaction has been successfully submitted.

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

   ![Approval Category: Assign Primary Job to a Student who HAS worked on campus, STUJOB]

7. After you have submitted your EPAF, the SEO will further process your transaction and verify that the information is correct and contains an HR approved Job Title and Step (Pay Category). At this point any corrections will be made by the SEO. The SEO will also verify that the student has a current I-9 on file, and has completed their Direct Deposit paperwork; otherwise the EPAF cannot be processed until the student submits their paperwork in person. Once approved by the SEO your EPAF will be applied to the Banner system by our HR/Payroll office. After your EPAF is applied, the student you hired will have a job record in Banner and they are now eligible to start working on campus.

   **Congratulations, you hired a Student Worker!**

Make sure to “EXIT” out of your mySwarthmore account when complete and close your browser session!!
Common Error Messages Encountered During EPAF Submission

When submitting EPAFs you may encounter some Error Messages after attempting to submit the EPAF – these messages can direct you to missing information that is required prior to submitting the EPAF. Below is a list of common Error Messages to be aware of and how to continue to submission when encountering one of these messages.

<table>
<thead>
<tr>
<th>Type</th>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Student Job</td>
<td>ERROR</td>
<td><em>ERROR</em> End Date must be later than Begin Date.</td>
</tr>
<tr>
<td>End Student Job</td>
<td>ERROR</td>
<td><em>ERROR</em> Date cannot be prior to the Base Job Begin Date of 15-AUG-2011.</td>
</tr>
<tr>
<td>Create a Labor Dist Rec</td>
<td>ERROR</td>
<td><em>ERROR</em> Date cannot be after the Base Job End Date of 25-JUN-2011.</td>
</tr>
</tbody>
</table>

- indicates a required field.

See the following pages for common error messages and how to resolve these error messages.
**ERROR:** *Invalid Timesheet Organization*

<table>
<thead>
<tr>
<th>Type</th>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Student Job</td>
<td>ERROR</td>
<td>Invalid <strong>Timesheet Orgn.</strong></td>
</tr>
</tbody>
</table>

**SOLUTION:** Enter a valid Timesheet Organization Code (only 4 numeric digits permitted)

### Create Student Job, W00075-00 Student Worker 5126

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Job Begin Date: MM/DD/YYYY</td>
<td>08/16/2011</td>
<td></td>
</tr>
<tr>
<td>*Jobs Effective Date: MM/DD/YYYY</td>
<td>06/16/2011</td>
<td></td>
</tr>
<tr>
<td>Contract Type:</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Timesheet Orgn:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Status: (Not Enterable)</td>
<td>A</td>
<td></td>
</tr>
<tr>
<td>FTE: (Not Enterable)</td>
<td>.1</td>
<td></td>
</tr>
<tr>
<td><strong>Pay Category 1-2-3:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Change Reason: (Not Enterable)</td>
<td>INTAP</td>
<td></td>
</tr>
<tr>
<td>Employee Class Code:</td>
<td>S1</td>
<td></td>
</tr>
</tbody>
</table>
**ERROR:** *Invalid Step*

### Errors and Warning Messages

<table>
<thead>
<tr>
<th>Type</th>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Student Job</td>
<td>ERROR</td>
<td><em>ERROR</em> New Value for **Step cannot exceed 0 digits to the right of the decimal point.</td>
</tr>
<tr>
<td>Create Student Job</td>
<td>ERROR</td>
<td><em>ERROR</em> Salary record not found for entered Table, Grade, and Step.</td>
</tr>
<tr>
<td>Create Student Job</td>
<td>ERROR</td>
<td><em>ERROR</em> Annual Salary must be entered.</td>
</tr>
<tr>
<td>Create Student Job</td>
<td>ERROR</td>
<td><em>ERROR</em> Assignment Salary must be entered.</td>
</tr>
<tr>
<td>Create Student Job</td>
<td>ERROR</td>
<td><em>ERROR</em> Rate must be entered.</td>
</tr>
<tr>
<td>End Student Job</td>
<td>ERROR</td>
<td><em>ERROR</em> Salary record not found for entered Table, Grade, and Step.</td>
</tr>
<tr>
<td>Create a Labor Dist Rec</td>
<td>ERROR</td>
<td><em>ERROR</em> Salary record not found for entered Table, Grade, and Step.</td>
</tr>
</tbody>
</table>

**SOLUTION:** Enter a valid Pay Category (Only 1, 2 or 3 will be accepted)

*Note: Double check Student Master Job Listing on HR website for position pay grade*

### Create Student Job, W00075-00 Student Worker 5126

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Job Begin Date: MM/DD/YYYY</td>
<td></td>
<td>08/16/2011</td>
</tr>
<tr>
<td>*Effective Date: MM/DD/YYYY</td>
<td></td>
<td>08/16/2011</td>
</tr>
<tr>
<td>Contract Type:</td>
<td>Primary</td>
<td></td>
</tr>
<tr>
<td><strong>Timesheet Orgn:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Status: (Not Enterable)</td>
<td>A</td>
<td></td>
</tr>
<tr>
<td>FTE: (Not Enterable)</td>
<td>.1</td>
<td></td>
</tr>
<tr>
<td><strong>Pay Category 1-2-3:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Change Reason: (Not Enterable)</td>
<td>INTAP</td>
<td></td>
</tr>
<tr>
<td>Employee Class Code:</td>
<td></td>
<td>S1</td>
</tr>
</tbody>
</table>
**ERROR:** *Invalid Labor Dist Effective Date Entered*

### Errors and Warning Messages

<table>
<thead>
<tr>
<th>Type</th>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a Labor Dist Rec</td>
<td>ERROR</td>
<td><em>ERROR</em> First Labor Dist Effective Date must equal the Job Begin Date.</td>
</tr>
<tr>
<td>Create a Labor Dist Rec</td>
<td>ERROR</td>
<td>New Job Labor Distribution Date should be &gt;= query effective date.</td>
</tr>
</tbody>
</table>

**SOLUTION:** In the ‘Create a Labor Dist Rec’ section of the EPAF, update “New Effective Date: MM/DD/YYYY” field to match the Hire/Begin Date
ERROR:  *ERROR* First Name, SSN, Birth Date, Sex Code or Ethnic Code incomplete.

SOLUTION:  Call HR/Payroll Office and have them verify Student’s Information

ERROR:  User Id(s) must be entered for Routing Queue

SOLUTION:  Enter valid User Id(s) in the Routing Queue Section of the EPAF.  See Page 5 of documentation for instructions on how to set up Routing Queue defaults.

ERROR:  *ERROR* This employee already has a primary job.

SOLUTION:  Change the Contract Type from Primary to Secondary.  Save and Submit