



Division of
Human Resources

CLAS HR PROCESSING 101 TRAINING

A Higher
Degree of **HR**

hr.wayne.edu

AGENDA

- Introductions
- EDSW Form
- Banner Screens
- Q & A





Introductions

Let's get to know each other!

- Name
 - Title
 - Department
 - What is your primary duty?
-

EDSW

When to use an EPAF Data Summary Worksheet (EDSW):

- New Assignment
- Renewal
- Change of Assignment
- Pay Increase or Decrease
- FTE Increase or Decrease
- Termination or Resignation
- Change in Labor

First Name: <input type="text"/>		Middle Initial: <input type="text"/>	Last Name: <input type="text"/>	Banner ID/Access ID: <input type="text"/>	
Position Title: <input type="text"/>		Contact Phone: <input type="text"/>	Email Address: <input type="text"/>		
<input type="checkbox"/> New Employee	<input type="checkbox"/> 9 Month	<input type="checkbox"/> 12 Month	<input type="checkbox"/> International	Other: <input type="text"/>	
Will 100% of the work be performed in Detroit, MI? <input type="checkbox"/> Yes <input type="checkbox"/> No					
If NO, what City/State/Province and Country will the work be performed in? City: <input type="text"/> State/Province: <input type="text"/> Country: <input type="text"/>					
Is employee changing from: <input type="checkbox"/> 9 month to 12 month Assignment? or <input type="checkbox"/> 12 month to 9 month Assignment?					
Financial Information					
Index: <input type="text"/>	Account Code: <input type="text"/>	Percent (%): <input type="text"/>	Index: <input type="text"/>	Account Code: <input type="text"/>	Percent (%): <input type="text"/>
Index: <input type="text"/>	Account Code: <input type="text"/>	Percent (%): <input type="text"/>	Index: <input type="text"/>	Account Code: <input type="text"/>	Percent (%): <input type="text"/>
Will employee be working on a Federal contract? <input type="checkbox"/> Yes <input type="checkbox"/> No (Check federal contract for minimum wage.)					
Campus Address		Dept./Office Phone: <input type="text"/>			
Address: <input type="text"/>		Suite: <input type="text"/>	Building: <input type="text"/>		
City: <input type="text"/>		State: <input type="text"/>	ZIP: <input type="text"/>		
Position Information					
Position Number: <input type="text"/>	PTF Rank: <input type="text"/>	Start Date: <input type="text"/>	Contract End Date: <input type="text"/>	Appointment %: <input type="text"/>	FTE: <input type="text"/>
Annual Salary: <input type="text"/>	Regular Rate: <input type="text"/>	Termination Date: <input type="text"/>	Vacation Payout: <input type="text"/>	Work Schedule	
Supervisor Name: <input type="text"/>		Supv. Banner ID/Access ID: <input type="text"/>		Shift: <input type="text"/>	End Time: <input type="text"/>
SCD Information					
Home Org Code: <input type="text"/>	Check Distribution Code: <input type="text"/>	District (SCD) Code: <input type="text"/>	Time Sheet Org Code: <input type="text"/>		
Comments					
<small>(When completing this form electronically, the field will allow multiple lines beyond the standard space)</small>					
<input type="text"/>					
Signatures/Approvals					
<small>Please review your supporting documentation to ensure all necessary documents are gathered and verify that appropriate authorization exists. If your Business Affairs Officer or designate has not had the opportunity to review and authorize this transaction, please obtain his or her signature before requesting an EPAF.</small>					
<small>Please Note: The deadline for submitting HR transaction requests for processing is no later than Wednesday, 12 noon, second week of the pay period.</small>					
Submitted By: <input type="text"/>	Date: <input type="text"/>	Contact Info: <input type="text"/>			
Supervisor/Manager: <input type="text"/>	Date: <input type="text"/>	Contact Info: <input type="text"/>			

EMPLOYEE INFORMATION

IT IS IMPORTANT TO FILL IN AS MUCH AS POSSIBLE TO MINIMIZE DELAYS AND FOLLOW-UP QUESTIONS

Employee Information *(Enter employee's legal name.)*

First Name: Middle Initial: Last Name: Banner ID/Access ID:

Position Title: Contact Phone: Email Address:

New Employee 9 Month 12 Month International Other

Will 100% of the work be performed in Detroit MI? Yes No

If NO, what City/State/Province and Country will the work be performed in? City: State/Province: Country:

Is employee changing from: 9 month to 12 month Assignment? or 12 month to 9 month Assignment?

FINANCIAL INFORMATION

Financial Information

Index:	<input type="text"/>	Account Code:	<input type="text"/>	Percent (%):	<input type="text"/>	Index:	<input type="text"/>	Account Code:	<input type="text"/>	Percent (%):	<input type="text"/>
Index:	<input type="text"/>	Account Code:	<input type="text"/>	Percent (%):	<input type="text"/>	Index:	<input type="text"/>	Account Code:	<input type="text"/>	Percent (%):	<input type="text"/>

Will employee be working on a Federal contract? Yes No *(Check federal contract for minimum wage.)*

- ENTER ALL INDEXES FOR THE POSITION
- ACCOUNT CODE (DEFAULTS FROM THE POSITION NUMBER)
- PERCENT OF EACH INDEX THAT IS COVERING POSITION MUST TOTAL 100

CAMPUS ADDRESS

<u>Campus Address</u>		Dept/Office Phone:	<input type="text"/>		
Address:	<input type="text"/>	Suite:	<input type="text"/>	Building:	<input type="text"/>
City:	<input type="text"/>	State:	<input type="text"/>	ZIP:	<input type="text"/>

- DEPARTMENT/OFFICE PHONE REQUIRES NAME OF DEPARTMENT AND NUMBER
 - LIST ADDRESS THAT EMPLOYEE WILL BE WORKING AT ALONG WITH SUITE OR ROOM NUMBER
 - PROVIDE THE NAME OF THE BUILDING
 - IF CITY IS LEFT BLANK, DETROIT WILL BE THE ASSUMED LOCATION, LIST IF OTHERWISE
-

POSITION INFORMATION

Position Information											
Position Number:	<input type="text"/>	PTF Rank:	<input type="text"/>	Start Date:	<input type="text"/>	Contract End Date:	<input type="text"/>	Appointment %:	<input type="text"/>	FTE:	<input type="text"/>
Annual Salary:	<input type="text"/>	Regular Rate:	<input type="text"/>	Termination Date:	<input type="text"/>	Vacation Payout:	<input type="text"/>	Work Schedule		Start Time:	<input type="text"/>
Supervisor Name:	<input type="text"/>	Supv. Banner ID/Access ID:		<input type="text"/>		Shift:	<input type="text"/>	End Time:		<input type="text"/>	

- LIST POSITION NUMBER PROVIDE THE START AND END DATE
- LIST THE APPOINTMENT PERCENTAGE AS WELL AS FTE
- FOR SALARIED ROLES, LIST SALARY; FOR HOURLY, LIST HOURLY RATE
- GIVE THE NAME OF THE EMPLOYEE'S FUTURE SUPERVISOR AND BANNER ID

S/C/D INFORMATION

<u>SCD Information</u>	Home Org Code: <input type="text"/>	Check Distribution Code: <input type="text"/>	District (SCD) Code: <input type="text"/>	Time Sheet Org Code: <input type="text"/>
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- FILL IN THE HOME ORG CODE OF THE DEPARTMENT THE EMPLOYEE WILL BE WORKING IN
 - CHECK DISTRIBUTION CODE IS NEEDED TO KNOW WHERE FUNDS SHOULD BE TAKEN FROM
 - DISTRICT CODE IS THE SCHOOL/COLLEGE/DIVISION
 - TIME SHEET ORG CODE
-

COMMENTS

Comments

(When completing this form electronically, the field will allow multiple lines beyond the visual space)

- NOTE WHAT TYPE OF TRANSACTION THIS WILL BE: NEW HIRE, RENEWAL, CHANGE OF LABOR, TERM, ETC.
- IF AN APPOINTMENT, PROVIDE LIST OF JOB DUTIES, IF APPLICABLE
- IF TERM, PROVIDE EXPLANATION: IF RESIGNATION OR RETIREMENT NEED BACKUP DOCUMENTATION
- NOTE IF ILLNESS AND/OR VACTION SHOULD BE PAID OUT

SIGNATURES AND APPROVALS

Signatures/Approvals

Please review your supporting documentation to ensure all necessary documents are gathered and verify that appropriate authorization exists. If your Business Affairs Officer or designate has not had the opportunity to review and authorize this transaction, please obtain his or her signature before requesting an EPAF.

Please Note: The deadline for submitting HR transaction requests for processing is no later than Wednesday, 12 noon, second week of the pay period.

Submitted By:	<input type="text"/>	Date:	<input type="text"/>	Contact Info:	<input type="text"/>
Supervisor/Manager:	<input type="text"/>	Date:	<input type="text"/>	Contact Info:	<input type="text"/>
AVP/Dean/Dept. Head	<input type="text"/>	Date:	<input type="text"/>	Contact Info:	<input type="text"/>
Business Affairs Officer:	<input type="text"/>	Date:	<input type="text"/>	Contact Info:	<input type="text"/>

Revision 3.1 (01/08/2015)

- INDIVIDUAL THAT INITIATES THE EDSW SHOULD SIGN THE 'SUBMITTED BY' LINE
- PI SHOULD SIGN THE SUPERVISOR / MANAGER LINE
- DEAN OR DEPARTMENT HEAD IS RESPONSIBLE FOR THE AVPLINE
- BAO WOULD BE FINAL SIGNATURE IF REQUIRED

Where do I find EDSW (EPAF) INFORMATION BANNER SCREEN

Personal Information	Position Information	Employee Information	Jobs Information	International Information	Faculty Information	General Information	Pay Details	Pay History
PPAIDEN <ul style="list-style-type: none"> • Name Fields • Date of Birth • ID • Citizenship • Visa Status • Name • Address • Marital status • Ethnic Code • Emergency Contact 	NBAPOSN/PBUD <ul style="list-style-type: none"> • FOAPAL • PCLASS • Pos. # • Title • EClass • Position budget • Salary Budget 	PEAEMPL <ul style="list-style-type: none"> • EClass • Check dist code • I9 date • Leave bank balances • Soft money • Leave balances • Service dates • Current status • Dept/scd 	NBAJOBS <ul style="list-style-type: none"> • Banner ID • Pos. # • Suffix • Personnel Date • Hours Per Pay FTE • Hours Per Day Salary • Timesheet Org • Pay ID • Shift Code • Appt. % • Contract Date • Home Org • Labor 	GOAINTL <ul style="list-style-type: none"> • Visa Status • Visa end date 	PEAFAC <ul style="list-style-type: none"> • Appt or Tenure Records • Title • Rank Record • Faculty Leave Records 	PPAGENL <ul style="list-style-type: none"> • Educational Background • Degrees • Degree year • Institution 	PHICHEK <ul style="list-style-type: none"> • Check/ Direct Deposit number • Gross and net amounts • Earnings • Deductions • Check Issue Date 	PHILIST <ul style="list-style-type: none"> • Checks issued • Status of every check issued • Verification of check disbursement to employee

NBIPORG - position numbers specific to each department

NBAPOSN – position number information (9/12 month)

EDSW (EPAF) WORKFLOW

- ❑ Send all epaf's to the HR Region A inbox
 - ❑ Complete all sections on the EPAF Form and submit all documents along with the epaf as one packet
 - ❑ Please be sure to wait to send the epaf until TMC emails the background check clearance with official start date (also indicating that the I-9 has been completed)
 - ❑ Please continue to cc' TMC on any background check requests
 - ❑ Continue to check NBAJOBS to determine if an employee is actually a New Hire or Renewal
 - Remember that Stipends and Rumble Fellowships are not considered employees and **may** require full on-boarding (I-9/BGC/Paperwork)
-

EDSW (EPAF) WORK FLOW CONT'D

- ❑ **Epaf's are due by the Wednesday (noon) of apply week**
- ❑ Late epaf's are prioritized on a **“first come-first serve”** basis
- ❑ The region has up until the Friday of the deadline week to process
- ❑ Please verify assignments in banner the following Monday of the Friday deadline

*The HR Team will send an email verifying that the assignment has been data entered. However, the assignment is still pending approval and may not show as active in banner until the following Monday of apply week

NOTIFICATIONS: *Duplicate and/or submitted but not processed EPAF's*

Please be aware that HR does not send out emails to notify the departments whether or not an epaf has or will be processed after the Wednesday, noon cutoff

To find out more about the status of a specific epaf, please contact the HRA that submitted/processed the epaf

QUESTIONS?
