EPAF Manual

Faculty/Staff Hire

University of Nebraska at Omaha and SAPPHIRE

7/7/2021

PURPOSE

Use this procedure to enter personal information and appointment information for a new faculty or staff hire. Perform this procedure when a person is hired by an authorizing individual.

PREREQUISITES

- Required legal documents collected
  - W-4
  - I-9
  - Direct Deposit Form
- Verification that documents are completed accurately
- Complete department section of PAF form

MENU PATH

Standard Menu:

- Human Resources➔Personnel Management➔HR Master Data➔Electronic PAF

Simplified Menu:

- Human Resources➔Electronic Personnel Action Form (EPAF)

TRANSACTION CODE

ZEPAF PROCEDURE

Note: If the SSN# is unknown or if the employee has dual employment with both NU and NSCS and the personnel number has not yet been assigned (i.e., 666+personnel number), the SSN# field on the initial screen can be bypassed by entering **999999999**. Infotype 0002 will need to updated, however, once the SSN# is known.

The following document provides instructions for completing the personal information, the appointment data and the workflow process for an EPAF new hire. The document begins with the personal information. SAP is case sensitive; use a combination of upper and lower case when filling in the fields.

The first two lines will be automatically populated. This information is for review prior to completing any screens. If any of this data is incorrect, you should exit the screen by clicking **Cancel** ( ) and start the hire process over.

1. (Required) In the *Last* field, enter **employee's legal last name**.
2. (Required) In the *First* field, enter **employee's legal first name**.
3. (Required) In the *Middle init* field, enter **employee's middle initial**.
4. (Conditional) In the *Last name at birth* field, enter **employee's maiden name** only if different than current last name.
5. (Required) In the *Address line 1* field, enter **employee's permanent address**.

Note: Use US Postal code format abbreviations. Do not use periods or special characters.

6. (Required) In the *City/Campus* field, enter **city** associated with permanent address.
7. (Required) In the *State* field, enter **state** associated with permanent address.
8. (Required) In the *Zip* field, enter the **zip code** associated with permanent address.
9. (Optional) In the *E-mail* field, enter employee's **email address**.
10. (Required) In the *(###)* field, enter **area code** of employee's permanent phone number.
11. (Required) In the *Phone #* field, enter the **employee's phone number** associated with permanent address.
12. (Required) In the *WA Address line 1* field, enter **abbreviated building name** of work address.
13. (Required) In the *WA Address line 2* field, enter **room number** of building associated with work address.
14. (Required) In the *WA City/Campus* field, enter **campus** associated with work address.
15. (Conditional) In the *WA County* field, enter **county** if work address is an extension office.
16. (Required) In the *WA State* field, enter **state** associated with work address.
17. (Required) In the *WA ZIP* field, enter **zip code** associated with work address.
18. (Required) In the *WA (###)* field, enter **area code** of employee's work phone number.
19. (Required) In the *WA Phone #* field, enter employee's **work phone number**.

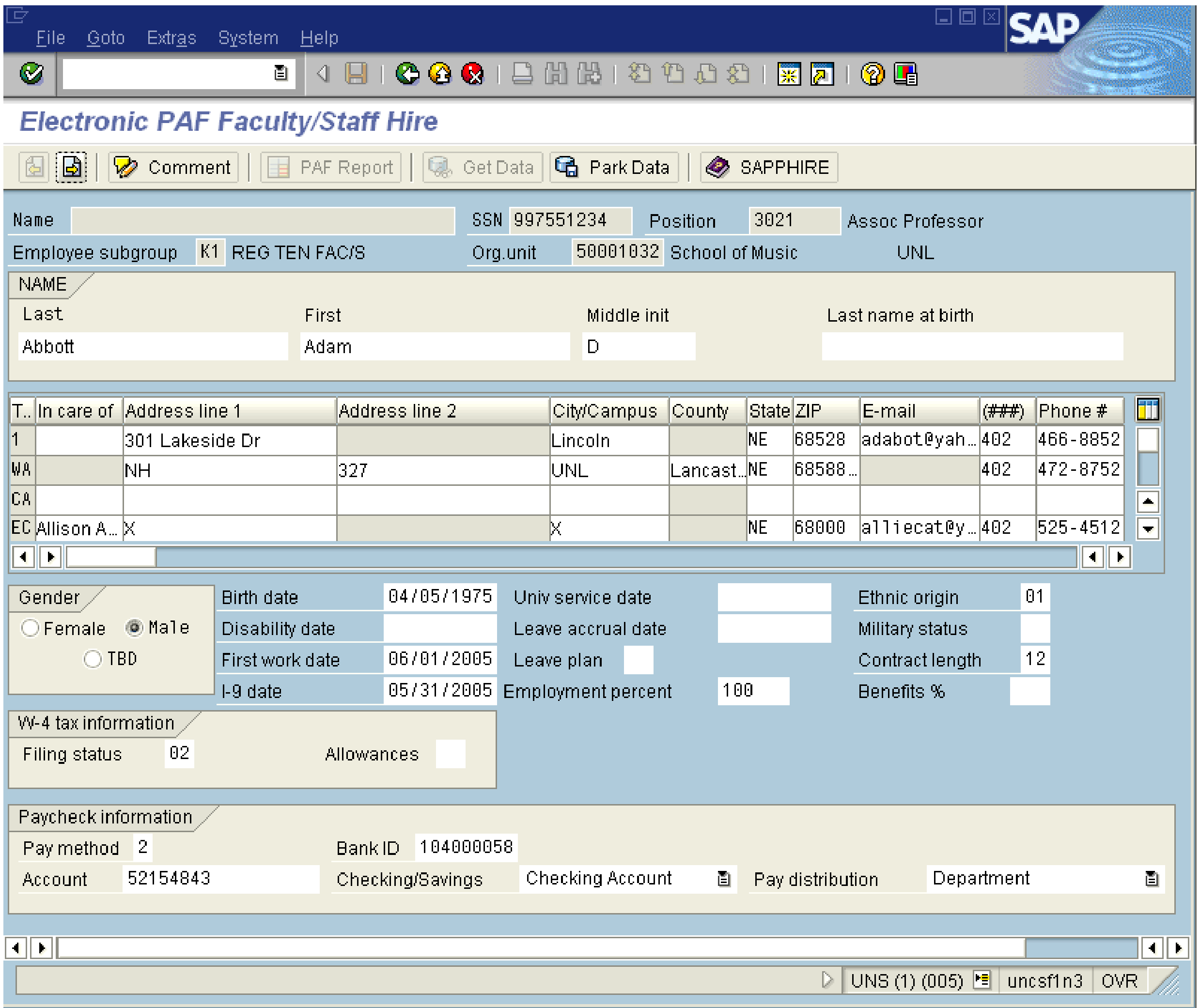
Only complete current address (CA) fields if different than permanent address.

20. (Conditional) In the *CA Address line 1* field, enter **employee's current address**.
21. (Conditional) In the *CA Address line 2* field, enter **employee's current address**.
22. (Conditional) In the *CA City/Campus* field, enter **city** associated with current address.
23. (Conditional) In the *CA State* field, enter **state** associated with current address.
24. (Conditional) In the *CA ZIP* field, enter **zip code** associated with current address.
25. (Conditional) In the *CA (###)* field, enter **area code** of employee's current phone number.
26. (Conditional) IN the *CA Phone #* field, enter **phone number** associated with current address.
27. (Optional) In the *EC In care of* field, enter **name of emergency contact**.
28. (Optional) In the *EC (###)* field, enter **area code of emergency contact's phone number**.
29. (Optional) In In the *EC Phone #* field, enter **phone number of emergency contact**.
30. (Required) In the *Birth date* field, enter **employee's date of birth**.
31. (Required) In the *Ethnic origin* field, select description of **employee's ethnic origin**.
32. (Required) In the *Gender* field, select appropriate radio button for **employee's gender**.
33. (Conditional) in the *Disability date* field, enter the **date the employee notified you of his/her disability**.
34. (Conditional) In the *Military status* field, if indicated by information provided by the employee, enter **military status code**.
35. (Required) In the *First work date* field, **enter date employee will be reporting to work**.
36. (Required) In the *Contract length* field, enter appropriate **contract length code** based on employee's term of employment.

    Note: This field collects the time frame of the employee hire, as well as the method of payment. If you are not familiar with these terms, contact your HR Coordinator to confirm which contact length is appropriate for this specific hiring action.

37. (Required) In the *I-9 date* field, enter **date employer signed the I-9 form**.
38. (Required) In the *Filing Status* field, enter **filing status code** as indicated by employee.
39. (Conditional) In the *Allowances* field, enter any **allowances** (a number between 1 and 9) as indicated by the employee (or leave blank).
40. (Conditional) In the *FICA Exempt* field, **check the checkbox** if exempt; otherwise, leave blank.

41. (Required) In the *Hours worked* field, enter the **amount of hours** the employee will work in an average week.
42. (Required) In the *Pay method* field, enter **payroll method** (1= payroll check; 2 = payroll direct deposit) as indicated by employee.
43. (Required) In the *Bank ID* field, Enter 9-digit **bank route transit number** shown on employee's supporting banking documentation.
44. (Required) In the *Account* field, enter employee's **bank account number**. Extra zeroes must be included. (No spaces are allowed)
45. (Required) in the *Checking/Savings* field, select the **type of account**.
46. (Required) in the *Pay distribution* field, select **where the employee's pay advice will be delivered**.



47. Click **Enter** ( ) to validate the information. If any information is missing or incorrect the system will give you an edit message.

Note: If you have missing and/or incorrect information you can click Park Data and the information you have entered will be saved. A message will appear, click Continue. This information can be retrieved at any time from the Initial Entry screen. Click Get Data and enter employee's social security number in the pop-up box and click **Continue** ( ). Click Yes to retrieve the data.

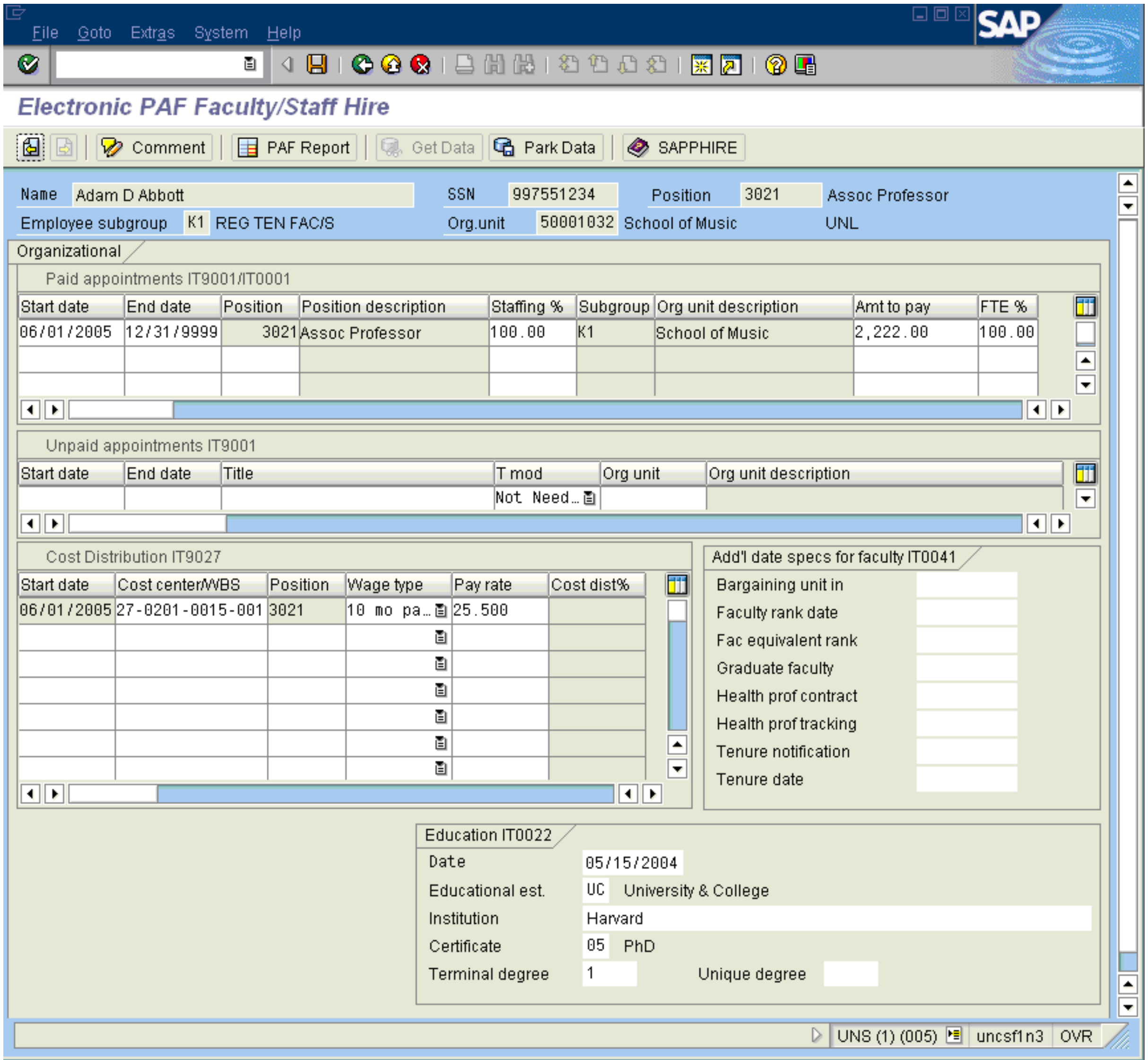
48. (Optional) Click Comment if you want to add comments. When adding a comment, note which screen and time you are commenting on, it's current content, what the content should be changed to and any description needed to explain. These comments can later be viewed on the employee's Action screen (IT0000). To view the comments, click **Display Text** ( ).
49. Click **Next Screen** ( ) to continue the process or if you wish to exit and not save this hire action click **Cancel** ( ) or **Exit** ( ). Answer the prompts appropriately.
50. Complete the following for paid appointments:
    - (Required) In the *Start date* field, **enter appointment begin date**. All appointments must have the same start dates.
    - (Required) In the *End date* field, enter **appointment end date**. If not know, enter 12/31/9999.
    - (Required) In the *Staffing %* field, enter **percent of effort** for a position comparted to all positions held. Use 100 when there is only one position.
    - (Required) In the *Amt to pay* field, enter the **total amount to be paid** for the appointment period.
    - (Required) In the *FTE%* field, enter **percentage of time expected to work** based on a 40-hour work week.
51. Complete the following for unpaid appointments:
    - (Required) In the *Start date* field, **enter appointment begin date**. (Required) In the *End date* field, enter **appointment end date**. If not know, enter 12/31/9999.
    - (Required) In the *Title* field, enter **position title**.
    - (Required) In the *Org unit field,* enter the **organizational unit**.
    - (Optional) In the *T mod* field, enter **a title modifier**.

    Note: Each line represents an additional appointment, but the first line **must** correspond with the position initially entered. All appointments **must** have the same pay dates.

52. (Required) In the *Cost center/WBS* field, enter the **funding source for each position**.
53. (Required) In the *Pay rate* field, enter the **hourly or salaried amount** to be paid.
54. (Required) In the *Cost dist%* field, enter the **percentage of cost** assigned to each funding source.

The *Add'l date specs* section only appears for faculty rehires. The *Education* section only appears if applicable to the employee.

55. (Conditional) In the *Add'l date specs for faculty* section, enter **appropriate dates for each line**.
56. (Conditional) In the *Education Date* field, enter the **effective date of the degree or certification**.
57. (Conditional) In the *Educational est.* field, enter the **code of educational establishment**.
58. (Conditional) in the *Institution* field, enter the **name of the institution** at which the employee completed his/her education or training.
59. (Conditional) In the *Certificate* field, select **certification code**.
60. (Conditional) In the *Terminal degree* field, select whether or not this is a **terminal degree**. The term, Terminal degree, is defined by the Campus Academic offices and indicates the highest obtainable degree within the discipline.



61. Click **Enter** (✓) to validate the information. If any information is missing or incorrect the system will give you an edit message.

Note: If you have missing and/or incorrect information you can click Park Data and the information you have entered will be saved. A message will appear, click Continue. This information can be retrieved at any time from the Initial Entry screen. Click Get Data and enter employee's social security number in the pop-up box and click **Continue** (✓). Click Yes to retrieve the data.

62. (Optional) Click Comment if you want to add comments. When adding a comment, note which screen and time you are commenting on, it's current content, what the content should be changed

to and any description needed to explain. These comments can later be viewed on the employee's Action screen (IT0000). To view the comments, click **Display Text** ().

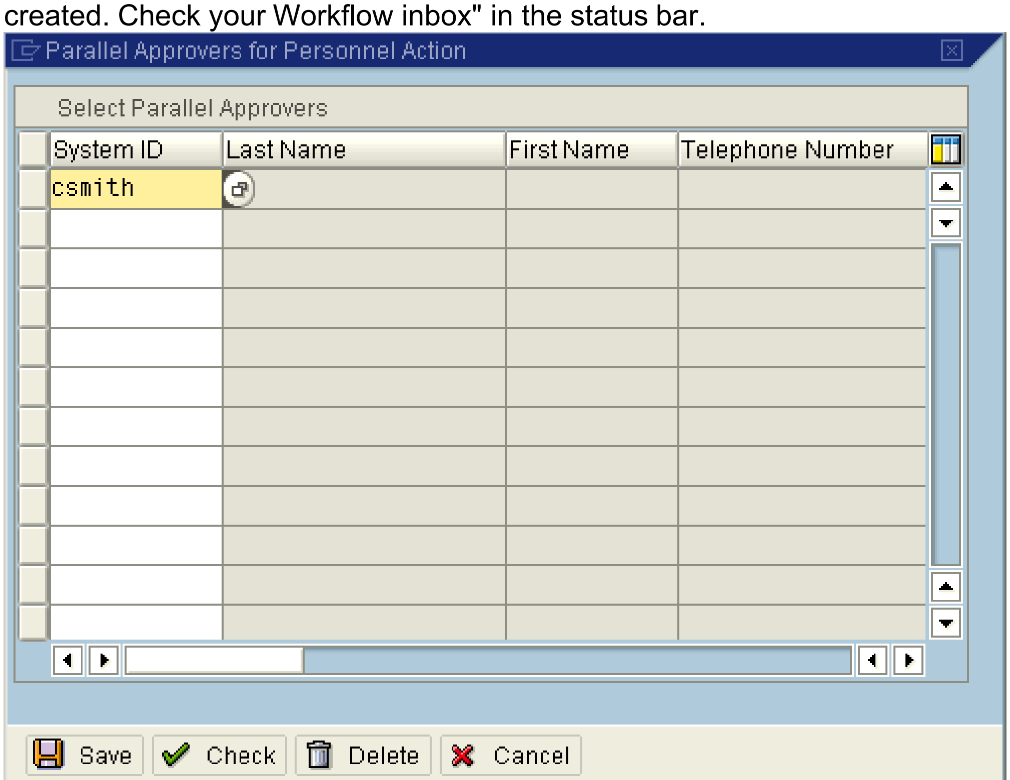
63. Click **Next Screen** () to continue the process or if you wish to exit and not save this hire action click **Cancel** () or **Exit** (). Answer the prompts appropriately.
64. Click **Save** () to continue the process and select parallel approver(s). You may click **Previous Screen** () to go back to the personal information screen.

Parallel Approvers for Personnel Actions

65. (Required) In the *System ID* field, enter the **SAP ID of the parallel approver**. You must enter at least one approver and you cannot make yourself a parallel approver.

    a. **Note:** Click **Search** () to search for/select appropriate field value or when available. Use the scroll bar on the right to search for the approver name or click **Search Arrow** () to search on SAP user name or last name of an approver.

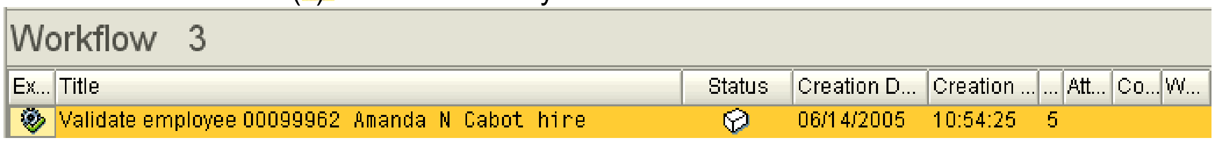
66. Click Save to finish process. The system displays the message "Amanda Cabot 00099962 created. Check your Workflow inbox" in the status bar.



Workflow Process

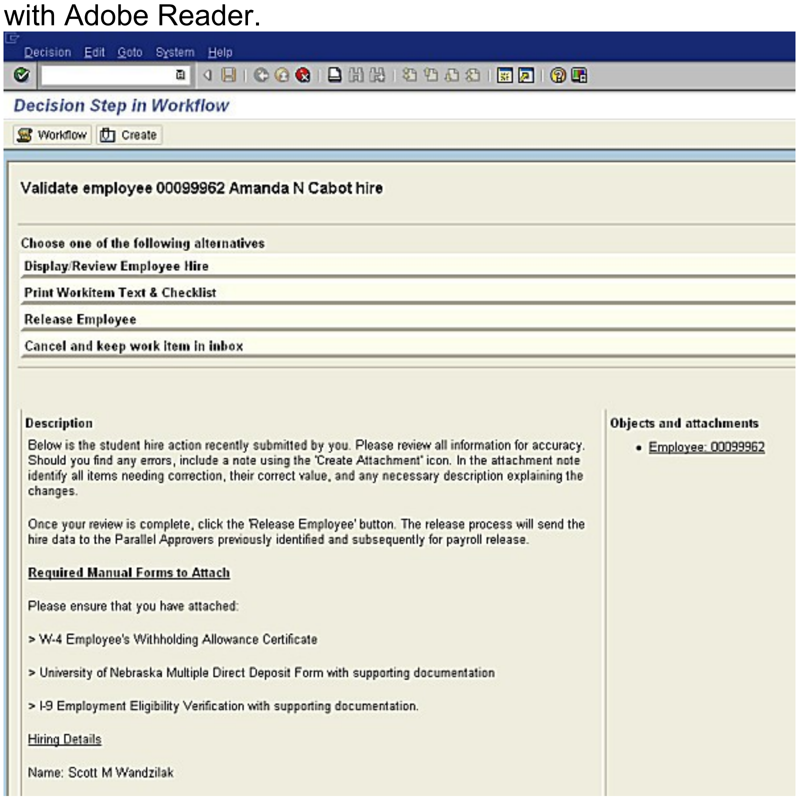
After completing the EPAF process and providing the list of parallel approvers you will have a workflow item delivered to your SAP Inbox. This will be your last opportunity to validate the data and add any comments before the data is released to the parallel approvers and the EPAF Functional Office.

67. Follow menu path: **Office➔Business Workplace➔Workflow**. Your inbox will open each time you open SAP if there are remaining inbox items. You can click **Exit** ( ) to close the inbox and access other transactions.
68. Double-click **Execute** ( )next to the item you want to validate or add comments.

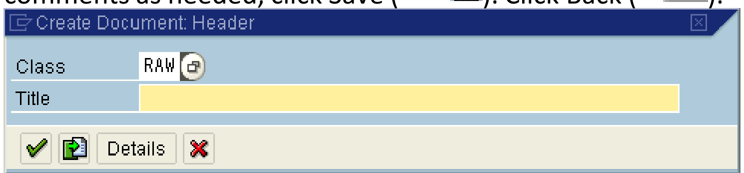


Decision Step in Workflow

69. There are three ways to validate an employee:
    - On the left side of the screen under 'Description', review employee information using the scroll bar.
    - On the right side of the screen under 'Objects and attachments', click the link with the employee's personnel number to bring up the PA20 HR Master Data screen.
    - Click Display/Review Employee Action to review in Personnel Data/Action Form format with Adobe Reader.



70. If comments are needed for corrections or updates to the data on the EPAF screen, click Create. The Create Document Header pop-up box will appear. Class selection should always be RAW. Title should include the subject matter (i.e., Incorrect WBS). Click Continue ( ). Type comments as needed, click Save ( ). Click Back ( ).



71. Click **Print Workitem Text & Checklist** to get a printed hardcopy. This step is only required for some campuses before the work item is allowed to be released. If required by yourcampus, attach printed hardcopy to other legally required documents and forward to the EPAFFunctional Office.
72. Click **Cancel and keep work item in inbox** to brink you back to the workflow inbox without taking any action on the new hire.
73. If you are ready to release the new hire, click **Release Employee**. The work item will no longer appear in your workflow inbox. You will receive a confirmation from the EPAF Functional Office when the PAF process is complete and is available for payroll processing.
74. The final step is to clear the inbox message that is received when the release is done.
    - Follow menu path:**Office→Business Workplace→Workflow**.
    - Double click on the work item to be removed.

75Click **Complete Review** to remove work item from inbox.

Workflow Item Reminder Email

SAP checks for unopened workflow items twice a day at 9:00 AM and 2:00 PM and an email notification is sent to the user as a reminder. For example, if a user receives a new workflow item at 3:00 PM an email notification would be sent the following day at 9:00 AM if the work item had not been previously opened. Regardless of the quantity of new work items, only one email will be delivered, thus a maximum of two email reminders would be generated in a single day.