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 be 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 (###) field, enter area code of employee’s current phone number.
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 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 and enter employee’s social security number in the pop-up box and click Continue. Click Yes to retrieve the data.

48. (Optional) Click 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 known, enter 12/31/9999.
   - (Required) In the Staffing % field, enter percent of effort for a position compared 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 known, 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 **Continue** and the information you have entered will be saved. A message will appear, 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.

<table>
<thead>
<tr>
<th>Workflow 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ex. Title</td>
</tr>
<tr>
<td>Validate employee 00099962 Amanda N Cabot hire</td>
</tr>
</tbody>
</table>

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 \( \text{Create} \). 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 \( \text{Check Mark} \). Type comments as needed, click Save \( \text{Save} \). Click Back \( \text{Back} \).

71. Click \( \text{Print Workitem Text & Checklist} \) 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 your campus, attach printed hardcopy to other legally required documents and forward to the EPAF Functional Office.

72. Click \( \text{Cancel and keep work item in inbox} \) to bring 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 \( \text{Release Employee} \). 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: \( \text{Office} \rightarrow \text{Business Workplace} \rightarrow \text{Workflow} \).
   - Double click on the work item to be removed.

75. Click \( \text{Complete Review} \) 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.