



ELECTRONIC PERSONNEL ACTION FORMS

E P A F

## Job Aid

**Termination of Assignment Only -  
Still Has Other WSU Employment - TERM-J**

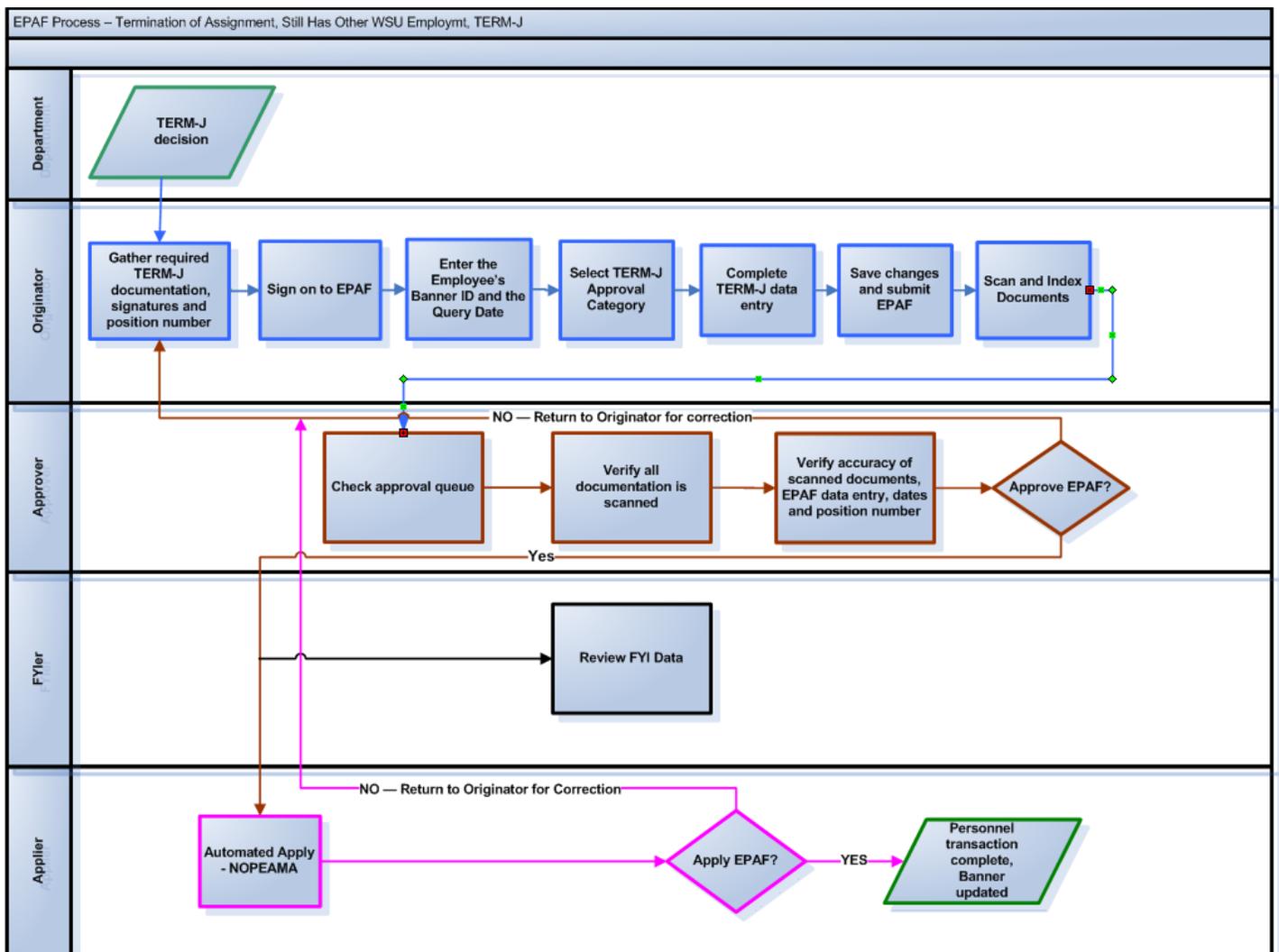
**TERMINATION OF ASSIGNMENT ONLY, STILL HAS OTHER WSU EMPLOYMENT, TERM-J**

Welcome to the TERM-J module. In this module, we will:

- Define TERM-J.
- Discuss the overall process for completing the TERM-J transaction.
- Identify the documentation requirements for a TERM-J transaction.
- Perform the steps to complete the TERM-J EPAF transaction.

TERM-J is the Approval Category used to terminate an assignment when the job change reason code is TERMI and there are other WSU assignments.

The overall process for completing this EPAF transaction appears below.



**DOCUMENTATION**

Before you enter the TERM-J transaction into EPAF, you must compile the appropriate paperwork. An example of TERM-J documentation is the termination letter.

The specific steps for completing the TERM-J EPAF transaction follow.

**STEP 1**

Sign On

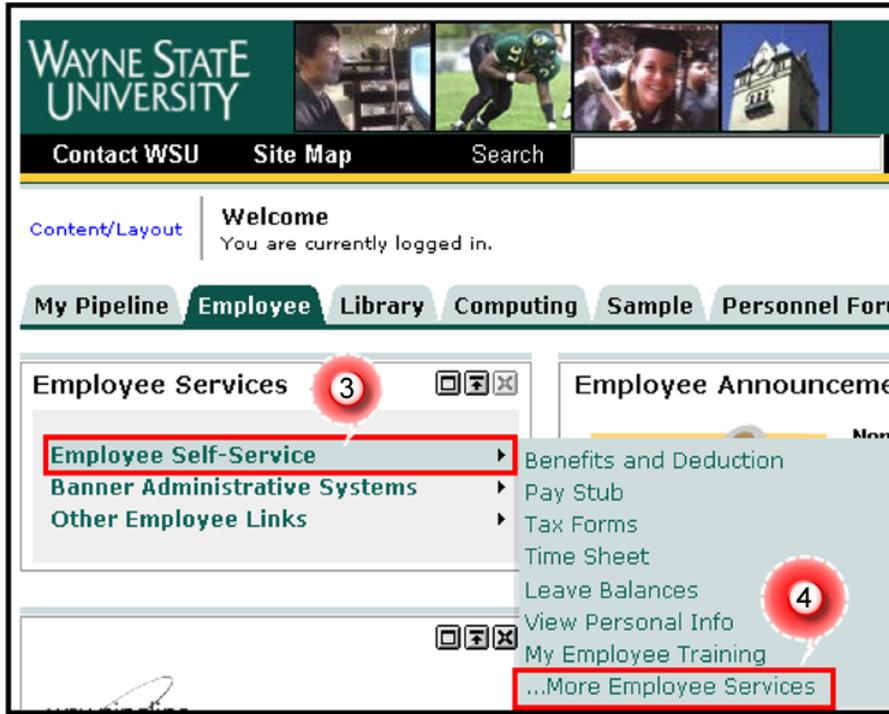
- 1) **Login** to Pipeline at *Pipeline.wayne.edu*.



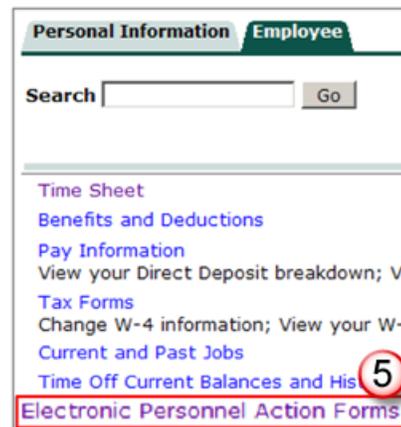
- 2) Click the Employee tab.



- 3) Click **Employee Self Service**
- 4) Click **More Employee Services**

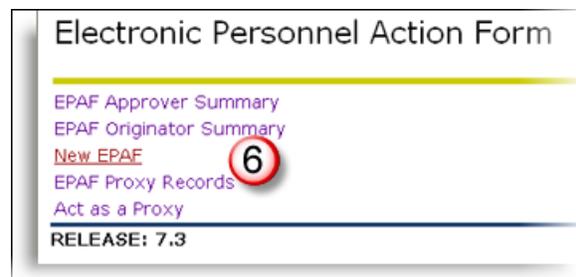


- 5) Click **Electronic Personnel Action Forms.**



- 6) Click **New EPAF.**

The **New EPAF Person Selection** screen appears.



**STEP 2**

## New EPAF Person Selection

- 1) Enter the employee's **Banner ID or Access ID** and TAB to the Query Date field.

**NOTE: Always check to be sure you have entered the appropriate ID!**

- 2) In the Query Date field, leave the **default date** (unless instructed otherwise) and press TAB.
- 2) In the Approval Category field, click the down arrow and select **Termination of Assignment Only - Still has other WSU Emplmnt, TERM-J**.
- 3) Click **Go**.

## New EPAF Person Selection

**i** Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Confirmation Category. Confirm that person is not in BANNER before generating new ID

Click on "HELP" for a more detailed explanation.

\* - Indicates a required field.

ID: \*

Query Date: MM/DD/YYYY \*

Approval Category: \*

The **New EPAF Job Selection** screen appears.

**STEP 3**

## New EPAF Job Selection

- 1) Under **Existing Jobs**, click the **Number and Title** of the assignment being terminated.

### New EPAF Job Selection

 Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: Alex Trebec, 003433442  
 Query Date: Mar 03, 2008  
 Approval Category: Terminate Job, TERM-J

**New Job**

Position:   

Suffix:

**Existing Jobs**

Number and Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
<a href="#">N99672-00 Office Supervisor II</a>	HOTR11, Train11	Oct 01, 2001		Jun 09, 2002	Active
<a href="#">P99147-00 Additional Service</a>	HOTR26, Train26	Oct 01, 2001		May 26, 2002	Active
<a href="#">P99506-00 Non-rep Professional Tech</a>	HOTR26, Train26	Oct 01, 2001		May 26, 2002	Active

The **Electronic Personnel Action Form** screen appears.

**NOTE:** You will receive an error if you haven't set your default routing queue. Follow the prompts to do this and then continue with the transaction.

ERROR: Default routing must be established. Click OK to set up defaults



**STEP 4**

## Electronic Personnel Action Form

## Electronic Personnel Action Form

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

<b>Name and ID:</b>	Jane Denise Doe, 000000001	<b>Job and Suffix:</b>	P94293-00, Non-rep. Professio Tech
<b>Transaction:</b>		<b>Query Date:</b>	Feb 28, 2007
<b>Transaction Status:</b>		<b>Last Paid Date:</b>	Feb 28, 2007
<b>Approval Category:</b>	Termination of Assignment only - Still has other WSU Emplmt, TERM-J		

Scroll down until all fields under **Termination Information Ending NBAJOBS Assignment** are visible.

- 1) In the **Job Change Reason** field, click the arrow at the right of the field and select the appropriate code. Then, TAB to the Personnel Date field.
- 2) In the **Personnel Date** field, enter the **actual date this personnel action occurs or should have occurred**, and then press TAB.

**NOTE:** If applicable, the Contract End Date will automatically change to match the personnel date.

- 3) The **Jobs Effective Date** entry is automated to display the last paid date. You **CANNOT** change this date. As the popup message says, the transaction **MUST** be approved and applied no later than 5:00 p.m. on the **last weekday of the current pay period** or the transaction will fail.

**NOTE:** The Last Paid Date is shown at the top right corner of the TERM-J screen.

**NOTE:** If you are uncertain about the personnel date, contact your central office or HR Representative.

Termination Information - End NBAJOBS Assignment		
Item	Current Value	New Value
Job Change Reason:		TERMI, Termination of Employment  <b>1</b>
Personnel Date: MM/DD/YYYY	10/09/2007	<b>2</b>
Contract End Date: MM/DD/YYYY		This is the actual date of this Personnel action.
Jobs Effective Date: MM/DD/YYYY	10/09/2007	<b>3</b>
		The process has been changed to automate the Effective Date entry. This transaction must be approved and applied by 5:00 PM on the last weekday of this pay period or transaction will Fail.

- 4) **Scroll** down until all fields under **Routing Queue** are visible.

**STEP 5**

## Routing Queue

The routing queue initially appears displaying the default approval levels required by the transaction. However, you may also add to this list.

- 1) Select additions to the required **Approval Level(s)** by clicking the down arrow at the right of the Approval Level field.
- 2) If you added an approval level(s), enter the **AccessID(s)** for the approval level(s) under User Name.
- 3) If you added an approval level(s), enter the **Required Action** for the approval level(s) under Required Action.

**NOTE:** If more than 9 approval levels are required, click **Save and Add New Rows** and then enter any additional approval level information.

Routing Queue

Approval Level	User Name	Required Action
10 - (BENEFI) TCW - Total Comp & Wellness	<input type="text"/>	FYI
20 - (PAYROL) Payroll	<input type="text"/>	FYI
40 - (S/C/D) School/College/Division	<input type="text"/>	Approve
60 - (HR) Human Resources	<input type="text"/>	Approve
70 - (EMPMNT) Employment - Applier	<input type="text"/>	Apply
Not Selected <input type="button" value="v"/>	<input type="text"/>	Not Selected <input type="button" value="v"/>
Not Selected <input type="button" value="v"/>	<input type="text"/>	Not Selected <input type="button" value="v"/>
Not Selected <input type="button" value="v"/>	<input type="text"/>	Not Selected <input type="button" value="v"/>
Not Selected <input type="button" value="v"/>	<input type="text"/>	Not Selected <input type="button" value="v"/>

**NOTE:** For levels 60 and 70, select your HR Representative.

- 4) Scroll down until the **Comment** box is visible.

**STEP 6**

## Comment Box

## Comment

Termination of Hourly Tech Assignment effective 2/28/07, starting Research Assistant assignment effective 3/01/2007

1) Enter any **comments** relevant to the current transaction in this box.

2) Click **Save**.

Save

If there are errors, a message appears. This message displays the type of error(s) that has occurred.

**Errors and Warning Messages**

Type	Message Type	Description
Termination Information ending NBAJOBS assignment	ERROR	Invalid Date for Personnel Date. Format is MM/DD/YYYY.

3) Go to the section and field where the error(s) has occurred, make the **required correction(s)**, and click **Save** again.

**NOTE:** You **MUST** click **Save** after making any corrections.

**STEP 7**

Submit the Transaction

- 1) Click **Save**.
- 2) Click **Submit**. 

**NOTE:** You **MUST** click **Submit** to place the transaction in the Routing/Approval queue.

Once the transaction has been successfully submitted, it is placed in the Routing/Approval Queue pending approval.

- 3) At the bottom of the screen is the **Transaction History** section. This section shows when the transaction was created and submitted, and by whom.



**Transaction History**

Action	Date	User Name
Created:	Mar 02, 2007	Scott Douglas Casey
Submitted:	Mar 02, 2007	Scott Douglas Casey

[Approval Types](#) | [Comments](#) | [Routing Queue](#) | [Transaction History](#)

[Save](#) [Submit](#) [Delete](#)

[Return to Top](#)

[New EPAF](#) | [EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

The Originator Summary **History** indicates that its status is **Pending**. This means it's moved up the approval queue and is ready for the next required action.

To review the transaction, update it to make changes if it's returned for correction, or void it, click the name or transaction number. This will display the transaction in its entirety.

## EPAF Originator Summary

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**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:

[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
<a href="#">Bardeau, Brejette L.</a> Accounting Clerk Senior, N99182-00	003430315	232105	Change to Contract Dates	Nov 20, 2007	Nov 20, 2007	Pending
<a href="#">Trebec, Alex</a> Office Supervisor II, N99672-00	003433442	232258	Termination of Assignment only - has other WSU Employment	Mar 03, 2008	Mar 03, 2008	Pending

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When a transaction is submitted, the "Current" Approver Summary shows that there is a required action that needs to be completed. In this example, the required action is Approve. The Approver can click the Name of the individual employee to preview the transaction.

The screenshot displays the 'EAPF Approver Summary' page in a web application. At the top, there is a navigation bar with 'Personal Information' and 'Employee Self-Services'. Below this is a search bar and several utility links: 'RETURN TO EMPLOYEE MENU', 'SITE MAP', 'HELP', and 'EXIT'. The main heading is 'EAPF Approver Summary'. There are three tabs: 'Current', 'In My Queue', and 'History'. A message box states: 'Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.' Below this is a checkbox for 'Click on "HELP" for a more detailed explanation.' and a 'Queue Status' dropdown menu set to 'All'. There are also buttons for 'Select All', 'Reset', and 'Save'. A table titled 'EAPF Transactions' is shown with the following columns: Name, ID, Transaction, Type of Change, Submitted Date, Effective Date, Required Action, and Action Links. The first row of data is for 'Alex Trebec', with ID '000000001', Transaction '182468', and Required Action 'Approve'. A red arrow points to the 'Approve' text, and another red arrow points to the name 'Alex Trebec'.

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action Links
Trebec, Alex Office Supervisor II, N99672-00 - UU	000000001	182468	Termination of Assignment only - has other WSU Employment	Oct 09, 2007	Oct 09, 2007	Approve	**Co

By previewing the transaction, the Approver can review the data for accuracy and completeness. He or she can **Approve** the transaction and move it up to the next level in the routing queue, or **Return for Correction** if there are errors the Originator needs to correct.

The screenshot displays the Wayne State University Self-Services interface. At the top, the university logo and tagline "World-Class Education in the Real World" are visible. Below this, the "Self-Services" header includes tabs for "Personal Information" and "Employee". A search bar and navigation links ("RETURN TO EMPLOYEE MENU", "SITE MAP", "HELP", "EXIT") are present. The main content area is titled "EPAF Preview" and features a checked checkbox for "You are acting as an Approver." Transaction details include: Name and ID: Alex Trebec; Transaction: 182651; Transaction Status: Pending; Approval Category: Termination of Assignment only - has other WSU Employment, TERM-J. Job and Suffix: N96534-00, Senior Auditor; Query Date: Oct 15, 2007; Last Paid Date: Jul 29, 2007. Navigation options include "Previous", "Next", "Approve", "Disapprove", "Return for Correction", "More Info", and "Add Comment". A section titled "Termination Information - End NBAJOBS Assignment" is partially visible at the bottom.

Other options include **Disapprove** and **More Info**. Do not use **Disapprove** unless you do NOT want the transaction to occur at all. **More Info** indicates More Information. Use this if you want to indicate that you are gathering more information prior to making your decision.

This completes the TERM-J module. In this module, we:

- Defined TERM-J.
- Discussed the overall process for completing the TERM-J transaction.
- Identified the documentation requirements for a TERM-J transaction.
- Performed the steps to complete the TERM-J EAPF transaction.