

## EPAF Required Document Matrix:

The use of Application Xtender Web Access (Web Xtender) is crucial in the successful processing of EPAF transactions. EPAF originators must attach supporting documentation to an EPAF transaction in order for the transaction to be successfully approved and applied to Banner.

The EPAF Required Document Matrix is a tool developed to assist EPAF users in identifying the minimally required documents that are necessary to complete EPAF transactions. This tool incorporates the job change reasons, e-class, HR documents and document types in order to provide guidance to the user.

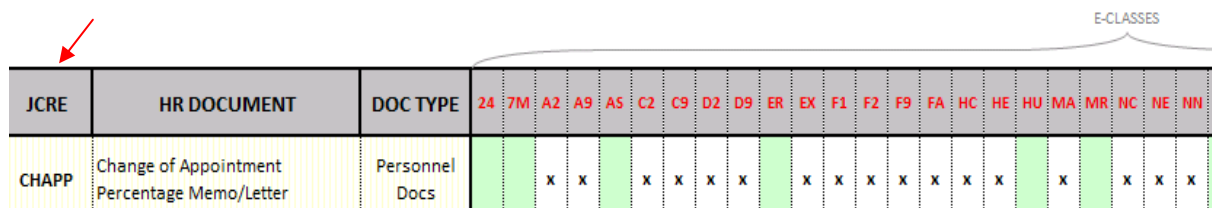
### Benefits of the Matrix: `

The EPAF Required Document Matrix has been created in an easy-to-use format that lists all the documentation you need to process an EPAF successfully. Whether you are an experienced EPAF user or just a beginner, this tool will help you. Prior to processing a transaction, utilizing the EPAF Required Document Matrix will ensure that you have gathered all documents necessary for ensuring a smooth approval process.

### How to Use the Matrix:

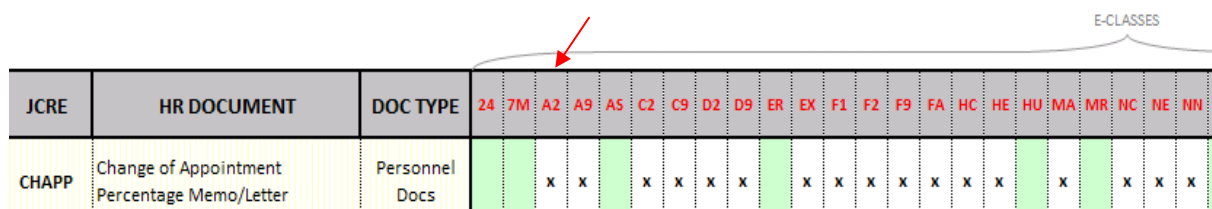
**Example:** Originator needs to process a Change in Appointment Percent (CHAPP) for an Assistant Professor (A2):

- 1) In order to determine the documents required to complete this transaction, access the EPAF Required Document Matrix at: <http://www.hr.wayne.edu/help> under EPAF.
- 2) Locate the **Job Change Reason (JCRE)** on the left hand column of the matrix. If you need a description of the available JCRE, this job aid can be found at: <http://www.hr.wayne.edu/help> under HRMS Data Codes-Job Aids





JCRE	HR DOCUMENT	DOC TYPE	24	7M	A2	A9	A5	C2	C9	D2	D9	ER	EX	F1	F2	F9	FA	HC	HE	HU	MA	MR	NC	NE	NN
CHAPP	Change of Appointment Percentage Memo/Letter	Personnel Docs			x	x		x	x	x	x		x	x	x	x	x	x	x		x		x	x	x

- 3) Locate the **E-Class** for the employee for which the action is to occur.





JCRE	HR DOCUMENT	DOC TYPE	24	7M	A2	A9	A5	C2	C9	D2	D9	ER	EX	F1	F2	F9	FA	HC	HE	HU	MA	MR	NC	NE	NN
CHAPP	Change of Appointment Percentage Memo/Letter	Personnel Docs			x	x		x	x	x	x		x	x	x	x	x	x	x		x		x	x	x

- 4) Identify any **HR Documents** required to process the transaction

JCRE	HR DOCUMENT	DOC TYPE	24	7M	A2	A9	A5	C2	C9	D2	D9	ER	EX	F1	F2	F9	FA	HC	HE	HU	MA	MR	NC	NE	NN
CHAPP	Change of Appointment Percentage Memo/Letter	Personnel Docs			x	x		x	x	x	x		x	x	x	x	x	x	x		x		x	x	x

- 5) Originate your EPAF transaction. If you need instructions on how to process an EPAF transaction, see the EPAF participant guides available in the WSU Help System, <http://www.hr.wayne.edu/help> located under EPAF.
- 6) Scan your required documents into Web Xtender into the correct **Document Type** for the employee for which EPAF transaction is to occur. Instructions on how to scan and index documentation in Web Xtender can be accessed in the WSU Help System, <http://www.hr.wayne.edu/help> located under Application Xtender Web Access (Web Xtender).

JCRE	HR DOCUMENT	DOC TYPE	24	7M	A2	A9	A5	C2	C9	D2	D9	ER	EX	F1	F2	F9	FA	HC	HE	HU	MA	MR	NC	NE	NN
CHAPP	Change of Appointment Percentage Memo/Letter	Personnel Docs			x	x		x	x	x	x		x	x	x	x	x	x	x		x		x	x	x

- 7) When indexing, be sure to add the correct **Comment** to your document. A list of all HR documents and associated comments can be accessed at: <http://pipeline.wayne.edu> under Employee Tab then click on **HR Document Types**, located on the left-hand side under Other Employee Links.
- 8) Submit your EPAF transaction to be approved and applied to Banner.