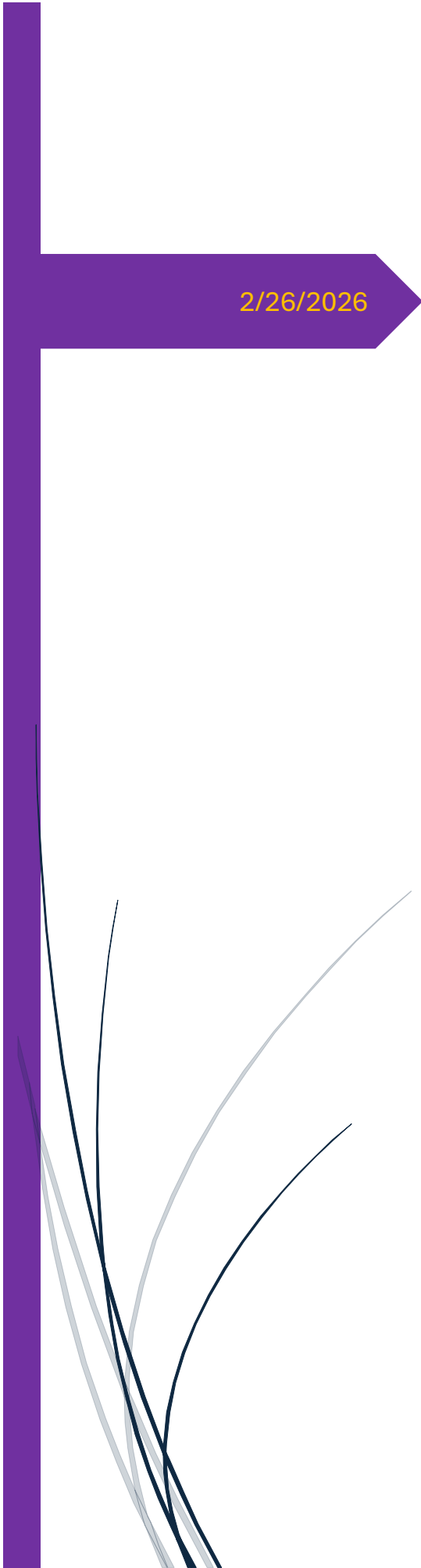




2/26/2026

Electronic Personnel Action Forms (EPAFs)

Banner Self-Service 9 Training Manual

Alcorn State University

OFFICE OF HUMAN RESOURCES MANAGEMENT

WWW.ALCORN.EDU

ELECTRONIC PERSONNEL ACTION FORMS (EPAFs)

Self-Service 9 Training Manual

Alcorn State University

Office of Human Resources Management

Document Control

- **System Version:** Banner Self-Service 9 (SS9)
 - **Audience:** EPAF Originators, Approvers, Proxies, Supervisors
 - **Applier:** Payroll (HR/Finance)
 - **Effective Date:** 01/01/2026
 - **Version:** v2026.1
 - **Supersedes:** EPAF Manual – Self-Service 8
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1. Purpose of This Manual

This manual provides official guidance for initiating, approving, and processing **Electronic Personnel Action Forms (EPAFs)** in **Banner Self-Service 9**. It reflects current system navigation, institutional business rules, and Mississippi public-sector compliance requirements.

Annotated Screenshot Placeholder: SS9 Home Dashboard – Banner Self-Service landing page (tiles view)

2. Key EPAF Roles & Responsibilities

2.1 Originator

- Initiates EPAFs
- Ensures accuracy of data, position, dates, and labor
- Submits EPAFs timely to meet payroll deadlines

2.2 Approver

- Reviews EPAFs for accuracy and compliance
- Approves, returns for correction, or disapproves
- Acts within assigned approval level

2.3 Proxy

- Acts on behalf of an originator or approver during absences
- Must have required Banner security

2.4 Applier (Payroll)

- Final application of EPAFs into Banner
 - Payroll is the sole applier
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3. At-Will & Public-Sector Compliance Disclaimer

STANDARD HRM DISCLAIMER (Required on All Job Aids & Training Materials)

Employment with Alcorn State University is **at-will** and subject to the laws of the State of Mississippi. Nothing in this training, manual, or associated materials shall be construed as creating a contract of employment or altering the at-will nature of employment.

4. Accessing EPAFs in Self-Service 9

4.1 Navigation Path

1. Log into **Banner Self-Service 9**
2. Select **Employee** tile
3. Select **Electronic Personnel Action Forms (EPAFs)**

Annotated Screenshot Placeholder: SS9 Employee tile → EPAFs menu

Common Error Callout: If EPAFs do not appear, the user does not have security access. Contact HRM.

5. Common Matching & Banner ID Rules

Banner maintains records for students, employees, vendors, and donors. Prior to creating a new EPAF: - **Always search first** - Generate an ID **only when confirmed the person is not in Banner**

Annotated Screenshot Placeholder: SS9 Person Search & Common Matching screen

Critical Warning: Creating duplicate IDs or attaching a job to the wrong person causes payroll, benefits, and audit issues.

6. Query Date & Payroll Timing

6.1 Query Date

- Typically the **effective date** of the action
- May differ due to payroll processing cycles

6.2 Payroll Cutoffs

- Once payroll processing begins, changes cannot be applied
- Late EPAFs are returned and must restart approvals

Compliance Note: Late EPAFs are a Banner system limitation, not an HR exception.

7. Default Routing Queues

7.1 Purpose

Default routing queues ensure consistent approvals and reduce errors.

7.2 Rules

- Separate queue required for **each EPAF type**
- FYI approvers are optional
- Mandatory approvers cannot be bypassed

Annotated Screenshot Placeholder: SS9 Routing Queue configuration screen

8. EPAF Approval Workflow

8.1 Approval Queue Types

- **FYI:** Acknowledgement only
- **Approver:** Required approval
- **Applier:** Payroll

8.2 Approval Actions

- Approve
- Return for Correction (restarts routing)
- Disapprove (terminates EPAF)

Annotated Screenshot Placeholder: SS9 Approver Summary – Current / In My Queue / History tabs

9. Proxies in Self-Service 9

9.1 Proxy Requirements

- Proxies must be established by the user
- Must have proper Banner security

9.2 Acting as a Proxy

- Select **Act as Proxy**
- Choose proxy name and date range

Annotated Screenshot Placeholder: SS9 Proxy setup and Act-as-Proxy screen

10. EPAF Decision Guide (High-Level)

Action Needed	EPAF Type
New Hire – Monthly	NEW
New Hire – Biweekly	NEWBW
Extension	EXTEN
Rehire – Monthly	REHIRE
Rehire – Biweekly	REHRBW
Promotion	PROMO / PROBW
Salary Adjustment	SALADJ / SALABW
Secondary Job	MOSEC / SECSL
Adjunct Faculty	ADJFAC
Labor Change Only	LABOR
Separation	SEPAR / TERM

11. EPAF TYPE EXPANSION – SELF-SERVICE 9

This section provides SS9-specific, step-by-step operational guidance for the most frequently used EPAFs. Each EPAF type includes purpose, navigation, required fields, compliance rules, and common errors.

11.1 NEW – New Hire (Monthly)

When to Use

- Hiring a **monthly** employee who has **never been employed** by Alcorn State University
-

Do NOT Use When

- Rehiring a former employee
- Hiring a biweekly or hourly employee
- Processing adjunct or student appointments

SS9 Navigation

Employee Tile → EPAFs → Create New EPAF → **Approval Category: NEW**

Annotated Screenshot Placeholder: SS9 New EPAF – Monthly (NEW) selection screen

Required Data Elements

- Query Date = Job Start Date
- Position Number + Suffix **00** (must be correct)
- Personal Data (legal name, SSN, DOB)
- Employee Class and Home Organization
- Annual Salary (no commas)
- Labor Distribution (must total 100%)
- Routing Queue

Banner Rules & Compliance

- Generate ID **only** if individual is not found in Banner
- Address and phone sequence fields must remain **blank**
- Incorrect position requires EPAF cancellation and restart

Common Errors

- Generating duplicate Banner IDs
 - Incorrect query date causing payroll rejection
 - Labor distribution not totaling 100%
-

11.2 NEWBW – New Hire (Biweekly)

When to Use

- Hiring a **biweekly/hourly** employee with no prior employment at the University

SS9 Navigation

Employee Tile → EPAFs → Create New EPAF → **Approval Category: NEWBW**

Annotated Screenshot Placeholder: SS9 New EPAF – Biweekly (NEWBW)

Key Differences from NEW

- Hourly rate instead of salary
- Biweekly employee class required

Common Errors

- Using NEW instead of NEWBW
 - Entering commas in hourly rate
-

11.3 EXTEN – Extension of Assignment

When to Use

- Extending an existing assignment that has a defined termination date

Critical Rule

EXTEN can **only** be used on an existing position and suffix.

Query Date Rule

- Query Date = **Day after current termination date**
- If payroll deadline is missed, use first day after last paid date

Annotated Screenshot Placeholder: SS9 EXTEN – All Jobs view

Common Errors

- Using incorrect query date
 - Attempting to extend a non-terminating job
-

11.4 REHIRE – Monthly Rehire

When to Use

- Rehiring a former employee into a **monthly** position

SS9 Navigation

Employee Tile → EPAFs → Create New EPAF → **Approval Category: REHIRE**

Annotated Screenshot Placeholder: SS9 REHIRE position selection

Key Compliance Rules

- Correct position selection is mandatory
 - Job Begin Date must be updated if employee held the position previously
-

11.5 REHRBW – Biweekly Rehire

When to Use

- Rehiring a former employee into a **biweekly** position

Common Errors

- Using REHIRE instead of REHRBW
 - Incorrect labor distribution defaulting from prior job
-

11.6 PROMO / PROBW – Promotion

When to Use

- Moving an employee to a **new position** with increased responsibility

Required Actions

- Terminate old position
- Add new position with suffix 00
- Update salary or hourly rate

Annotated Screenshot Placeholder: SS9 Promotion – Termination and New Job records

Audit Warning

Promotion EPAFs must clearly show position movement, not just pay changes.

11.7 SALADJ / SALABW – Salary Adjustment

When to Use

- Adjusting pay **without** changing position

Key Rule

Personnel Date must reflect the **actual effective date** of the increase.

11.8 MOSEC / SECSL – Secondary Assignments

MOSEC

- Monthly secondary job
-

SECSL

- Single-pay assignment within one pay period

Annotated Screenshot Placeholder: SS9 Secondary Job EPAF

Critical Payroll Rule

Start date must align with pay period boundaries.

11.9 ADJFAC – Adjunct Faculty

When to Use

- Paying adjunct faculty only

Do NOT Use

- Full-time faculty
- Staff overloads

Compliance Note

ADJFAC EPAFs must start on the **first day of the month**.

11.10 LABOR – Labor Distribution Change

When to Use

- Changing funding only (no other job changes)

Labor Rules

- Must total 100%
 - Chart of Accounts = A
-

11.11 SEPAR / TERM – Separation or Job Termination

SEPAR

- Employee is separating from the University entirely

TERM

- Employee remains employed but a specific job is ending

Annotated Screenshot Placeholder: SS9 Separation vs Termination selection screen

12. STUDENT EPAFs – SPECIAL RULES APPLY

Student EPAFs follow different Banner rules than faculty and staff EPAFs. Failure to follow these rules may result in incorrect pay, audit findings, or inability to correct the transaction once submitted.

12.1 WKSTU – Work Study Student (New Hire)

When to Use

- Hiring a Work Study student who has **never been employed** by Alcorn State University

SS9 Navigation

Employee Tile → EPAFs → Create New EPAF → **Approval Category: WKSTU**

Annotated Screenshot Placeholder: SS9 WKSTU – Work Study New Hire selection screen

Banner-Specific Rules

- Student will already exist in Banner
- W-2 address must be selected or created
- Position number must be **CW0001 or CW0002**
- Suffix must be entered manually (usually 00)

Required Fields

- Query Date = Job start date
- Yellow required fields only
- Labor and routing queue as needed

Critical Warning

Position numbers **cannot be corrected** once submitted. Incorrect EPAFs must be cancelled and restarted.

12.2 WKREH – Work Study Student (Rehire or Secondary Job)

When to Use

- Hiring a Work Study student with a current or prior University job

SS9 Navigation

Employee Tile → EPAFs → Create New EPAF → **Approval Category: WKREH**

Annotated Screenshot Placeholder: SS9 WKREH – Work Study Rehire

Banner Rules

- Existing W-2 address must be selected
- Position remains CW0001 or CW0002
- Suffix must not overlap an existing active suffix

Common Errors

- Using WKSTU instead of WKREH
 - Reusing an active suffix
-

12.3 RSSTU – Research Student (New Hire)

When to Use

- Hiring a Research Student with no prior employment

SS9 Navigation

Employee Tile → EPAFs → Create New EPAF → **Approval Category: RSSTU**

Annotated Screenshot Placeholder: SS9 RSSTU – Research Student New Hire

Banner Rules

- Student record already exists
- Position must be selected carefully by employee class and department
- Suffix must be entered manually

Required Fields

- Yellow required fields
 - Labor must total 100%
-

12.4 RSSRE – Research Student (Rehire or Secondary Job)

When to Use

- Hiring a Research Student with a current or past University job

SS9 Navigation

Employee Tile → EPAFs → Create New EPAF → **Approval Category: RSSRE**

Annotated Screenshot Placeholder: SS9 RSSRE – Research Student Rehire

Banner Rules

- Existing address must be selected
- Position and suffix rules apply

12.5 Student EPAF Compliance Reminders

- Student EPAFs do **not** replace I-9 or tax processing
- Position numbers are department-specific
- Many student EPAF errors **cannot be fixed** after submission

HR Escalation Required: Contact HRM immediately if an incorrect student EPAF is submitted.

—————|—————| | New Hire – Monthly | NEW | | New Hire – Biweekly | NEWBW | | Extension | EXTEN | | Rehire – Monthly | REHIRE | | Rehire – Biweekly | REHRBW | | Promotion | PROMO / PROBW | | Salary Adjustment | SALADJ / SALABW | | Secondary Job | MOSEC / SECSL | | Adjunct Faculty | ADJFAC | | Labor Change Only | LABOR | | Separation | SEPAR / TERM |

11. Labor Distribution Rules

- Labor must total **100%**
- Chart of Accounts = **A**
- Grant-funded positions require verification

Audit Warning: Labor errors delay payroll and create audit findings.

12. Common SS9 EPAF Errors

1. Incorrect position or suffix
2. Wrong query date
3. Duplicate Banner IDs
4. Labor not totaling 100%
5. Missing routing approvals
6. Submitting after payroll cutoff

13. HR Escalation Guidance

Stop and contact HRM immediately if: - A duplicate ID is created - The wrong person or position is selected - An EPAF is approved in error

14. Record Retention & Audit Readiness

- EPAFs are official personnel records
 - All actions are logged in Banner
 - Training acknowledgements may be subject to FOIA requests
-

15. Final Notes

This manual is maintained by the Office of Human Resources Management. Updates will be issued as Banner or institutional policies change.

EPAF Troubleshooting Guide

Quick Steps to Resolve EPAF Errors



EPAF DECISION JOB AID

Banner Self-Service 9 (SS9)

Alcorn State University
Office of Human Resources Management

Purpose

This job aid helps departments and supervisors quickly determine the **correct EPAF type** to use in Banner Self-Service 9 and identify when to **pause and contact HR**.

STEP 1: Who Is the Action For?

- ☐ Staff / Faculty (Monthly or Biweekly)
- ☐ Adjunct Faculty
- ☐ Student Employee (Work Study or Research)

STOP: Student EPAFs follow special rules. See Student section below.

STEP 2: What Action Are You Taking?

Situation	EPAF Type
New employee – Monthly	NEW
New employee – Biweekly	NEWBW
Extend existing assignment	EXTEN
Rehire former employee – Monthly	REHIRE
Rehire former employee – Biweekly	REHRBW
Promotion to new position	PROMO / PROBW
Pay change only	SALADJ / SALABW
Add secondary monthly job	MOSEC
One-time or single-pay assignment	SECSL

Situation	EPAF Type
Adjunct faculty payment	ADJFAC
Change funding only	LABOR
Employee leaving University	SEPAR
Job ending, employee still works here	TERM

STUDENT EPAFs – SPECIAL RULES APPLY

Student Action	EPAF Type
Work Study – New Hire	WKSTU
Work Study – Rehire / Secondary	WKREH
Research Student – New Hire	RSSTU
Research Student – Rehire / Secondary	RSSRE

Critical Student Rules:

- Student records already exist in Banner
 - Position numbers are department-specific
 - Many student EPAF errors **cannot be corrected** once submitted
-

STOP & CALL HR IMMEDIATELY IF:

- You are unsure which EPAF type applies
 - The position or suffix is unclear
 - A duplicate Banner ID may exist
 - The EPAF is for a student and something looks wrong
 - Payroll deadlines may be missed
-

At-Will & Public-Sector Disclaimer

Employment with Alcorn State University is **at-will** and governed by Mississippi law. EPAFs do not create employment contracts or guarantees.

HR CONTACT

Office of Human Resources Management

 hrm@alcorn.edu

 601-877-6188

Version: v2026.1

Use: Quick reference only – refer to EPAF Training Manual for full instructions