**Creation of the JOB EPAF (Electronic Personnel Action Form), establishing the index for the job labor distribution and Routing Queues.**

Note: The purpose of this document is to provide an overview of the JOB EPAF creation process. The objective is to lay out step-by-step instructions so that University Employees can successfully submit pertinent job detail information electronically without the need for a paper form. Once the e-form has been submitted and routed for approval(s), the information contained in the JOB EPAF will be automatically applied in the Banner system.

Step 1. University Employees that are responsible for making changes to job detail information will receive an email from **WorkflowPROD** <noreply@lehigh.com>. In addition to the link, the email will have the new hire's Offer Letter attached. Please take a moment to review the **Offer Letter** and verify it for accuracy. After reviewing the Offer Letter, please click on the link that follows the line **"Click the following link to process this task:"**
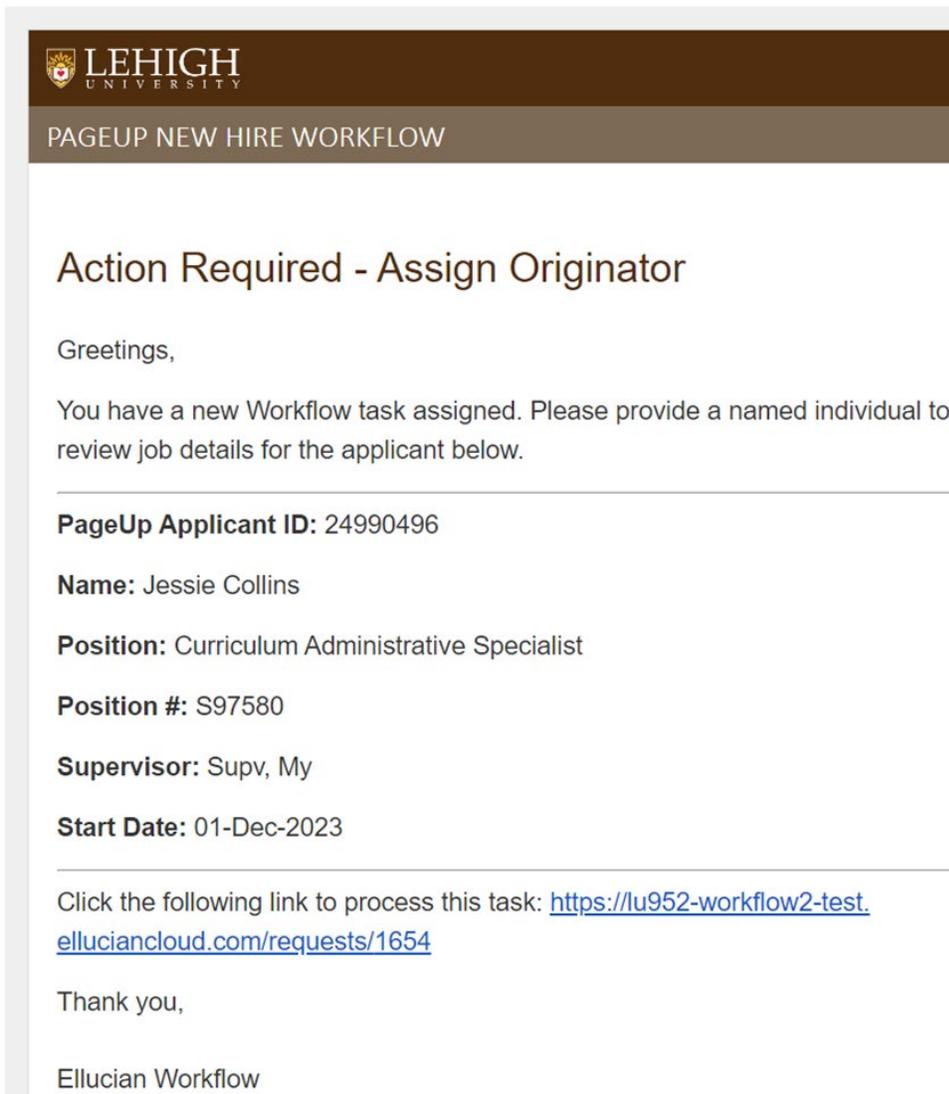
LEHIGH UNIVERSITY

PAGEUP NEW HIRE WORKFLOW

Action Required - Assign Originator

Greetings,

You have a new Workflow task assigned. Please provide a named individual to review job details for the applicant below.

PageUp Applicant ID: 24990496

Name: Jessie Collins

Position: Curriculum Administrative Specialist

Position #: S97580

Supervisor: Supv, My

Start Date: 01-Dec-2023

Click the following link to process this task: https://lu952-workflow2-test.elluciancloud.com/requests/1654

Thank you,

Ellucian Workflow

Step 2. After clicking on the link, you will receive a prompt from Ellucian. Please click on the box that reads, **"LOG IN WITH SAML".** This will begin the Workflow process.
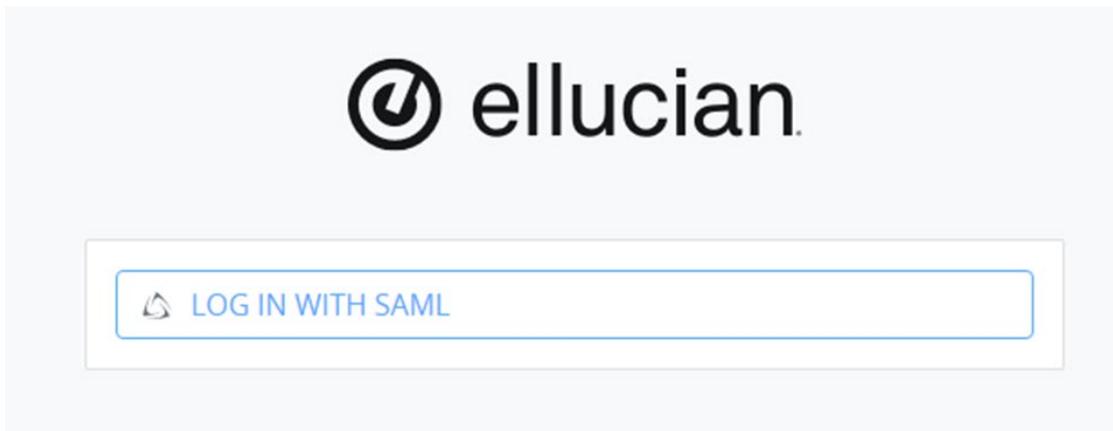
Step 3. It is now time to assign the individual responsible for entering the valid index for the job labor distribution.

Click on the **Assign Originator** link.

Step 4. On the following page, locate the UserId field. **Enter the UserId** of the individual who will provide the **valid index for the job labor distribution**. Please use the Search button to validate the UserID and populate the Name field. Once you have found the correct individual, most of the fields will automatically populate, including the presentation of the **Offer Letter.** Please review the letter for accuracy.

Click on the **Submit** button at the bottom of the page when finished.

New Hire Information

LIN

800128912

Position

S97580

First Name | Last Name

Jessie | Collins

PageUp Applicant ID

24990496

Offer Letter

171

OFFER LETTER EXAMPLE

You'll then see a Congratulations message and the status will now read **In Progress**. Additionally, an email will be routed to the UserId you selected to enter the index(es) for the job labor distribution.
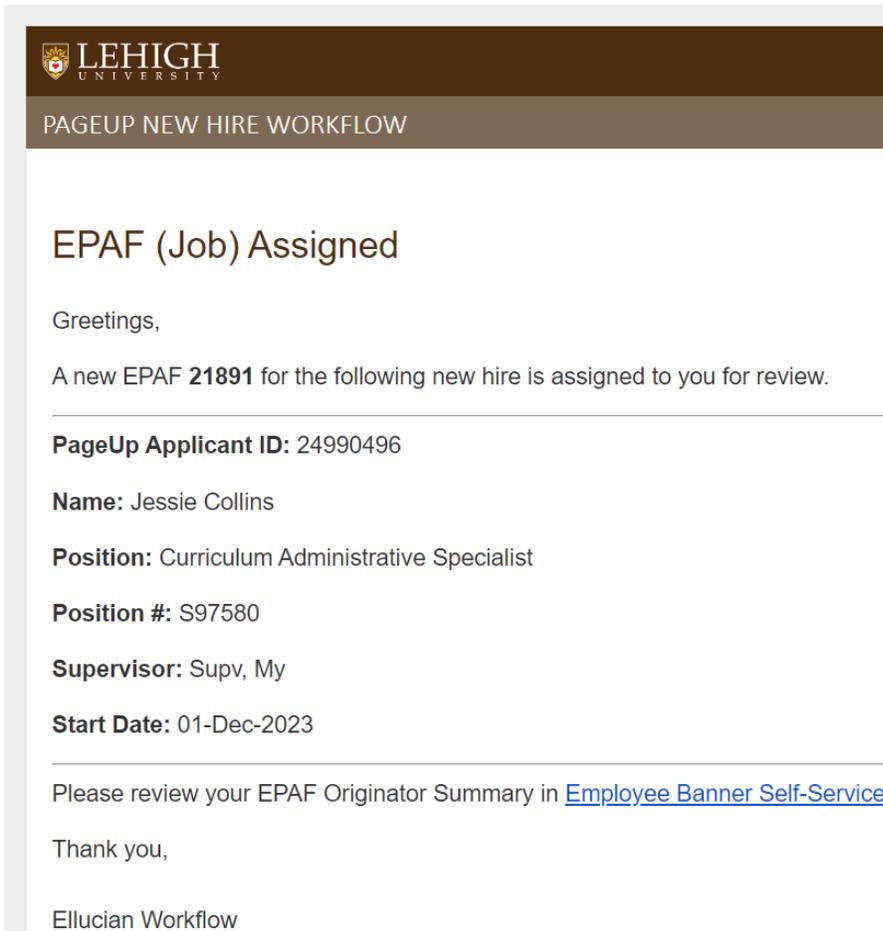
🏖

Congratulations

You don't currently have any tasks assigned to you

Status: In Progress ✕

| Task ⬍	Status ⬍
Add Applicant Personal Email And Offer Letter	🟢 In Progress

Step 5. The EPAF has now been routed to the individual responsible for establishing the valid index(es) for the job labor distribution. Please see an example of the email correspondence below.

Select the **Employee Banner Self-Service** link to open Banner Self-Service.

LEHIGH UNIVERSITY

PAGEUP NEW HIRE WORKFLOW

EPAF (Job) Assigned

Greetings,

A new EPAF **21891** for the following new hire is assigned to you for review.

PageUp Applicant ID: 24990496

Name: Jessie Collins

Position: Curriculum Administrative Specialist

Position #: S97580

Supervisor: Supv, My

Start Date: 01-Dec-2023

Please review your EPAF Originator Summary in Employee Banner Self-Service

Thank you,

Ellucian Workflow

Step 6. After clicking the link, the index approver will be automatically routed to Employee Banner Self-Service. Please select the upper-right box that reads **EPAF Originator Summary.**
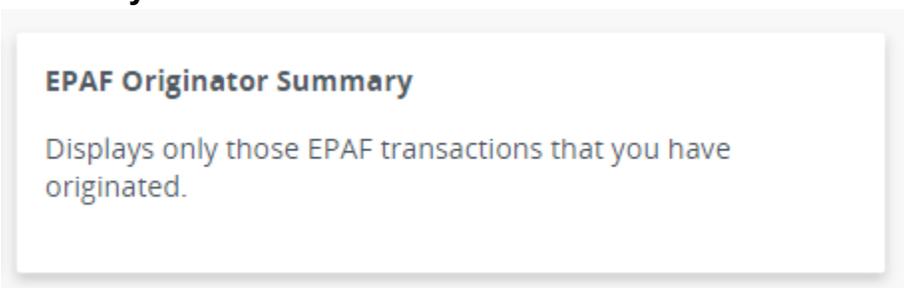
EPAF Originator Summary

Displays only those EPAF transactions that you have originated.

The next page you will see the name of the employee, and under the Transaction column you will click on the **Transaction number.**

EPAF Originator Summary

Current   History

ⓘ Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction

Transactions   Tr

Name	∧	ID	⇕	Transaction	⇕	Type of Change	⇕	Submitted Date	⇕	
Name		GENERATED		: 12345		New Hire Person and Employee				0

This action will route you to the **Details Page**. It is highly recommended to compare the information shown on the Details Page with the Offer Letter for accuracy.

Step 7. Navigate to the **New** section to review the index(es) for the job labor distribution. Please make any necessary changes or corrections, if necessary

If this is an existing position, the index, fund, organization, account and program fields will auto populate with the labor distribution that is already in Banner. You can edit this information or add additional rows if you need more than one index.

New

Effective Date null

11/06/2023	📅

COA		Index		Fund		Organization		Account		Program
P	🔍	424363	🔍	424363	🔍	CBAKFB	🔍	61100	🔍	3900
P	🔍	452754	🔍	452754	🔍	CBAKFB	🔍	61100	🔍	3900
P	🔍	425232	🔍	425232	🔍	CBAKFB	🔍	61100	🔍	3900

⊕ Default from Index   ⊕ Add Row

If you scroll to the right and navigate to the Percent column, the total must equal 100%.

Percent
65.19
20.89
13.92

Step 8. It's now time to select the **Routing Queue Approvers**. Under the Routing Queue, select the next-level approver for the EPAF (20-APPRVR). This approver is typically the Dean, Director or Department Head.

If the Office of Research and Sponsored Programs needs to approve the EPAF, please add their office at disposition 30 (30-ORSP).

Next is an FYI notification for the Budget Office. Please add their office to disposition 40 (40-BUDGET).

If there is a need to add more approvers to the queue, just click the **Add Row** plus sign (+) at the bottom to add more line(s). Also, if a User is not listed in the User Name column, please contact Enterprise Systems for assistance.

Finally, please add the Payroll Department for the Apply function (90-PAYROL). See below for details.

Routing Queue

Approval Level		User Name
20 - (APPRVR) Authorized Approvers	⌄	Not Selected
30 - (ORSP) ORSP	⌄	Not Selected
40 - (BUDGET) Budget Office	⌄	Not Selected
90 - (PAYROL) Payroll Office	⌄	Not Selected

⊕ Add Row

Note: If this is not a research classified staff hire, you **MUST DELETE** the ORSP field entirely. See the trash can icon below.

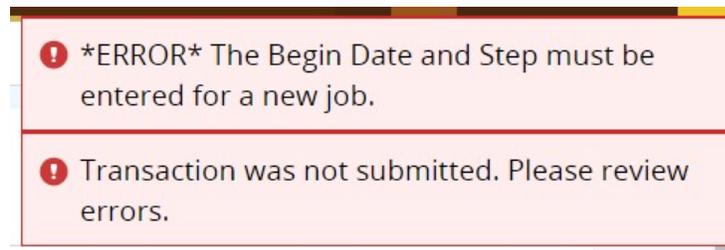| Required Action		Remove
Approve	⌄	
Approve	⌄	🗑
FYI	⌄	
Apply	⌄	

Once complete, *first* select the **Save** button, then select **Submit**.

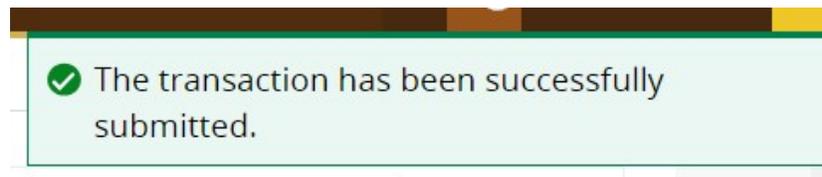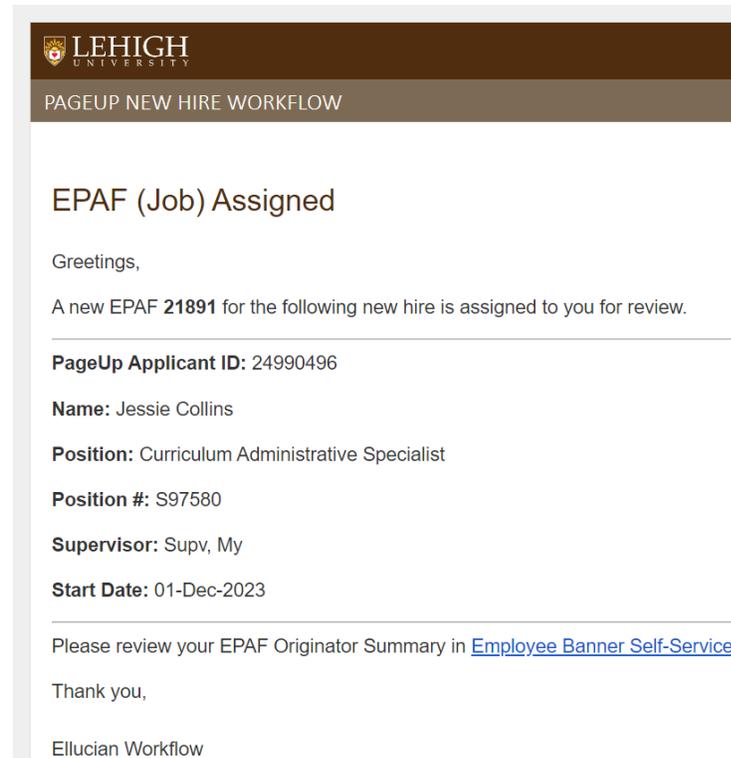| Delete	Save	Submit

New EPAF · EPAF Originator Summary

After selecting **Submit**, you will receive a prompt in the upper right corner to alert you of the status of the EPAF. If you receive an ***error message***, please contact Enterprise Systems for assistance.

> ❗ *ERROR* The Begin Date and Step must be entered for a new job.
>
> ❗ Transaction was not submitted. Please review errors.

Successful notifications should read like this:

> ✅ The transaction has been successfully submitted.

Once this message is received, the next approver (20-APPRVR) will be sent the following email notification:

> **LEHIGH** UNIVERSITY
>
> PAGEUP NEW HIRE WORKFLOW
>
> **EPAF (Job) Assigned**
>
> Greetings,
>
> A new EPAF **21891** for the following new hire is assigned to you for review.
>
> **PageUp Applicant ID:** 24990496
>
> **Name:** Jessie Collins
>
> **Position:** Curriculum Administrative Specialist
>
> **Position #:** S97580
>
> **Supervisor:** Supv, My
>
> **Start Date:** 01-Dec-2023
>
> Please review your EPAF Originator Summary in Employee Banner Self-Service
>
> Thank you,
>
> Ellucian Workflow

Step 9. Next in the queue is the Dean, Director or Department Head approval. This approver will click on the link in the email that reads Employee Banner Self-Service. The link will automatically take them to Self Service.

Select the box in the upper left-hand corner that reads, "EPAF Approver Summary."

EPAF Approver Summary

All EPAFs that you need to currently act upon are displayed in the Current tab. The queue status will be Pending, FYI, or More Information.
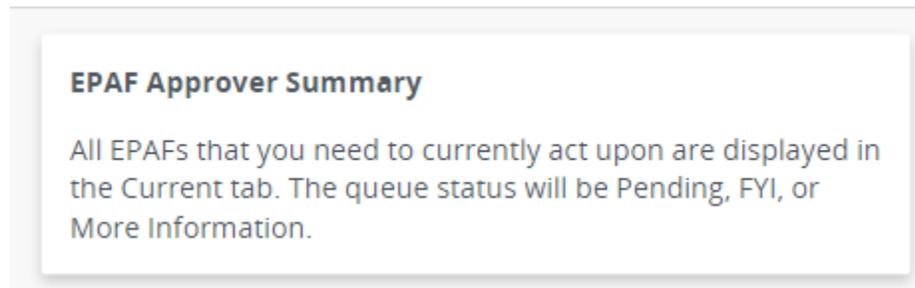
The approver will be shown all EPAFS that are currently available to approve. Select the name of the individual that you want to review and approve.

Transactions

Name		ID
Collins, Jessie Curriculum Admin Specialist, S97580-00		800128912

Please review all pertinent information attributable to this EPAF. Depending on the results, several options are available to the approver at this juncture. Most commonly used actions would be **Approve** or **Return for Correction**. The Approve action will forward the EPAF onto the next level of approvers. If Return for Correction is selected, the EPAF is returned to the Originator for corrective action. The Approver cannot edit the EPAF.

Add Comment	Approve	Disapprove	Return for Correction	More Info
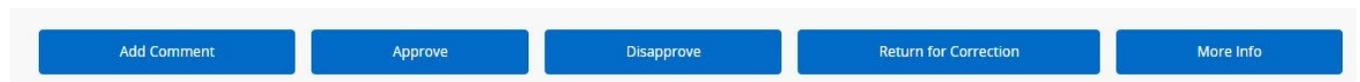
There is another option for approving the EPAF if you don't have the need to review all the pertinent information. After clicking on the "EPAF Approve Summary" box, there is an empty box in the lower right corner that is under the action field. You can check the box and click Save and the EPAF will be routed for further review.

Submitted Date	Effective Date	Required Action	Action	Links
12/12/2023	12/01/2023	Approve	☐	💬

Note: If ORSP is needed for approval, they will be next in the Approval Queue and they will have the same options available to them as above. If ORSP is not required, the EPAF will send an FYI copy to the Budget Office and Payroll will be notified to Apply the EPAF, which is the final step in the transaction process.

Helpful tip: There is a workflow tile on the Connect Lehigh portal that will display any open workflow items that need to be addressed. If you don't already have it added to your dashboard, you can click on the main menu hamburger icon and select Discover. Enter the word "Workflow" in the search field and the tile will be available to add/remove.