

Testing BENEFIT HIRE for OT ELIGIBLE POSITIONS

Selecting the EPAF is the first step. When completing a new hire for a benefit eligible OT position, then follow these steps.

1. Select the icon for generating an ID.
2. Enter the query date that is the date of the new hire. So, for example if the new hire starts on March 3, 2010, then enter 03/03/2010.
3. Select the Approval Category of BENHOR.
4. Select Go.

The screenshot shows a web browser window titled "SunGard Higher Education - Windows Internet Explorer". The address bar contains a URL starting with "http://snap.test.sdbor.edu/". The page header includes the South Dakota Board of Regents logo and the text "PUBLIC UNIVERSITIES & SPECIAL SCHOOLS YOUR FUTURE IS HERE". The main content area is titled "New EPAF Person Selection" and contains the following instructions: "Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go." Below the instructions, there is a legend: "* - indicates a required field." The form fields are: "ID: *" with two input boxes and a magnifying glass icon; "Query Date: MM/DD/YYYY*" with a text box containing "03/02/2010"; and "Approval Category: *" with a dropdown menu showing "Not Selected". A "Go" button is located below the form fields. At the bottom of the page, there are links for "EPAF Approver Summary", "EPAF Originator Summary", and "Return to EPAF Menu". The footer includes the text "RELEASE: 8.3.0.1" and "powered by SUNGARD HIGHER EDUCATION". The browser's status bar at the bottom shows "Error on page." and "Unknown Zone (Mixed)".

Once Go is selected, you will need to select the position that you are recruiting.

1. Enter the position number into Position.
2. Enter the suffix number into the Suffix.
3. Make sure the position title displays.
4. If these steps are missed, you will not be able to proceed to submit upon entering in the form.
This is a critical step.
5. Select Next Approval Type.
6. If you do not know the job number, then you can query All Jobs.

The screenshot shows a web browser window titled "New EPAF Job Selection - Mozilla Firefox". The address bar shows the URL: https://hfrsapp2.sdbor.edu:4444/pls/TEST/bwplepaf.P_ChooseJob. The browser's bookmark bar includes "South Dakota Board of Reg...", "New EPAF Job Selection", and "Oracle Application Server For...".

The application interface features a header with the "SUNGARD HIGHER EDUCATION" logo. Below the header, there are tabs for "Personal Information" and "Employee". A search bar is present with a "Go" button. Navigation links include "RETURN TO EMPLOYEE MENU", "SITE MAP", "HELP", and "EXIT".

The main content area is titled "New EPAF Job Selection" and contains the instruction: "Enter or search for a new position number and enter the suffix, or select the link under Title." Below this, the following information is displayed:

ID: GENERATED
Query Date: Mar 12, 2010
Approval Category: Hiring Process - OTELIQ/HOURLY, BENHOR

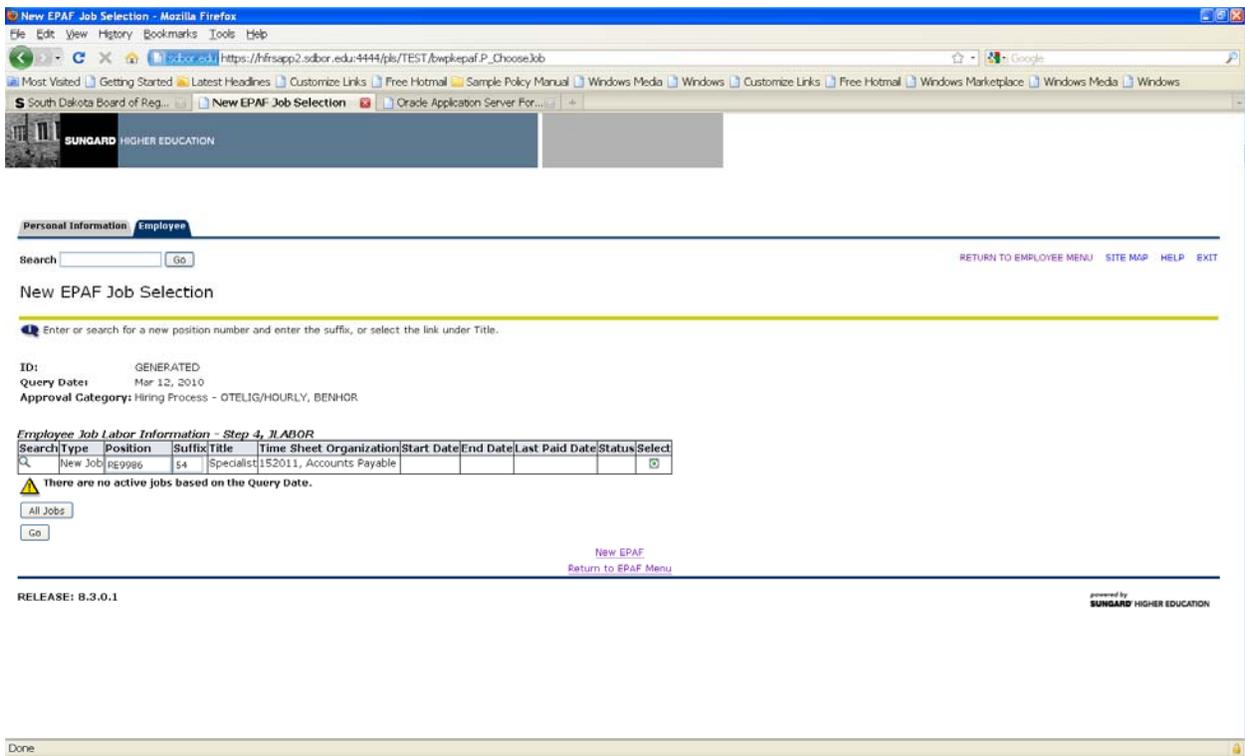
Employee Job Detail Information - Step 3, JOBDTL

Search	Type	Position	Suffix	Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="checkbox"/>	New Job	2E9986	54	Specialist	152011, Accounts Payable						<input type="checkbox"/>

A warning message states: "There are no active jobs based on the Query Date." Below this, there are buttons for "All Jobs" and "Next Approval Type".

At the bottom of the page, there are links for "New EPAF" and "Return to EPAF Menu". The footer includes "RELEASE: B.3.0.1" and "powered by SUNGARD HIGHER EDUCATION".

1. Enter the position number into Position.
2. Enter the suffix number into the Suffix.
 Make sure they match the first action type POSN-SUFF or it will error out.
3. Make sure the position title displays.
4. If these steps are missed, you will not be able to proceed to submit upon entering in the form.
 This is a critical step.
5. Select Go.
6. If you do not know the job number, then you can query All Jobs.



You will want to be sure prior to entering anything in this form that the position and suffix appear in Step 3 and Step 4 or this EPAF will error out.

Electronic Personnel Action Form - Mozilla Firefox
 https://mfrsapp2.sdbor.edu:4444/pls/TEST/fwpkpeaf.P_ChooseJobDriver
 South Dakota Board of Regents
 Transaction: Query Date: Mar 12, 2010
 Transaction Status:
 Approval Category: Benefit Eligible Hiring Process - OT Eligible/Hourly, BENHOR
 Save
 Approval Types | Account Distribution | Routing Queue | Transaction History

General Person Information - Step 1

Item	New Value
First Name:	
Last Name:	
Middle Name:	
Name Type:	Not Selected
ID:	GENERATED
Birth Date: MM/DD/YYYY	
Citizenship:	US, US Citizen
Ethnicity:	WH, White
Sex:	Not Available
SSN/SIN/TIN:	
Address From Date: MM/DD/YYYY	
Address Line 1:	
Address Line 2:	
Address Line 3:	
City:	
State:	SD, South Dakota
ZIP or Postal Code:	
Address Sequence No.:	
Address Type:	IN, Institutional On Campus
County:	Not Selected
Inactive Address:	Not Selected
Telephone Type:	IN, Institutional On Campus
Telephone Seq. No.:	
Area Code:	605
Telephone Number:	

Step 1 General Person Information

1. Enter the legal name of the applicant/employee. This can be found on the employee's SSN card.
 - a. First Name
 - b. Last Name
 - c. Middle Name (only if exists on the employee's SSN card).
2. Leave the Name Type as Not Selected. This will populate in Banner a name type of NULL. This is the appropriate name type to go with the SSN Name.
3. ID will say Generated.
4. Birth Date must be MM/DD/YYYY.
5. Citizenship will auto-populate to US due to the number of US Citizens that are hired. If you have a non-US Citizen, then you need to select from the drop down the correct citizenship based on the Visa or I-9 information.
6. Ethnicity may be populated in YourFuture. You can access YourFuture or you can identify this one by sight. A ethnicity must be selected. Unknown, Not Disclosed cannot be used.
7. SSN number must be populated without dashes. If the SSN is not known due to immigration status, then contact the HR Office to generate a fake SSN number.
8. Address From Date should be populated to match the hire date.
9. Address should be populated according to the Institutional Address. So, enter the Department Address.

10. City should be populated for the city the department address is located.
11. State of SD will auto-populate, however, if you need to select a different state, select from the drop down.
12. Address Sequence must be left Blank (NULL).
13. Address Type is IN. Do not change this as it indicates Institutional Address.
14. Zip Code can be populated from drop down or entered manually. Should match the city for which the department is located.
15. County should be populated from the drop down and should match the City for which the department is located. County in which the employee works.
16. Inactive Address must be loaded as a No. This simply means the address is active.
17. Telephone should be IN.
18. Telephone Sequence must be left Blank (NULL).
19. Area code will auto-default as 605, however, can be changed to match the area code for the location of the office for which the employee works.
20. Telephone number should be the number of the department or the employee and should be ###-####.

The screenshot shows a web browser window with the URL https://hirsapp2.sdbor.edu:4444/pls/TEST/bwpkepaf.P_ChooseJobDriver. The page title is "Electronic Personnel Action Form - Mozilla Firefox".

Employee Information - Step 2

Item	New Value
Employee Class Code:	<input type="text"/>
Employee Status:	Not Selected
Current Hire Date: MM/DD/YYYY	<input type="text"/>
Home COAS:	<input type="text"/>
Home Organization:	<input type="text"/>
Location Code:	Not Selected
District Code:	Not Selected
College Code:	Not Selected

Employee Job Detail Information - Step 3, RE9986-54 Specialist

Item	New Value
Contract Type:	Not selected
Job Begin Date: MM/DD/YYYY	<input type="text"/>
Jobs Effective Date: MM/DD/YYYY	<input type="text"/>
Personnel Date: MM/DD/YYYY	<input type="text"/>
Job Status:	Not Selected
Regular Rate:	<input type="text"/>
Step:	<input type="text"/>
FTE:	1.0
Employer Code:	Not Selected
Job Change Reason:	Not Selected
Supervisor ID:	<input type="text"/>
Supervisor Position:	<input type="text"/>
Supervisor Suffix:	<input type="text"/>
Hours per Day:	8
Hours per Pay:	173.33
Factor:	12

Employee Job Labor Information - Step 4, RE9986-54 Specialist

New

Done

Step 2 Employee Information

21. Employee Class Code must be the class that is associated to the position and can be found on the position posting in Your Future.
22. The Employee Status should be Active for recruitment.

23. Current Hire Date must match the query date and the date of the address. It must be loaded as MM/DD/YYYY.
24. Home COAS is always S.
25. Home Organization can be found in the drop down and is on the posting in Your Future.
26. Location Code must be filled by the Home Employer.
27. District Code must be populated by SDSU, USD and BOR.
28. College Code must be populated with the department the position belongs. This is essential for reporting purposes.

Electronic Personnel Action Form - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Address: https://hirsapp2.sdbor.edu:4444/pls/TEST/awpkpaf_P_ChooseJobDriver

South Dakota Board of Reg... Electronic Personnel Act... Oracle Application Server For...

Employee Information - Step 2

Item	New Value
Employee Class Code:	<input type="text"/>
Employee Status:	Not Selected
Current Hire Date: MM/DD/YYYY	<input type="text"/>
Home COAS:	S
Home Organization:	<input type="text"/>
Location Code:	Not Selected
District Code:	Not Selected
College Code:	Not Selected

Employee Job Detail Information - Step 3, RE9986-54 Specialist

Item	New Value
Contract Type:	Not selected
Job Begin Date: MM/DD/YYYY	<input type="text"/>
Jobs Effective Date: MM/DD/YYYY	<input type="text"/>
Personnel Date: MM/DD/YYYY	<input type="text"/>
Job Status:	Not Selected
Regular Rate:	<input type="text"/>
Step:	<input type="text"/>
FTE:	1.0
Employer Code:	Not Selected
Job Change Reason:	Not Selected
Supervisor ID:	<input type="text"/>
Supervisor Position:	<input type="text"/>
Supervisor Suffix:	<input type="text"/>
Hours per Day:	8
Hours per Pay:	173.33
Factor:	12

Employee Job Labor Information - Step 4, RE9986-54 Specialist

New

Done

Step 3 Job Detail Information

29. Contract Type should be populated for Primary Job, Secondary Job or Overload.
30. Job Begin Date must match the hire date.
31. Jobs Effective Date must match the hire date and the job begin date.
32. Personnel Date can be populated to match what the first day should be. So, if a Leave is selected as the jobs status, then the date could be the first date of Active status as an example.
33. Job Status will be Active if that is the first day of payment, if not, then it can be placed as Leave without Pay with Benefits.
34. Regular Rate must be populated only if STEP is 0 otherwise, leave blank.
35. FTE will auto-populate as 1.0. This can be change and cannot exceed two decimals.
36. Step can be 0 for NFE or for CSA if over the midpoint. CSA should have a step if at or under midpoint.
37. Employer Code must be populated to match the Home Institution.

38. Job Change Reason for a new hire should always be used with one that starts with 'A'.
39. Supervisor's ID must be populated and must match that of NBAPOSN Position.
40. Supervisor's Position must match that of the supervisors on NBAJOBS.
41. Supervisor's Suffix must match that of the supervisors on NBAJOBS.
42. Hours per Day must be populated. Full time would be 8. Prorate for less and cannot be a decimal, must be a whole number.
43. Hours per Pay will auto-default to 173.33 and must match the FTE. This can be changed to a prorated number. Must match ###.## or ##.##.
44. Factor must be populated and is the number contract months for an employee. So, if 9 month contract, then 9. If fulltime, 12 months, then 12.

Electronic Personnel Action Form - Mozilla Firefox

Factor: 12

Employee Job Labor Information - Step 4, RE9986-54 Specialist

New

Effective Date: MM/DD/YYYY 03/12/2010

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
S		110000	152011	611050	06					100.00			
Total:										100.00			

Save and Add New Rows

Routing Queue

Approval Level	User Name	Required Action
75 - (BUDGET) Budget		FYI
105 - (HR) HR Level		Approve
149 - (INFORM) Informational Only		FYI
150 - (SPC) Shared Payroll Center		Apply
Not Selected		Not Selected

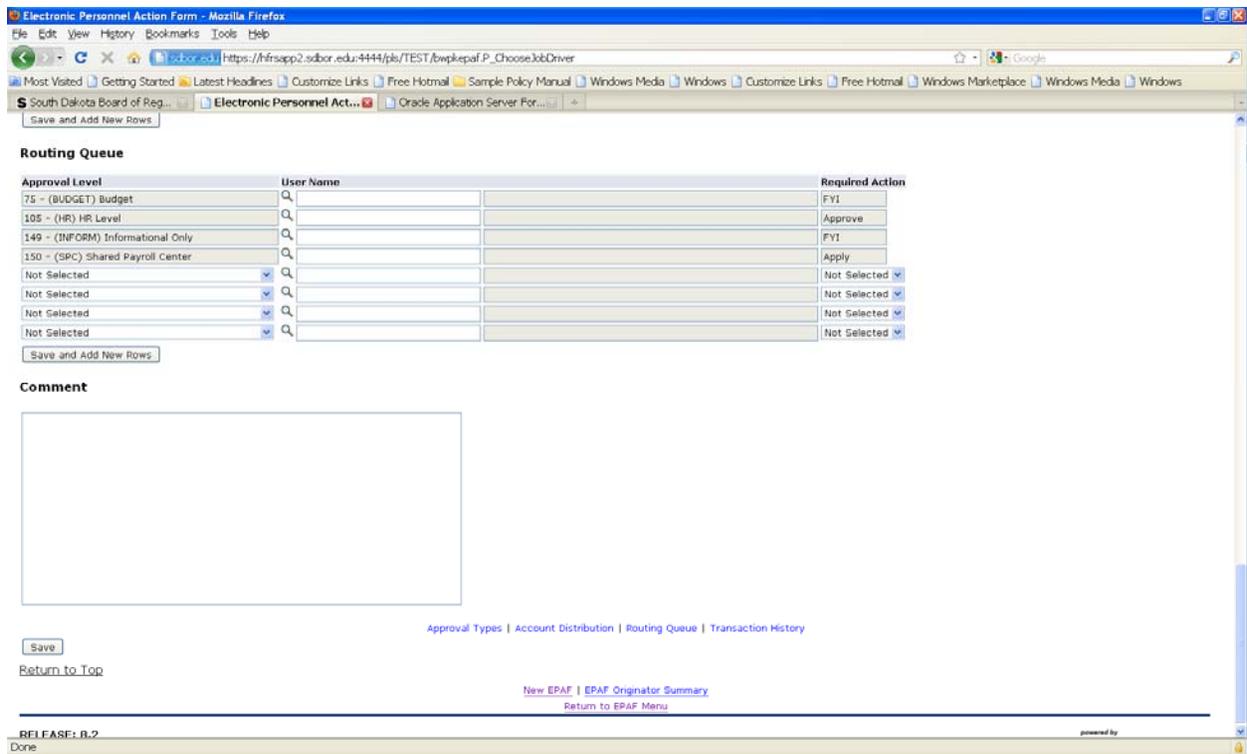
Save and Add New Rows

Comment

Done

Step 4 Job Labor Distributions

45. Enter the FOAPAL if it has changed. The FOAP that defaults is from NBAJOBS – NBAPBUD.

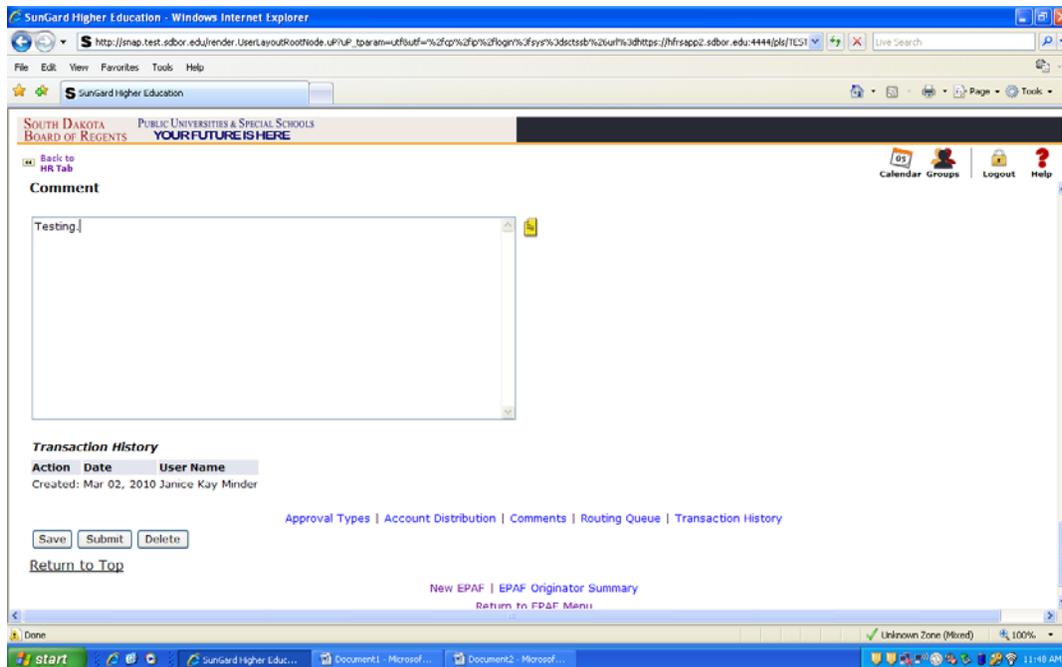
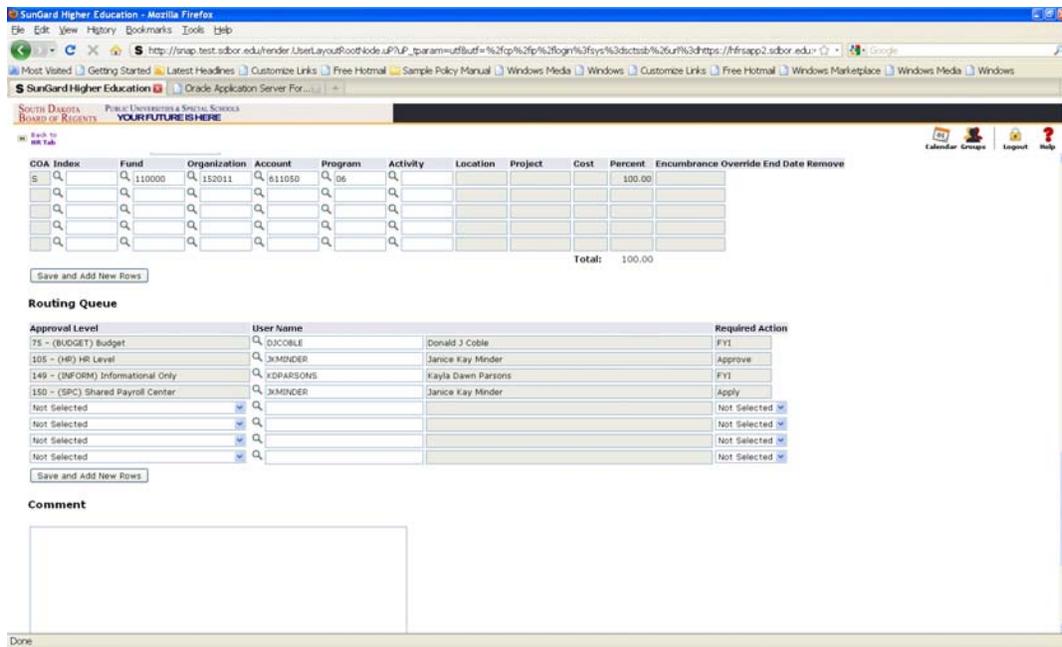


Routing Queue

46. Enter the appropriate routing queue. As these are being tested, they may change.
47. If there is a queue, it must be entered. Currently in test, Budget is FYI, HR is Approve, Information is FYI and SPC is APPLY. At a minimum, these must be populated. Others could be populated if desired. The more you place in, the longer the queue may take.

Comments

48. Enter Comments for the support for hiring. This cannot be discriminatory. Anything that is recorded can be pulled into reports.



49. Once completed, Save.
50. Then Submit.
51. If there are errors, they will be generated at the top.
52. Warnings allow the system to continue.
53. Errors must be corrected.
54. If an error occurs, fix and then submit.

SunGard Higher Education - Windows Internet Explorer

http://snap.test.sdbor.edu/render.UserLayoutRootNode.uP?UP_tparam=uf&utf=%2fcp%2fip%2flogin%3fsys%3dsctsb%26ur%3dhttps://hfrsapp2.sdbor.edu:4444/pls/TEST

File Edit View Favorites Tools Help

SunGard Higher Education

SOUTH DAKOTA BOARD OF REGENTS PUBLIC UNIVERSITIES & SPECIAL SCHOOLS YOUR FUTURE IS HERE

Back to HR Tab

Calendar Groups Logout Help

Personal Information Employee

Search Go

RETURN TO EMPLOYEE MENU SITE MAP HELP

Electronic Personnel Action Form

The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID: Jimmy Lynn Minder, A00106245
Transaction: 18617 **Query Date:** Mar 02, 2010
Transaction Status: Pending
Approval Category: Benefit Eligible Hiring Process - OT Eligible/Hourly, HIRHOR

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

Errors and Warning Messages

Type	Message Type	Description
Hiring Process- OTElig/Hourly	WARNING	*WARNING* Encumbrance has been set to 0, because method is Value Input.
Hiring Process- OTElig/Hourly	WARNING	*WARNING* Encumbrance has been set to 0, because method is Value Input.

Hiring Process- OTElig/Hourly, RE9986-99 Specialist

Error on page.

Unknown Zone (Mixed) 100%

start SunGard Higher Educ... Document1 - Microsof... Document2 - Microsof... 11:48 AM