



INITIATING AN EPAF

To access **Self-Service Banner** you must know your **Banner ID** and **Personal Identification Number (PIN)**.

Please note: The PIN is Case Sensitive. If you enter the incorrect PIN number five consecutive times, you will be locked out of the system and will need to contact the Registrar's Office (students) or the HR Office (employees) to reset your PIN. For more information, please visit www.sus.edu/Bannerlinks

Please enter your **Banner ID** and **PIN**. For first time users the PIN is your 6 digit date of birth (**MMDDYY**). Example: Date of Birth: April 01, 1988 Pin:040188. When finished, select Login.

To protect your privacy, please Exit and close your browser when you are finished.

User ID:

PIN:

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Access Banner

Using Banner 8 or 9

For Banner 8, you will need your U-Number and Pin Number.

For Banner 9, you will need your SUS username and password.

Main Menu

Welcome, Patricia Alexander, to the Southern University Self-Service System! Last web access on Oct 03, 2024 at 03:47 pm

Personal Information

Update addresses, contact information or marital status; review name or social security number change information; Change your PIN; Customize your directory profile.

Student

Apply for Admission, Register, View your academic records, View Account, Pay Your Bill.

Financial Aid

Apply for Financial Aid; View financial aid status and eligibility, accept award offers, and view loan applications.

Employee

Time sheets, time off, leave or job data, paystubs, W2 forms, W4 data.

WebCT.com, The Learning Hub

Find online help, research tools, discussions, and more!

Finance

Create or review financial documents, budget information, approvals.

SU MOODLE Consolidated Environment

Web-based server software platform that offers academic course enhancement, management and communications.

Banner 9 Self-Service Dashboard

Use this link to navigate in the new Banner 9 Self-Service Menus

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From the Main Menu,
select Employee.

Main Menu

Personal Information Student Financial Aid **Employee** Finance

Search Go

Employee

[Time Sheet](#)
[Electronic Personnel Action Forms](#) 
[Benefits and Deductions](#)
Retirement, health, flexible spending, miscellaneous, beneficiary, benefits enrollment, Benefit Summary.
[Pay Information](#)
Direct deposit allocation, earnings and deductions history, or pay stubs.
[Tax Forms](#)
W4 information, W2 Form.
[Leave Balances](#)
[Campus Directory](#)

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From the Employee Page,
select Electronic Personnel
Action Forms.

Employee page

Search

Electronic Personnel Action Form

[EPAF Approver Summary](#)
[EPAF Originator Summary](#)
[New EPAF](#) ←
[EPAF Proxy Records](#)
[Act as a Proxy](#)

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EPAF page

From the Electronic Personnel Action Form page, select New EPAF.

New EPAF Person Selection

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.

* - indicates a required field.

ID: * 

Query Date: MM/DD/YYYY*

Approval Category: *

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)

Person selection

On this screen you will enter the employee's information by entering the employee's U-Number. Click "Enter" and the employee's name will generate next to their U-Number.

New EPAF Person Selection

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.

* - indicates a required field.

ID: * 

Query Date: MM/DD/YYYY*

Approval Category: *

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)

**Person Selection:
Query date**

The Query Date means “Effective Date”. If your new hire effective date is 10/01/2024, then your query date should be the same date.

New EPAF Person Selection

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.

* - indicates a required field.

ID: * 

Query Date: MM/DD/YYYY*

Approval Category: *

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)

Person Selection: Approval category

There are several different “Approval Categories” to use. The next slide lists the most common.

New EPAF Person Selection

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.

* - indicates a required field.

ID: * 

Query Date: MM/DD/YYYY*

Approval Category: *



[EPAF Approver Summary](#) | [EPAF Originator Summary](#)

Please consult with Human Resources if you need assistance in identifying the approval category to be used.

**Most Common:
Approval category**

- HIRE10
- HIRE13
- HIRE20
- HIRE50
- HIRE60
- AJOB50
- AJOB60
- RACT60
- RACT65

New EPAF Job Selection

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

ID: ██████████
Query Date: Oct 03, 2024
Approval Category: Hire FT Monthly Staff, HIRE10

Create a New Job Assignment, JOBS01

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job									<input checked="" type="radio"/>
	Primary	4A9997	00	Adjunct	42620, School of Social Work Office	Mar 01, 2023	Dec 31, 2024	Sep 30, 2024	Active	<input type="radio"/>

All Jobs

Next Approval Type

[New EPAF](#)

[Return to EPAF Menu](#)

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Job Selection

Once the “Approval Category” has been determined, please select “Go.” You will land on the “Job Selection” page and a Position Number is required.

New EPAF Job Selection

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

ID: ██████████
Query Date: Oct 03, 2024
Approval Category: Hire FT Monthly Staff, HIRE10

Create a New Job Assignment, JOBS01

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job	489984	00	Admin Asst 3	42110, Academic Affairs Office					<input checked="" type="radio"/>
	Primary	4A9997	00	Adjunct	42620, School of Social Work Office	Mar 01, 2023	Dec 31, 2024	Sep 30, 2024	Active	<input type="radio"/>

All Jobs

Next Approval Type

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Job Selection: Position Number

The position number relates to the position that the employee is being hired and it is attached to a budget (FOAP).

New EPAF Job Selection

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

ID: [REDACTED]
Query Date: Oct 03, 2024
Approval Category: Hire FT Monthly Staff, HIRE10

Create a New Job Assignment, JOBS01

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job	489984	00	Adm	42110, Academic Affairs Office					<input checked="" type="radio"/>
	Primary	4A9997	00	Adjunct	42620, School of Social Work Office	Mar 01, 2023	Dec 31, 2024	Sep 30, 2024	Active	<input type="radio"/>

All Jobs

Next Approval Type

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Job Selection: Suffix

The suffix denotes if the position is a primary position or secondary/overload position. All primary positions should have the suffix 00.

Electronic Personnel Action Form

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

Name and ID:

Transaction:

Query Date: Oct 03, 2024

Transaction Status:

Approval Category: Hire Full-Time Monthly Staff, HIRE10

Save

Generate EPAF

Once all of the necessary information has been entered, click “enter” An Electronic Personnel Action Form (EPAF) will be generate for you to complete. You will see this information at the top of the page.

Create New Employee Record

Item	Current Value	New Value
Employee Class Code: *	4U, MO Unclassified New Orleans	<input type="text"/>
Employee Status: (Not Enterable)	Active	<input type="text" value="A"/>
Home COAS: *(Not Enterable)	C	<input type="text" value="C"/>
Home Organization: *	42620, School of Social Work Office	<input type="text"/>
Current Hire Date: MM/DD/YYYY*	07/11/2023	<input type="text" value="10/03/2024"/>
Original Hire Date: MM/DD/YYYY(Not Enterable)	08/15/1988	<input type="text"/>
Adjusted Serv. Date: MM/DD/YYYY(Not Enterable)	08/15/1988	<input type="text"/>
First Work Date: MM/DD/YYYY(Not Enterable)	08/15/1988	<input type="text"/>

Create a New Job Assignment, 4B9984-00 Admin Asst 3

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		<input type="text" value="10/03/2024"/>
Jobs Effective Date: MM/DD/YYYY*		<input type="text" value="10/03/2024"/>
Personnel Date: MM/DD/YYYY*		<input type="text"/>
Contract Type: *		<input type="text" value="Primary"/>
Title: *		<input type="text"/>
Hours per Pay: *		<input type="text"/>
Annual Salary: *		<input type="text"/>
Factor: *		<input type="text"/>
Pays: *		<input type="text"/>
Step: *(Not Enterable)		<input type="text" value="0"/>
Job Change Reason: *(Not Enterable)		<input type="text" value="10000"/>

Create New Employee Record

The Initiator will input the hiring information. The Initiator only needs to complete the sections with the red asterisk (*).

Change Job Labor Distribution, 4B9984-00 Admin Asst 3

Current
Effective Date: 10/03/2024
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New
Effective Date: MM/DD/YYYY 10/03/2024

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
Q C		Q 420074	Q 42110	Q 61001	Q 45000	Q	Q			100.00			
Q		Q	Q	Q	Q	Q	Q						
Q		Q	Q	Q	Q	Q	Q						
Q		Q	Q	Q	Q	Q	Q						
Q		Q	Q	Q	Q	Q	Q						
Q		Q	Q	Q	Q	Q	Q						
Total:										100.00			

Job Labor Distribution

The Initiator needs to ensure that the position is charged to the correct budget (FOAP). If it is not, then the FOAP needs to be corrected. The percent that the employee will work from this FOAP must also be listed.

Enter Changes	Current Value	New Value
Jobs Effective Date: *	10/01/2024	09/30/2025
Personnel Date:	10/01/2024	09/30/2025
Job Status: *	Active	Terminated
Job Change Reason: *	10012	10013

End Job Assignment, 4B9984-00 Admin Asst. 3, Last Paid Date: Sept. 30, 2024

End Job Assignment

If position is grant-funded or secondary / overload, you will be required to enter an end date under "End Job Assignment." Most primary positions will not have an end date.

Routing Queue

Approval Level	User Name	Required Action
5 - (HRFYI) Human Resources FYI	<input type="text"/>	FYI
5 - (PAYLL) Payroll FYI	<input type="text"/>	FYI
30 - (HRREVW) HR Review	<input type="text"/>	Approve
40 - (BUDGET) Budget Office	<input type="text"/>	Approve
45 - (FINANC) Finance Approvers	<input type="text"/>	Approve
99 - (APPLY) EPAF Applier	<input type="text"/>	Apply
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

Save and Add New Rows

Routing Queue

The "Routing Queue" must be completed for the EPAF to circulate. In this section, you will add the "User Name" because the "Approval Level" is already listed.

Routing Queue

Approval Level	User Name	Required Action
5 - (HRFYI) Human Resources FYI	<input type="text"/>	FYI
5 - (PAYLL) Payroll FYI	<input type="text"/>	FYI
30 - (HRREVW) HR Review	<input type="text"/>	Approve
40 - (BUDGET) Budget Office	<input type="text"/>	Approve
45 - (FINANC) Finance Approvers	<input type="text"/>	Approve
99 - (APPLY) EPAF Applier	<input type="text"/>	Apply
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

Save and Add New Rows



If you need to add an approver to the “Approval Level,” make sure to update the “Required Action” section.

Routing Queue: Add Approval Level

Comment

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Comments

Your next step is to add Comments. In this section, input information about the position, i.e., the supervisor, purpose of overload/secondary position, effective dates, etc. Click "Save."



Submit

Your EPAF is now completed. Click "Submit". This is where we pray that everything goes through without an error. If there is an error and you cannot fix it, then contact Human Resources for assistance.