

# How To Approve an Electronic Personnel Action Form (EPAF)

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1. Go to Employee Self Service Banner: [https://portal.msutexas.edu:9040/pls/PROD/twbkwbis.P\\_WWWLogin](https://portal.msutexas.edu:9040/pls/PROD/twbkwbis.P_WWWLogin)
2. Enter your User ID (always use a Capital M) and PIN and click the Login button. If you've forgotten your PIN, click on the Forgot PIN button.



Please enter your User Identification Number (ID) and your Personal Identification Number (PIN). When finished, select Login.

Please Note: ID is Case Sensitive

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

User ID:

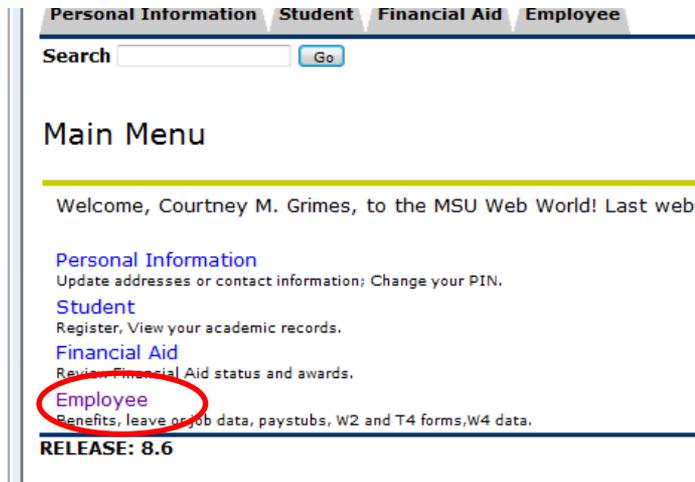
PIN:

Login

Forgot PIN?

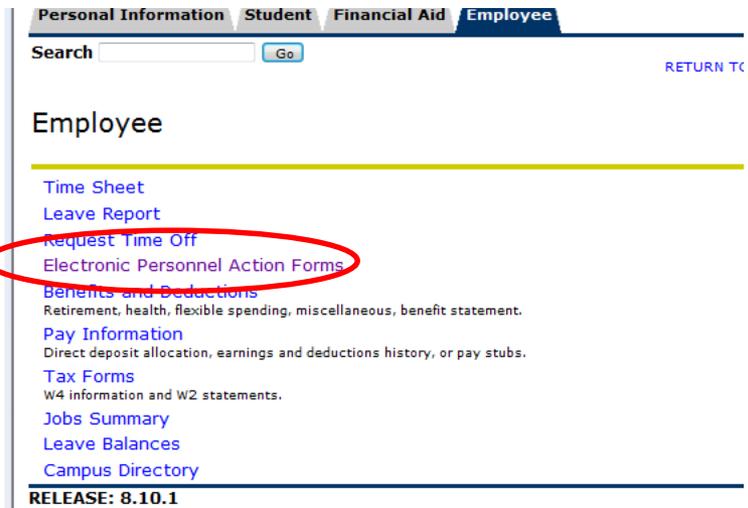
RELEASE: 8.6

3. Once logged in, click on EMPLOYEE.



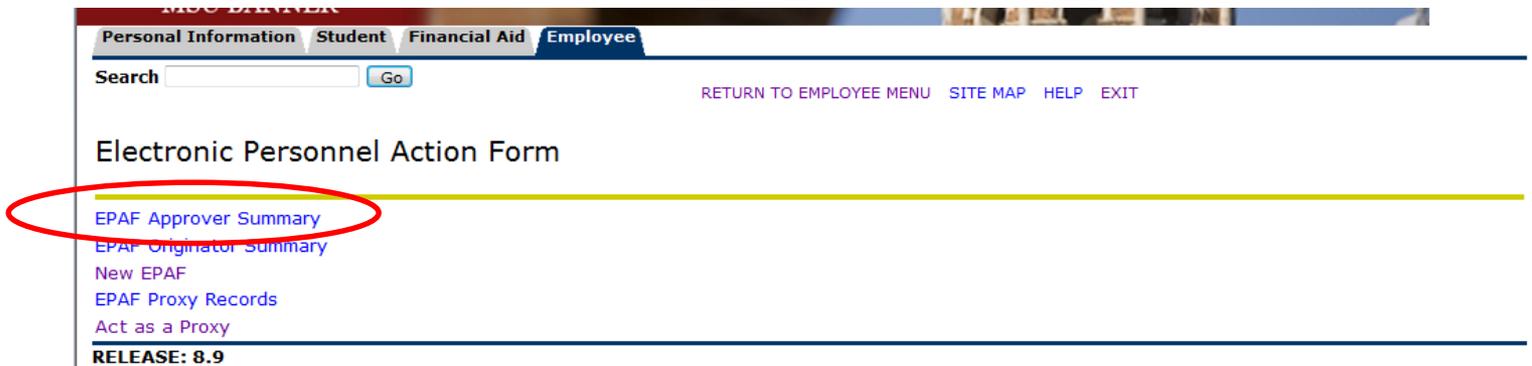
The screenshot shows the MSU Web World main menu. At the top, there are navigation tabs: Personal Information, Student, Financial Aid, and Employee. The Employee tab is highlighted. Below the tabs is a search bar with a 'Go' button. The main menu lists several options: Personal Information, Student, Financial Aid, and Employee. The Employee option is circled in red. Below the menu is a 'RELEASE: 8.6' notice.

4. Once on the Employee tab, Click on Electronic Personnel Action Forms.



The screenshot shows the MSU Web World Employee page. At the top, there are navigation tabs: Personal Information, Student, Financial Aid, and Employee. The Employee tab is highlighted. Below the tabs is a search bar with a 'Go' button and a 'RETURN TO' link. The main content area is titled 'Employee' and lists several options: Time Sheet, Leave Report, Request Time Off, Electronic Personnel Action Forms, Benefits and Deductions, Pay Information, Tax Forms, Jobs Summary, Leave Balances, and Campus Directory. The 'Electronic Personnel Action Forms' option is circled in red. Below the list is a 'RELEASE: 8.10.1' notice.

5. Click on EPAF Approver Summary.



The screenshot shows the MSU Web World Electronic Personnel Action Form page. At the top, there are navigation tabs: Personal Information, Student, Financial Aid, and Employee. The Employee tab is highlighted. Below the tabs is a search bar with a 'Go' button and a 'RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT' link. The main content area is titled 'Electronic Personnel Action Form' and lists several options: EPAF Approver Summary, EPAF Originator Summary, New EPAF, EPAF Proxy Records, and Act as a Proxy. The 'EPAF Approver Summary' option is circled in red. Below the list is a 'RELEASE: 8.9' notice.

- To see EPAF's waiting for action from you, click on the "Current" tab. Click on the employee name of the EPAF you wish to take action on. **If the originator has added comments to justify exceptions or made notes for the approvers to look at, there will be asterisks preceding the word "Comments" under the Links column.**

## EPAF Approver Summary

**Current** In My Queue History

Select the link under Name to access details of the transaction.

Queue Status: All FYI Go

[New EPAF](#) | [Update Proxies](#) | [Search](#) | [Proxy or Superuser](#) or [Filter Transactions](#)

[Return to EPAF Menu](#)

Select All Reset Save

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[Jump to Bottom](#)

### EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
<a href="#">Mouse, Minnie</a> Student Assistant - Life Guard, SC08LG-00	M20212546	494	Hire Student Employee	Jul 07, 2014	Jul 07, 2014	Approve	<input type="checkbox"/>	<b>**Comments</b>



- The EPAF Preview shows the following information:

Employee Name, Job and Suffix, Transaction Number, Transaction Status, Query Date, Last Paid Date, and Approval Category (type of EPAF being submitted). There is also a link to “Add Comment”. Use the “Add Comment” field if you are returning the EPAF to the originator for correction or if you are approving an EPAF on an exception basis (hours, rate of pay, etc).

### EPAF Preview

**Name and ID:** Johnny Doe Smith, M20214642 **Job and Suffix:** SC28SW-00, Student Assistant  
**Transaction:** 81 **Query Date:** Sep 01, 2014  
**Transaction Status:** Pending **Last Paid Date:**  
**Approval Category:** Hire Student Employee, HIREST

[Add Comment](#)

[Approval Types](#) | [Errors](#) | [Posting Queue](#) | [Transaction History](#)

[EPAF Approver Summary](#)

[Return to EPAF Menu](#)

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#### Errors and Warning Messages

Type	Message Type	Description
Hire Hourly Employee	WARNING	*WARNING* Rate for this job is outside the Table/Grade range.
Hire Hourly Employee	WARNING	*WARNING* Encumbrance has been set to 0, because method is Value Input.

\* - indicates a required field.

#### Hire Hourly Employee, SC28SW-00 Student Assistant

Enter Changes	Current Value	New Value
Job Begin Date: *		09/01/2014
Jobs Effective Date: *		09/01/2014
Title: *		\$8.00/SA/DSupport
Regular Rate: *		8.00
Contract Type: *		Secondary
Job Status: *		Active
FTE: *		.5
Hours per Day: *		4
Hours per Pay: *		43.34
Step: *		0
Job Change Reason: *		900

- The Job Begin Date, Job Effective Date, Job Title, Rate of Pay, Contract Type, Job Status, FTE %, Hours per Day, Hours per Pay, Step, and Job Change Reason.
- FOAPAL – Fund/Organization/Account/Program/Activity/Location

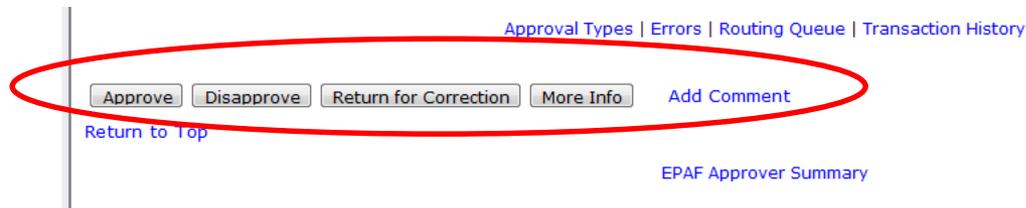
- The Routing Queue and Transaction History.

<b>Routing Queue</b>				
Approval Level	Name	Required Action	Queue Status	Action Date
Department, 10	Courtney Meagan Grimes, CGRIMES	Approve	Pending	
HR Preview, 40	Merlinda R Martinez, MMARTINEZ	Approve	In the Queue	
Payroll, 99	Sandra Sue Krebs, SKREBS	Apply	In the Queue	

<b>Transaction History</b>		
Action	Date	User Name
Created:	Jul 22, 2014	Courtney Meagan Grimes
Submitted:	Jul 22, 2014	Courtney Meagan Grimes

- Actions you can perform: Approve, Disapprove, Return for Correction, More Info, Add Comment. **Please note that Disapprove should never be used by an Approver. If an Approver disapproves the EPAF, the originator is not notified through the EPAF process. Instead the Approver should Return for Correction to the originator with notes in the comment field indicating corrections to be made or request that the originator void the EPAF.**



- Once you have reviewed the EPAF, select the action you wish to perform. The EPAF will then move from your “In My Queue” Tab to your “History” tab. Continue on to next EPAF in your queue.

# Acting As A Proxy

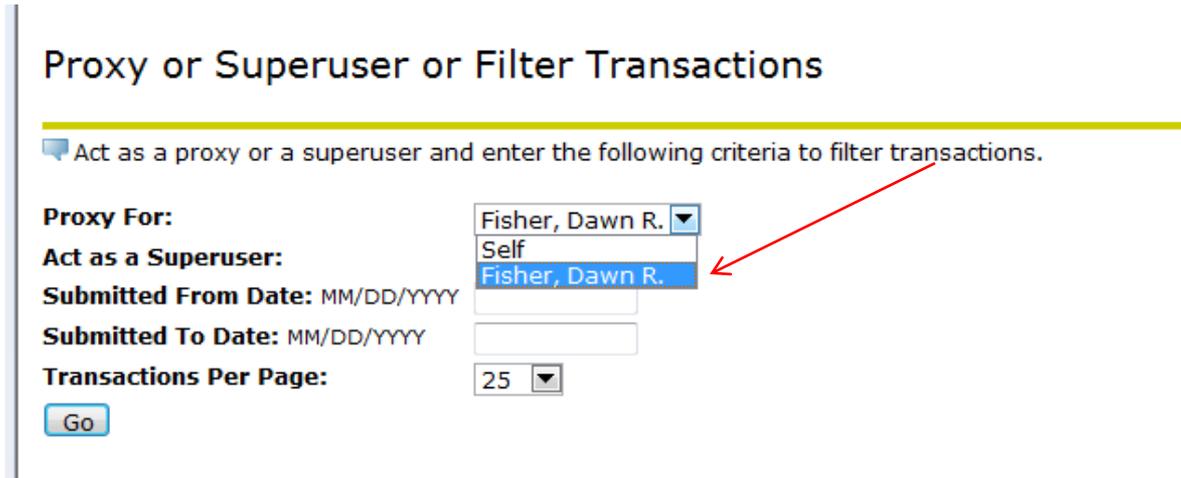
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There will be times when you may have to act as an approver for someone else, also known as “acting as a proxy”. At these times you will log into Self Service and approve/reject as necessary.

- After logging into **Electronic Personnel Action Form** under the **Employee** tab, select **Act as a Proxy**.

The screenshot shows the user interface for the Electronic Personnel Action Form (EPAF). At the top, there is a navigation bar with tabs for 'Personal Information', 'Student', 'Financial Aid', and 'Employee'. The 'Employee' tab is currently selected. Below the navigation bar, there is a search field with a 'Go' button and a link to 'RETURN TO EMPLOYEE MENU'. The main heading is 'Electronic Personnel Action Form'. Below this heading, there is a list of links: 'EPAF Approver Summary', 'EPAF Originator Summary', 'New EPAF', 'EPAF Proxy Records', and 'Act as a Proxy'. The 'Act as a Proxy' link is circled in red. At the bottom of the page, there is a copyright notice: '© 2014 Ellucian Company L.P. and its affiliates.'

- In the drop down menu, select the individual you wish to “**Proxy For**”.



**Proxy or Superuser or Filter Transactions**

Act as a proxy or a superuser and enter the following criteria to filter transactions.

**Proxy For:** Fisher, Dawn R. ▼  
Self  
Fisher, Dawn R. ←

**Act as a Superuser:**

**Submitted From Date:** MM/DD/YYYY

**Submitted To Date:** MM/DD/YYYY

**Transactions Per Page:** 25 ▼

- You can enter the desired date range or if you leave the **Submitted from Date** and **Submitted to Date** dates blank, you will see all EPAF submissions that require this individual’s approval.
- Click **Go**.
- You will now have access to approve, acknowledge, or return EPAFs at the approval level for which you have been designated by the EPAF Approver.



**IMPORTANT: To perform the proxy function:**

1. You must have security access at the levels for which you will approve EPAFs.
2. You must be a designated proxy by the original approver. Please contact Courtney Grimes x4207 in Human Resources for proxy authorization.