Entering EPAFs Web Self Service

– Web Information System for Employees

Users with security to initiate EPAF documents now have the option of either using the Banner HR application or Web Self Service. These instructions focus on the use of the self service application and how to enter EPAFs using WISE. The Cheat Sheets for each approval category still pertain and can be found on the Banner HR web site.

WISE EPAFs can be accessed by EPAF users who have the following security privileges:

- EPAF Originators
- EPAF Approvers

Users can perform the same functionality in Self Service as they would in the Banner HR application (e.g., enter a new EPAF, track and approve EPAFs, and act as a proxy).

Here are the required steps:

1) Log on to the VPN. The VPN is required to ensure data security.

2) Log on to WISE using this link:
   https://wise.unh.edu/
   or by selecting the button in the left hand column of the USNH HR Banner page found at this link:
   http://www.usnh.edu/banner/

First Time WISE Users
- Contact the CIS Dispatch Center at 603.862.4242 to activate your WISE account.
- The first time you log onto WISE you will be instructed to enter your USER ID (9 digit number – USNH ID) and a PIN. Your initial PIN is your date of birth in MMDDYY format. You will then be immediately prompted to change your PIN. Please note that PINs are case-sensitive, must be exactly 6 characters, and may include letters, numbers, and punctuation.

All Other Users
- From the screen select the button

LOGIN HERE
• Enter your User ID
• Enter your PIN

3) Once you have successfully logged on, please select the Employee Services cabinet button

**Employee Services**

Benefits, Leave balances, Job data, Paystubs, W2 and W4 data.

4) Click on the Blue Ball for **Electronic Personnel Action Forms [EPAF]**

5) Choose one of these options:

**A) EPAF Approver Summary**

- **Current** - Lists EPAFs pending your action.
  - Select the Queue Status and click on the **Go** button
  - Select the employee name to access the EPAF
  - Choose the desired action...

- **In My Queue** - Lists EPAFs which will eventually require your action.
  - Select the employee name to access the EPAF
  - Choose the desired action...

- **History** - Lists EPAFs you have already processed.
  - Select the Queue Status and click on the **Go** button
  - Select the employee name to access the EPAF
  - Choose the desired action...

**B) EPAF Originator Summary**

- **Current** - Lists EPAFs with a status of *Waiting or Return for Correction*
  - Select the Queue Status and click on the **Go** button
  - Select the employee name to access the EPAF
  - Choose the desired action...

- **History** - Lists EPAFs with a status of *Pending, Approved and Complete, Voided, Canceled and Disapproved.*
  - Select the Queue Status and click on the **Go** button
  - Select the employee name to access the EPAF
C) Other Links

- **New EPAF** – Enter a new EPAF
- **Default Routing Queue** – Manage default routing for EPAF approval categories
- **Search** – Search for EPAF Transactions by Name, ID or Transaction Number
- **Proxy or Superuser or Filter Transactions** – Act as proxy and/or access a set of EPAF transactions based on their dates of submission to a routing queue.

The steps to be followed for entering a New EPAF are more streamlined than if an EPAF is entered in the Banner application and follow the existing cheat sheets for each approval category. The steps to follow for the employee ID are significant enough to repeat here:

- Enter the employee ID
  - If you know the ID just type it in
  - If you don’t know the ID click on the spyglass
  - Check this field to limit your search to employees:
    - **Employee**: ✓
  - ENTER one or more of the following or a combination of all of them.
    1. Last Name:
    2. First Time:
    3. ID:
    4. SSN/SIN/TIN

Note: You are allowed to use the % wild card.
For example: **Last Name:** JOH% would find all employees with a last name that begins with JOHN

- Click on the **GO** button
- Click on the ID desired

Now you can proceed to fill in the rest of the document:

- Enter the Query Date (MM/DD/YYYY format)
- Enter the Approval Category or use the ✓ to get a dropdown menu to select the EPAF you desire
- Click on the **GO** button.
- Enter the Position
- Enter the Suffix
- Click on the **Create** button.
- Enter the field information for this EPAF type
• Click on the **Save and Add New Rows** button.
• If errors exist you will need to correct and save again.
• If no errors exist the **Save Submit Delete** button will appear.
• Select the **Submit** button.
• If you only have warnings after submitting, you will be allowed to select the **Complete Submit** button and the EPAF should move to the pending status.
• If you have errors after submitting you will need to make the corrections, save and submit again.

6) **Things to remember:**

* Enter Position Numbers, Fund, Orgn [Timesheet Orgn and Distribution Orgn] and Account information in UPPERCASE.

* Enter dates as MM/DD/YYYY.

* As you continue from one section to the next you will encounter buttons that look like this:

  ![Save and Add New Rows](image)

  Be sure to click on these buttons before continuing on to the next section.

* At this time the Distribution Orgn [XUNHPM, XUNHCM, XUNHCK] must be entered manually. These Orgn codes currently do not display on the list. We’re exploring options for resolving this issue.

* If you encounter a Page Not Found error message, click on the browsers back button at the top of your screen and try the link again.

* Remember – DO NOT USE **Cancel Transaction**
Frequently Asked Questions (FAQ):

Can I start an EPAF in the application and finish it in WISE?
Yes – WISE and the Banner HR application can be used interchangeably.

Why do I have to use the VPN?
Using the VPN moves your work behind the Banner firewall and offers a second level of security.

Will I have to use the VPN if I am accessing WISE as an employee?
No – The only time you will need to use the VPN is when you are working with EPAF entry and approvals.

Why are only a limited number of appointment categories displayed on the drop down menu?
We have customized appointment categories by campus. If you do not see the EPAF you want to use, please call STHRs.