ELECTRONIC PERSONNEL ACTION FORM (EPAF)
APPROVER PROCEDURES
Banner Human Resources Self Service
EPAF Approver Procedures

• In the Banner application, the EPAF replaces the Assignment Authorization (AA). Human Resources will initiate EPAFs for all approved Personnel Transaction requests.

• Department Administrators will be solely responsible for initiating EPAFs for Labor Distribution Changes.
EPAF Approver Procedures

• The purpose of this presentation is to instruct all Approvers on how to approve an Electronic Personnel Action Form (EPAF) for various Personnel changes.

• The EPAF will be routed to the required Approvers by the Originator.

• Once all Approvers have “signed off” on the form, the changes are applied to the Banner database by Human Resources.
EPAF Approver Procedures

• Each time an EPAF is routed to you for approval, you will receive an Email notifying you that there is an EPAF awaiting your approval.

• The Email will contain instructions on how to access the EPAF along with a link.
EPAF Approver Procedures

Timing of approvals is extremely important!

• It is your responsibility to make sure the EPAF is approved in a timely fashion. EPAF effective dates cannot be prior to the first day of the current pay period – so if it is not applied to the system by HR prior to the close of payroll, the EPAF will be returned to the Originator for submission in the next payroll.
  – The Originator will then need to resubmit the EPAF with a new effective date and reroute for approval.
  – This will also require a Labor Redistribution to correct the payroll that was missed.

• The EPAF deadline is Tuesday of Payroll week.
EPAF Approver Procedures

• To view the EPAFs routed to you for approval, you will need to sign in through the new Luminis Portal at https://cap.uchc.edu.

• You may sign in to the portal using the same Username and Password that you use to log in to your computer each day.
EPAF Approver Procedures

Welcome to the UConn Health Center Administrative Portal

This secure site provides access to a number of administrative systems. This is where you can view financial related information, enter and/or approve purchase requests, update position information, enter travel requests, etc.

This site allows for single sign-on access to Banner FI and Banner HR systems, as well as Banner Self Service.

This portal includes access to the following:

- Banner FI
- Banner HR
- Personnel Action Notices
- Self Service Banner (Labor Redistribution, Employment Details, etc)
- Travel & Expense
- HuskyBuy
- HuskyBid
- TM1 Budget System
- Research Store
- Kronos
- SABA
EPAF Approver Procedures

• Once inside the portal, you will click on the link entitled **Self Service Banner** within the **Banner Links** Channel.
EPAF Approver Procedures

- Click on the ‘Employee’ tab.
- Click on the link for Electronic Personnel Action Forms.
EPAF Approver Procedures

• Once within the EPAF Menu, an Approver can view all EPAFs awaiting their approval by navigating to the **EPAF Approver Summary**.
EPAF Approver Procedures

• All EPAFs awaiting your approval will be listed on the ‘Current’ tab on the EPAF Approver Summary.
• EPAFs that are scheduled to be sent to you after another user’s approval are listed on the ‘In My Queue’ tab.
• EPAFs approved by you in the past will be listed on the ‘History’ tab.
• You will then click on the name of the employee to access the desired EPAF.
EPAF Approver Procedures

EPAF Approver Summary

Queue Status: All Pending

1 - 1 of 1

**Comments Exist**

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Transaction</th>
<th>Type of Change</th>
<th>Submitted Date</th>
<th>Effective Date</th>
<th>Required Action</th>
<th>Action Links</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nash, Patricia</td>
<td>800013644</td>
<td>1301</td>
<td>Labor Change</td>
<td>May 23, 2011</td>
<td>May 23, 2011</td>
<td>Approve</td>
<td><strong>Comments</strong></td>
</tr>
</tbody>
</table>

Banner Human Resources
Employee Job Information

- The Approver should review all of the information contained on the EPAF. The EPAF has a column for **Current** Information and a column for **New** Information.

- Please note: it is the Approver’s responsibility to insure that all information is correct on the EPAF before clicking on the “Approve” button.
**Funding**

The funding area looks different, but also has a **Current** and **New** section to display values.

### Current

Effective Date: 07/01/2010

<table>
<thead>
<tr>
<th>COA Index</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Project</th>
<th>Cost</th>
<th>Percent</th>
<th>Encumbrance</th>
<th>Override</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>U</td>
<td>210098</td>
<td>121210</td>
<td>6101</td>
<td>70</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### New

Effective Date: 06/08/2011

<table>
<thead>
<tr>
<th>COA Index</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Project</th>
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</tbody>
</table>
Default Hours
The Default Hours area also looks different, and should reflect the desired standard work hours for Salaried employees – and will be reflected under a table labeled: **New**.

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Earnings</th>
<th>Hours or Units Per Pay</th>
<th>Deemed Hours</th>
<th>Special Rate</th>
<th>Shift</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/13/2010</td>
<td>010, Base Earnings</td>
<td>80.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Approving an EPAF

Once you have verified all information, you can then choose one of the four buttons below:
• “Approve” will attach the Approver’s online signature and automatically forward the EPAF to the next approver level.
• “Disapprove” will cancel the EPAF.
• “Return for Correction” will return the EPAF to the Originator who will need to either make a correction and reroute the EPAF or Void it.
• “More Info” puts the EPAF on hold until the Approver has received enough information to sign off.

Note: When Disapproving or Returning an EPAF, please go to the Add Comment link and write a reason for the disapproval or return in the Comment section. The Originator will see this comment.
EPAF Approver Procedures

- Once you have clicked on one of the four buttons, you can verify that the action was completed at the top of the EPAF.
EPAF Approver Procedures

- The Routing Queue and the Transaction History may be viewed at the bottom of each EPAF.
There is currently no print version of the EPAF. If a paper copy is needed, you may use the print screen function in the browser.
EPAF Approver Procedures

• You may now return to the EPAF Approver Summary to approve additional EPAFs or close the application. This can be done using the link at the bottom of the EPAF.
EPAF Approver Contacts

• For questions specific to the EPAF system, or for technical difficulties, please contact Sandy Leba at extension 4579.

Human Resources Records Unit

• This unit is responsible for the auditing and processing of all requests for personnel action in accordance with state, federal and Health Center regulations.
EPAF Approver Contacts

- Please contact the Records staff for all other questions you may have. Specific employee inquiries should be addressed to the person responsible for that processing area. The workload is broken down by the employee’s last name.

- Records Manager: Liz Fay, 679-7573
- Records Coord (T-Z & PTR): Cathy Guidotti, 679-4663
- Records Analyst (A-C): Kristen Gauvin, 679-3492
- Records Analyst (D-J): Amy Lawson, 679-4368
- Records Analyst (K-N): Lauren McLean, 679-4694
- Records Analyst (O-S): Carrie Proctor, 679-2049