ELECTRONIC PERSONNEL ACTION FORM (EPAF)
Banner Human Resources Self Service

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Purpose

To create an Electronic Personnel Action Form (EPAF) for Labor Code Changes. The EPAF will be routed to the required approvers. Once all approvers have processed the form, the changes are applied to the Banner database.

Access EPAF

Access Employee Self Service – Employee Tab - Electronic Personnel Action Form

Search [Go]

Employee

Time Sheet
Leave Report
Request Time Off
Electronic Personnel Action Forms

Create New EPAF

To Initiate a new EPAF – select “New EPAF”
Search for Employee

Enter the Banner ID or use the magnifying glass to search for an Employee by name.

New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate a new ID.

* - indicates a required field.

**ID:** [ ] [ ]

**Query Date:** [ ] [ ] [ ] [ ] [ ]

**Approval Category:** [ ] [ ]

After you click on the magnifying glass enter the search criteria shown below. If the action is for an existing employee, click the “Employee” box to limit the search.
Select ID

Select the ID from the List next to the name.

Person Search Results

To choose a person, select a link under ID.

<table>
<thead>
<tr>
<th>ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>B00013644</td>
<td>Nash</td>
<td>Patricia</td>
<td></td>
</tr>
</tbody>
</table>

1 - 1 of 1

Query Date and Approval Category

The name and ID will populate.
The query date will default to today’s date. Change to the effective date of the Labor Coding Change. Select Labor Change from the Approval Category Drop Down and select “Go”.

Select Position

Select the correct Position/Suffix by selecting the radial dial at the end of the row and hit ‘Go’.

New EPAF Job Selection

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

<table>
<thead>
<tr>
<th>Search Type</th>
<th>Position</th>
<th>Suffix</th>
<th>Title</th>
<th>Time Sheet Organization</th>
<th>Start Date</th>
<th>End Date</th>
<th>Last Paid Date</th>
<th>Status</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Job</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary</td>
<td>C50270</td>
<td>00</td>
<td>HRIS Administrator</td>
<td>10160, Human Resources Admin</td>
<td>Feb 25, 2011</td>
<td>Mar 10, 2011</td>
<td></td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>

All Jobs

Go
Change Labor Distribution

In the “CURRENT” section – the current labor codes and the effective date of the last change will default into the form if you have ORGN/Department access.

In the “NEW” section - add new rows or make changes to the existing rows. Enter the INDEX codes and the percentages for each row.

If you are deleting a row, enter a zero on the ‘Percent’ field.

Click “Save and add New Rows

Enter in the Account Code “61001” for each row and ‘Save’ again.

Rows must total to 100%.

Delete a Row

To delete a row, after changing the ‘Percent’ field to zero and completing the previous step) click on the ‘Remove’ box and ‘Save’.

[Table showing labor distribution changes]
Routing Queue

In the “Routing Queue” section, enter a User Name for each level of approver. Additional approver levels may be added with a ‘Required Action’ of ‘Approve’ or ‘FYI’ only.

Click on the “Save and Add New Rows”.

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 - (APRVR) Approver Level</td>
<td></td>
<td>Approve</td>
</tr>
<tr>
<td>40 - (BDGNT) Budget and Grants Approve</td>
<td></td>
<td>Approve</td>
</tr>
<tr>
<td>90 - (SUPER) Supervisor</td>
<td></td>
<td>Apply</td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
<td>Not Selected</td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
<td>Not Selected</td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
<td>Not Selected</td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
<td>Not Selected</td>
</tr>
</tbody>
</table>

Save and Add New Rows

Comments

In the “Comments” section, enter comments for the approvers with an explanation for the action.
Hit the “Save: Button at the Bottom of the form.
Return to the top of the form.
You should see the message – “Your change was saved successfully.”
Check your data entry.

Electronic Personnel Action Form

☐ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

Name and ID: Patricia Nash, B00013644  Job and Suffix: C50270-00, HRIS Administrator
Transaction: 01  Query Date: May 10, 2011
Transaction Status: Waiting  Last Paid Date: Mar 10, 2011
Approval Category: Labor Change, LABOR

Submit EPAF

Hit the “Submit” button. If Errors occur, fix the errors, Save and Re-submit.
The EPAF automatically routes to the approvers in the order of their approver levels.

Routing Queue Status and Transaction History

The Routing Queue and the Transaction History may be viewed at the bottom of each EPAF you have initiated. Hit the “Submit” button.
Originator Summary

You may also navigate to any of EPAF you initiated by clicking the EPAF Originator Summary

Electronic Personnel Action Form

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

EPAFs currently on your work list will appear on the Current Tab
EPAF’s submitted for Approval will appear in History – to view, click on the “History” Tab
Then click on the link to the EPAF you want to view.
Return for Correction

Once you select an EPAF you may ‘Return for Correction’, ‘Void’ and ‘Add a Comment’. The ‘Return for Correction’ will pull the EPAF back out of the approval queue (as long as it has not been applied by HR) and changes can be made, and re-submitted to the approvers. The EPAF will re-route to all approvers in order of their approver level.

Transaction: 781
Transaction Status: Pending
Query Date: Apr 25, 2011
Approval Category: Salaried EPAF, SEPAF
Last Paid Date:

Return for Correction  Void  Add Comment

Default Routing Queue

You may set up your own default routing queue.

Click on the Default Routing Queue at the bottom of the Originator Summary Page.
Enter the Approver Level, User Name, and Required Action you want to default into your Labor Change EPAF.

Hit the “Save and Add New Rows”

Note: You may enter one for each level or only some levels. These values will default into all your EPAFs. You may override any of these defaults on the individual EPAF.