

UConn HEALTH

ELECTRONIC PERSONNEL ACTION FORM (EPAF)

Banner Human Resources Self Service



Prepared: May, 2011

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BANNER - EPAF – Labor Distribution Changes

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

[Personal Information](#) **Employee** [WebTailor Administration](#)

Search

Employee

[Time Sheet](#)
[Leave Report](#)
[Request Time Off](#)
[Electronic Personnel Action Forms](#)

Create New EPAF

To Initiate a new EPAF – select “New EPAF”

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[Personal Information](#) **Employee** [WebTailor Administration](#)

Search


Electronic Personnel Action Form

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

* - indicates a required field.

ID: *

Query Date: MM/DD/YYYY *

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.

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Search Criteria

Employee:

Last Name:

First Name:

Or

ID:

Or


SSN/SIN/TIN:

Records per Page: 25

Select ID

Select the ID from the List next to the name.

Person Search Results

 To choose a person, select a link under ID.

 ID	 Last Name	 First Name	Middle Name
 B00013644	Nash	Patricia	

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".

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* - indicates a required field.

ID: *  

Query Date: MM/DD/YYYY *


Approval Category: * 

E

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.

ID: Patricia Nash, B00013644
Query Date: May 10, 2011
Approval Category: Labor Distribution Change, LABOR

Labor Change, LABOR

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	<input type="text"/>	<input type="text"/>							<input type="radio"/>
	Primary	C50270	00	HRIS Administrator	60160, Human Resources Adm	Feb 25, 2011		Mar 10, 2011	Active	<input checked="" type="radio"/>

BANNER - EPAF – Labor Distribution Changes

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%.

Labor Change, C50270-00 HRIS Administrator, Last Paid Date: Mar 10, 2011

Current

Effective Date: 05/06/2011

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
U	210064	122501	61121	61001	40					25.00			
U	210098	121210	60160	61001	70					75.00			

New

Effective Date: MM/DD/YYYY 05/10/2011

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
U	210064	122501	61121	61001	40					25.00			
U	210098	121210	60160	61001	70					75.00			
										Total:	100.00		

Defaulting values for Labor Distribution from the Job records.

Save and Add New Rows

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'.

New

Effective Date: MM/DD/YYYY 05/17/2011

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date	Remove
U	210064	122501	61121	61001	40					.00				<input type="checkbox"/>
U	210098	121210	60160	61001	70					100.00				<input type="checkbox"/>
										Total:	100.00			

Save and Add New Rows

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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".

Routing Queue

Approval Level	User Name	Required Action
30 - (APPRVR) Approver Level	<input type="text"/>	Approve
40 - (BDGRNT) Budget and Grants Approver	<input type="text"/>	Approve
99 - (SUPER) Superuser	<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

Comments

In the "Comments" section, enter comments for the approvers with an explanation for the action.


Comment

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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: 81 **Query Date:** May 10, 2011

Transaction Status: Waiting **Last Paid Date:** Mar 10, 2011

Approval Category: Labor Change, LABOR

Save

Submit

Delete

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.

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Routing Queue

Approval Level	Name	Required Action	Queue Status	Action Date
HR Audit, 20	Sandra L. Leba, LEBA	Approve	Approved	May 09, 2011 01:45:07 PM
Approver Level, 30	Lawrence G. Pittman, PITTMAN	Approve	Approved	May 09, 2011 01:52:53 PM
Superuser, 99	Patricia Nash, NASH	Apply	Applied	May 09, 2011 01:54:00 PM

Transaction History

Action	Date	User Name
Created	May 09, 2011	Patricia Nash
Submitted	May 09, 2011	Patricia Nash
Applied	May 09, 2011	Patricia Nash

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.

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EPAF Originator Summary

Current History

Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

Transaction Status:

[New EPAF](#) | [Default Routing Queue](#) | [Search](#) | [Superuser or Filter Transactions](#)

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EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Nash, Patricia HRIS Administrator, C50270-00	B00013644	63	Salaried EPAF	May 09, 2011	Mar 11, 2011	Completed	Warnings
Nash, Patricia HRIS Administrator, C50270-00	B00013644	62	Salaried EPAF	May 09, 2011	Mar 11, 2011	Completed	Warnings
Nash, Patricia HRIS Administrator, C50270-00	B00013644	61	Labor Change	May 09, 2011	May 06, 2011	Completed	
Nash, Patricia HRIS Administrator, C50270-00	B00013644	22	Labor Change	May 05, 2011	May 06, 2011	Completed	**Comments
Williams, Katherine Nurse Aide, 067683-00	B00020792	1	Hourly EPAF	May 05, 2011	Apr 08, 2011	Completed	Warnings

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

Query Date: Apr 25, 2011

Transaction Status: Pending

Last Paid Date:

Approval Category: Salaried EPAF, SEPAF

[Previous](#) [Next](#)

[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.

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[New EPAF](#) | [Default Routing Queue](#) | [Search](#) | [Superuser or Filter Transactions](#)
[Return to EPAF Menu](#)

EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category:

Approval Queue

Approval Level	User Name	Required Action
<input type="text" value="Not Selected"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="Not Selected"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="Not Selected"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="Not Selected"/>	<input type="text"/>	<input type="text" value="Not Selected"/>

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.