ELECTRONIC PERSONNEL ACTION FORM (EPAF) FOR DEPARTMENT CHANGES

Banner Human Resources Self Service

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Purpose

To create an Electronic Personnel Action Form (EPAF) for Department Changes. In Banner, the terms ‘Department’ and ‘Organization’ are used interchangeably to reflect the reporting relationship and the area where an employee’s job is assigned. This Department information is stored in two places, the ‘Home Organization’, and ‘Timesheet Orgn’, which are separate from the funding information which determines where the employee’s salary will be charged. If the funding is also changing, a separate ‘Labor Change’ EPAF will need to be completed as well. Once submitted, the EPAF will be routed to the required approvers and after all approvers have processed the form, the changes are applied to the Banner database.

Access EPAF

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

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.

* indicates a required field.

ID: *

Query Date: MM/DD/YYYY *

05/10/2011

Approval Category: *

Not Selected

Go

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.
**Search Criteria**
Employee:  
Last Name:  
First Name:  
Or

**ID:**  
Or

**SSN/SIN/TIN:**  
Records per Page: 25

Go

**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>

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**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 Department Change. Select ‘Assigned Department Change, DEPT’ 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’.

Change Department Information

In the ‘Current Value’ section – the current Department Code will be reflected under ‘Home Organization’ and ‘Timesheet Orgn’. Both values will need to be updated to ensure that the employee’s assigned department is reflected correctly. Please note, these values should always be the same.

In the ‘New Value’ section – enter the new Department (Org) Code value.

The ‘Job Change Reason’ code will default in as DTDEP and cannot be edited.

Verify that the ‘Jobs Effective Date’ and ‘Personnel Date’ have defaulted in correctly or have been adjusted to reflect the correct effective date of the change.

Update the ‘Timesheet Orgn’ field as well with the new Department Code value.
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”.

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” and a transaction number will be assigned to the EPAF.
Check your data entry.

Electronic Personnel Action Form

☐ Your change was saved successfully.

ℹ 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

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.

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>Name</th>
<th>Required Action</th>
<th>Queue Status</th>
<th>Action Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Audit, 20</td>
<td>Sandra L. Leba, LEBA</td>
<td>Approve</td>
<td>Approved</td>
<td>May 09, 2011 01:45:07 PM</td>
</tr>
<tr>
<td>Approver Level</td>
<td>Lawrence G. Pittman, PTTMAN</td>
<td>Approve</td>
<td>Approved</td>
<td>May 09, 2011 01:52:53 PM</td>
</tr>
<tr>
<td>Superuser, 99</td>
<td>Patricia Nash, NASH</td>
<td>Apply</td>
<td>Applied</td>
<td>May 09, 2011 01:54:00 PM</td>
</tr>
</tbody>
</table>

**Transaction History**

- 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.
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.

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 Department 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.