

ELECTRONIC PERSONNEL ACTION FORM (EPAF) FOR DEPARTMENT CHANGES

Banner Human Resources Self Service



Prepared: August, 2017

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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 interchangably 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 sumbitted, 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

Personal Information	Employee	WebTailor Administration	Finance	
Search	Go			

Employee

Electronic Personnel Action Forms

Benefits and Deductions

Retirement, health, flexible spending, miscellaneous, beneficiary, open enrollment, Benefit Statement.

Pay Information

Direct deposit allocation, earnings and deductions history, or pay stubs.

Tax Forms

W4 information, W2 Form.

Jobs Summary

Leave Balances

Labor Redistribution

Allows administrative staff to create and approve labor redistribution transactions.

Create New EPAF

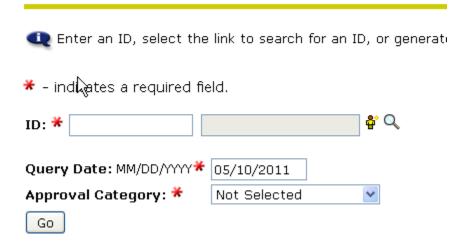
To Initiate a new EPAF – select "New EPAF"



Search for Employee

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

New EPAF Person Selection



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		ß	
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.

<u> </u>	∆ 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 Department Change. Select 'Assigned Department Change, DEPT' from the Approval Category Drop Down and select "Go".

* - indicates a required field.

ID: * B00024913 Sandra L. Leba

Query Date: MM/DD/YYYY* 08/14/2017

Approval Category: * Assigned Department Change, DEPT

Select Position

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



• 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
Q,	New Job									0
	Primary	C50270	00	HRIS Administrator	60160, Human Resources Adm	Feb 25, 2011		Mar 10, 2011	Active	•

All Jobs

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.

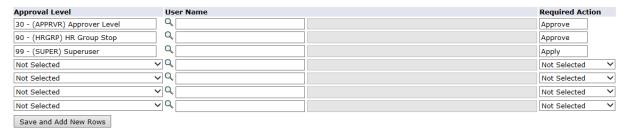


Routing Queue

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.

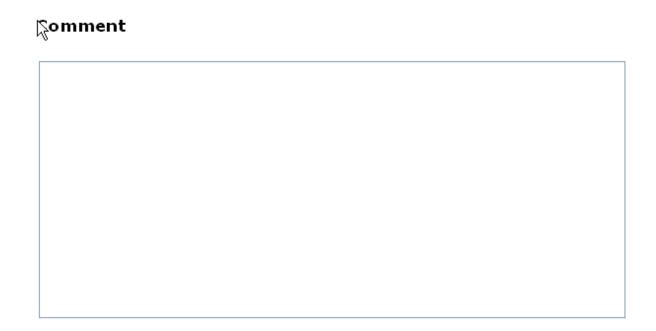
Click on the "Save and Add New Rows".

Routing Queue



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.

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:81Query Date:May 10, 2011Transaction Status:WaitingLast 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.

Routing Qu	ueue										
Approval L	evel	Name			Required Action	Queue Status	Actio	n Da	te		
HR Audit, 20)	Sandra	a L. Leba, LEBA	A	Approve	Approved	Мау	09, 20	11	01:45	07 PM
Approver Le	vel, 30	Lawrer	nce G. Pittman	, PITTMAN	Approve	Approved	Мау	09, 20	11	01:52:	53 PM
Superuser, 9	99	Patrici.	a Nash, NASH		Apply	Applied	Мау	09, 20	11	01:54:	00 PM
Transactio	n Histo	ry									
Action	Date		User Name								
Create(%	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.

EPAF Originator Summary



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 \varTheta

Return for Correction Add Comment Void

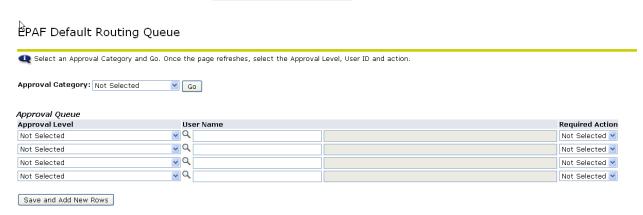
Default Routing Queue

You may set up your own default routing queue.

Click on the **Default Routing Queue** at the bottom of the Originator Summary Page.

New EPAF | Default Routing Queue | Search | Superuser or Filter Transactions

Return to EPAF Menu



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.