EPAF Frequently Asked Questions

QUESTION	RESPONSE
What is an EPAF?	EPAF stands for Electronic Personnel Action Form. An EPAF allows personnel actions to be created and approved electronically, eliminating paper and allowing the originator to track an EPAF through the approval process.
What is the flow of an EPAF?	**FIRST:** An Originator creates an EPAF in Banner Self-Service **NEXT:** One or more Approvers approve the EPAF in Banner Self-Service. **LAST:** An Applier in Human Resources applies the information from an approved EPAF to Banner.
Who is an Originator?	An Originator is a person who creates an EPAF.
Who is an Approver?	An Approver is a person who reviews an EPAF, and either approves, disapproves, or returns the EPAF to the Originator for correction. An EPAF must have at least one Approver (a mandatory approval level), but it may have more than one. Examples of approval levels include the Department Chair, the Dean's Office, and the Office of Sponsored Programs. If a department requires more than the mandatory approval level(s) associated with a given EPAF, the originator can set up additional approval levels in the Default Routing Queue associated with each type of EPAF he/she originates.
How do I get access to EPAF	Complete Administrative System Access Form.
Who is an Applier?	An Applier is a person who saves (applies) the information from an approved EPAF transaction to Banner. Each EPAF must have an Applier (another mandatory approval level). EPAFs for hourly students are applied by Student Financial Aid. All other EPAFs are applied by Human Resources.

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What is the difference between **"Approve"**, **"FYI",** and **"Apply"** in the Routing Queue section?	**Approve** – A person in the approval queue with a required action of "approve" reviews the EPAF for correctness before approving it. If there are multiple approvers for an EPAF, the EPAF will be routed to each of them in an order based on their approval levels. **FYI** – A person in the approval queue with an action of "FYI" will be able to see an EPAF is in process. This individual will have the ability to view the EPAF but not to approve it. The flow of the EPAF is not dependent on any action by this person. **Apply** – This is the final step of the EPAF process. A designated person in Human Resources applies the EPAF transaction information to Banner.
How do I access EPAFs through Self-Service?	Once you have been identified and set up as an Originator or someone in an Approval Level (i.e., available to be added to the Routing Queue), you can access the EPAF menu through the EMPLOYEE menu in self-service. This is the same place you go to do timesheets.
Can I set up a proxy for EPAFs?	Only Approvers and Appliers can set up proxies to handle their EPAF duties while they are absent.
I have a proxy set up for timesheet approvals. Do I need to set up a proxy for EPAFs?	Yes. Proxies for timesheet approvals are not related to proxies for EPAF approvals.

ORIGINATORS

Can a department have more than one Originator?	Yes. A department can have more than one Originator. However, an EPAF can only be corrected by the Originator who created it.
Our department's Originator is out on leave. Can someone else make corrections to an EPAF he/she created?	No. Since an Originator can't designate a Proxy, another Originator in the department would need to create a new EPAF if it is something that can't wait. If there isn't anyone else to create a new EPAF, contact Human Resources for assistance.
How do I know which EPAF to use?	Refer to the List of EPAFs document.
What does "current value" mean in an EPAF?	The "Current Value" column reflects the most current Banner information for the employee

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What do all the different dates in EPAF mean?	Job Effective Date: The date the action will become effective in Banner. This date cannot be earlier than the last pay date of the employee. Personnel Date: The date the action actually took effect. This does not affect pay but serves as an informational field for historical, audit or reporting purposes. Last Paid Date: The last day of the pay period for which the employee was last paid. Query Date: The Query Date field appears at the beginning of every EPAF, and automatically defaults to the date the EPAF is created.
What should I do when I get the error – "The future dated job record must be deleted before ending Job"	This means that the employee already has an ending date in Banner and you must contact HR to remove it before you can submit the EPAF with a new ending date
After I've made corrections to an EPAF, do I need to save the EPAF again?	Yes. You always need to save an EPAF after you have made changes. When it is ready for approval, you can submit it.
How will I know if my transaction has been saved or submitted successfully?	You need to save your EPAF before your submit it. You will receive a message at the top of the EPAF screen telling you that your save or submit was successful. If you received error messages, you will need to resolve them before you save or submit.
How do I check the status of my EPAF?	Use the Originator Summary screen to check the status of your EPAF. If the EPAF has already been submitted, it will appear under the "History" tab.
Why does the queue status say "Waiting" instead of "Pending?"	The EPAF has not been successfully submitted. Locate the EPAF in the Originator Summary and view the error messages, if there are any. Click on "update" if necessary and then save and submit the EPAF.
Do I need to worry about warning messages?	No. Warning messages will not prevent a transaction from being submitted, approved and applied to Banner.

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Do I need to worry about error messages?	Yes. Error messages will prevent an EPAF from being saved or submitted successfully. If you have read the error messages carefully, reviewed your EPAF, and still can't resolve the problem, call your Human Resources team for assistance.
Why do I need to complete "Comments" section?	To provide information that might be helpful to approvers or appliers
What is the difference between "voiding" and "deleting" and EPAF?	An EPAF that has been voided will remain in the Originator Summary. This selection is useful if you would like to keep a copy for future reference. Once an EPAF has been deleted, it will no longer appear in Originator Summary. Be careful! There is no prompt to confirm that you actually want something deleted.
I need to change some information on an EPAF. What should I do?	**If you have saved (but not submitted) the EPAF**, you can access it from your Originator Summary and make your changes. **If you have submitted the EPAF and it does not yet have a transaction status of "Approved,"** you can call the next approver in line and have him/her return it to you for correction. **If the EPAF has a transaction status of "Approved,"** it has been approved, but it has not yet been applied to Banner. Call HR so that the EPAF can be returned to you for correction. **If the EPAF has a transaction status of "Completed,"** it has been applied to Banner. You can either 1) call Human Resources to delete the transaction (in which case you would want to "cancel" it from your Originator Summary) and create a new EPAF, or 2) submit an EPAF with corrected information on it.
How can I make someone default into the Routing Queue rather than having to search for or type his/her username each time?	Additional approval levels, as well as specific people, can be set up to automatically default by setting up a Default Routing Queue. A Default Routing Queue is specific to a type of EPAF, so if you use 6 types of EPAFs, you will probably want to set up a Default Routing Queue for each one. The Default Routing Queue can be accessed from the Originator summary or EPAF menu page.

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What if I want to choose a person to be in my routing queue, but I don't see him/her on the drop down list?	All people in the Routing Queue must be defined in an Approval Level. If the person you need to choose is not available, please contact Human Resources.
What can I do if my EPAF Approver is on leave and he/she has not designated a proxy?	You can contact Human Resources to return the EPAF to you. You will be able to update the EPAF and change the routing queue of the EPAF so that it routes to a different Approver, if there is an additional person who would be appropriate to assume that responsibility.

APPROVERS

How do I set up my proxy?	Log in to SSB • Click on Employee • Click on Electronic Personnel Action Forms • Select Proxy Setup for New Users • Then choose the appropriate Approver Level • Select the name of your proxy • Click on Add and and click Save
Can there be more than one Approver for an EPAF?	Yes, there can be multiple levels of approval (e.g., in some cases, an EPAF must go to the Office of Sponsored Programs). The order of approval is dictated by the routing queue. Once an approver has approved the EPAF, it will be available for the next approver in line to review it.
Can an Approver make changes to an EPAF?	No, only the Originator can make changes. If there is a problem with the EPAF, the Approver can choose "return for correction" and add a comment as to what the problem is. The Originator can make the necessary changes, save and re-submit the EPAF.
How do I check the status of an EPAF?	Use the Approver Summary screen to check the status of your EPAFs: • The **Current** tab displays EPAFs you need to act on. • The **In My Queue** tab displays EPAFs that have been submitted, but that have not reached you yet. • The **History** tab shows EPAFs you have already taken action on.

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What is the difference between "return an EPAF for correction" and "disapprove?"	If you return something for correction, you are expecting the originator to change data on the EPAF, and the EPAF will need to go through the entire routing queue again. If you disapprove, it will remove the EPAF from the routing queue and a new EPAF will have to be submitted.
Will I receive a notification that I need to approve an EPAF?	Yes. Emails are generated once a day and are sent to anyone who has EPAFs needing approval or available for FYI.
How do I designate a proxy to handle my approvals while I'm gone?	EPAF approver proxies are separate from timesheet approver proxies and must be set up separately. If you are in an approval level, you can set up/maintain your proxies from the EPAF main menu.