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

EPAF Approver Procedures

- In the Banner application, the EPAF replaces the Assignment Authorization (AA). Human Resources will initiate EPAFs for all approved Personnel Transaction requests.

- Department Administrators will be solely responsible for initiating EPAFs for Labor Distribution Changes.

EPAF Approver Procedures

- The purpose of this presentation is to instruct all Approvers on how to approve an Electronic Personnel Action Form (EPAF) for various Personnel changes.

- The EPAF will be routed to the required Approvers by the Originator.

- Once all Approvers have "signed off" on the form, the changes are applied to the Banner database by Human Resources.

EPAF Approver Procedures

- Each time an EPAF is routed to you for approval, you will receive an Email notifying you that there is an EPAF awaiting your approval.

- The Email will contain instructions on how to access the EPAF along with a link.

EPAF Approver Procedures

Timing of approvals is extremely important!

- It is your responsibility to make sure the EPAF is approved in a timely fashion. EPAF effective dates cannot be prior to the first day of the current pay period – so if it is not applied to the system by HR prior to the close of payroll, the EPAF will be returned to the Originator for submission in the *next* payroll.
  - The Originator will then need to resubmit the EPAF with a new effective date and reroute for approval.
  - This will also require a Labor Redistribution to correct the payroll that was missed.
- The EPAF deadline is Tuesday of Payroll week.

EPAF Approver Procedures

- To view the EPAFs routed to you for approval, you will need to sign in through the new Luminis Portal at https://cap.uchc.edu.

- You may sign in to the portal using the same Username and Password that you use to log in to your computer each day.

EPAF Approver Procedures

EPAF Approver Procedures

- Once inside the portal, you will click on the link entitled **Self Service Banner** within the **Banner Links** Channel.

Banner Links

Internet Native Banner
Single Sign-on direct link to Internet Native Banner
Self Service Banner
Single Sign-on direct link to Self Service Banner

EPAF Approver Procedures

- Click on the 'Employee' tab.

- Click on the link for Electronic Personnel Action Forms.

EPAF Approver Procedures

- Once within the EPAF Menu, an Approver can view all EPAFs awaiting their approval by navigating to the **EPAF Approver Summary**.

EPAF Approver Procedures

- All EPAFs awaiting your approval will be listed on the 'Current' tab on the EPAF Approver Summary.

- EPAFs that are scheduled to be sent to you after another user's approval are listed on the 'In My Queue' tab.

- EPAFs approved by you in the past will be listed on the 'History' tab.

- You will then click on the name of the employee to access the desired EPAF.

EPAF Approver Procedures

Employee Job Information

• The Approver should review all of the information contained on the EPAF. The EPAF has a column for **Current** Information and a column for **New** Information.

• Please note: it is the Approver's responsibility to insure that all information is correct on the EPAF before clicking on the "Approve" button.

Errors and Warning Messages

Type	Message Type	Description
Salaried HR EPAF Section	WARNING	*WARNING* This job EEO Contract Group Code is not IPEDS reportab

Salaried HR EPAF Section, C42729-00 Adm Program Assistant 2, Last Paid Date: Mar 10, 2011

Enter Changes	Current Value	New Value
Job Change Reason:	PAMCO	DTFTE
Job Begin Date:	11/07/2008	
Contract Type:	Primary	
Employee Class Code:	I1, Confidential, Full Time	
Leave Category Code:	MF, Manager/Conf/Adm/FT	
Benefit Category:	U, Unclass Fac Mgr Conf UHP Res	
FT/PT Status:	Full Time	
Home COAS:	U	U
Home Organization:	60160, Human Resources Adm	
Distribution COA:	Z	Z
Distribution Orgn:	036, Human Resources	
Jobs Effective Date:	08/13/2010	06/08/2011
Personnel Date:	08/13/2010	06/08/2011
Job Status:	Active	
Title:	Adm Program Assistant 2	
Employee Class Code:	I1, Confidential, Full Time	
Appointment Percent:	100	80
FTE:	1	.8
Hours per Pay:	80	64
Salary Group:	2011B	
Salary Table:	N2	
Salary Grade:	01	
Step:	0	
Regular Rate:	22.160625	
Annual Salary:	46094.1	
Factor:	26	26
Pays:	26	26
Contract Number:	1	

Funding

The funding area looks different, but also has a **Current** and **New** section to display values.

Current

Effective Date: 07/01/2010

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
U	210098	121210	60160		61001	70				100.00	

New

Effective Date: 06/08/2011

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
U	210098	121210	60160		61001	70				100.00	

Default Hours

The Default Hours area also looks different, and should reflect the desired standard work hours for Salaried employees – and will be reflected under a table labeled: **New**.

Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
08/13/2010	010, Base Earnings	80.00			1	

Approving an EPAF

Once you have verified all information, you can then choose one of the four buttons below:

| Approve | Disapprove | Return for Correction | More Info | Add Comment |

Return to Top

EPAF Approver Summary

Return to EPAF Menu

Approve	Disapprove	Return for Correction	More Info	Add Comment

- "Approve" will attach the Approver's online signature and automatically forward the EPAF to the next approver level.

- "Disapprove" will cancel the EPAF.

- "Return for Correction" will return the EPAF to the Originator who will need to either make a correction and reroute the EPAF or Void it.

- "More Info" puts the EPAF on hold until the Approver has received enough information to sign off.

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Note: When Disapproving or Returning an EPAF, please go to the **Add Comment** link and write a reason for the disapproval or return in the Comment section. The Originator will see this comment.

EPAF Approver Procedures

EPAF Preview

☑ You are acting as an Approver.

☑ Transaction successfully completed.

Name and ID: Patricia Nash, B00013644 **Job and Suffix:** C50270-00, HRIS Administrator
Transaction: 1301 **Query Date:** May 23, 2011
Transaction Status: Pending **Last Paid Date:** Mar 10, 2011
Approval Category: Labor Change, LABOR

- Once you have clicked on one of the four buttons, you can verify that the action was completed at the top of the EPAF.

EPAF Approver Procedures

Routing Queue

Approval Level	Name	Required Action	Queue Status	Action Date
Approver Level, 30	Sandra L. Leba, LEBA	Approve	Approved	Jun 08, 2011 04:23:55 PM
Budget and Grants Approver, 40	Budget GroupStop, BUDGRP	Approve	Pending	
Superuser, 99	Patricia Nash, NASH	Apply	In the Queue	

Comments

Date: May 23, 2011 08:41:33 AM

Made by: Anna L. Candelario, ACANDELARIO

Comments: Test ending not in Security ORGN

Transaction History

Action	Date	User Name
Created:	May 23, 2011	Anna L. Candelario
Submitted:	May 23, 2011	Anna L. Candelario

- The Routing Queue and the Transaction History may be viewed at the bottom of each EPAF.

EPAF Approver Procedures

- There is currently no print version of the EPAF. If a paper copy is needed, you may use the print screen function in the browser.
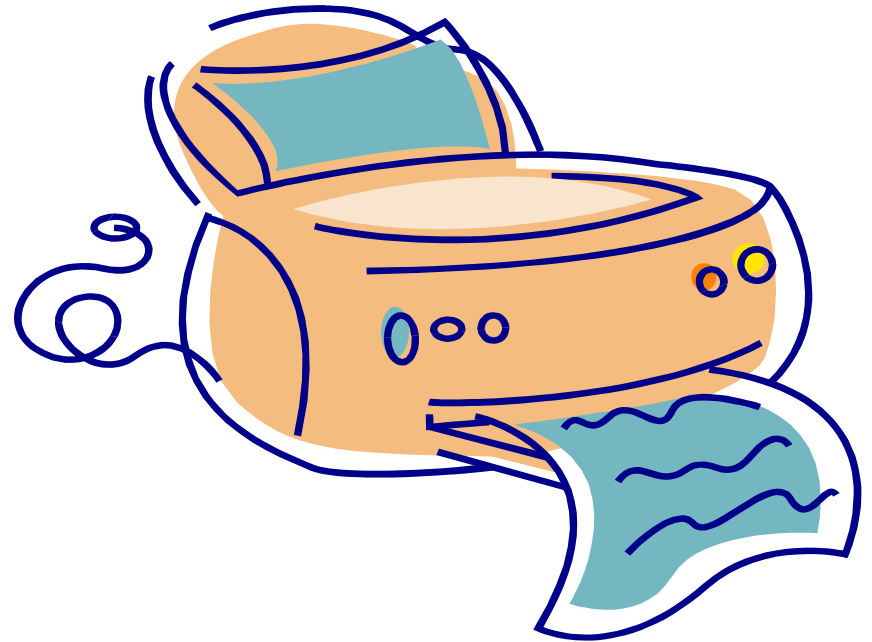
EPAF Approver Procedures

- You may now return to the **EPAF Approver Summary** to approve additional EPAFs or close the application. This can be done using the link at the bottom of the EPAF.

EPAF Approver Summary

Return to EPAF Menu

EPAF Approver Contacts

- For questions specific to the EPAF system, or for technical difficulties, please contact Sandy Leba at extension 4579.

Human Resources Records Unit

- This unit is responsible for the auditing and processing of all requests for personnel action in accordance with state, federal and Health Center regulations.

EPAF Approver Contacts

- Please contact the Records staff for all other questions you may have. Specific employee inquiries should be addressed to the person responsible for that processing area. The workload is broken down by the employee's last name.

- Records Manager   Liz Fay   679-7573
- Records Coord (T-Z & PTR)   Cathy Guidotti   679-4663
- Records Analyst (A-C)   Kristen Gauvin   679-3492
- Records Analyst (D-J)   Amy Lawson   679-4368
- Records Analyst (K-N)   Lauren McLean   679-4694
- Records Analyst (O-S)   Carrie Proctor   679-2049