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Electronic Personnel Action Form (EPAF) Process

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What is an EPAF?

- An **Electronic Personnel Action Form** - **EPAF,** is an online form originated by a department to communicate an employment decision about an employee to the Human Resources and Payroll Department.
- EPAFs were developed to improve and simplify the process for completing and approving employee actions in Banner.

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What is an EPAF?

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- An EPAF may be initiated by a user who has proper authorization for the department which is hiring.
- All EPAFs require approval
- Each EPAF is assigned an "Approval Category"
- Human Resources is the final approver before it is applied to the employee's job record.

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What are the benefits of an EPAF?

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Some efficiencies from using EPAFs are:
- An EPAF is never lost in campus mail or in somebody's "inbox".
- An EPAF is routed electronically so there is never any question regarding the location of the EPAF.

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What are the benefits of an EPAF?

• An EPAF is created online and applied to the Banner system online so the information is keyed only once, lessening the chance for data entry errors.

• Once the EPAF has been submitted, you can see who has approved it, disapproved it, made remarks about it or returned it for correction.

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Who creates an EPAF?

• An *Originator* is required to create and correct an EPAF

• The originator must log into the EPAF Originator Summary to view, void, update, or re-submit the EPAF.

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Who approves an EPAF?

- An *Approver* is allowed to approve the EPAF
- An approver can also return an EPAF for correction or disapprove an EPAF
- Approvers have the ability to assign a proxy

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When should an EPAF be completed?

- EPAFS are currently being used for:
  - Hiring Adjunct / Part-Time Faculty (E50PTF)
  - Hiring Part-Time EPA Staff (E50PTS)
  - Special Payments for Full Time Employees (E45SP)
  - Student Temp Hourly Wage (S70N, S70R)

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How do I complete an EPAF?

•Log in to 49er Express using your NinerNet ID and password.
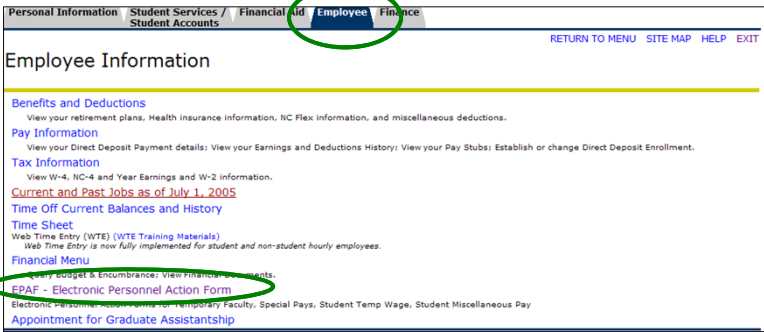
How do I complete an EPAF?

•Select Banner Self Service from the Employee home tab.

How do I complete an EPAF?

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•Select the Employee tab and then choose EPAF – Electronic Personnel Action Form

Personal Information   Student Services /   Financial Aid   **Employee**   Finance
                                         Student Accounts

RETURN TO MENU   SITE MAP   HELP   EXIT

Employee Information

Benefits and Deductions
   View your retirement plans, Health insurance information, NC Flex information, and miscellaneous deductions.
Pay Information
   View your Direct Deposit Payment details; View your Earnings and Deductions History; View your Pay Stubs; Establish or change Direct Deposit Enrollment.
Tax Information
   View W-4, NC-4 and Year Earnings and W-2 information.
Current and Past Jobs as of July 1, 2005
Time Off Current Balances and History
Time Sheet
Web Time Entry (WTE) (WTE Training Materials)
   Web Time Entry is now fully implemented for student and non-student hourly employees.
Financial Menu
   Salary Budget & Encumbrance; View Financial Documents.
EPAF - Electronic Personnel Action Form
   Electronic Personnel Action Forms for Temporary Faculty, Special Pays, Student Temp Wage, Student Miscellaneous Pay
Appointment for Graduate Assistantship

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•The EPAF Menu

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

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How do I complete an EPAF?

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•**EPAF Approver Summary**: View EPAFs that have the Approver listed in the Approval Queue.
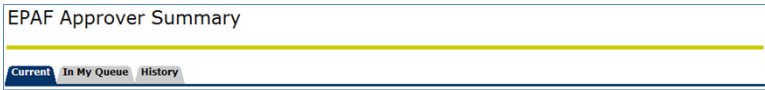•Only see this menu option if you are an approver or proxy for an approver.

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

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How do I complete an EPAF?

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•Within the **EPAF Approver Summary** there are three tabs: **Current**, **In My Queue**, and **History**:

EPAF Approver Summary

Current In My Queue History

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How do I complete an EPAF?

- The **Current tab** is similar to an "inbox" for the EPAF Approver Summary. EPAFs that require the Approver's attention appear here.

	Current	In My Queue	History					
Name	**ID**	**Transaction**	**Type of Change**	**Submitted Date**	**Effective Date**	**Required Action**	**Action**	**Links**
EPA Temporary - Instructional, E50310-00	800...	9033	Continuing Education - Reappoint Part Time Faculty	Jun 15, 2009	Sep 01, 2009	Approve	☐	**Comments Warnings
EPA Temporary - Instructional, E50325-00	800	9053	Hire Part Time Faculty	Jun 25, 2009	Sep 01, 2009	FYI	☐	**Comments

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How do I complete an EPAF?

- The **In My Queue Tab** shows EPAFs that are pending in the queue of the Approver.
- The **History tab** shows EPAFs that have been approved for acknowledged by the Approver

How do I complete an EPAF?

•**EPAF Originator Summary** stores EPAFs that the Originator has created, voided, saved, or submitted. It also contains EPAFs that have been Returned for Correction and require the Originator's attention.

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

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How do I complete an EPAF?

•Within the EPAF Originator Summary, there are two tabs: **Current** and **History**.

EPAF Originator Summary

Current History

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How do I complete an EPAF?

- The **Current tab** is similar to an "inbox" for the EPAF Originator Summary.
- Two types of EPAFs appear:
  - *Waiting* – An EPAF that has been created and saved (but not submitted)
  - *Returned for Correction* – An EPAF that contains an error or incorrect data and needs correction

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Helms, Gale M. EPA Temporary - Instructional, E50325-00	800	9037	New Hire Part Time Faculty		Aug 24, 2009	Waiting	Comments Errors
Tyson, Debra A. EPA Temporary - Instructional, E50305-00	800	9056	Hire Part Time Faculty	Jun 30, 2009	Sep 01, 2009	Return for Correction	**Comments

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How do I complete an EPAF?

- All EPAFs created by the Originator are stored in the **History tab.**
- To check the status of an EPAF, in the EPAF Originator Summary, click the History tab, and notice the Transaction Status of the EPAF.

1 - 6 of 6
EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Adams, Orlanda D. EPA Temporary -Instructional, E50320-89	800	9006	New Hire Part Time Faculty	Jun 01, 2009	Sep 01, 2009	Cancelled	Comments
Davis, Gregory A. EPA Temporary -Instructional, E50320-89	800	8998	New Hire Part Time Faculty	May 29, 2009	Jun 01, 2009	Completed	
Lanning, Robert W. EPA Temporary -Instructional, E50325-89	800	9031	New Hire Part Time Faculty	Jun 09, 2009	Sep 01, 2009	Pending	**Comments
Miller, Charlie P. Temporary Wage Students, S81015-00	800	9036	Student Wage New Hire (Hourly)	Jun 12, 2009	Sep 01, 2009	Approved	**Comments

How do I complete an EPAF?

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•**EPAF Proxy Records** – Allows an Approver to Designate a Proxy Approver
•An approver may designate a proxy to approve or acknowledge an EPAF for Approval Level designated.

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EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

How do I complete an EPAF?

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•**Act as a Proxy** – Allows a user to approve EPAFs as a Proxy
•A Proxy will have access to approve, acknowledge, or return EPAFs at the approval level for which they have been designated by the EPAF Approver.

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EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

Default Routing Queue

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• A **Default Routing Queue** allows the user to customize the routing queue for every type of EPAF that they create.
• This should be done before the first EPAF is created.

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Default Routing Queue

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• To set up the Default Routing Queue:
  • Select **EPAF (Electronic Personnel Action Form)**
  • Select **EPAF Originator Summary**
  • Select **Default Routing Queue**

New EPAF | Default Routing Queue | Search | Superuser or Filter Transactions
Return to EPAF Menu

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Default Routing Queue

- To set up the Default Routing Queue cont.:
  - Select **Default Routing Queue**
  - Select the **Approval Category** (EPAF type) from the dropdown list.
  - Press **Go**.

Approval Category: Hire Part Time Faculty, E50PTF [Go]

Approval Queue

Approval Level	User Name		Required Action
1 - (PAYROL) Payroll	BLMUSSEL	Brenda L Musselman	FYI
45 - (DEPT) Department	GMHELMS	Gale M Helms	Approve
50 - (DEAN) Dean/Director	VLHILL	Virginia L Hill	FYI
60 - (AA) Academic Affairs	HFTENCH	Dawn F Tench	Approve
65 - (FUND) Fund Approval	JCHARPER	Jessica Harper Miller	Approve
90 - (HR) Human Resources	TLHUX	Tracy L Hux	Apply

Default Routing Queue

- To set up the Default Routing Queue cont.:
  - When complete, press **Save and Add New Rows**.

[Save and Add New Rows]

How do I complete an EPAF?

•**New EPAF** – Allows a user to enter a new EPAF

EPAF Approver Summary
EPAF Originator Summary
New EPAF
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Act as a Proxy

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Things to know before entering a new EPAF:

•EPAF Deadlines
  •EPAF to be paid on the 15th Payroll, deadline is the 1st day of the month.
  •EPAF to be paid on the End of Month Payroll, deadline is the 15th of the month.

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Things to think about before entering a new EPAF:
- When should this action be effective?
- When is the EPAF deadline for that effective date?
- What is today's date?
- Is there enough time before the EPAF deadline to submit my EPAF and have it routed and approved?

How do I complete an EPAF?

- Begin by searching for the employee for whom the EPAF is being created.

If the UNC Charlotte ID # is not known then search the employee data base. If the person does not have a UNC Charlotte ID#, please contact Academic Affairs or Human Resources so that a UNC Charlotte ID # can be created.

How do I complete an EPAF?

Enter the Query Date – The first day of the first pay period the employee is going to be paid

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

✱ - indicates a required field.

ID: ✱ 800   Debra   .

Query Date: MM/DD/YYYY✱ 01/01/2012

Approval Category: ✱ Hire Part Time Faculty, E50PTF

Go

Pay date = 15th of month –> Query date = 1st day of month
Pay date = last day of month –> Query date = 16th of month

How do I complete an EPAF?

Warning: At this point in the EPAF process, the system will not prevent you from entering an incorrect Query Date. The system only validates that the date is entered in the correct format, MM/DD/YYYY. However, if the Query Date is an incorrect date, the EPAF will error out upon attempting to submit and will have to be voided and entered again.

How do I complete an EPAF?

- Choose Approval category. Click the **GO** button.

How do I complete an EPAF?

- Approval categories:
  - Hire Part Time Faculty
  - Hire Continuing Education Part Time Employee
  - Special Payment for Full Time Employee
  - Student New Hire
  - Student Reappointment
  - Hire Part Time EPA Staff

How do I complete an EPAF?

–New EPAF Job Selection
Enter the position number and the two digit suffix and tab.

Create Assignment, JOBSAL

Search Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍 New Job	EPTF50	00	EPA Temporary - Teaching	90000, Acctg & Budgeting Admin					⦿

⚠️ There are no active jobs based on the Query Date.

[All Jobs]

[Next Approval Type] [Go]

Position:
- EPTF50 – EPA Temp (teaching)
- ETMP50 – EPA Temp (non-teaching)
- ESPE45 – Special Payment

How do I complete an EPAF?

Employee Information -- The **Employee Information** section sets the person up as an employee in Banner HR.

* - indicates a required field.

Employee Information, EPTF50-00 EPA Temporary - Teaching

Item	Current Value	New Value
Employee Class Code: *(Not Enterable)		50
Home COAS: *(Not Enterable)		1
Home Organization: *	🔍	20900
Employee Status: *(Not Enterable)		A
Current Hire Date: MM/DD/YYYY*		01/09/2012

How do I complete an EPAF?

Creating Assignment -- The **Create Assignment** section sets the persons job record up in Banner HR.

Create Assignment, EPTF50-00 EPA Temporary - Teaching

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		01/01/2012
Contract Type: *		Primary
Jobs Effective Date: MM/DD/YYYY*		01/01/2012
Personnel Date: MM/DD/YYYY*		01/09/2012
Title: *		PT Lecturer
Job Status: *(Not Enterable)		A
Step: *(Not Enterable)		0
Annual Salary: *		2500
Factor: *		9
Pays: *		9
Timesheet Orgn: *		20900
Job Change Reason: *(Not Enterable)		E102

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How do I complete an EPAF?

Ending the Assignment – The **Assignment End Date** section terminates the persons job record in Banner HR.

* - indicates a required field.

Assignment End Date, EPTF50-00 EPA Temporary - Teaching

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		05/31/2012
Personnel Date: MM/DD/YYYY*		05/15/2012
Job Status: *(Not Enterable)		T
Job Change Reason: *(Not Enterable)		E103

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How do I complete an EPAF?

Labor Distribution – The **Funding Source** section determines how the labor for this position will be charged within Banner Finance.

Funding Source, EPTF50-00 EPA Temporary - Teaching

Current
Effective Date: 01/01/2012
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New
Effective Date: MM/DD/YYYY 01/01/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override Date
1	141007	141007	90000	913200	17000					100.00	
										Total: 100.00	

Default from Index   Save and Add New Rows

How do I complete an EPAF?

Labor Distribution –

Enter only the **Index** of the Fund the assignment will be paid from and press

Default from Index

How do I complete an EPAF?

Labor Distribution –
An error message will appear stating that the Account Code is required.

Errors and Warning Messages

Type	Message Type	Description
Funding Source	ERROR	Account code is required.

* - indicates a required field.

Return to the **Funding Source** section and enter the **Account**. Press [Save and Add New Rows]

How do I complete an EPAF?

Creating the Routing Queue –

Routing Queue

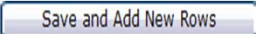| Approval Level	User Name		Required Action	Remove
1 - (PAYROL) Payroll	PRBAILEY	Patricia Rann Bailey	FYI	
45 - (DEPT) Department	CJFOSTER	Christine Jo Durham	Approve	
60 - (AA) Academic Affairs	HFTENCH	Dawn F Tench	Approve	
65 - (FUND) Fund Approval	HFTENCH	Dawn F Tench	Approve	
90 - (HR) Human Resources	BANWORX	. Appworx	Apply	
Not Selected			Not Selected	
Not Selected			Not Selected	
Not Selected			Not Selected	
Not Selected			Not Selected	

[Save and Add New Rows]

How do I complete an EPAF?

Creating the Routing Queue –
• Required Approval Levels have been set up for each EPAF. Click the 🔍 to select an approver. When all approvers are selected, press

Save and Add New Rows

• Before an EPAF is created for the first time, default User Names can be added for the Approval Levels by setting up your Default Routing Queue.

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How do I complete an EPAF?

There are three possible Required Actions:
- **Approve** - The individual is required to "approve" the EPAF. The EPAF cannot be approved at a higher level until is it is approved at lower levels. A proxies name will appear in an EPAF as the Approver.
- **Apply** - Only an individual at the HR level can "apply" an EPAF. This is the action that occurs when an EPAF turns into a jobs record in the payroll system.
- **FYI** - An EPAF originator can select additional individuals at different levels to "FYI" or "acknowledge" the EPAF. Unlike the required action to "approve," an EPAF can be approved and applied at higher levels if the EPAF Approver doesn't perform the required action of "FYI."

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How do I complete an EPAF?

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Adding Comments

•A description or reason must be entered into the comments section of the EPAF by the originating department.

•Once comments are "saved," they cannot be changed. An EPAF user can make multiple comments at any time to the EPAF and comments can be attached to the EPAF at any approval level.

Comment

This employee will be working during the fall semester only.

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How do I complete an EPAF?

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Save & Submit

To complete the EPAF, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

ERROR - Error messages will not allow the EPAF to progress to the approval levels. Errors must be corrected. Read the details provided, and correct the errors as indicated.

WARNING - Warning messages simply deliver information, and allow the EPAF to progress successfully.

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What if I need help?

Training Manuals for EPAFs:

http://finance.uncc.edu/financial-data-administration-fda/training/electronic-personnel-action-form/electronic-personnel-act
- EPAF General Instructions
- Hire Adjunct / Part-time Faculty
- Special Payments for Full Time Faculty & EPA Staff
- Hire Temporary EPA Staff

http://hr.uncc.edu/hiring-employees-using-banner-epafs
- Students

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