

Electronic Personnel Action Forms (EPAF) Instructions

Useful information before you begin:

[EPAF Quick Guide](#)

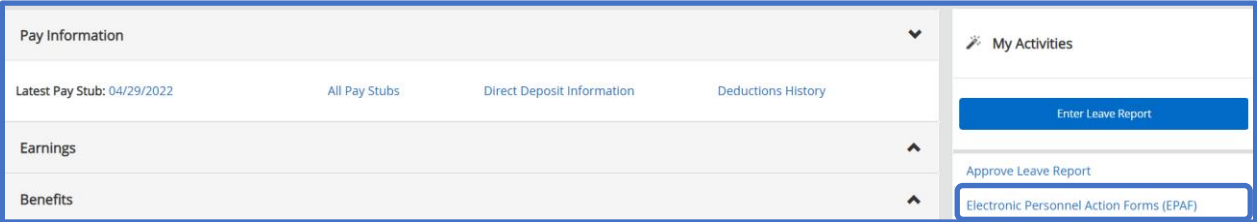
[EPAF Quick Tips](#)

Accessing EPAFs:

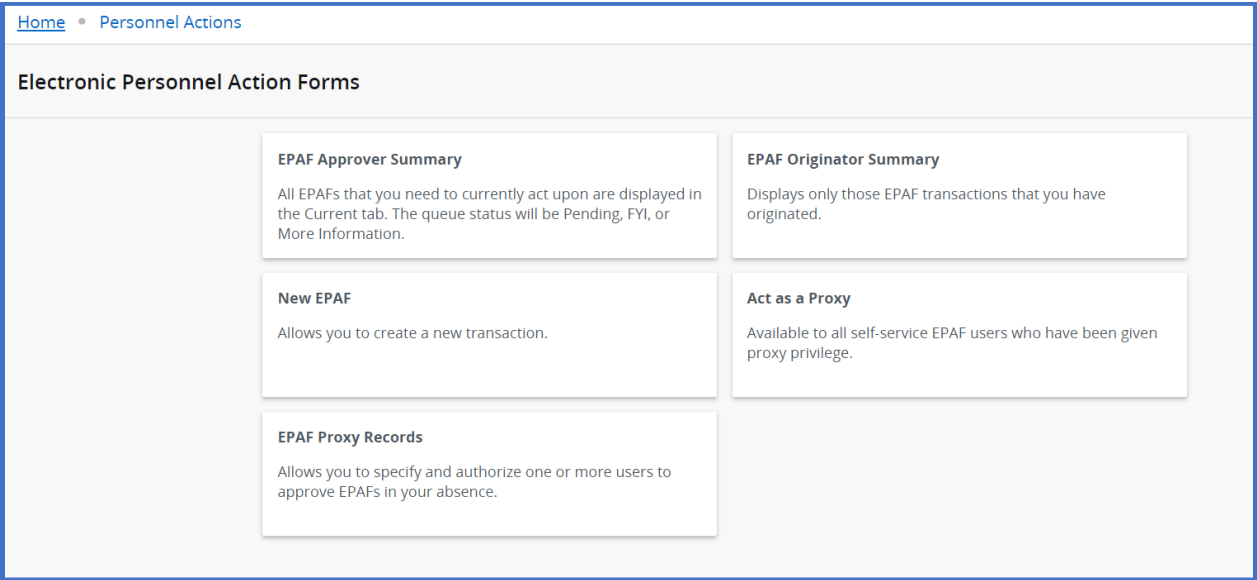
Access EPAFs through [Bannerweb 9](#):

(Note that if you are accessing EPAFs using Bannerweb 8, you will use the EPAF link as you always do, but you will be redirected to the screen shown below.)

Select **'Electronic Personnel Action Forms (EPAF)'** from the **'My Activities'** area on the right-hand side.



EPAF Menu:



EPAF Approver Summary:

[Home](#) • [Personnel Actions](#)

Electronic Personnel Action Forms

EPAF Approver Summary
All EPAFs that you need to currently act upon are displayed in the Current tab. The queue status will be Pending, FYI, or More Information.

EPAF Originator Summary
Displays only those EPAF transactions that you have originated.

New EPAF
Allows you to create a new transaction.

Act as a Proxy
Available to all self-service EPAF users who have been given proxy privilege.

EPAF Proxy Records
Allows you to specify and authorize one or more users to approve EPAFs in your absence.

The Approver Summary displays the EPAFs that are awaiting your approval. The 'Links' column shows if there are comments and/or warning messages on the EPAF.

[Home](#) • [Personnel Actions](#) • [Approver Summary](#)

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
		203731	Summer Admin and & Non-Teaching Assignments	05/13/2022	06/01/2022	Approve	<input type="checkbox"/>	
		203840	Summer Admin and & Non-Teaching Assignments	05/19/2022	06/01/2022	Approve	<input type="checkbox"/>	
		203753	Summer Admin and & Non-Teaching Assignments	05/16/2022	06/01/2022	Approve	<input type="checkbox"/>	
		203770	Summer Admin and & Non-Teaching Assignments	05/17/2022	07/01/2022	Approve	<input type="checkbox"/>	
		203841	Summer Admin and & Non-Teaching Assignments	05/19/2022	07/01/2022	Approve	<input type="checkbox"/>	
		203763	Summer Admin and & Non-Teaching Assignments	05/16/2022	06/01/2022	Approve	<input type="checkbox"/>	
		203776	Summer Admin and & Non-Teaching Assignments	05/16/2022	06/01/2022	Approve	<input type="checkbox"/>	
		203941	Summer Admin and & Non-Teaching Assignments	05/24/2022	06/01/2022	Approve	<input type="checkbox"/>	
		203768	Summer Admin and & Non-Teaching Assignments	05/17/2022	06/01/2022	Approve	<input type="checkbox"/>	
		203834	Faculty Summer Appointment	05/18/2022	07/01/2022	Approve	<input type="checkbox"/>	
		203767	Summer Admin and & Non-Teaching Assignments	05/17/2022	06/01/2022	Approve	<input type="checkbox"/>	
		203780	Summer Admin and & Non-Teaching Assignments	05/16/2022	06/01/2022	Approve	<input type="checkbox"/>	
		203764	Summer Admin and & Non-Teaching Assignments	05/16/2022	06/01/2022	Approve	<input type="checkbox"/>	
		203799	Summer Admin and & Non-Teaching Assignments	05/17/2022	07/01/2022	Approve	<input type="checkbox"/>	
		203804	Summer Admin and & Non-Teaching Assignments	05/17/2022	07/01/2022	Approve	<input type="checkbox"/>	
		203803	Summer Admin and & Non-Teaching Assignments	05/17/2022	07/01/2022	Approve	<input type="checkbox"/>	

At the bottom of the window, there is a link for 'Transaction Search', which will allow you to do a name, ID, or Transaction Number search:

Select All Save

New EPAF > EPAF Proxy Records > Transaction Search > Superuser or Filter Transactions

Home > Personnel Actions > Approver Summary > Transaction Search

Transaction Search

Enter the Last Name and or First Name of the person or an ID. Or, enter a Transaction Number. Select Go. A percent sign may be used as the wildcard.

Transaction Search

First Name Last Name

ID Transaction Number

Results Per Page

25

Go

The blue button on the right can be used advance to the Next Transaction.

Home > Personnel Actions > Approver Summary > EPAF Preview

EPAF Preview

Previous Transaction Next Transaction

Details

Name and ID	Transaction	Transaction Status	Approval Category
995041-64, Summer Appointment EDL	203731	Pending	Summer Admin and & Non-Teaching Assignments, SUMADM

Job and Suffix: 995041-64, Summer Appointment EDL

Query Date: 06/01/2022

Last Paid Date: 08/31/2021

Job Type, 995041-64, Summer Appointment EDL, Last Paid Date: 08/31/2021

Contract Type: Overload

Job Begin Date: 07/01/2011

Summer Admin & Non-Teaching Assignments, 995041-64, Summer Appointment EDL, Last Paid Date: 08/31/2021

	Old Value
Jobs Effective Date	08/31/2021
Personnel Date	08/13/2021
Step	0
Job Status	Terminated

Active

Routing and Transaction area:

Approval Level	Name	Required Action	Status	Date
Academic Personnel Reviewer, 10		Approve	Pending	
Chair/Director/Supervisor, 45		Approve	In the Queue	
Dean/Director of Academic Unit, 50		Approve	In the Queue	
VP and Provost, 60		Approve	In the Queue	
HR/Academic Personnel, 90		Apply	In the Queue	

Date	Made By	Comments
05/13/2022 09:50 AM		SAHE Graduate Studies Director more

Action	Date	User Name
Created	05/13/2022	
Submitted	05/13/2022	

[Add Comment](#) [Approve](#) [Disapprove](#) [Return for Correction](#) [More Info](#)

1. The Routing Queue area displays the approval workflow. This EPAF is at the Level 10 approval level.
2. In this example (SUMADM), the Comments give information about the administrative need. Additional comments can be made using the 'Add Comment' button at the bottom of the form.
3. The Transaction History area will display the actions taken on the EPAF.
4. These are the available actions for the Approver to take.

EPAF Originator Summary:

[Home](#) > [Personnel Actions](#)

Electronic Personnel Action Forms

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EPAF Originator Summary – History Tab:

Home • Personnel Actions • EPAF Originator Summary

EPAF Originator Summary

Current **History** 1

Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

Transactions 3 2 Transaction Status All

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Status	Links
		200851	Faculty Summer Appointment	05/09/2022	05/01/2022	Completed	
		200837	Faculty Summer Appointment	05/05/2022	05/05/2022	Pending	
		200835	Faculty Summer Telecommuting Appointment		05/01/2022	Voided	
		200771	Faculty Summer Appointment	04/11/2022	04/11/2022	Completed	
		200766	Faculty Summer Appointment	04/08/2022	05/01/2022	Completed	
		200762	Summer Admin and & Non-Teaching Assignments	04/07/2022	05/16/2022	Pending	
		200758	Index Code Change	04/06/2022	04/06/2022	Approved	

1. Use the 'Current' tab to select recent transactions; and, use the 'History' tab to find all transactions you submitted and the current status.
2. The 'Transaction Status' filter can be helpful to narrow the transaction list.
3. The transactions are listed showing EPAF type, associated dates, and status.

The 'Transaction Search' list at the bottom of the screen can be used to narrow the search even further.

Home • Personnel Actions • Originator History • Transaction Search

Transaction Search

Enter the Last Name and or First Name of the person or an ID. Or, enter a Transaction Number. Select Go. A percent sign may be used as the wildcard.

Transaction Search

First Name

Last Name

ID

Transaction Number

Results Per Page

25

Go

New EPAF:

Home » Personnel Actions

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New Person Selection Window:

Home » Personnel Actions » New EPAF Person Selection

New EPAF Person Selection

1 Check the box to limit to search an Employee. Enter the Last Name and/or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

First Name Last Name Is an employee or ID or SSN/SIN/TIN Search

Enter or Generate New ID 2

* indicates a required field. 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.

ID *

Generate new ID

Query Date * 3
05/01/2022

Approval Category * 4

Go 5

1. Search for the employee by name or Banner ID. Note that the 'is an employee' checkbox is intended to narrow the search list, but is not necessary. Once the list is generated, select the appropriate employee.
2. If the Banner ID of the employee is known, the Search can be bypassed, and the ID entered.
Note: do NOT use the 'Generate new ID' field.
3. Enter the Query Date in accordance with the type of EPAF being generated. If this is not known, use the [EPAF Quick Tips by Term](#) documentation.

ID *
+01519542

Kevin David Ballard

Generate new ID

Query Date *
07/01/2022

Approval Category *

Go

- The Approval Category dropdown is where the EPAF type will be selected. If you don't know what EPAF type you need, use the [Which Quick Tip](#) guide.
- Select **Go**, which display current jobs will create a new row. If you want to work from an existing EPAF.

Details

ID: Kevin David Ballard, +01519542 Query Date: 07/01/2022 Approval Category: Faculty Summer Appointment, FACSUM

Faculty Summer Appointment, FACSUM

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
<input checked="" type="checkbox"/>	New Job	<input type="text"/>	<input type="text"/>						
<input type="checkbox"/>	Overload	995039	64	Summer Appointment PHS	PH599, Kinesiology, Nutrition, and Health	05/01/2016	08/31/2022	06/30/2022	Active
<input type="checkbox"/>	Primary	997352	00	Associate Professor	PH599, Kinesiology, Nutrition, and Health	09/01/2015		06/30/2022	Active

6

All Jobs Next Approval Type Go

- Select **All Jobs** to display a listing of both current and previous positions.

Faculty Summer Appointment, FACSUM

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
<input type="checkbox"/>	New Job	<input type="text"/>	<input type="text"/>						
<input type="checkbox"/>	Overload	995039	64	Summer Appointment PHS	PH599, Kinesiology, Nutrition, and Health	05/01/2016	08/31/2022	06/30/2022	Active
<input type="checkbox"/>	Primary	997352	00	Associate Professor	PH599, Kinesiology, Nutrition, and Health	09/01/2015		06/30/2022	Active
<input checked="" type="checkbox"/>	7 load	995039	45	Summer Appointment PHS	PH599, Kinesiology, Nutrition, and Health	05/01/2016	07/31/2021	07/31/2021	Terminated
<input type="checkbox"/>	Overload	995039	60	Summer Appointment PHS	D5T99, Assoc VP & Dean of Students	07/01/2016	07/31/2021	07/31/2021	Terminated

Active Jobs Next Approval Type Go

- If you are not creating a New Job, select the Job that you wish to copy.

Contract Information:

Faculty Summer Appointment, 995039-47 Summer Appointment PHS

Contract Type *	<input type="text" value="Not Selected"/>	8
Job Begin Date *	<input type="text"/>	
Jobs Effective Date *	<input type="text"/>	10
Personnel Date *	<input type="text"/>	
Step *	<input type="text" value="0"/>	<input type="button" value="↶"/> Old Value: 11
Job Status *	<input type="text" value="A"/>	<input type="button" value="↶"/> Old Value: 11
FTE *	<input type="text"/>	12
Job Change Reason *	<input type="text" value="ADDJB, Additional Job"/>	<input type="button" value="↶"/> Old Value: Not Selected 13
Hours per Pay *	<input type="text"/>	14

Faculty Summer Appointment, 995039-45 Summer Appointment PHS, Last Paid Date: 07/31/2021

Contract Type *

Overload

8

Job Begin Date *

05/01/2016



Remove

9

Jobs Effective Date *

07/31/2021



Remove

10

Personnel Date *

08/07/2021



Remove

11

Step *

0

12

Job Status *

A



Old Value: Terminated

FTE *

.13

13

Job Change Reason *

ADDJB, Additional Job



Old Value: ENDAP, End of Appointment

14

Hours per Pay *

48

15

8. The **Contract Type** will depend on the type of EPAF. Please consult the [EPAF Quick Tips by Term](#) documentation for assistance.
9. The **Job Begin Date** will retain its value if you started from an existing EPAF. If a new EPAF is being created, follow the Quick Tips documentation for details.
10. The **Jobs Effective Date** will need to be changed in accordance with the [EPAF Quick Tips by Term](#) documentation and depend on the EPAF type. Date fields are a calendar display and selection. The date can also be manually changed.
11. The **Personnel Date** will need to be changed in accordance with the [EPAF Quick Tips by Term](#) documentation and depend on the EPAF type. Date fields are a calendar display and selection. The date can also be manually changed.
12. Any field that is grayed out on the EPAF entry windows represents a default and cannot be changed.
13. Please consult the 'FTE and Hours Per Pay' chart in the [EPAF Quick Tips by Term](#) documentation
14. In this example the Job Change Reason defaulted to Additional Job. This is due to the type of EPAF selected (FACSUM), and it can be changed if needed via the dropdown menu. Please refer to the [EPAF Quick Tips by Term](#) documentation.
15. Please consult the 'FTE and Hours Per Pay' chart in the [EPAF Quick Tips by Term](#) documentation

Contract Information:

Factor *	<input type="text" value="1"/>	
Pays *	<input type="text" value="1"/>	15
Annual Salary *	<input type="text" value="6486"/>	16
Timesheet Orgn *	<input type="text" value="PHS99"/>	17
Payroll Id *	<input type="text" value="MN"/>	18
Contract Number	<input type="text"/>	19
		20

- 16. For **Factor** and **Pays**, please consult the 'FTE and Hours Per Pay' chart in the [EPAF Quick Tips by Term](#) documentation
- 17. Total **Salary** for this assignment.
- 18. The **Timesheet Org** is the Organizational Code for your department (PHS99, BIO99, etc.)
- 19. The **Payroll ID** will always be defaulted to MN.
- 20. Add **Contract Number** if needed.

Funding Information:

Current

Effective Date 21
07/01/2021

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
C	PH5001	000000	000068	111610	01130					100	

New

Effective Date MM/DD/YYYY 22
07/01/2022

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
<input type="text" value="c"/>	<input type="text" value="PH5001"/>	<input type="text" value="000000"/>	<input type="text" value="000068"/>	<input type="text" value="111610"/>	<input type="text" value="01130"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="100"/>	<input type="text"/>	<input type="button" value="🗑"/>

[+ Default from Index](#) [+ Add Row](#)

21. Information will populate in this row if a prior job had been selected when initiating the EPAF. If it's a new position, as in this example, no information will be populated and will be populated under **New**.
22. The **Effective Date** will be the same as the Query Date used when the EPAF was created. The funding information for this position will be adjusted as needed. If a new Index code is added, populate the remaining fields using the '**Default from Index**' link (with the exception of the Account Code, which has to be manually added). If the funding source is split, a row can be added with the additional information. If this is done, ensure that the Percent column adds up to 100. Note that the magnifying glass can be used for searching. If you are working on a smaller monitor, the magnifying glass may cover some of the entry box/text. In this case, reduce your Zoom using **Alt+-**. Note: If the EPAF is for a research activity, the Location Code must be populated with **HERD**.

Earnings Information:

Current

23

Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
07/01/2021	FSM, Faculty Summer	48			1	

New Value 24

Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date	Remove
<input type="text" value="07/01/2021"/>	<input type="text" value="FSM, Faculty Summer"/>	<input type="text" value="48"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="1"/>	<input type="text"/>	<input type="button" value="🗑"/>

[+ Add Row](#) 25

23. The Current Value area will have the Earnings information from the previous EPAF.
24. In the New Value area, if an existing EPAF was used, the previous Earnings information will populate and can be adjusted. If this is for a new job, there will not be any Earnings information populated in the Current area. The information will need to be added in the New Value area. The Effective date will need to be set to the Query Date. The Earnings field value will depend on the EPAF type
25. The New Value area does not automatically populate with a row as in Bannerweb 8. Use the 'Add Row' link.

Job Termination:

End job record, 995039-47 Summer Appointment PHS

Jobs Effective Date * 25

Personnel Date *

Job Status * 26

Job Change Reason *

End job record, 995039-45 Summer Appointment PHS, Last Paid Date: 07/31/2021

Jobs Effective Date * 25

Personnel Date * 26

Job Status * 26

Job Change Reason *

- 25. The date fields should be populated in accordance with the [EPAF Quick Tips by Term](#) documentation
- 26. The Job Status and Job Change Reasons cannot be changed. These fields terminate the record.

Routing Queue and EPAF Submission:

Routing Queue

Approval Level	User Name	28	Required Action	29	Remove
10 - (LVL_10) Academic Personnel Reviewer	Not Selected		Approve		
45 - (LVL_45) Chair/Director/Supervisor	Not Selected		Approve		
50 - (LVL_50) Dean/Director of Academic Unit	Not Selected		Approve		
60 - (LVL_60) VP and Provost	Not Selected		Approve		
90 - (LVL_90) HR/Academic Personnel	Not Selected		Apply		

+ Add Row 30

Comments

Add Comment

31

Remaining Characters : 4000

Save 32

Routing Queue

Approval Level	27	User Name	28	Required Action	29	Remove
10 - (LVL_10) Academic Personnel Reviewer		Not Selected		Approve		
45 - (LVL_45) Chair/Director/Supervisor		Not Selected		Approve		
50 - (LVL_50) Dean/Director of Academic Unit		Not Selected		Approve		
60 - (LVL_60) VP and Provost		Not Selected		Approve		
90 - (LVL_90) HR/Academic Personnel		Not Selected		Apply		

+ Add Row 30

Comments

Add Comment

31

Remaining Characters : 4000

Save 32

27. These are the approval levels set up for this EPAF.
28. Use the dropdowns to select the approver. The [EPAF Quick Tips by Term](#) documentation will outline who needs to be defined in each of the levels.
29. Ensure that the Required Action area is set to 'Approve' with the exception of Lvl 90, which should be 'Apply'.
30. If an approval level needs to be added, use the Add Row link. (An example of when a row would need to be added is if the EPAF is for a workshop.)
31. The Comment field can be used to define the Course information and Campus.

32. Save, and then once saved, as long as there are no errors, you can Submit. Note that the Save and Summit buttons are only on the bottom of Bannerweb 9.

Setting a proxy – EPAF Proxy Records

Home • Personnel Actions

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Adding a Proxy:

Home • Personnel Actions • EPAF Proxy Records

EPAF Proxy Records

Proxies 1 Approval Level

Please select an approval level to start.

Remove Selected Add Proxy... 2

Select Approval Level

- Academic Personnel Reviewer (LVL_10)
- Chair/Director/Supervisor (LVL_45)
- Dean/Director of Academic Unit (LVL_50)
- HR/Academic Personnel (LVL_90)
- Superuser (LVL_99)

1. Select the **Approval Level**
2. Use the **Add Proxy** button to display a list of those at the selected Approval Level, and select the appropriate Proxy.

Act as a Proxy:

[Home](#) • [Personnel Actions](#)

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Proxy User:

[Home](#) • [Personnel Actions](#) • [Proxy or Superuser or Filter Transactions](#)

Proxy or Superuser or Filter Transactions

Act as a proxy or a superuser and enter the following criteria to filter transactions.

Proxy For

Perry, Jennifer

Self

Submitted To Date

MM/dd/yyyy

Transactions Per Page

25

Go

1. Once an EPAF user has added you as a Proxy, their records can be access by selecting their name in the 'Proxy For' field.
2. Enter the appropriate date range to access the records. If dates are not entered, all records will be pulled.

Once the proxy's records are accessed, an Approver Summary area can be chosen to view the records:

Home • Personnel Actions • Approver Summary ✔ Filtering On

Approver Summary

Current In My Queue History

① Select the link under Name to access details of the transaction

Transactions Queue Status: All

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
[Redacted]		204054	Summer Admin and & Non-Teaching Assignments	05/31/2022	06/01/2022	Approve	<input type="checkbox"/>	🗨️ !
[Redacted]		204037	Faculty Summer Appointment	05/27/2022	06/01/2022	Approve	<input type="checkbox"/>	🗨️ !
[Redacted]		204052	Faculty Summer Appointment	05/31/2022	06/01/2022	Approve	<input type="checkbox"/>	🗨️ !

Routing and Transaction area:

Routing Queue 1

Approval Level	Name	Required Action	Status	Date
Academic Personnel Reviewer, 10	[Redacted]	Approve	Pending	
Chair/Director/Supervisor, 45	[Redacted]	Approve	In the Queue	
Dean/Director of Academic Unit, 50	[Redacted]	Approve	In the Queue	
VP and Provost, 60	[Redacted]	Approve	In the Queue	
HR/Academic Personnel, 90	[Redacted]	Apply	In the Queue	

Comments

Date	Made By	Comments
05/31/2022 01:14 PM	[Redacted]	Campus: Oxford Begin Date: 06/01/2022 End Date: 06/15/2022 Assignment: STA 261 revision to incorporate ... more

Transaction History 3

Action	Date	User Name
Created	05/31/2022	[Redacted]
Submitted	05/31/2022	[Redacted]

Add Comment Approve Disapprove Return for Correction More Info 4

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2. In this example (SUMADM), the Comments give information about the administrative need. Additional comments can be made using the 'Add Comment' button at the bottom of the form.
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