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.
What is an EPAF?

- 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.

What are the benefits of an EPAF?

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.
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.

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.
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

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)
How do I complete an EPAF?

• Log in to 49er Express using your NinerNet ID and password.

• Select Banner Self Service from the Employee home tab.
How do I complete an EPAF?

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

• The EPAF Menu
How do I complete an EPAF?

• **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.

• Within the **EPAF Approver Summary** there are three tabs: **Current**, **In My Queue**, and **History**.
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 Tab Example](image)

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.

![In My Queue Tab Example](image)
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.

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

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.
How do I complete an EPAF?

- **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.

- **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.
Default Routing Queue

• 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.

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

When complete, press **Save and Add New Rows**.
How do I complete an EPAF?

New EPAF – Allows a user to enter a new EPAF

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.
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

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

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.

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

Employee Information -- The Employee Information section sets the person up as an employee in Banner HR.
Creating Assignment -- The **Create Assignment** section sets the person's job record up in Banner HR.

**Create Assignment, EPTF50-00 EPA Temporary - Teaching**

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Begin Date</td>
<td></td>
<td>01/01/2012</td>
</tr>
<tr>
<td>Contract Type</td>
<td>Primary</td>
<td>PT Lecturer</td>
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<tr>
<td>Jobs Effective Date</td>
<td>01/01/2012</td>
<td></td>
</tr>
<tr>
<td>Personnel Date</td>
<td>01/09/2012</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Status</td>
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<td></td>
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<tr>
<td>Step</td>
<td><em>(Not Enterable)</em></td>
<td></td>
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<td>Annual Salary</td>
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<td></td>
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<tr>
<td>Factor</td>
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<tr>
<td>Pays</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Timesheet Org.</td>
<td><em>(Not Enterable)</em></td>
<td></td>
</tr>
<tr>
<td>Job Change Reason</td>
<td><em>(Not Enterable)</em></td>
<td></td>
</tr>
</tbody>
</table>

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

**Assignment End Date, EPTF50-00 EPA Temporary - Teaching**

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs Effective Date</td>
<td></td>
<td>05/31/2012</td>
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<tr>
<td>Personnel Date</td>
<td></td>
<td>05/15/2012</td>
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<tr>
<td>Job Status</td>
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<tr>
<td>Job Change Reason</td>
<td><em>(Not Enterable)</em></td>
<td></td>
</tr>
</tbody>
</table>

* - indicates a required field.
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.

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: Funding Source
- Message Type: ERROR
- Description: 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

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>Username</th>
<th>User Name</th>
<th>Required Action</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll</td>
<td>ANITA</td>
<td>Anita Hall</td>
<td>Pay</td>
<td></td>
</tr>
<tr>
<td>45 - (SPOF) Department</td>
<td>CHRISTINA</td>
<td>Christina Durham</td>
<td>Approve</td>
<td></td>
</tr>
<tr>
<td>50 - (PFA) Academic Affairs</td>
<td>GLENDA</td>
<td>Glen Jenkins</td>
<td>Approve</td>
<td></td>
</tr>
<tr>
<td>60 - (RD) Fund Analysis</td>
<td>JENNY</td>
<td>Jenny Smith</td>
<td>Apply</td>
<td></td>
</tr>
</tbody>
</table>

Not Selected |

Save and Add New Row

8/4/2014
Creating the Routing Queue –
• Required Approval Levels have been set up for each EPAF. Click the \( \text{ } \) to select an approver. When all approvers are selected, press

• 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.

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 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.”
How do I complete an EPAF?

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.

How do I complete an EPAF?

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.
What if I need help?

Training Manuals for EPAFs:

  • 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