Office of Human Resources

Electronic Personnel Action Forms (EPAF) Training

March 10, 2015
and
March 12, 2015
Agenda

• What’s an EPAF?
• What are the types of EPAF (Personnel Actions)?
• What are the benefits of EPAF?
• What are the types of EPAF Users?
• EPAF Due Dates and Pay Period Schedule
• Originators’ Roles and Responsibilities (R&R)
• Approvers’ Roles and Responsibilities (R&R)
• Human Resources’ Roles and Responsibilities (R&R)
• Hands-On EPAF Training using Self-Service Banner
What’s an ePAF?

1. Personnel actions that is originated electronically, via Self-Service Banner (SSB), by the department and electronically routed for approval.

2. After approval, the actions are applied to Banner module by Human Resources.

Examples: EPAFs can be used for:

- rehiring employees
- changing the account budget
- changing a job title, changing pay or adding a new employee
- terminating job at a future date
What are the Benefits of an EPAF System?

Benefits of the EPAF System:
- Electronic Process
- User Defined Approval Process
- Tracking System

Results of the Benefits:
- Never lost in campus mail or in somebody's "inbox".
- Created online and applied to the Banner system electronically so the information is keyed only once, lessening the chance for data entry errors.
- Routed online so there is never a question regarding the location of the EPAF.
- Available for viewing so various people can view it simultaneously.
- View Status of the EPAF: Once the EPAF has been submitted, you can see who has approved it, disapproved it, made remarks about it or returned it for correction.
Types of Personnel Actions

- Initial Hire (New Hire)
- Rehire
- Budget Account Change (Labor Distribution)
- Supplemental/Overloads
- Summer Grants
- Separation

EPAF is required for the following Personnel Actions:

- Rehire of Full-time (grants and contracts funding only), Part-Time Staff and adjunct faculty
- Hire and Re-hire of Graduate Assistants
- Change in Budget Account of the employee’s job assignment
- End a job assignment (but not a full employee separation)
- Add Overload, Supplemental Pay or Summer Grant
Types of EPAF Users

Originators
Prepare and create EPAF transaction.

Approvers
Process EPAF to approve and acknowledge, and return to Originator for corrections.

Human Resources
Apply the transaction to Banner database.
EPAF Due Date

Regular end of the month payroll: 18th
Supplemental Payroll: 6th

1. EPAFs must be approved by the department approver(s) and proxy before the deadline date.

2. Please note, it takes a few days to gather all required approvals so it is imperative that EPAFs are submitted as early as possible to avoid delays in payment.

3. All EPAFs received after the deadline date will be processed during the next payroll period. Late EPAFs can cause a nonpayment or overpayment for employees.
## Pay Period Schedule

**Deadline dates may change**

<table>
<thead>
<tr>
<th>Payroll No.</th>
<th>Pay Period</th>
<th>EPAF Deadline</th>
<th>Pay Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1/1/2015 - 1/31/2015</td>
<td>1/16/2015</td>
<td>1/30/2015</td>
</tr>
<tr>
<td>7</td>
<td>7/1/2015 - 7/31/2015</td>
<td>7/17/2015</td>
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<td>8</td>
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<td>8/18/2015</td>
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<tr>
<td>9</td>
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<td>9/18/2015</td>
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<tr>
<td>10</td>
<td>10/1/2015 - 10/31/2015</td>
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<td>10/30/2015</td>
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<tr>
<td>12</td>
<td>12/1/2015 - 12/31/2015</td>
<td>12/9/2015</td>
<td>12/31/2015</td>
</tr>
</tbody>
</table>
Originator R&R

 Roles and Responsibilities of the Originator:

• Create and submit your EPAFs before the deadline to allow your approver time to review and approve the transactions.

• As the originator of the EPAF, you are responsible for selecting the appropriate approvers at all levels of the routing queue.

• Develop a system to check the Approval Level to make sure the EPAF is not pending or waiting on your approver; then contact or email the approver(s) of the pending transaction(s).

• Monitor and track end dates of EPAF making sure you submit a rehire EPAF, if appropriate. Create MS-Calendar email as a reminder to trigger end dates before the previous EPAF ends; and only if you need to complete or track the end dates for rehire EPAF for the next semester.

• Notify the employee(s) if you know they will not be paid on-time due to pending EPAFs’ approval. Inform the employee of the expected check date.

• Please do not CANCEL EPAFs after the status is Completed. Notify, HR if you need to CANCEL an EPAF before the Payroll Process begin.
Roles and Responsibilities of the Approver:

- Ensure ALL EPAFs are approved in a timely manner; before deadline allowing HR to review and correct transactions before the payroll process.

- Set-up a Proxy User access in case of your absence or when you are not able to respond to the deadline.

- Follow these steps when you receive notification that an EPAF is waiting for your approval. (Reminder Email Subject: Electronic Personnel Action Form (EPAF)-Notice Required)

  - Log into Self Service Banner; click on the Employee link; Electronic Personnel Action Forms link; EPAF Approver Summary link.
  - EPAF waiting your approval will be listed under the “Current” tab.
  - EPAFs scheduled for your approval after another user’s approval will be on the “In My Queue” tab. EPAFs you have already approved will be on the “History” tab; and click the name of the employee to access an EPAF.
Roles and Responsibilities for Human Resources:

• To review, approve and apply all EPAFs within deadlines.

• To provide you with adequate EPAF training, in order for you to accomplish your duties in an effective and efficient manner.

• Our main goal is to make this EPAF process as simple and easy as possible (User-Friendly), allowing you to become proactive and accountable for your department’s personnel and budget management.
Hands-On Training

Log in Self-Service Banner:  www.aamu.edu, myAAMU, Banner
SSB Log-in
Enter User ID and PIN
Employee Link
Electronic Personnel Action Forms
New EPAF Transaction

Person Selection
- Banner ID: A# and Name
- Query Date
- Approval Category

General Information
- Name, Transaction #, Query Date, Transaction Status, Approval Category.

Main Job - (Based on Approval Category)
- Job effective date, Salary Grade, Step, Factor & Pays, Annual Salary, etc.

Budget
- Labor Distribution: COA, Fund, Organization, Account Program, and Percent

Routing Queue
- Approval Level, User Name, and Required Actions

Comments
Warning & Error Messages

**Warning Messages:** These messages will allow the EPAF to be save and submit.

**Error Messages:** These messages will not allow the EPAF to submit to the approval levels. Errors must be corrected. Read the details provided, and correct the errors as indicated.
Summarize & Re-Cap

- Defined EPAF
- Demonstrated the benefits of EPAF System
- Defined types of Personnel Actions – Approval Category
- Three Types of EPAF Users & Responsibilities
  1. Originators’ Roles and Responsibilities (R&R)
  2. Approvers’ Roles and Responsibilities (R&R)
  3. Human Resources’ Roles and Responsibilities (R&R)
- EPAF Transactions
- Banner Human Resource EPAFs Webpage – Coming Soon
  - EPAF – Training Manual
EPAF Training Manual

- Reference guides and samples of EPAF for each Personnel Actions:
  - New Hire (Initial Hire)
  - Rehire
  - Budget Account Change
  - Supplemental/Overloads
  - Summer Grants
  - Separation

- EPAF Banner Access Request Form
- EPAF Deadline Dates
- Common EPAF Errors and Troubleshooting
- FAQs EPAF
Questions, Comments, or Suggestions