

## EPAF Frequently Asked Questions

<b>GENERAL QUESTIONS</b>	
<b>QUESTION</b>	<b>RESPONSE</b>
What is an EPAF?	EPAF stands for "Electronic Personnel Action Form". An EPAF allows personnel actions to be created and approved electronically, eliminating paper and allowing the originator to track an EPAF through the approval process.
What is the flow of an EPAF?	<p><b>FIRST:</b> An Originator creates an EPAF in Banner Self-Service from the Employee menu.</p> <p><b>NEXT:</b> One or more Approvers approve the EPAF in Banner SelfService.</p> <p><b>LAST:</b> An Applier in Human Resources applies the information from an approved EPAF to Banner.</p>
Who is an Originator?	An Originator is a person who creates an EPAF.
Who is an Approver?	<p>An Approver is a person who reviews an EPAF, and either approves, disapproves, or returns the EPAF to the Originator for correction.</p> <p>An EPAF must have at least one Approver (a mandatory approval level), but it may have more than one. Examples of approval levels include the Department Chair, the Dean's Office, and the Office of Sponsored Programs.</p> <p>If a department requires more than the mandatory approval level(s) associated with a given EPAF, the originator can set up additional approval levels in the Default Routing Queue associated with each type of EPAF he/she originates.</p>
Can a person be both an Originator and an Approver?	In rare instances, a person may be both an Originator and an Approver; however, an Originator should never approve any EPAF that he/she originated.
Who is an Applier?	<p>An Applier is a person who saves (applies) the information from an approved EPAF transaction to Banner. Each EPAF must have an Applier (another mandatory approval level).</p> <p>EPAFs for hourly students are applied by Student Employment (Financial Aid). All other EPAFs are applied by Human Resources.</p>
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<p>What is the difference between “<b>Approve</b>”, “<b>FYI</b>”, and “<b>Apply</b>” in the Routing Queue section?</p>	<p><b>Approve</b> – A person in the approval queue with a required action of “approve” reviews the EPAF for correctness before approving it. If there are multiple approvers for an EPAF, the EPAF will be routed to each of them in an order based on their approval levels.</p> <p><b>FYI</b> – A person in the approval queue with an action of “FYI” will be able to see an EPAF is in process. This individual will have the ability to view the EPAF but not to approve it. The flow of the EPAF is not dependent on any action by this person.</p> <p><b>Apply</b> – This is the final step of the EPAF process. A designated person in Human Resources applies the EPAF transaction information to Banner.</p>
<p>How do I access EPAFs through Self-Service?</p>	<p>Once you have been identified and set up as an Originator or someone in an Approval Level (i.e., available to be added to the Routing Queue), you can access the EPAF menu through the Employee menu in self-service. This is the same place you go to do timesheets.</p>
<p>Can I set up a proxy for EPAFs?</p>	<p>Only Approvers and Appliers can set up proxies to handle their EPAF duties while they are absent.</p>
<p>I have a proxy set up for timesheet approvals. Do I need to set up a proxy for EPAFs?</p>	<p>Yes. Proxies for timesheet approvals are not related to proxies for EPAF approvals.</p>

<b>ORIGINATORS</b>	
<b>QUESTION</b>	<b>RESPONSE</b>
<p>Can a department have more than one Originator?</p>	<p>Yes. A department can have more than one Originator. However, an EPAF can only be corrected by the Originator who created it.</p>
<p>Our department’s Originator is out on leave. Can someone else make corrections to an EPAF he/she created?</p>	<p>No. Since an Originator can’t designate a Proxy, another Originator in the department would need to create a new EPAF if it is something that can’t wait. If there isn’t anyone else to create a new EPAF, contact Human Resources for assistance.</p>
<p>How do I know which EPAF to use?</p>	<p>Refer to the "Available EPAFs" document.</p>

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<p>If I'm trying to hire a returning student into a semi-monthly position, but he/she already has an hourly position, what should I do?</p>	<p>First, confirm with the student whether or not the hourly position is valid, since semi-monthly students must have permission to have a second job.</p> <p>When you try to save the semi-monthly EPAF, you might get an error saying the student already has a primary job. If this happens, change the "contract type" on the semi-monthly job to "overload" and add a comment to the EPAF:</p> <ol style="list-style-type: none"> <li>1. To tell HR whether the hourly job is valid and</li> <li>2. To alert HR that the contract type of the semi-monthly job needs to be changed manually once the EPAF is applied.</li> </ol>
<p>What do all the different dates in the body of an EPAF mean?</p>	<p><b>Effective Date:</b> The date the transaction will take effect in Banner. This will usually be a payroll date (i.e., the 10<sup>th</sup> or 25<sup>th</sup> for employees receiving a salary or a stipend; the 1<sup>st</sup> or the 15<sup>th</sup> for an hourly employee).</p> <p><b>Personnel Date:</b> The date the action actually took effect. This will generally match the effective date.</p> <p><b>Base Job Begin Date:</b> The first date that an employee was ever placed in a specific position. If you are creating an EPAF for a rehire, the begin date should not change from when the employee was first hired into this position.</p>

<b>ORIGINATORS</b>	
<b>QUESTION</b>	<b>RESPONSE</b>
<p>After I've made corrections to an EPAF, do I need to save the EPAF again?</p>	<p>Yes. You always need to save an EPAF after you have made changes. When it is ready for approval, you can submit it.</p>
<p>How will I know if my transaction has been saved or submitted successfully?</p>	<p>You need to save your EPAF before you submit it.</p> <p>You will receive a message at the top of the EPAF screen telling you that your save or submit was successful.</p> <p>If you received error messages, you will need to resolve them before you save or submit.</p>
<p>How do I check the status of my EPAF?</p>	<p>Use the Originator Summary screen to check the status of your EPAF. If the EPAF has already been submitted, it will appear under the "History" tab.</p>

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Why does the queue status say “Waiting” instead of “Pending?”	Waiting means that the EPAF has not been successfully submitted. Locate the EPAF in the Originator Summary and view the error messages, if there are any. Click on “Update” if necessary and then save and submit the EPAF.
Do I need to worry about warning messages?	No. Warning messages will not prevent a transaction from being submitted, approved, and applied to Banner.
Do I need to worry about error messages?	Yes. Error messages will prevent an EPAF from being saved or submitted successfully. If you have read the error messages carefully, reviewed your EPAF, and still can’t resolve the problem, call your Human Resources service team for assistance.
Can I change the position number and suffix once a transaction has been saved?	No. The position number and suffix are unique to each entry and cannot be changed after the transaction has been saved. You will have to delete or void your current EPAF and create a new EPAF.

<b>ORIGINATORS</b>	
<b>QUESTION</b>	<b>RESPONSE</b>
What is the difference between “voiding” and “deleting” and EPAF?	<p>An EPAF that has been voided will remain in the Originator Summary. This selection is useful if you would like to keep a copy for future reference. Once an EPAF has been deleted, it will no longer appear in Originator Summary.</p> <p>Be careful! There is no prompt to confirm that you actually want something deleted.</p>

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<b>ORIGINATORS</b>	
<b>QUESTION</b>	<b>RESPONSE</b>
What can I do if my EPAF Approver is on leave and he/she has not designated a proxy?	You can contact Human Resources or Student Employment (Financial Aid) to return the EPAF to you. You will be able to update the EPAF and change the routing queue of the EPAF so that it routes to a different Approver, if there is an additional person who would have be appropriate to assume that responsibility.
I need to change some information on an EPAF. What should I do?	<p><b>If you have saved (but not submitted) the EPAF,</b> you can access it from your Originator Summary and make your changes.</p> <p><b>If you have submitted the EPAF and it does not yet have a transaction status of “Approved,”</b> you can call the next approver in line and have him/her return it to you for correction.</p> <p><b>If the EPAF has a transaction status of “Approved,”</b> it has been approved, but it has not yet been applied to Banner. Call HR so that the EPAF can be returned to you for correction.</p> <p><b>If the EPAF has a transaction status of “Completed,”</b> it has been applied to Banner. You can either:</p> <ol style="list-style-type: none"> <li>1. Call Human Resources to delete the transaction (in which case you would want to “cancel” it from your Originator Summary) and create a new EPAF, or</li> <li>2. Submit an EPAF with corrected information on it.</li> </ol>
How can I make someone default into the Routing Queue rather than having to search for or type his/her username each time?	<p>Additional approval levels, as well as specific people, can be set up to automatically default by setting up a Default Routing Queue.</p> <p>A Default Routing Queue is specific to a type of EPAF, so if you use 4 types of EPAFs, you will probably want to set up a Default Routing Queue for each one.</p> <p>The Default Routing Queue can be accessed from the Originator Summary screen. You can choose an approval level, a person, and the required action for that person.</p> <p>There is a video tutorial available on setting up a default routing queue.</p>
What if I want to choose a person to be in my routing queue, but I don’t see him/her on the drop down list?	All people in the Routing Queue must be defined in an Approval Level. If the person you need to choose is not available, please contact <a href="mailto:askHR@wm.edu">askHR@wm.edu</a> .

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<b>APPROVERS</b>	
<b>QUESTION</b>	<b>RESPONSE</b>
What information am I expected to approve?	<p>It is understood that not all approvers will have the knowledge to approve all fields on the EPAF. For example, a PI wouldn't necessarily know a student's original hire date. However, he/she would know the dates he is expecting the student to work, the amount of money the student will earn, and what the funding will be.</p> <p>If there is a field you are unsure of, there are job aids that define what the fields mean.</p>
Can there be more than one Approver for an EPAF?	Yes, there can be multiple levels of approval (e.g., in some cases, an EPAF must go to the Office of Sponsored Programs and the Dean's Office). The order of approval is dictated by the routing queue. Once an approver has approved the EPAF, it will be available for the next approver in line to review it.
Can an Approver make changes to an EPAF?	No, only the Originator can make changes. If there is a problem with the EPAF, the Approver can choose "return for correction" and add a comment as to what the problem is. The Originator can make the necessary changes, save and re-submit the EPAF.
How do I check the status of an EPAF?	<p>Use the Approver Summary screen to check the status of your EPAFs:</p> <ul style="list-style-type: none"> <li>• The <b>Current</b> tab displays EPAFs you need to act on.</li> <li>• The <b>In My Queue</b> tab displays EPAFs that have been submitted, but that have not reached you yet.</li> <li>• The <b>History</b> tab shows EPAFs you have already taken action on.</li> </ul> <p>There is a video tutorial about the Approver Summary available.</p>
What is the difference between "returning something for correction" and asking for "more information?"	<p>If you return something for correction, you are expecting the originator to change data on the EPAF, and the EPAF will need to go through the entire routing queue again.</p> <p>If you ask for more information, you are expecting the originator to add a comment which clarifies something for you. The EPAF remains with you while you await the information, and it will not need to go through the routing queue again; it will continue on from where it is.</p>
Will I receive a notification that I need to approve an EPAF?	Yes. Emails are generated once a day and are sent to anyone who has EPAFs needing approval or available for FYI.

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<p>How do I designate a proxy to handle my approvals while I'm gone?</p>	<p>EPAF approver proxies are separate from timesheet approver proxies and must be set up separately. If you are in an approval level, you can set up/maintain your proxies from the EPAF main menu or from your Approver Summary. There is a video tutorial available.</p>
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