

ePAFs Introduction and Glossary

Welcome to Staff ePAFs!

An Electronic Personnel Action Form (EPAF) allows users to process personnel actions electronically, without paper, by submitting changes to information on NBAJOBS forms in Banner.

EPAF allows users to:

- Enter select personnel actions on-line
- Define approval routing queue's for each action
- Electronically route the action for approvals
- Track actions in real-time as they advance through the approval process
- Apply approved actions to Banner
- Provide an audit trail of all approval/disapproval EPAF history

The EPAF process is used to update information on Banner forms:

- NBAJOBS – Employee Job Form

This guide will introduce you to the basics of EPAF's, provide you with some tips, FAQ's and common EPAF Error and Warning Messages.

Advantages of EPAF

- Accountability for data entry is shifted to the originator
- Speed and efficiency of the process is increased
- Less opportunity for data entry errors
- Ability to track a transaction through the approval queue
- Speed of processing

Six Categories of EPAFs

- Labor Distribution Change, **CFOAP**
- Job End/Terminations, **JBTERM** (*just for a position—not termination from EMU*)
- New EC or TM Assignment, **NWTMP**
- Pay Adjustment, **PADJ**
- Additional Compensation, **ADCOMP**
- New Hire Job and Job Reactivation, **NWHIR**

GLOSSARY:

EPAF Roles

Originator: The originator initiates the data entry of the EPAF personnel transaction and submit it to the first level in the approval routing queue.

Approver: The Approver reviews the EPAF personnel transactions submitted by the originator to ensure that data entry is complete and accurate, and to verify that supporting documentation requirements are met.

FYler: The FYler receives a copy of the EPAF personnel transaction to review. This serves only as an “FYI” for the recipient – he/she cannot take action on the transaction.

Applier: The Applier “routes” or applies the EPAF transaction into the Banner database. Here at EMU, this is an automated process that runs nightly.

Basic EPAF Terminology
<p>Originator: After pre-EPAF steps are complete, Originators:</p> <ul style="list-style-type: none"> • Gather the required information and supporting documents • Create EPAF transaction in the system • Set’s up necessary approval routing queue • Submit the EPAF to the approval routing queue • Make any required changes or corrections throughout the review & approval process, until the EPAF “applies” to the Banner system. <p>The Originator is the person who initiates and submits the EPAF into the routing queue for review & application to the Banner System.</p>
<p>Required Action: The action of the designated Approver(s) is required to take. This is defined for each level or step in the Routing Queue.</p> <p>There are three action types available for selection in the Approval Routing Queue:</p> <ul style="list-style-type: none"> • Approve: This individual must take action on the EPAF • FYI: This individual is seeing the EPAF for information only and the EPAF does not have to wait for this person to do something before the EPAF can move on. • Apply: This individual must apply the EPAF to the Banner database after the final approval in the approval queue. This is a process that runs nightly at EMU.
<p>Approval Category: Approval Categories are the actions you are performing</p>
<p>Approver: Assigned individuals who can process EPAFs to Approve, Acknowledge, or Return EPAFs for Correction.</p>
<p>FYI:</p>

<p>Apply/Applied: this is the final step in the life-cycle of an EPAF transaction where the data is applied to the Banner database system. The new/changed data can then be viewed and verified in the appropriate Banner forms and tables.</p>
<p>Routing Queue: The sequence of Approvers and FYlers each EPAF must pass through before being applied to the Banner database system.</p>
<p>Query Date—MUST equal a Payroll Cycle begin date (please refer to the payroll calendars located at: https://www.emich.edu/controller/payroll/pacalendars.php) This should always be the beginning of currently open Payroll cycle.</p> <p>NOTE: The query date will default in to all dates in the EPAF, except the contract end date. <i>Payroll can not issue any back pay beyond the Query Date.</i></p>
<p>Personnel Date—is the actual date the assignment starts (first day of work).</p> <p>NOTE: It will default in as the Query Date and should be changed to reflect the actual start date of the assignment.</p>
<p>Current Hire Date—auto populates based upon the Query Date</p>
<p>Contract Type—will always be Secondary unless this is the first and only job record for the employee.</p> <p>Note: All Additional Compensation EPAF will be Secondary Contract Types.</p>
<p>Job Begin Date— auto-populates based upon the Query Date</p>
<p>Jobs Effective Date—auto-populates based upon the Query date</p>
<p>Job Change Reason—will auto populate based on the type of transaction you selected at the creation of the EPAF.</p>

<p>Transaction Status: The status of the EPAF itself – where it is in the approval process. These statuses are usually more relevant for an Originator. There are eight approval process Status indicators:</p>
<p>Waiting: The EPAF is in the process of being created and has not yet been submitted. An EPAF in Waiting Status can be deleted by the Originator by selecting the Delete button on the EPAF form.</p>
<p>Complete: The EPAF has been applied to the Banner database and the requested changes have been made in Banner.</p>
<p>Pending: The EPAF is in the Routing Queue and requires action by the Approver(s).</p>
<p>In the Queue: The EPAF is working its way through the approval queue, but has not made it to that level of approval yet.</p>
<p>Disapproved: The EPAF has been disapproved by an Approver. The other Approvers in the Routing Queue (after them) no longer need to take action. The EPAF was stopped.</p>
<p>Return for Correction: The Approver has returned the EPAF to the Originator for correction. The EPAF can then be corrected by the Originator and resubmitted. Once an EPAF is in Return for Correction Status, it is as if it were never submitted.</p>
<p>Void: The Originator has Voided the EPAF. It is no longer a valid transaction. The Originator can Void the EPAF at any time during the approval queue process unless the EPAF has been Applied.</p>

Approved: The EPAF has been approved by all the Approvers in the Routing Queue, but it has not yet been applied to the database.

Queue Status: The status of the EPAF for each individual defined in the approval queue.
The Approval Queue Status categories are:

Pending: The Approver(s) needs to take action.

In The Queue: The EPAF is on its way to you as an Approver but it needs actions at a lower level. The status changes to Pending when the transaction reaches you.

Approved: The Approver has reviewed and approved the transaction.

Acknowledge: As Approver designated with the action of FYI has seen the EPAF.

Disapproved: The Approver has reviewed and disapproved the transaction.

Overridden: A SuperUser has approved an EPAF, prior to receiving all approvals from those defined in the normal Approval Routing Queue. In this case, the Queue Status would read "Overridden" for all Approvers remaining in the Routing Queue that the EPAF has not reached.

Void: The transaction has been voided. This is only a valid status for Originators.

Removed from Queue: The EPAF has either been Voided by the Originator or Disapproved by an Approver. The EPAF is no longer a valid transaction. This is the Queue status the remaining Approvers would see.

FYI: Indicates that the EPAF transaction has been sent to you for your information only. No action is required. The EPAF will continue through the Approval Routing Queue.

Return For Correction: The EPAF has been returned to the Originator for correction. *NOTE: When using this option, please detail the reasons for return in the Comments section of the EPAF.*

Applied: The EPAF has been applied to the Banner database. The new data can be verified/viewed in the Banner NBAJOBS forms and tables.

More Information: If the Approver needs more information before they can take action, they can change the status to "More Information" to let others in the Approval Routing Queue know that they are working on it.