ePAF End User Training

A visual reference for (to be used in conjunction with the Guide to HR BANNER Forms & Transactions).
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Revised July 2022
What is an ePAF?

Electronic Personnel Action Form

Data entry forms used to initiate employee transactions

These transactions include:
- Reappointments
- Transfers
- Rehires (for College Work Study appointments only)
- Labor/Hourly Rate Updates
- Termination of Jobs
Available ePAFs

- Ordered ePAFs by Transaction Type
  - Additional Jobs
  - Adjustments to Active Jobs
  - Terminations & Transfers
  - Reappointments

- Added line breaks for visual aesthetic
Your Role as an ePAF Originator

Create ePAFs

Input applicable information (varies based on each ePAF):
- Personnel Start Date
- Personnel End Date
- Salary/ Hourly Rate
- Supervisor
- Comments

Track, review and make changes to ePAFs
Your Role as an ePAF Approver

- Approve
- Disapprove
- Return for Correction
- Acknowledge
Main Components of an ePAF

1. Determine type of transaction
   • Nature of the work/job
2. Determine Funding
   • Permanent or Temporary
   • Budget Transfer Needed?
3. Determine position
4. Review All Jobs for the employee
5. Determine ePAF approval category
### How to Determine Which ePAF to Use

**Detailed Chart of ePAFs**

#### Chapter 2: Detailed Listing of ePAFs

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>ePAF Approval Category</th>
<th>Availability</th>
<th>Personnel Transactions</th>
<th>Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Compensation or Job</td>
<td>Additional Job or Compensation - Salaried</td>
<td>Year Round</td>
<td>Supplemental income, overages, bonuses, one-time payments, Secondary job</td>
<td>Salaried except for Executive, Student,</td>
</tr>
<tr>
<td></td>
<td>Additional Job - Hourly</td>
<td>Year Round</td>
<td>Secondary job</td>
<td>Union employees</td>
</tr>
<tr>
<td></td>
<td>Reinstatement Job or Compensation (Salaried and Hourly)</td>
<td>Year Round</td>
<td>Supplemental income, overages, bonuses, one-time payments, Secondary job</td>
<td>Salaried and Hourly except for Executive, Student, Union employees</td>
</tr>
<tr>
<td>Adjustments to Active Jobs</td>
<td>Salary or Hourly Rate Update</td>
<td>Year Round</td>
<td>Salary, hourly rate, labor, timesheet/leave report approver, title updates</td>
<td>Salaried and Hourly except for Executive, Student, Union employees</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Labor allocation updates</td>
<td>All except Executive, Student</td>
</tr>
</tbody>
</table>
User Guides

• Always available in the Manager's Toolkit on the HR website

Chapter 3: Step by Step ePAF Instructions

Additional Compensation or Job

Additional Compensation or Job - Salaried
This ePAF can be used to submit an additional compensation or additional job on a Salaried employee in the form of supplemental income, overtime, bonus, one-time payment or secondary job. Executive, union and student employees are out of scope at this time and will be processed via paper PAFs. One-time payments for employee expenses > 90 days are also out of scope and will be processed via paper PAFs.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field (“T” in TCID in caps).</td>
<td></td>
</tr>
<tr>
<td>Enter the Query Date. The Query Date should equal the effective date of the additional compensation or job. The effective date should be after the employee’s last paid date.</td>
<td></td>
</tr>
<tr>
<td>Select Additional Job or Compensation – Salaried on the</td>
<td></td>
</tr>
</tbody>
</table>

EPAFS

General Information and Tools

- Detailed Listing of ePAFs
- Visual Guide for ePAF Originators
- Visual Guide for ePAF Approvers
- Position Guidance for Additional Compensation or Job
- Determining a Position Number for a Pooled Position for a PT Employee
- Determining a Position Number for a Supplemental Compensation for FT Employee
- Additional Job or Compensation ePAF - Common Issues Guide

How To:

Full Guide: Guide to HR Banner Forms & Transactions

Additional Compensation or Job

- Additional Compensation or Job - Salaried
- Additional Job - Hourly
- Additional Job - College Work Study
- Additional Job - Students
- Reinstall Job or Compensation - Salaried & Hourly

Adjustments to Active Jobs

- Salary or Hourly Rate Updates
- Salary Adjustment - Faculty FT Lecturer
- Labor Update
- Hourly Rate or Labor Update - Interim
- Hourly Rate or Labor Update - Work Study
- Timesheet, Leave Report Approver, and/or Title Updates
- Job Termination
Log into the TC Portal, click on the Employee Resources tab, then navigate to the Human Resources section. Click on **EPAFS** (**Electronic Personal Action Forms**).
ePAF Home Screen

Electronic Personnel Action Form (EPAFS)

- EPAF Approver Summary
- EPAF Originator Summary
- New EPAF
- EPAF Proxy Records
- Act as a Proxy

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# Key: ePAF Transaction Status

<table>
<thead>
<tr>
<th>Transaction Status</th>
<th>What It Means</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waiting</td>
<td>Indicates that the transaction is in the process of being created</td>
</tr>
<tr>
<td>Pending</td>
<td>Indicates that the transaction requires action by the approver(s)</td>
</tr>
<tr>
<td>Return for Correction</td>
<td>Indicates that the transaction has been returned to the Originator for update/correction</td>
</tr>
<tr>
<td>Approved</td>
<td>Indicates that the transaction has been approved by all parties and ready to be applied to Banner</td>
</tr>
<tr>
<td>Complete</td>
<td>Indicates that the transaction has been applied to Banner</td>
</tr>
<tr>
<td>Void/Canceled</td>
<td>Indicates that the transaction has been voided by an originator or superuser and is no longer a valid transaction</td>
</tr>
</tbody>
</table>
Now a Demo!
Successfully Saved EPAF

When you have saved your EPAF, you will see a green check mark with the statement “Your change was saved successfully.”

At this point, you may submit, delete or (update) and save your ePAF.
When you have saved your EPAF and there are errors, you will be alerted.

Please read the description of the error, resolve and click **Save** again.
Submit the EPAF

After Updating or Saving the EPAF, you can choose to Submit or Delete the EPAF from one of the icons listed under the Index.

The EPAF will not be submitted until you Submit the EPAF. If the Transaction Status still shows ‘Waiting’ the EPAF has not been submitted.

Remember to only press Submit or Delete once.
Successful Submission

When you have successfully submitted your EPAF, you will see a green check mark at the top with the statement “Your transaction has been successfully submitted.”

You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully.

A list of common EPAF errors can be found at the end of this guide.
Return for Correction, Errors, Other Changes, and Tracking Existing EPAFs

The next several slides detail common changes to EPAFs, including Return for Correction, errors, and any changes for EPAFs that have already been created and submitted by the originator. EPAF originators can also track the status of their EPAFs through the EPAF portal.
If an approver needs you to make a change on the EPAF, they will return the EPAF for correction. If you receive an email notification that indicates that you have an EPAF in your queue, the EPAF has been returned to you.

Click on **EPAFS (Electronic Personal Action Forms)** on the TC Services page and select the **EPAF Originator Summary** link under **Electronic Personnel Action Form** page to see what is in your queue.
In your **Current** tab, you will see any EPAFs that have been returned to you for correction. You will be able to see that the EPAF has been **Returned for Correction** by checking the **Transaction Status**.

Click the employee’s name or on the **Comments** link to see why the EPAF was returned **(do not click on the Transaction number)**.
You have the option to **Void** or **Update** the EPAF. Click on **Void** to delete the EPAF and remove it from your queue. Click on **Update** to make changes. If you choose to update, you will be able to alter the **salary**, the **routing queue**, and add new **comments**. You must then **submit** the EPAF.

*Note: The EPAF will remain in your queue until you void or update and resubmit the EPAF.*
Error: User ID(s) must be entered for Routing Queue

If you receive an error that says “User ID(s) must be entered for Routing Queue,” this means you have tried to submit the EPAF without selecting Approval Levels for the EPAF.

Be sure to enter select approval levels (you can establish Default Routing Queues). After reviewing, click submit.
Error: Invalid value for Salary. Value entered must be numeric.

If you receive an error that says “Invalid value for Salary. Value entered must be numeric,” this means you have put a “$” (dollar sign) in the salary section on the EPAF. You cannot put a “$” sign in the Salary New Value – this section should only have the exact amount to be paid (ex. 2000).

Be sure to remove the “$” sign and then, after reviewing, click submit.
Other Errors/Issues

Please disregard any warning messages you receive. These will not impact your ability to submit the EPAF.

If you continue to have difficulties, please contact your HR Generalist.
Other Changes and Tracking the EPAF

As an EPAF originator, you can track, review the status of, and make changes to your EPAF by returning to the **EPAF Originator Summary** screen and clicking on the **History** tab.

From the **History** tab, an EPAF originator can click on the name of the employee and see where the EPAF is in the **Routing Queue** and any **comments** associated with the EPAF.
Other Changes and Tracking the EPAF Continued

By clicking onto the employees’ name from the History tab, you can see the Transaction Status (when the EPAF has been applied by HRIS the Transaction Status will change from Pending to Approved).

You can also look at the Routing Queue to see who has approved the EPAF.

You may Return the EPAF for Correction or Void it from this screen. Please note that both actions will remove the EPAF from all of the following Approval Level queues.
Establishing Default Routing Queues

Default Routing Queues allow you to automatically populate approvers in your Routing Queue. You must create a default routing queue for each EPAF (i.e. setting up a default routing queue for Course Assistant EPAFs does not automatically set up a routing queue for Course Assistant EPAFs).

To establish Default Routing Queues, click on **EPAF Originator Summary** from your EPAF Menu.
Establishing Default Routing Queues

Click on Default Routing Queue.
Establishing Default Routing Queues

Select the EPAF you wish to establish **Default Routing Queues** for from the drop down (remember, you must set up default routing queues for each EPAF).

Then click **GO**.
Establishing Default Routing Queues

The first time you enter into the EPAF the routing queues will be blank. Click on the magnifying glass to select your Approval Levels.
Establishing Default Routing Queues

Once you have selected all of your approval levels, select **Save and Add New Rows**. Your routing queues have been saved! You can establish the default routing queues for another EPAF by clicking on the **Approval Category** and selecting a different EPAF.

You can make changes to your Default Routing Queues even after setting them up. Just click on the magnifying glass next to the approval level you would like to change, then click **Save and Add New Rows**.
Troubleshooting and Technical Help

Contact: HRISTeam@tc.edu or your HR Rep 😊
# Transaction Status and Queue Status Guide

<table>
<thead>
<tr>
<th>Status</th>
<th>Status Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>Transaction Status / Queue Status</td>
<td>Indicates that the transaction has been approved by all parties and ready to be applied to Banner</td>
</tr>
<tr>
<td>Complete</td>
<td>Transaction Status</td>
<td>Indicates that the transaction has been applied to Banner</td>
</tr>
<tr>
<td>Disapproved</td>
<td>Transaction Status / Queue Status</td>
<td>Indicates that the transaction has been disapproved by an approver</td>
</tr>
<tr>
<td>Pending</td>
<td>Transaction Status</td>
<td>Indicates that the transaction requires action by the approver(s)</td>
</tr>
<tr>
<td>Removed From Queue</td>
<td>Queue Status</td>
<td>Indicates that the transaction no longer needs your action</td>
</tr>
<tr>
<td>Return for Correction</td>
<td>Transaction Status / Queue Status</td>
<td>Indicates that the transaction has been returned to the Originator for update/correction</td>
</tr>
<tr>
<td>Void</td>
<td>Transaction Status</td>
<td>Indicates that the transaction has been voided by an originator or superuser and is no longer a valid transaction</td>
</tr>
<tr>
<td>Waiting</td>
<td>Transaction Status</td>
<td>Indicates that the transaction is in the process of being created</td>
</tr>
</tbody>
</table>

## Action Buttons Guide

<table>
<thead>
<tr>
<th>Action Buttons/Links</th>
<th>User Type</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve</td>
<td>Approver(s)</td>
<td>The transaction will progress to the next level of approval in the transaction queue</td>
</tr>
<tr>
<td>Comment</td>
<td>Originator / Approver(s)</td>
<td>Available on all transactions for users as a free text field to share additional information</td>
</tr>
<tr>
<td>Disapprove</td>
<td>Approver(s)</td>
<td>The transaction will be removed from all levels of approvals and no further action will be possible</td>
</tr>
<tr>
<td>Return for Correction</td>
<td>Approver(s)</td>
<td>The transaction will be returned to the Originator for update/correction</td>
</tr>
<tr>
<td>Update</td>
<td>Originator</td>
<td>Available on transactions that have been returned for correction and the originator can make changes and submit for approval</td>
</tr>
<tr>
<td>Void</td>
<td>Originator</td>
<td>The transaction will be removed from all levels of approvals and no further action will be possible</td>
</tr>
</tbody>
</table>

## Summary Page Guide

<table>
<thead>
<tr>
<th>Summary Page Tabs</th>
<th>User Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>Originator / Approver(s)</td>
<td>Transactions that require your action</td>
</tr>
<tr>
<td>In My Queue</td>
<td>Approver(s)</td>
<td>Transactions that will require your action after predecessor levels have been approved</td>
</tr>
<tr>
<td>History</td>
<td>Originator / Approver(s)</td>
<td>Transactions that you have already taken action on</td>
</tr>
</tbody>
</table>

## Miscellaneous

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Date (Begin Appointment)</td>
<td>Actual Start Date of appointment</td>
</tr>
<tr>
<td>Personnel Date (End Appointment)</td>
<td>Actual End Date of appointment</td>
</tr>
</tbody>
</table>
Frequently Asked Questions

How do I know who I can reappoint?
Before the beginning of each semester, HRIS will release an Excel spreadsheet listing those employees and their position numbers that are eligible for the Course Assistant Reappointment EPAF.

Who can be reappointed?
• Employee is returning to the same appointment
• Employee job record will be terminated before start date of reappointment
• Paying them from the same index/account combination (operating funded only)

I’m certain my employee worked last semester and should be reappointed via EPAF.

Why isn’t s/he on the list?
Please check with your Director of Academic Administration or HRISTeam@tc.columbia.edu if you do not see your employee on the Excel spreadsheet and you believe that your employee qualifies for a reappointment EPAF.

My EPAF has been “returned for correction.” What do I do?
You will need to make a correction to your original EPAF and then resubmit the EPAF. Follow the easy steps outlined in the Return for Correction section.

I’m getting an error and can’t submit my EPAF.
Your error could be due to salary, routing queues, or putting an incorrect character in the salary section. See if your error is one of the ones outlined in the Errors section. If you are receiving a different error, please contact HRISTeam@tc.columbia.edu
Frequently Asked Questions (cont.)

I’m getting a warning message. Do I need to do anything?
No – warning messages are just notifications but will not prevent you from submitting your EPAF. It is best to ignore the warning message. Only be concerned if there is an error.

I want to make a change to my EPAF or see where my EPAF is. Do I need to call someone?
The EPAF portal allows you to make changes to your EPAF or track your EPAF through the TC portal. To make a change (such as add a comment, return the EPAF for correction, or void the EPAF) or to track your EPAF’s progress, see the section on Other Changes and Tracking EPAFs.

What are Default Routing Queues, and how do I set them up?
Default Routing Queues can be used by EPAF originators to automatically populate approvers in your Routing Queue when creating a new EPAF. They save you time because they automatically populate your already established approvers (like budget, financial aid, HRIS, etc.) so you do not have to select those approvers each time you create an EPAF. For an explanation of setting up Default Routing queues, see the section on Establishing Default Routing Queues.

I’m an EPAF approver and need to set up a proxy. How do I do that?
See our section on Establishing Proxies.

I’m a proxy for an EPAF approver. How do I see and approve the EPAFs?
Follow our steps to viewing the EPAFs on the Acting as a Proxy section. You may want to refer to the Approvers Reference Guide for Reappointment EPAFs document for assistance and more information on approving EPAFs.

Is there an EPAF transaction glossary?
Sure is! Click here to see our EPAF glossary.

Who do I contact if I have questions/concerns?
You can contact HRISTeam@tc.columbia.edu