Teachers College
COLUMBIA UNIVERSITY

Intro to ePAF System Training

What We'll Cover Today

- What is an ePAF?
- How to Access ePAFs
- New ePAF
- ePAF Originator
- ePAF Approver
- Act as a Proxy
- Demo
- Defaulted Values, Common Errors and System Defects
- Other Items
- EPAF Transaction Glossary

What is an ePAF?

What is an ePAF?

Electronic Personnel Action Form

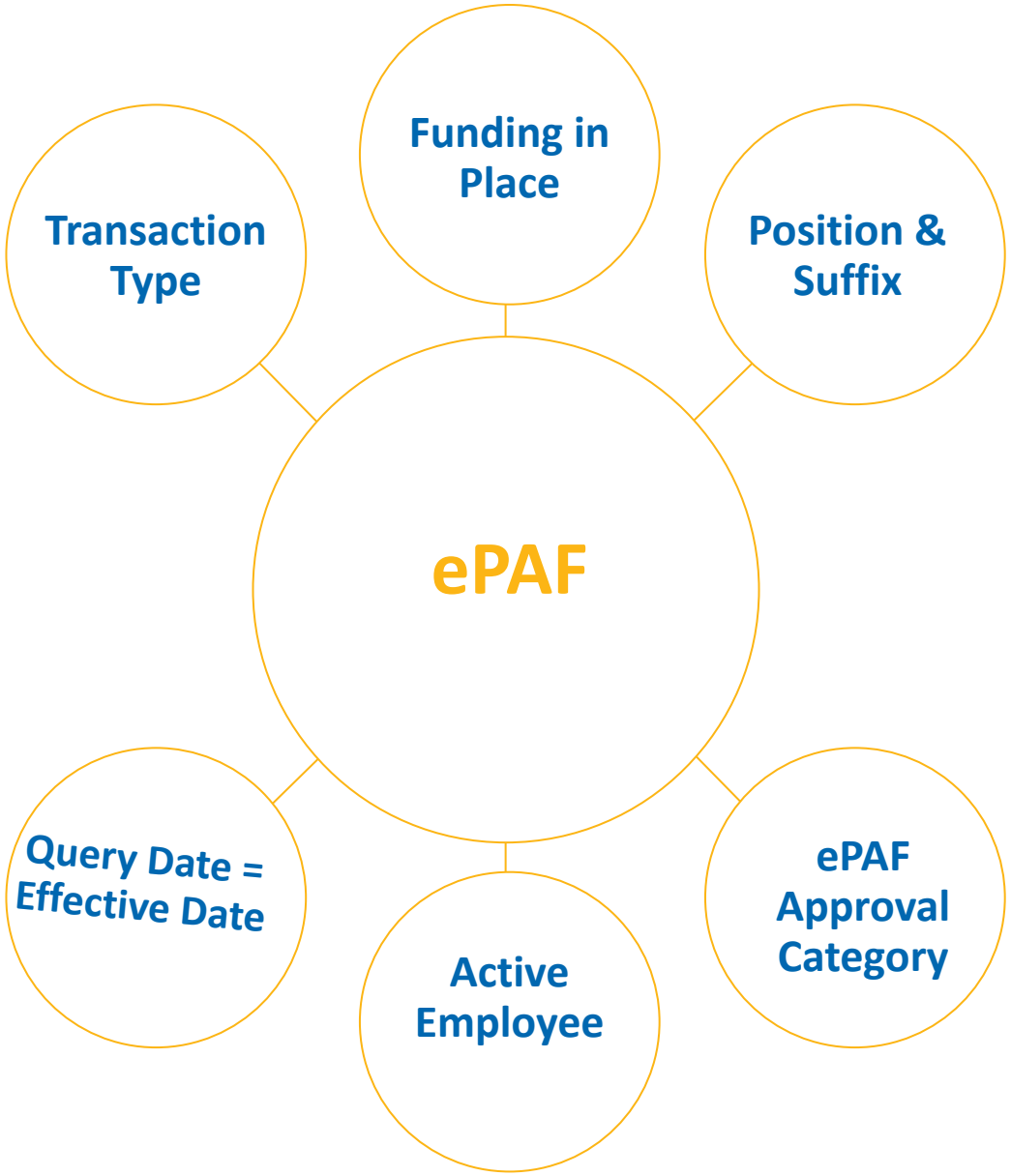
Data entry forms used to initiate employee transactions

These transaction types include:

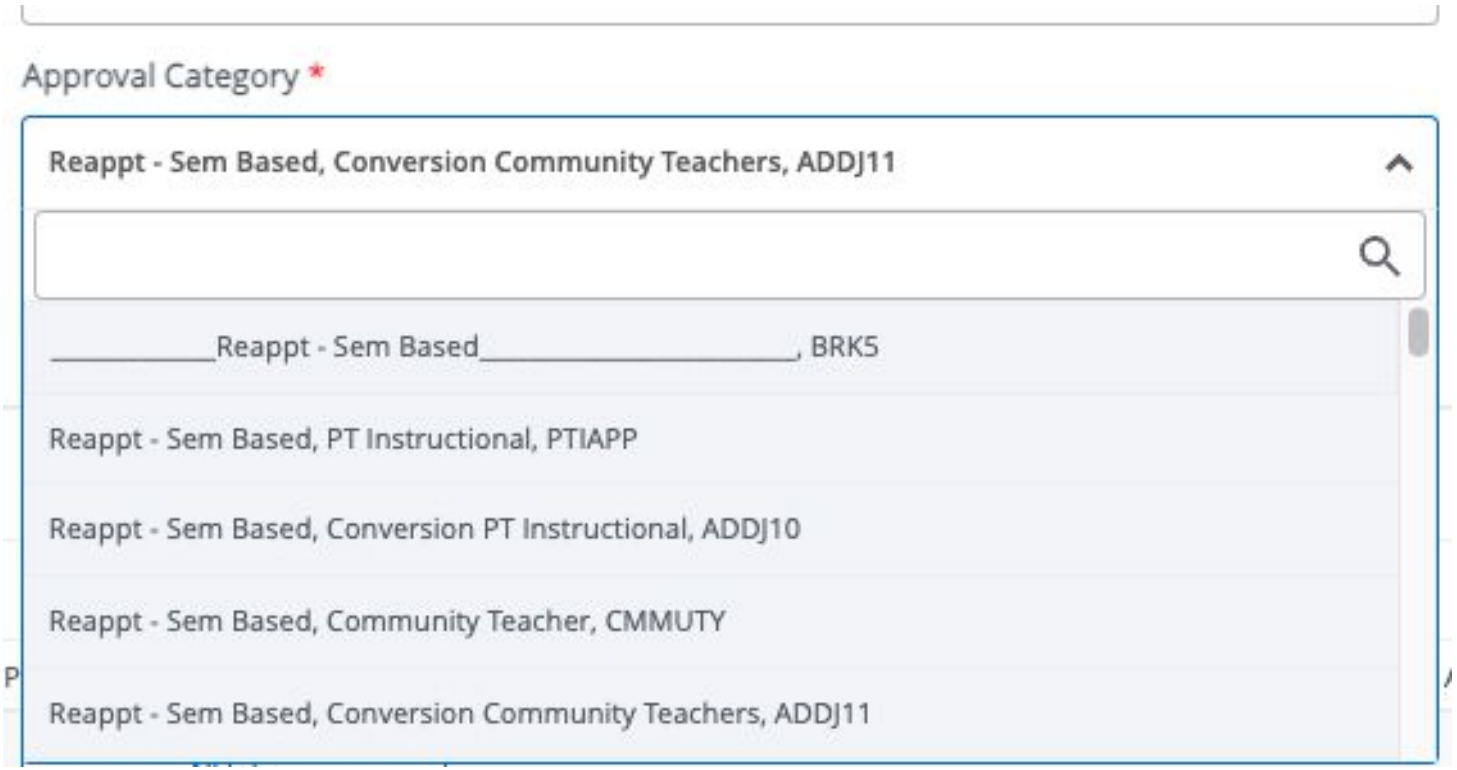
- Reappointments
- Terminations and Transfers
- Additional Jobs/Compensation
- Adjustments to Active Jobs

Main Components of an ePAF

Elements that must be in order prior to moving transactions through the ePAF system.



Available ePAF Approval Categories



- Ordered by transaction type:
  - Reappointments
  - Terminations/ Transfers
  - Additional Job or Compensation
  - Adjustments to Active Jobs

How to Determine Which ePAF to Use

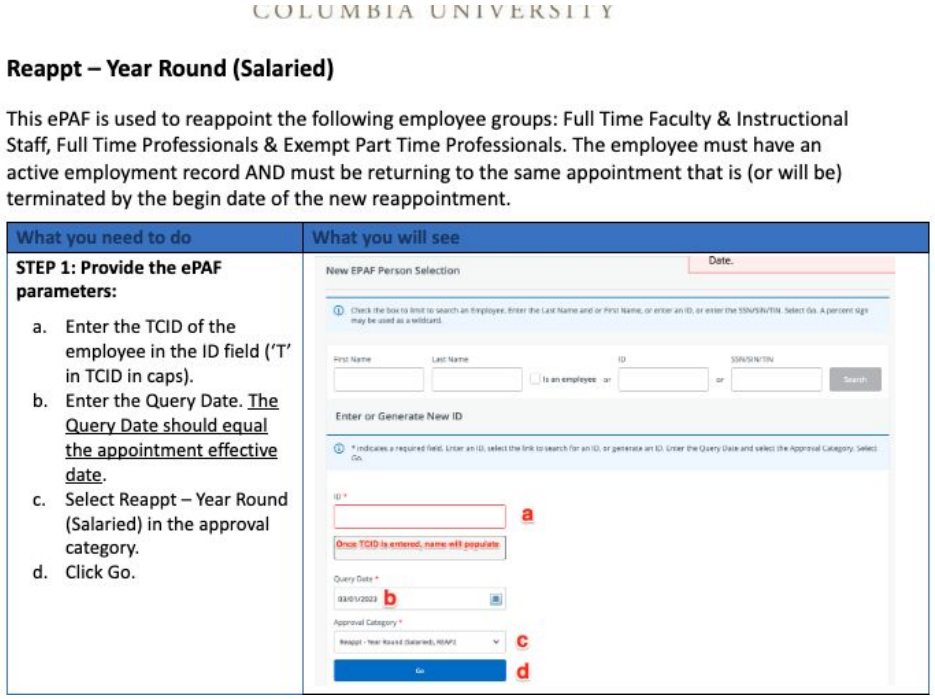
- Detailed Chart of ePAFs

Transaction Type	ePAF Approval Category	Availability	Personnel Transactions	Scope
Reappointments - Semester Based	Reappt - Sem Based, PT Instructional	Semester	Reappointment	PT Instructional staff paid from accounts 6122/6129, 6132/6139 or 6152/6159.
	Reappt - Sem Based, Conversion PT Instructional • Reappt - Sem Based, Conversion PT Instructors • Reappt - Sem Based, Conversion Adjunct Professor • Reappt - Sem Based, Conversion Fee Based Instructors	Semester	Reappointment and conversion to designated pooled position number	PT Instructional staff paid from accounts 6122/6129, 6132/6139 or 6152/6159.
	Reappt - Sem Based, Community Teacher	Semester	Reappointment	Part Time instructional staff paid from account 6142 or 6149.
	Reappt - Sem Based, Conversion Comm. Teachers	Semester	Reappointment and conversion to designated pooled position number	Part Time instructional staff paid from account 6142 or 6149.
	Reappt - Sem Based, RA/TA	Semester	Reappointment	Student employees paid from account 6422 or 6429

ePAF User Guides

- Always available on the HR Website

  TCHR Website > Employee Resources > Managers's Toolkit > HR Systems' Guides Always Available on the HR Website



COLUMBIA UNIVERSITY

Reappt – Year Round (Salaried)

This ePAF is used to reappoint the following employee groups: Full Time Faculty & Instructional Staff, Full Time Professionals & Exempt Part Time Professionals. The employee must have an active employment record AND must be returning to the same appointment that is (or will be) terminated by the begin date of the new reappointment.

What you need to do	What you will see
STEP 1: Provide the ePAF parameters: a. Enter the TCID of the employee in the ID field ('T' in TCID in caps). b. Enter the Query Date. The Query Date should equal the appointment effective date. c. Select Reappt – Year Round (Salaried) in the approval category. d. Click Go.	New EPAF Person Selection Date. Enter or Generate New ID a b c d

HR Systems Guides (SSB9)

EPAFS

General Information and Tools

- Intro to SSB9 ePAFs - Originator & Approver Training
- Conversion and Reappointment ePAF Training
- Detailed Listing of ePAFs - SSB9
- Position Guidance for Additional Compensation or Job
- Pooled Positions Crosswalk
- Determining a Position Number for a Supplemental Compensation for FT Employee
- Additional Job or Compensation ePAF - Common Issues Guide

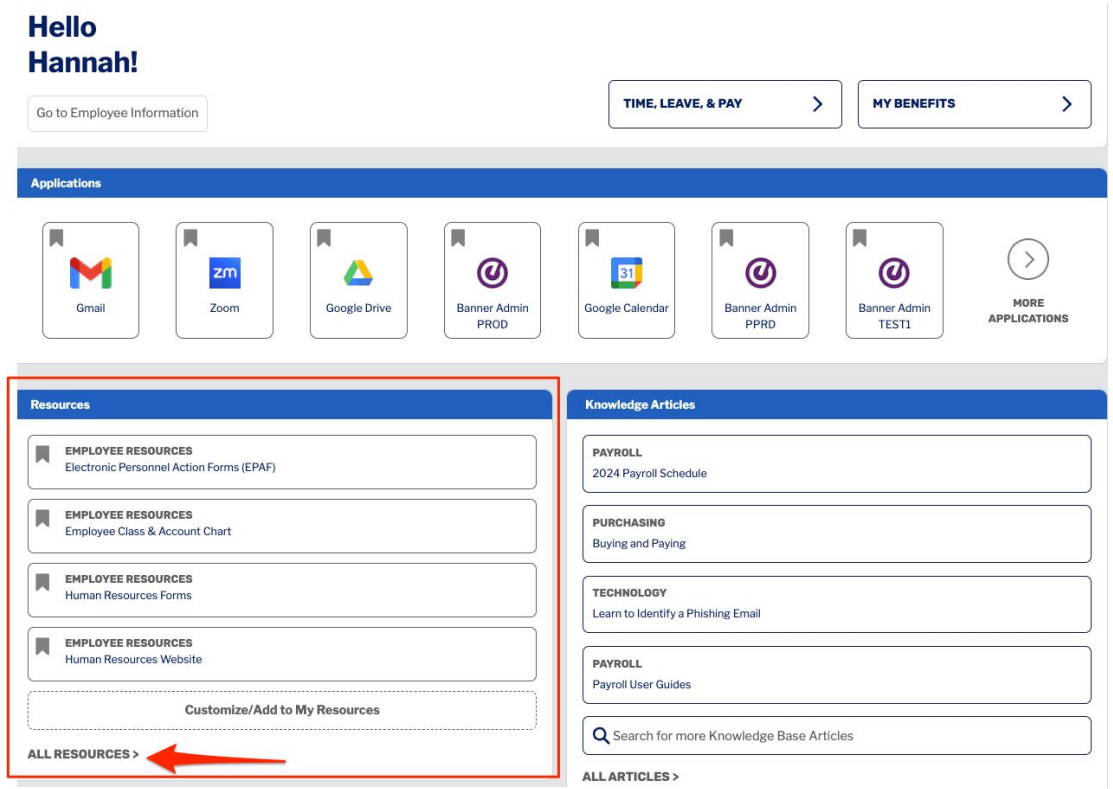
How To:

Additional Compensation or Job

- Additional Compensation or Job - Salaried - SSB9
- Additional Job - Hourly - SSB9
- Additional Job - CWS - SSB9
- Additional Job - Salaried Student - SSB9
- Reinstate Job or Compensation - Salaried - SSB9

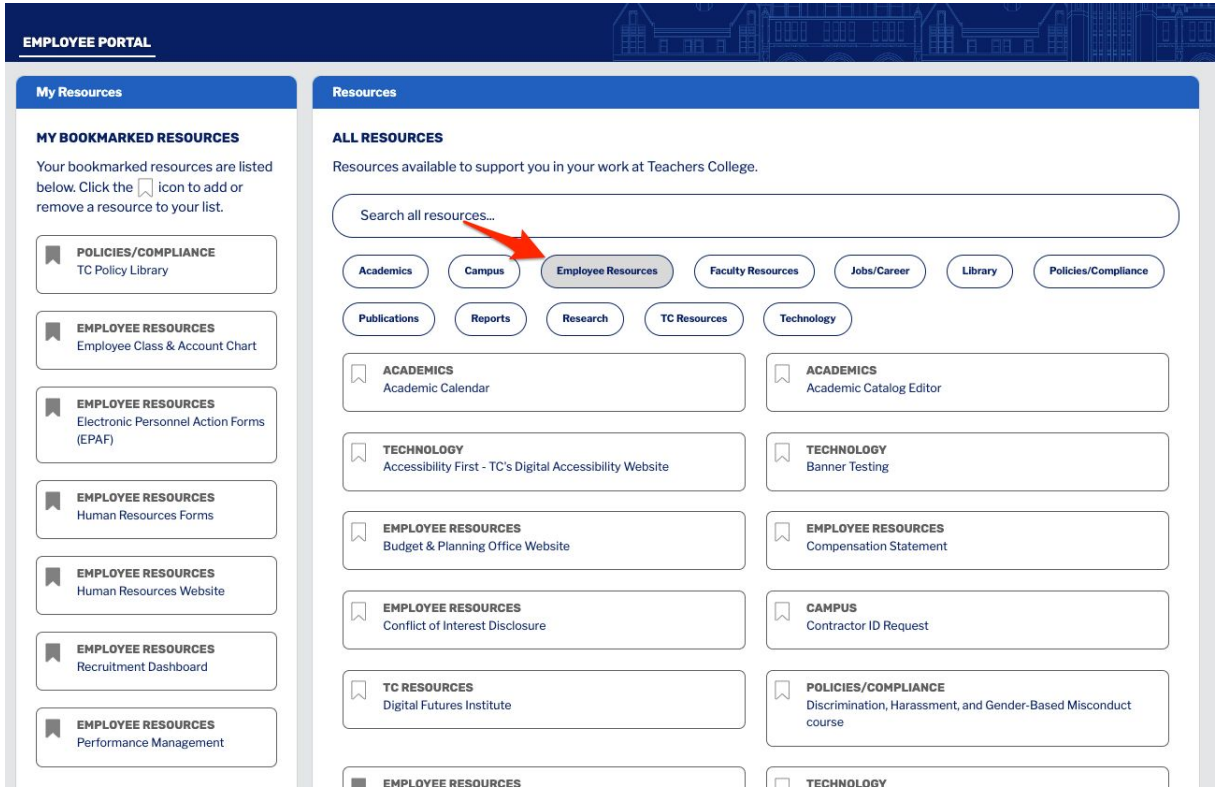
How to Access ePAFs

Log into the TC Portal



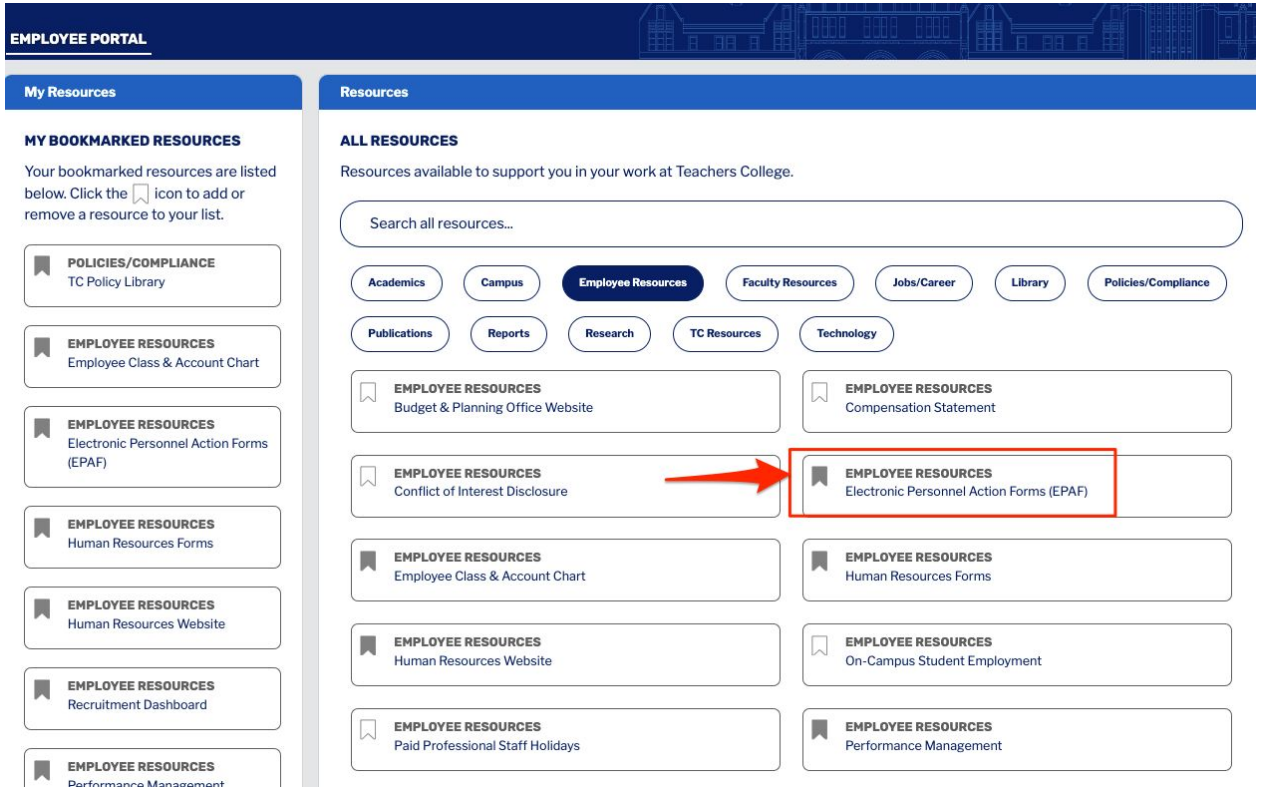
Log into the new TC Portal, head to the **Resource** section and click **All Resources**

Log into the TC Portal



You will be taken to an **All Resource** page where you can find all resources available to you. Find and click the **Employee Resource** button.

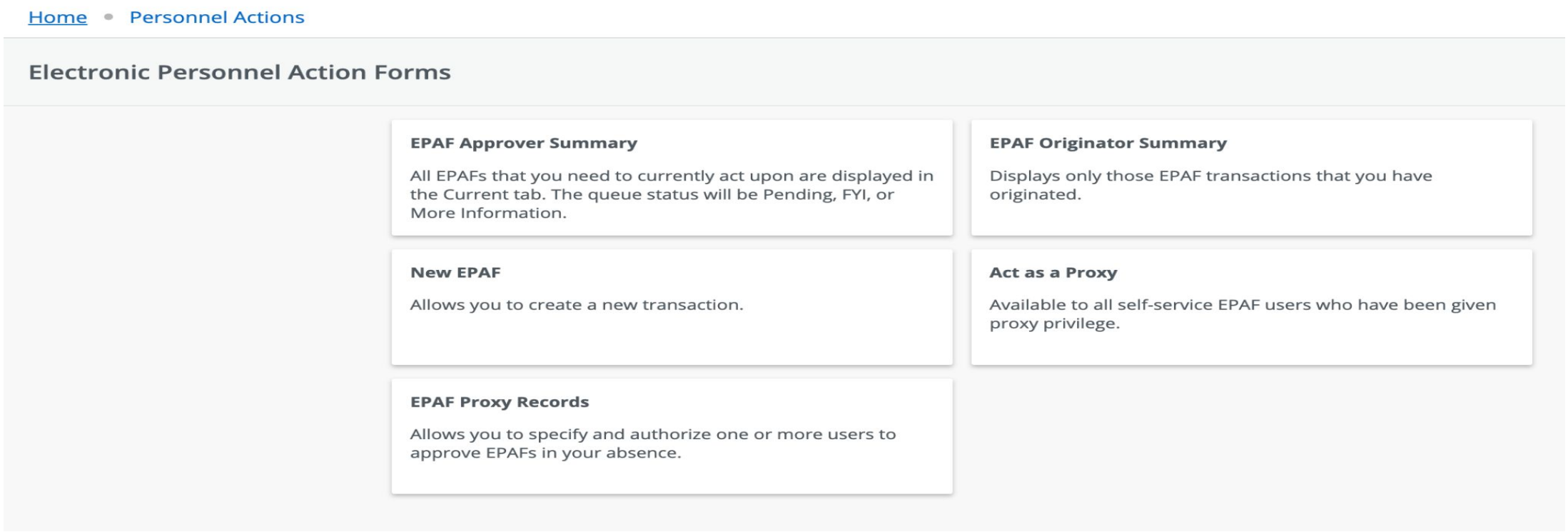
Log into the new TC Portal



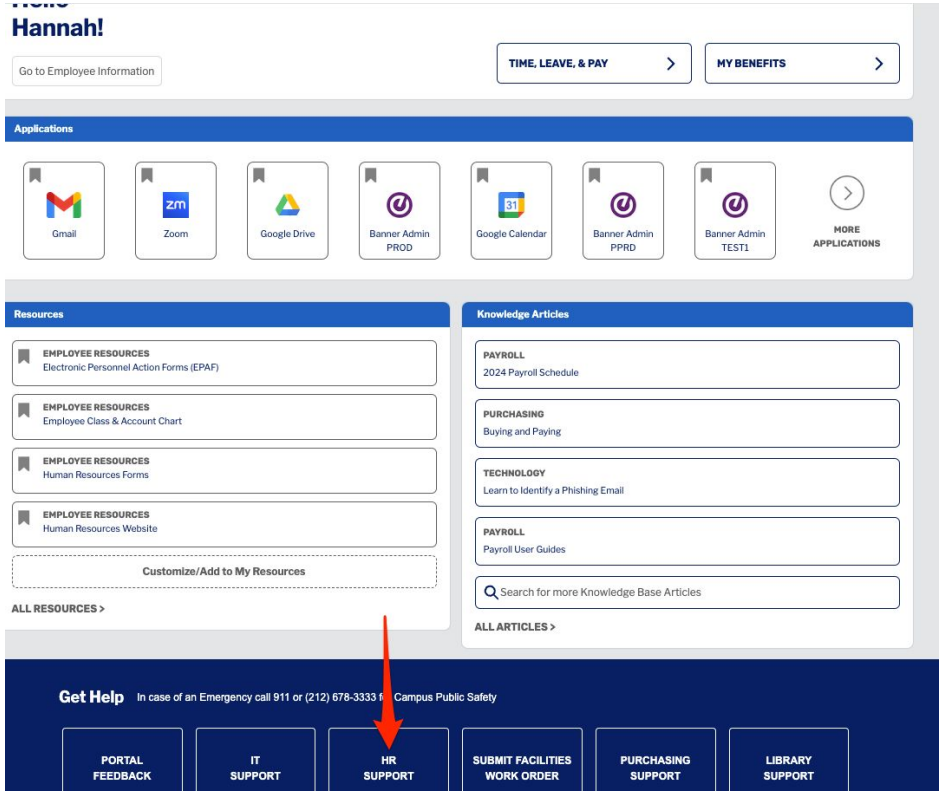
You will be presented with all the resources categorized as **Employee Resources**. From there, you can find and click the **Electronic Personnel Action Form (EPAF)** link.

*If you wish, you can click the icon next to the title and save this to your bookmarks.

ePAF Home Screen

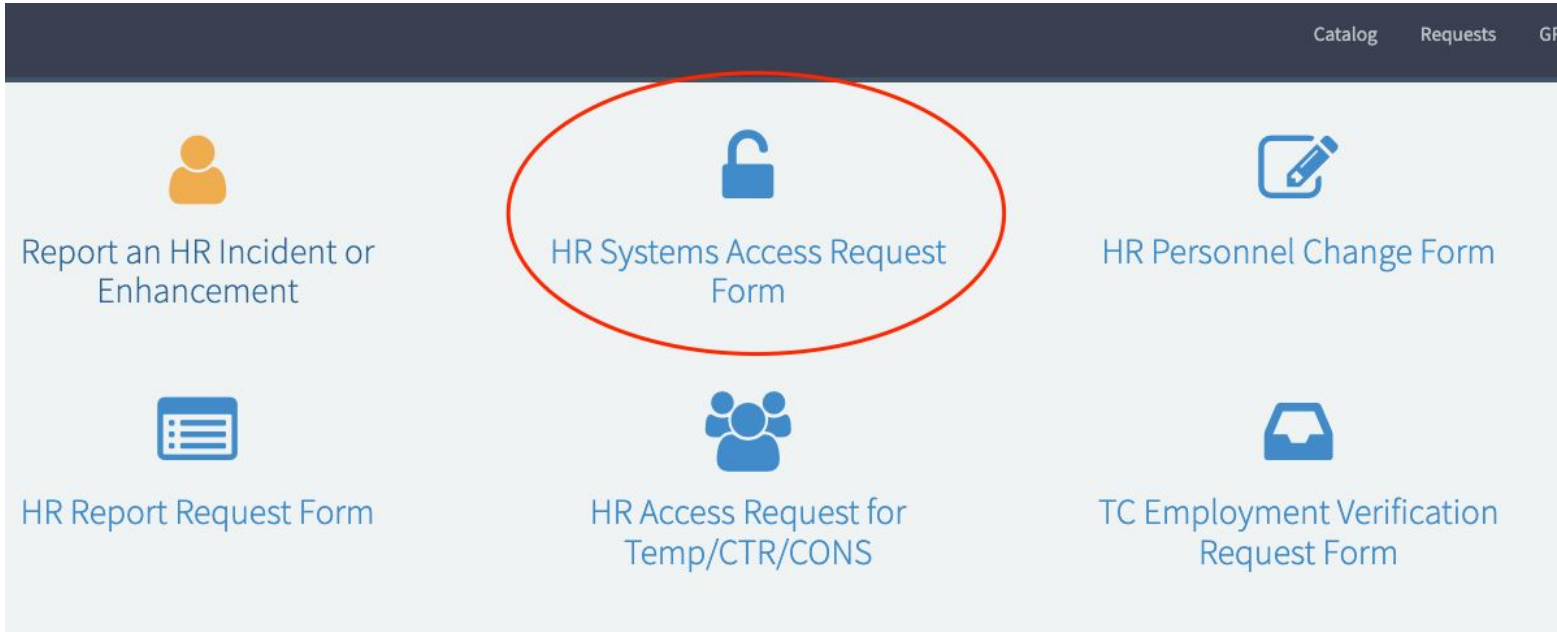


HR Systems Access Request Form



If you don't have the ePAF link, please have your supervisor submit the **HR Systems Access Request Form**.

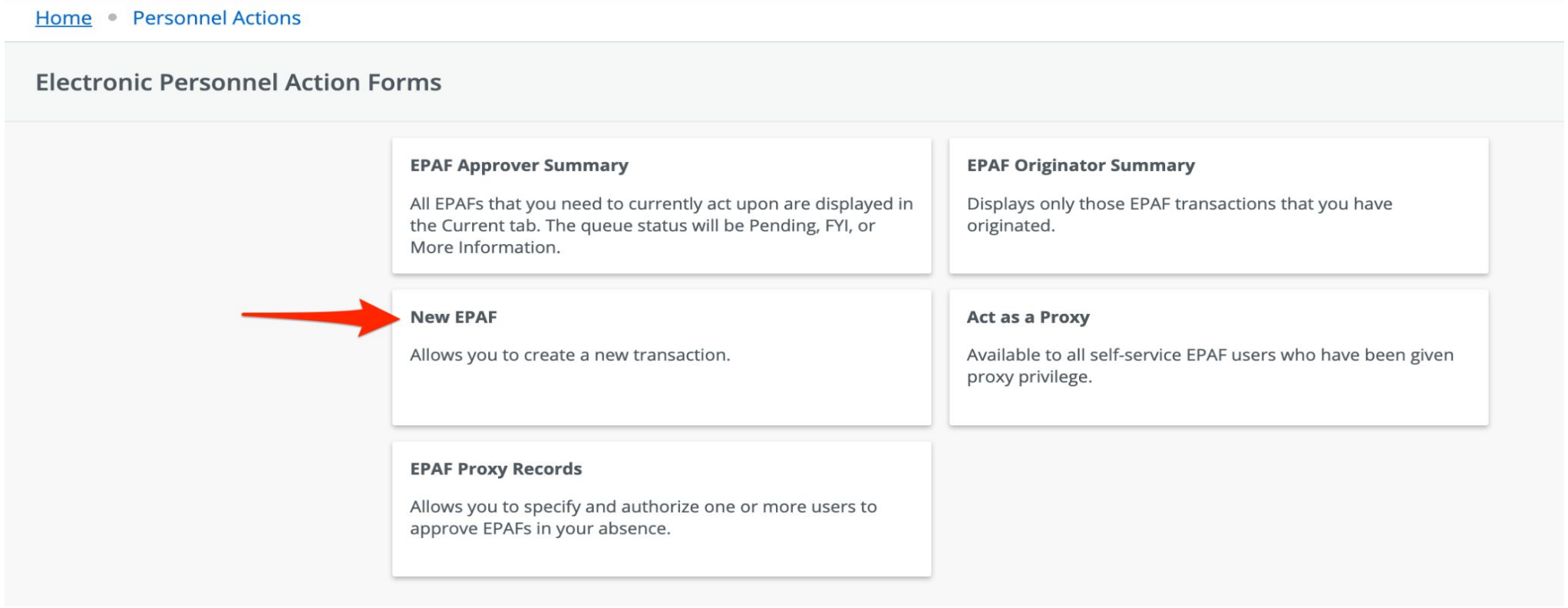
This can be found by going to the home page of the TC portal. Click the **HR Support** link. Then click and submit the **HR Systems Access Request form.**



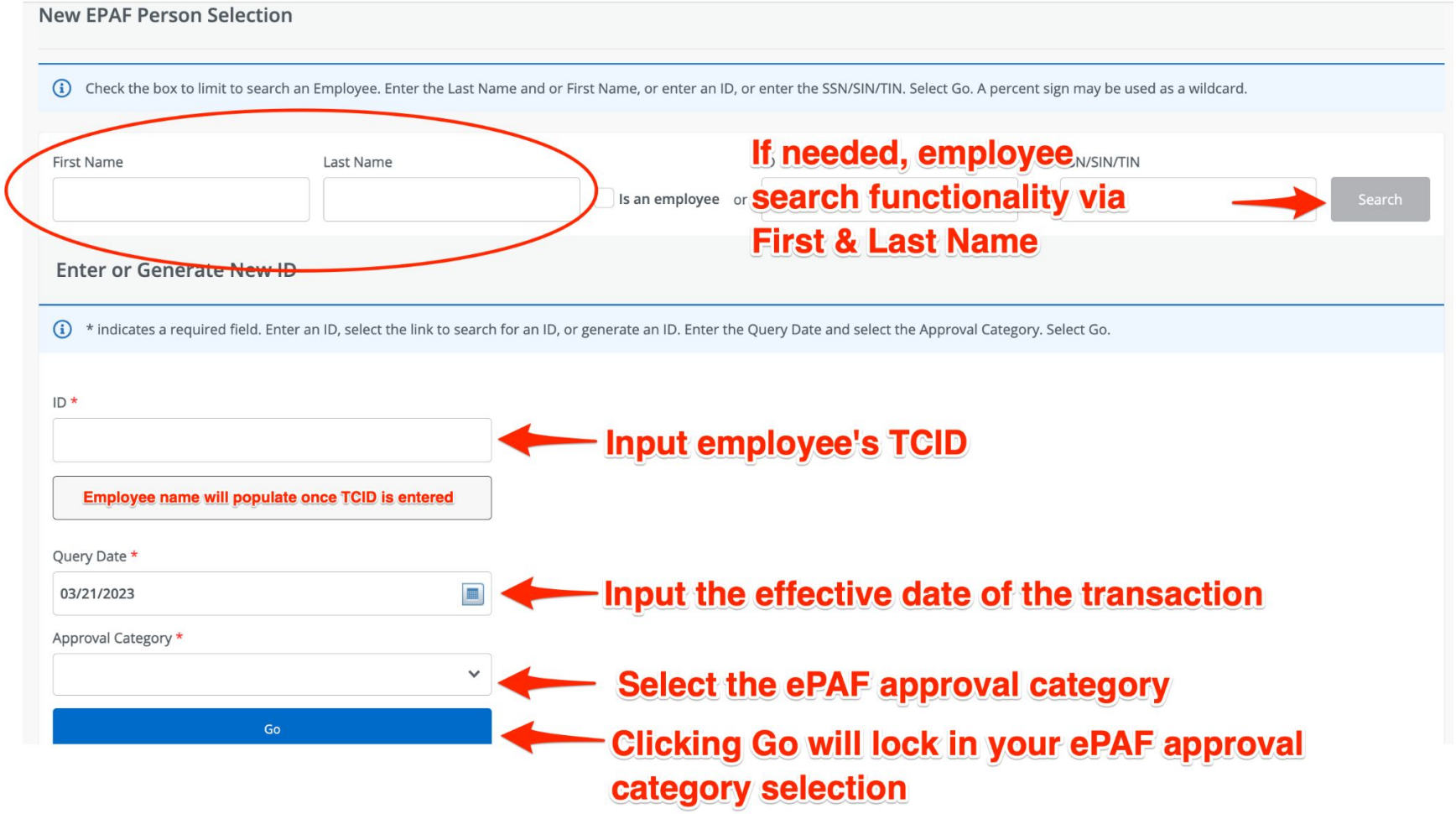
New ePAF

New ePAF

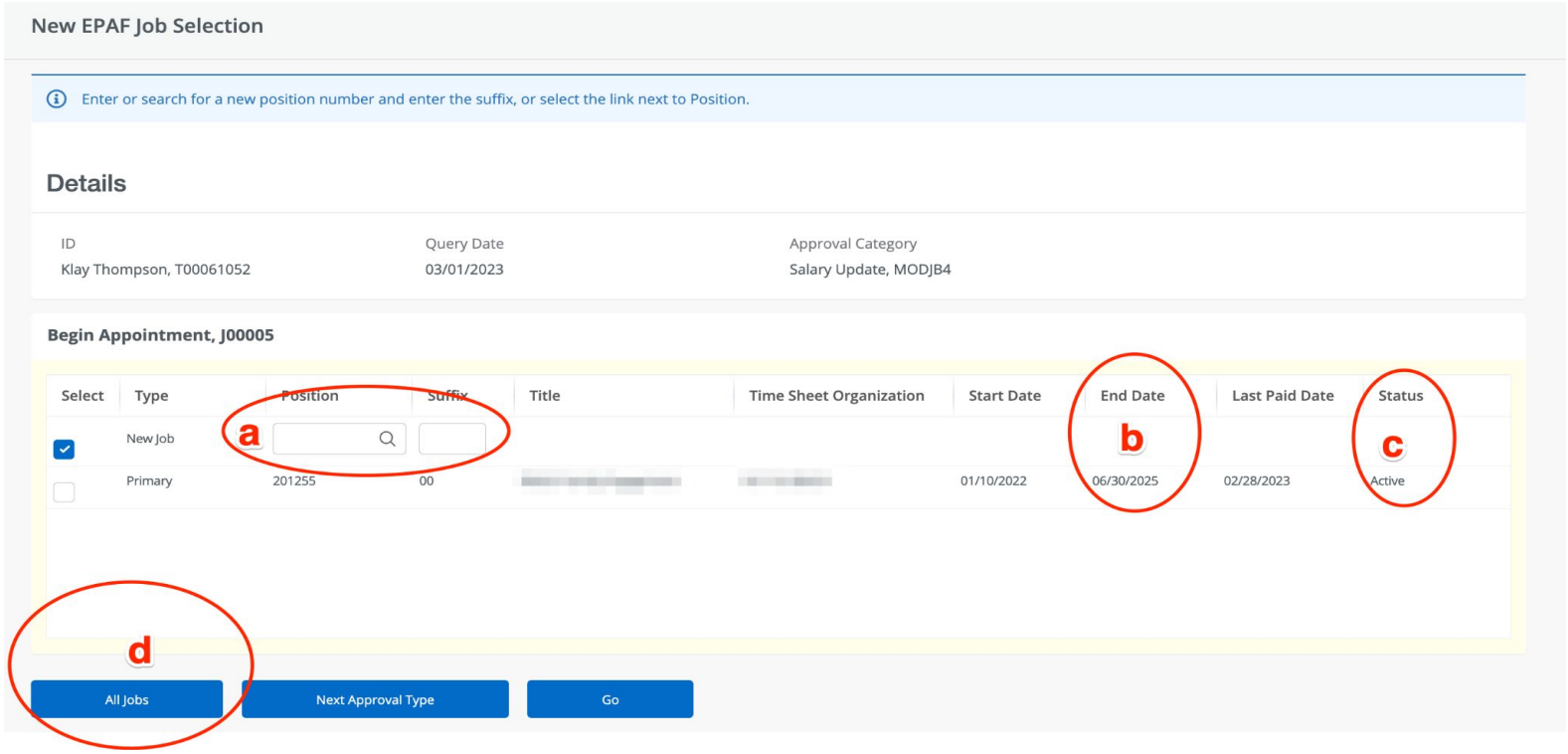
Where you go as an Originator to create a new employee transaction



New ePAF Person Selection Screen



New ePAF Job Selection Screen



A. **Position/Suffix -** Where you manually input a position number if granting someone a brand new job

B. **End Date** - Displays the job end date; important for reappointments

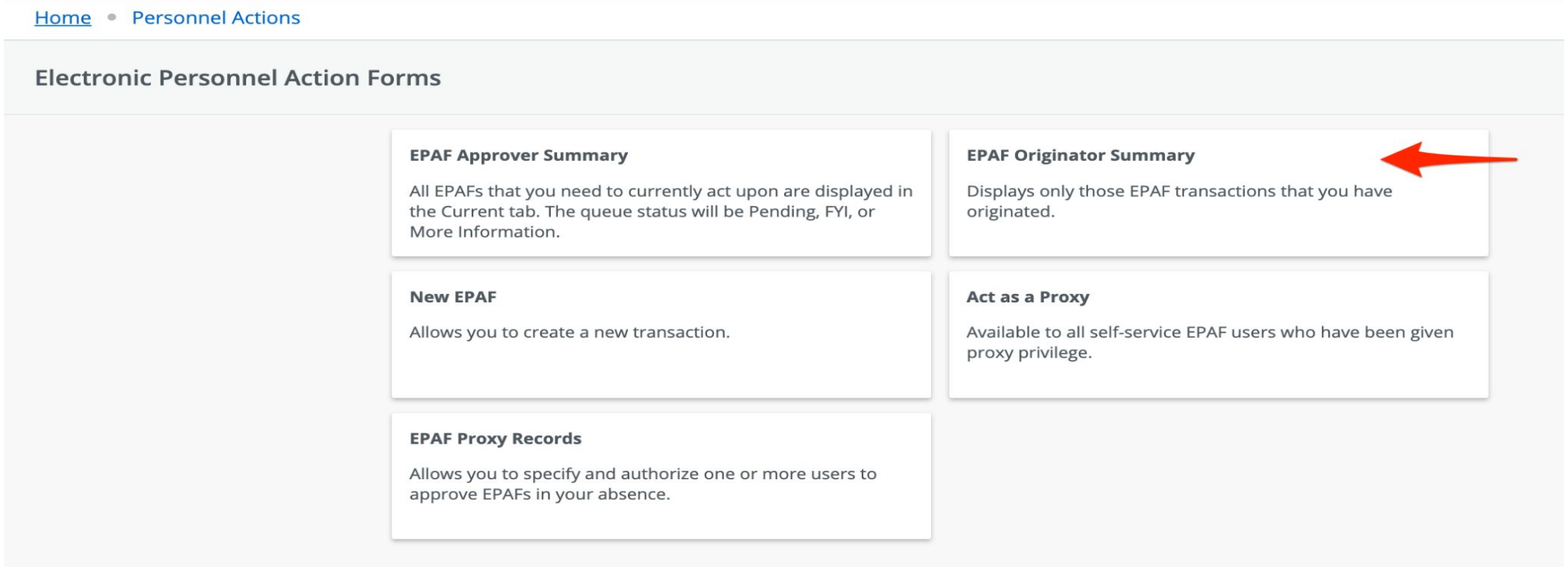
C. **Status** - Displays the status of the job; important to select an active job for any epafs that make adjustments to an active job

D. **All Jobs** - by clicking you will see a listing of all jobs the employee has held at the College; this is important to review especially for reappointments

ePAF Originator

ePAF Originator Summary

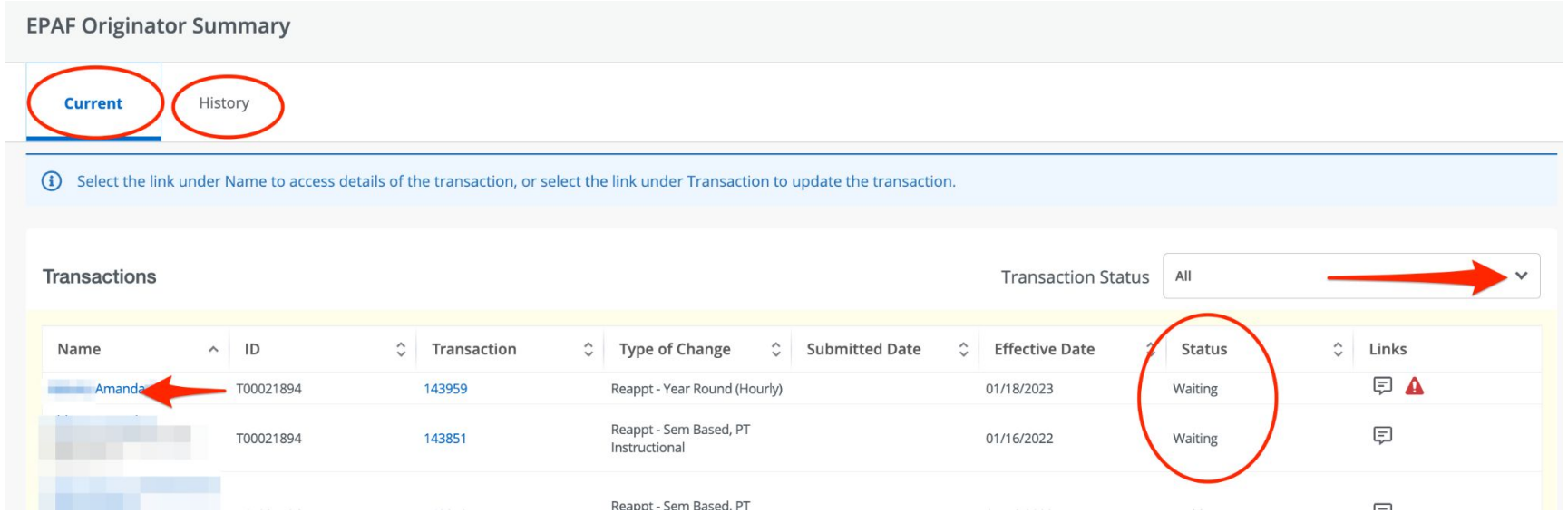
Where you go to see all ePAFs that you have originated



ePAF Originator Summary

Current
ePAFs sitting with you for action

History
ePAFs that you have originated and successfully submitted and are no longer sitting with you for action



Transaction Status
Ability to filter different statuses by clicking drop down menu

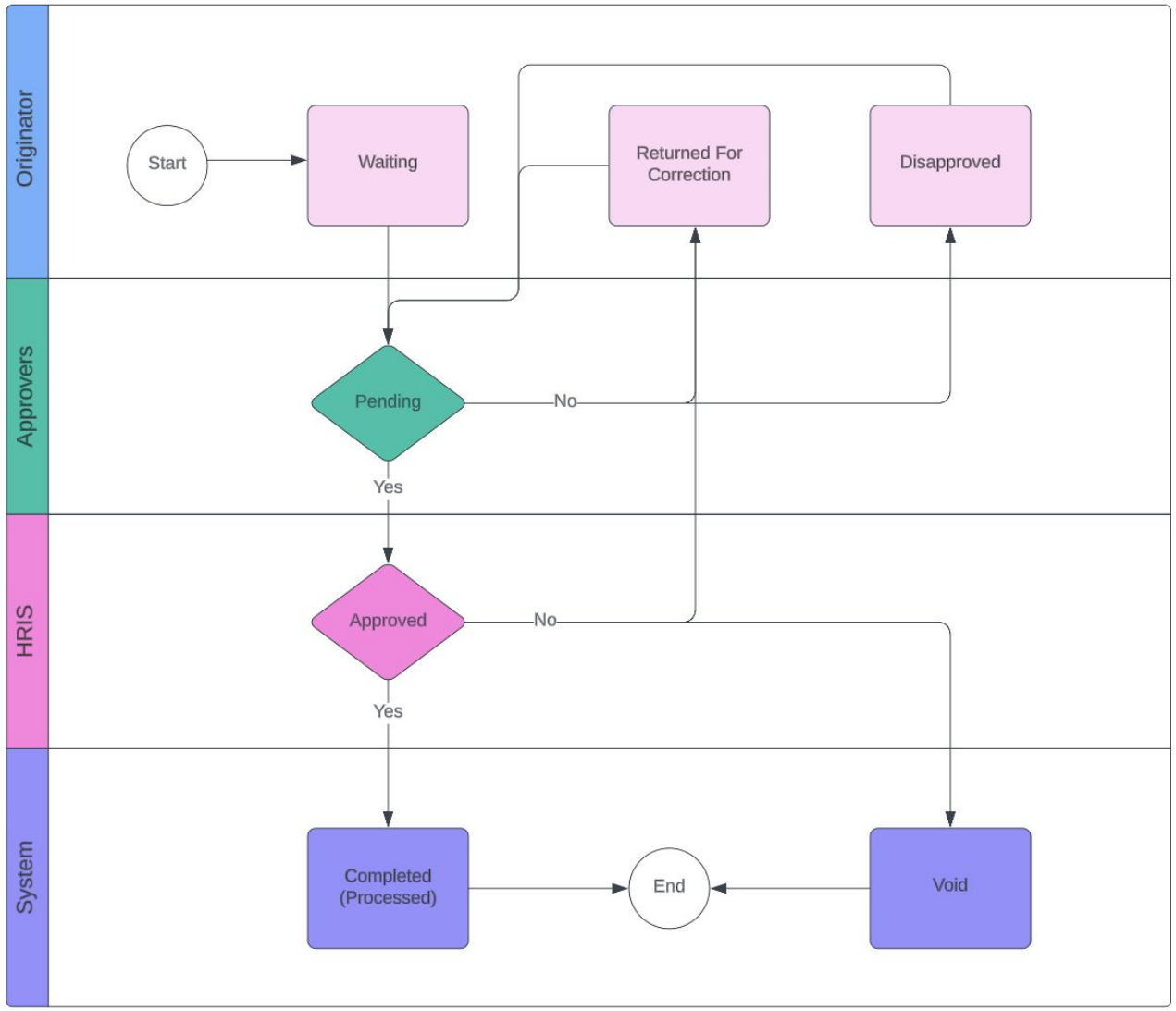
Employee Name
By clicking name, you'll be taken to the ePAF details

Status
ePAF Transaction status (see next slide)

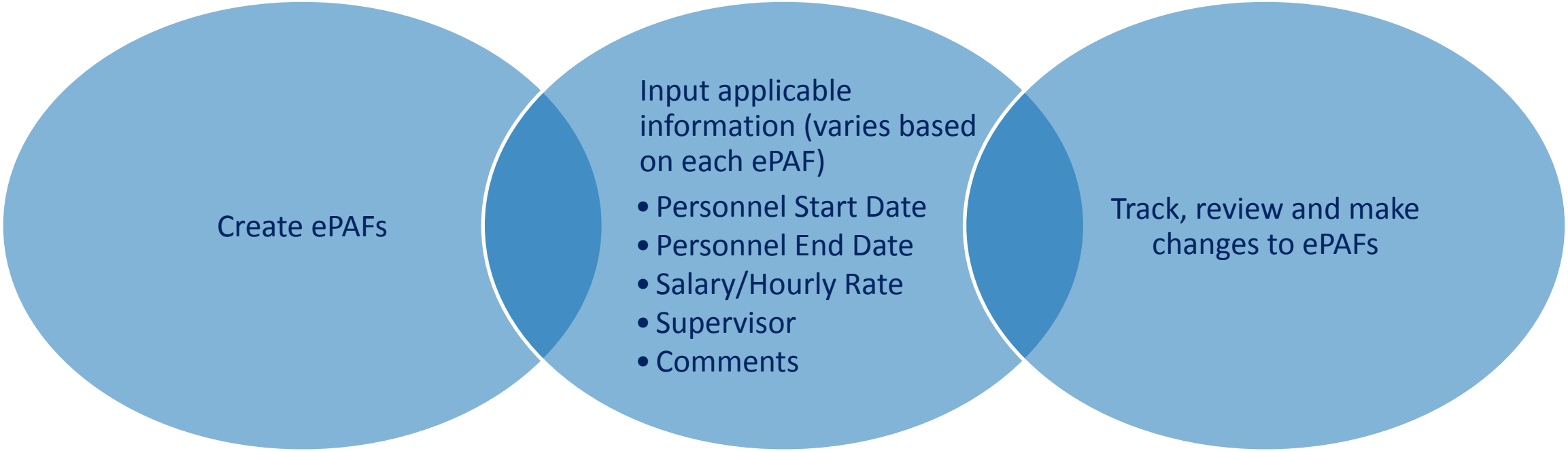
ePAF Transaction Status Key

Transaction Status	What It Means	Action Needed
Waiting	Indicates that the transaction is in the process of being created	ePAF Originator needs to review and submit
Return for Correction	Indicates that the transaction has been returned to the Originator for update/correction	ePAF Originator needs to review, update and submit
Disapproved	Indicates that the transactions has been disapproved by an Approver	ePAF Originator can chose to return it to themselves for correction, update, save and submit again
Pending	Indicates that the transaction requires action by the approver(s)	Approver needs to review and approved
Approved	Indicates that the transaction has been approved by all parties	HRIS needs to review and process
Complete	Indicates that the transaction has been applied to Banner; no further action needed	No Action
Void	Indicates that the transaction has been voided by an originator or superuser and is no longer a valid transaction; no action can be taken on this ePAF	No Action

ePAF Transaction Flow Chart

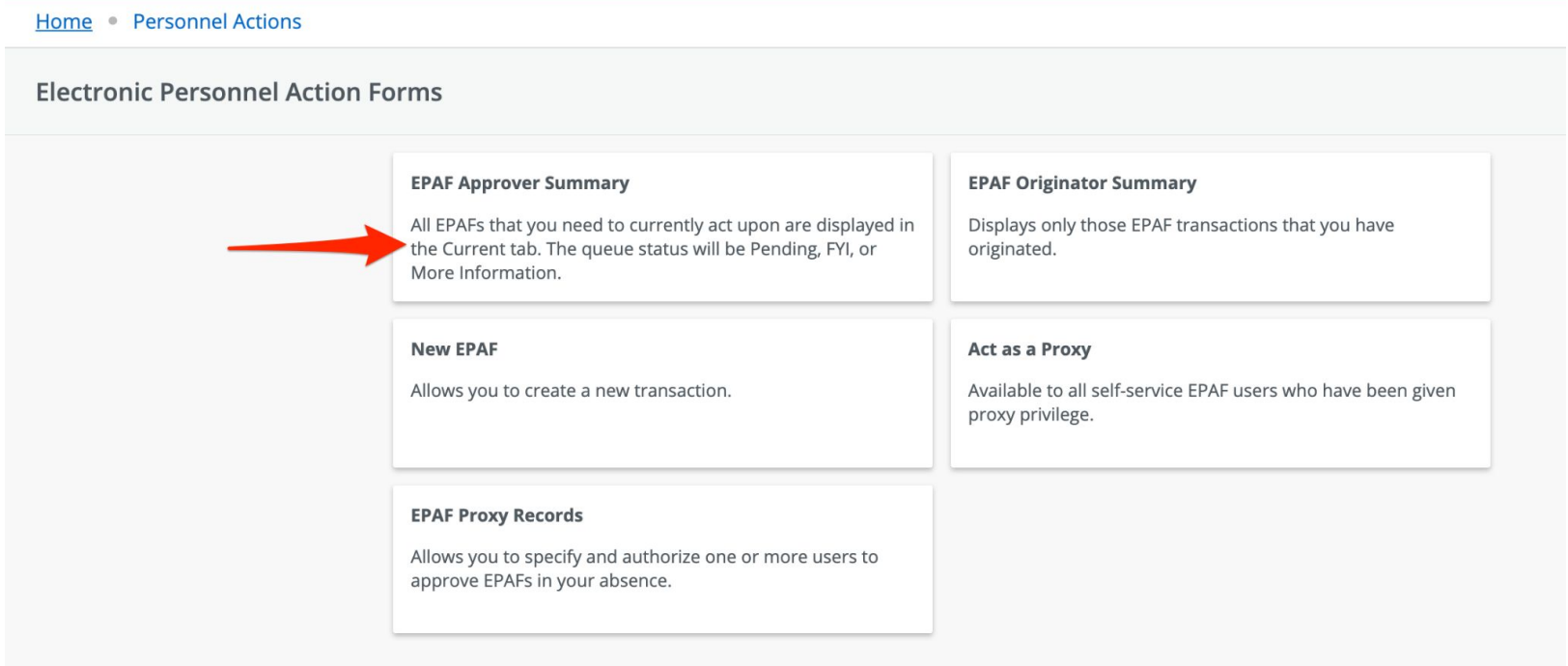


Your Role as an ePAF Originator



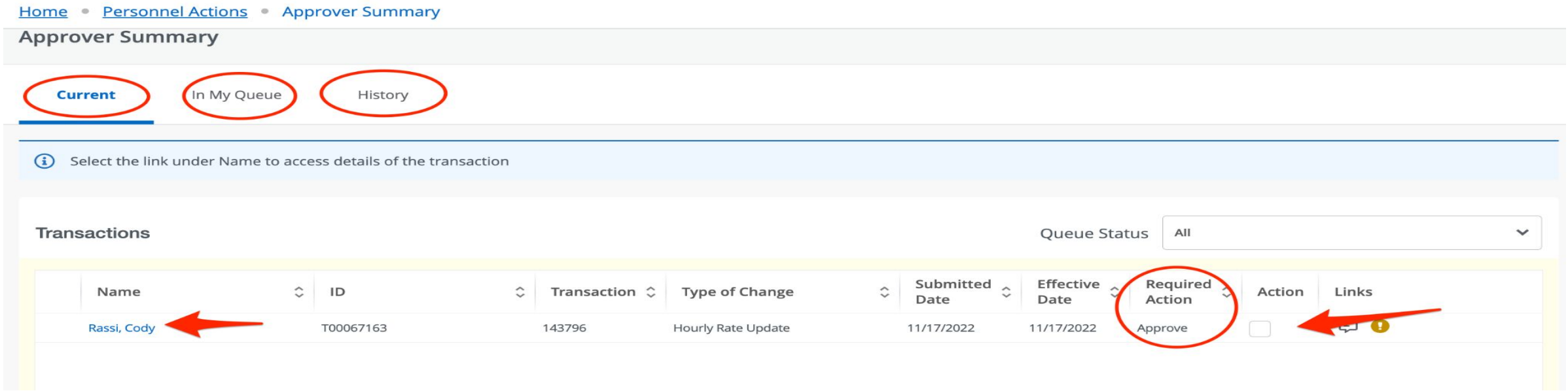
ePAF Approver

ePAF Approver Summary



Where you go to see all the ePAFs you need to OR have approved.

ePAF Approver Summary

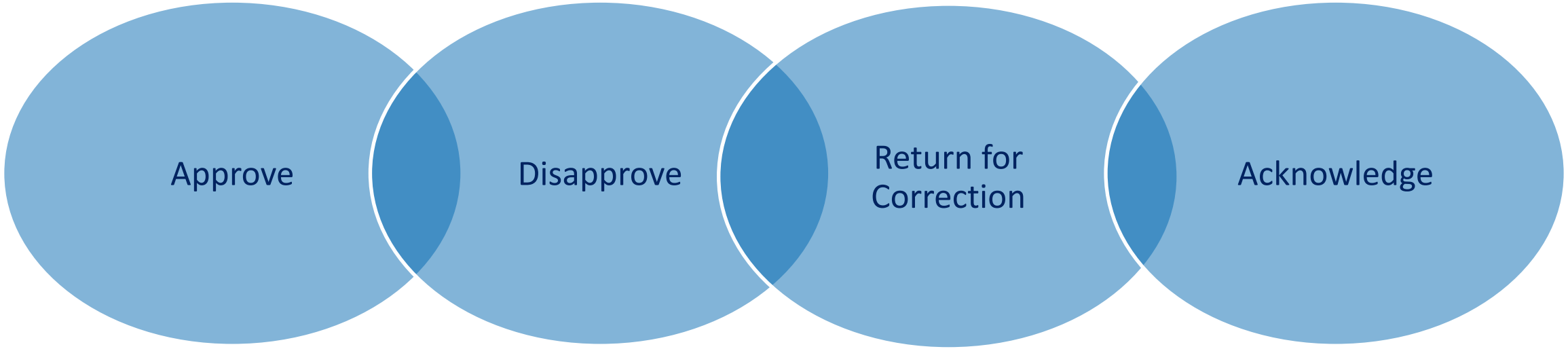


Current
ePAFs sitting with you for action

In My Queue
ePAFs that will eventually come to you once the previous levels have approved

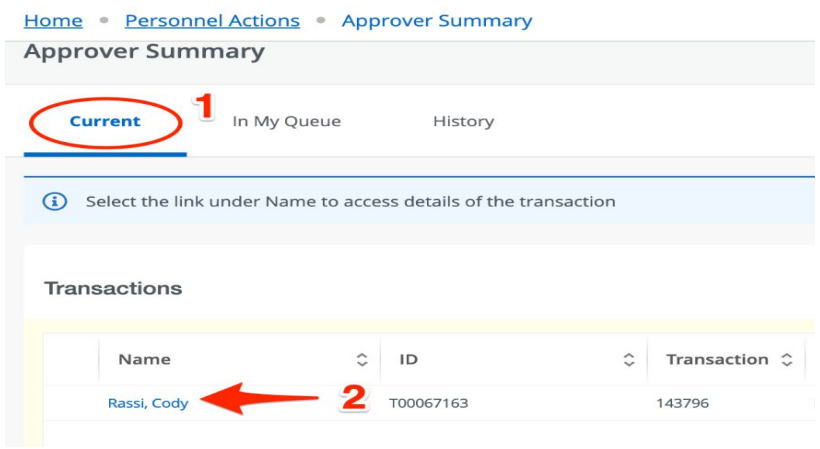
History
ePAFs that you have approved and are no longer sitting with you for action

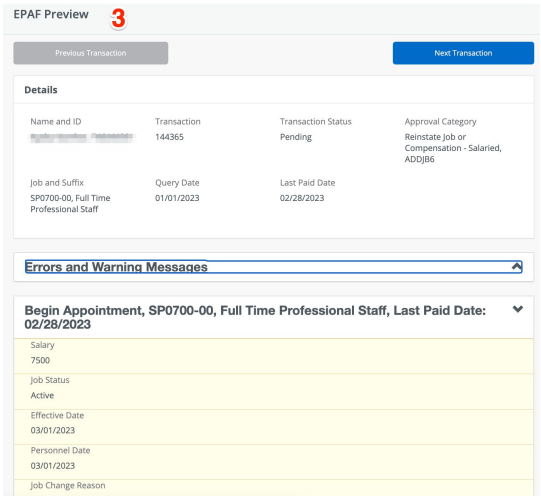
Your Role as an ePAF Approver



How to Approve an ePAF (Method 1)

1. Click the Current tab
2. Click the employee name to take you to the ePAF for review
3. Review the ePAF.
4. Scroll to the bottom. Click one of the action buttons, and/or Add a comment.





How to Approve an ePAF (Method 1)

Add Comment
Adds comment to ePAF where all users can see

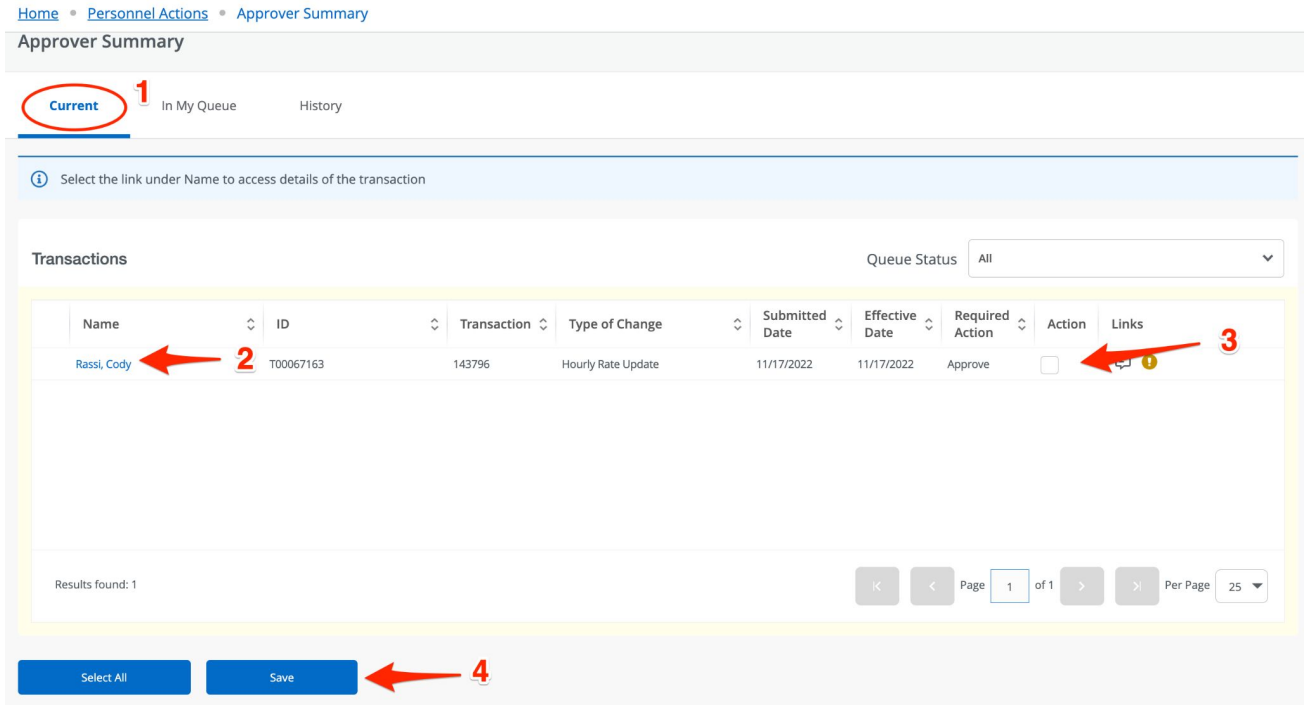
Approve
Approves the ePAF and moves to the next approval level

Disapprove
Returns ePAF to Originator; They can return it to themselves, update and re-submit if they wish; Please add comment

Return for Correction
Returns ePAF to Originator; They can update and re-submit if they wish; Please add comment

More Info
Removes it from your main queue, but still sitting with you for action; Common use if you need to wait for outside information before approving

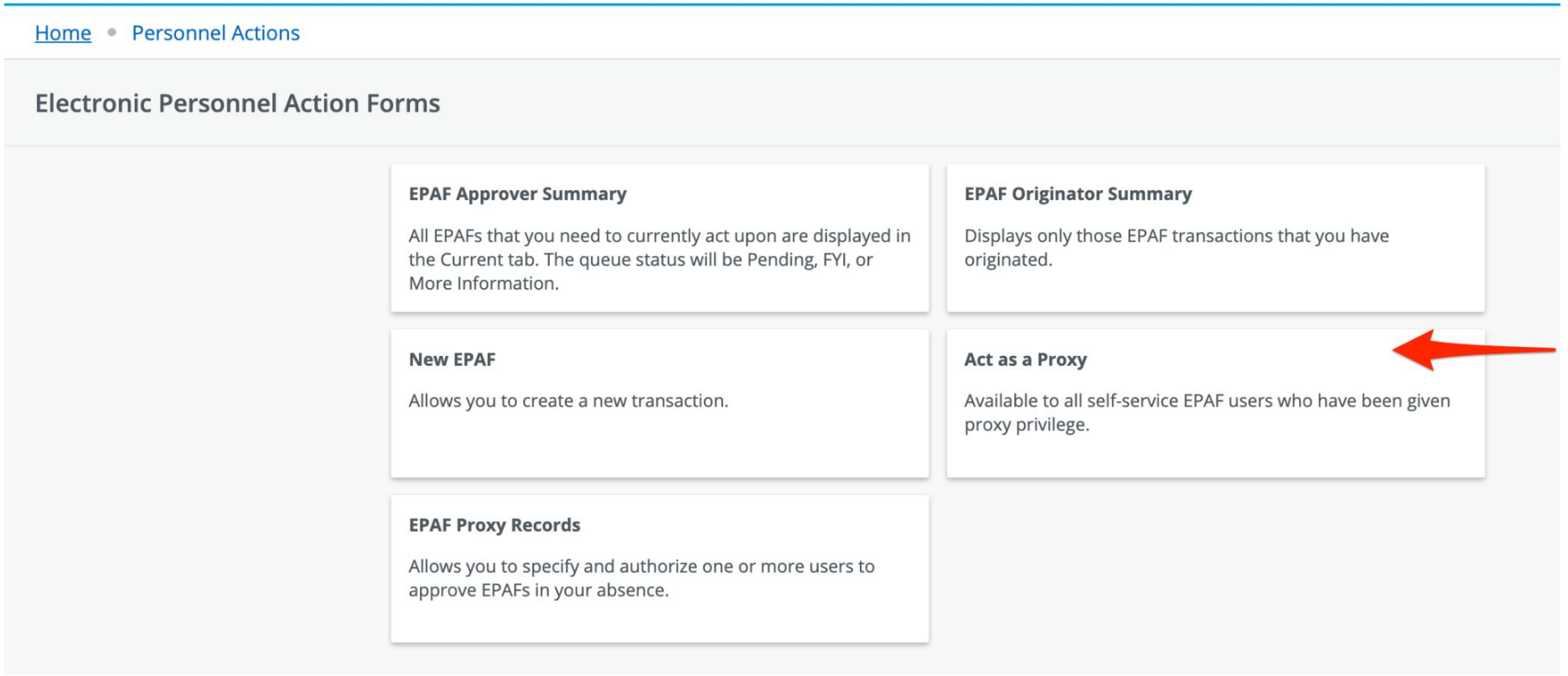
How to Approve an ePAF (Method 2)



1. Click the Current tab
2. Click the employee name to take you to the ePAF for review
3. From the ePAF Approver Summary home screen, click the box in the Action column
4. Click Save

Act as a Proxy

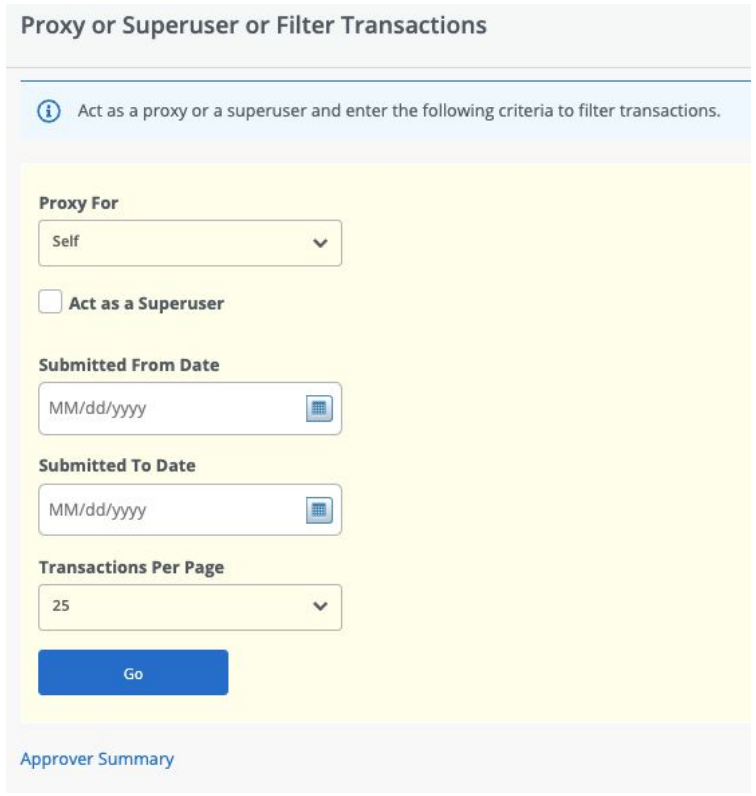
Act as a Proxy

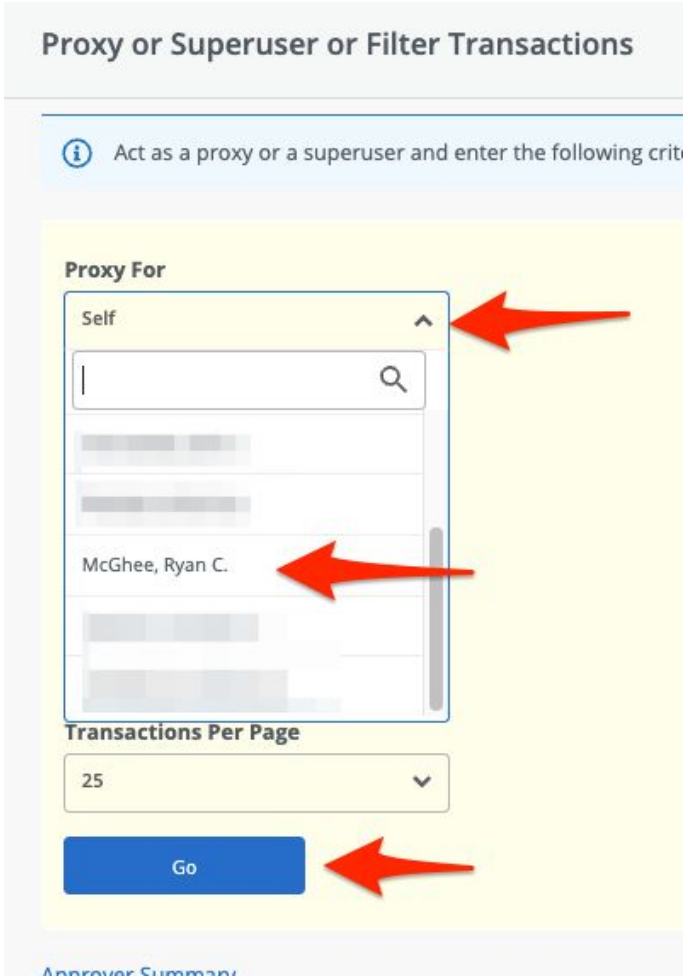


Where you go to approve an ePAF as a proxy approver

**must be requested in advance by supervisor submitting HR Systems Access Request Form

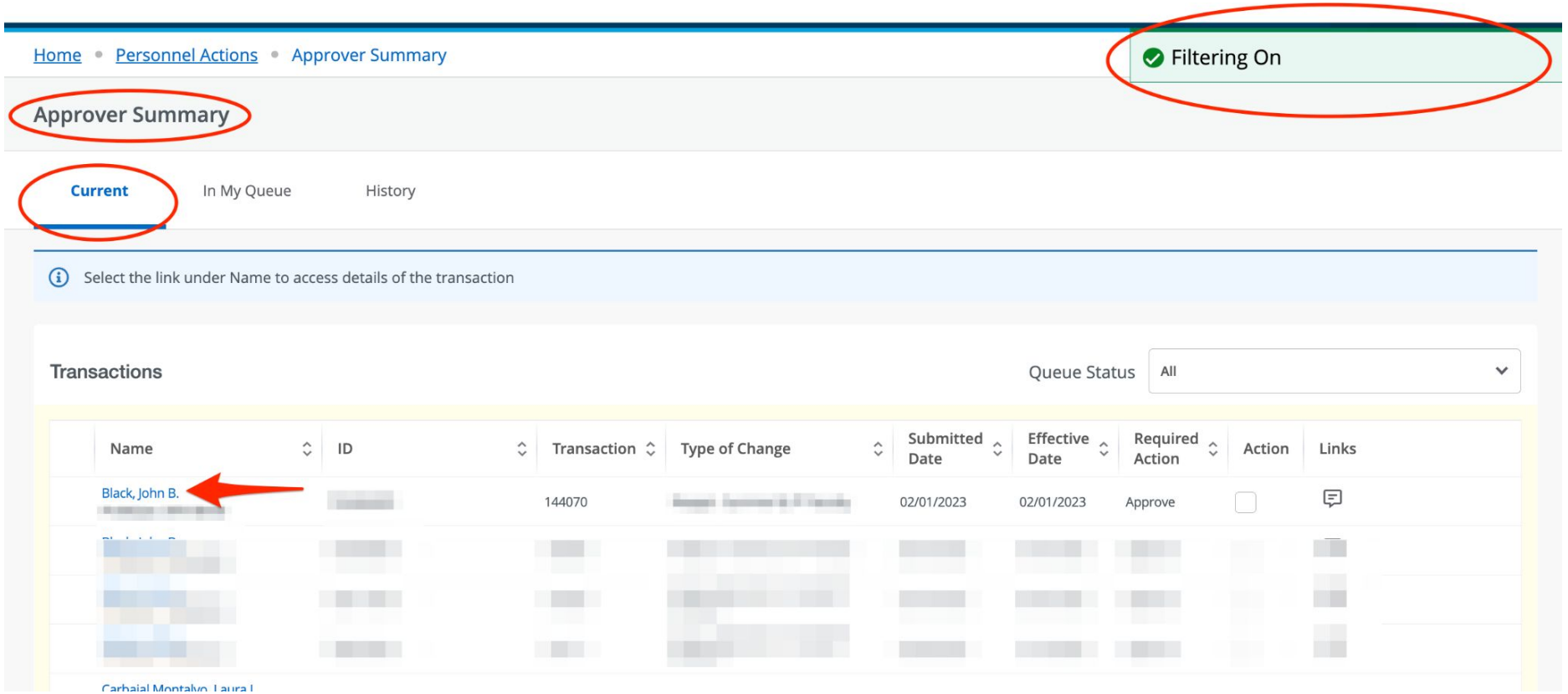
Act as a Proxy



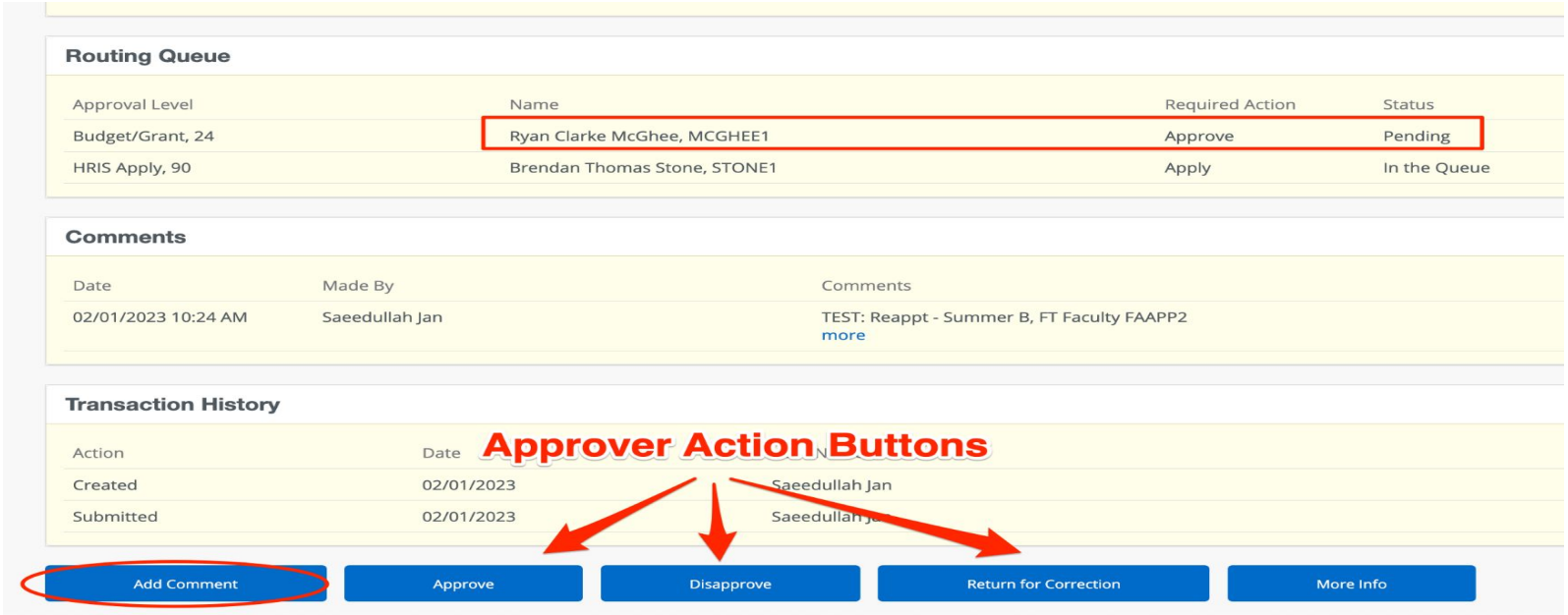


Act as a Proxy

You'll be taken to the ePAF Approver Summary screen of the person you're proxy approving for as indicated by the "Filtering On" in the upper right corner



Act as a Proxy

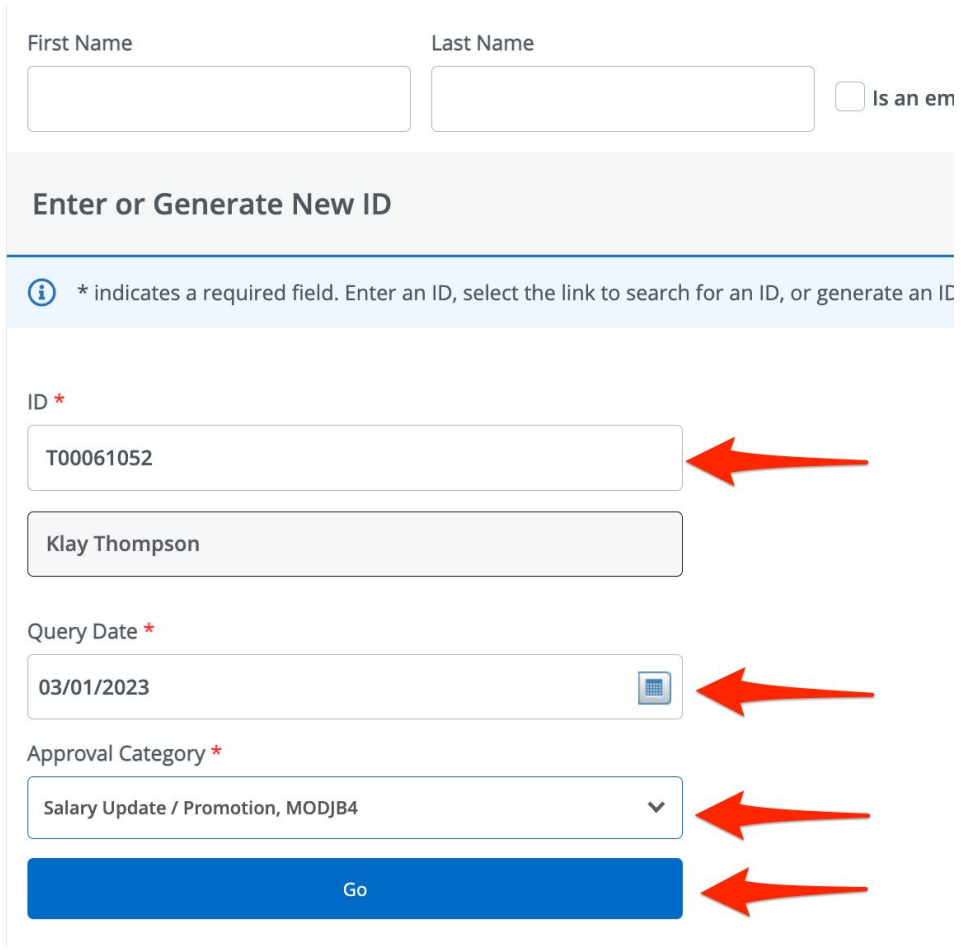


Approver Proxy has access to same actions as actual approver

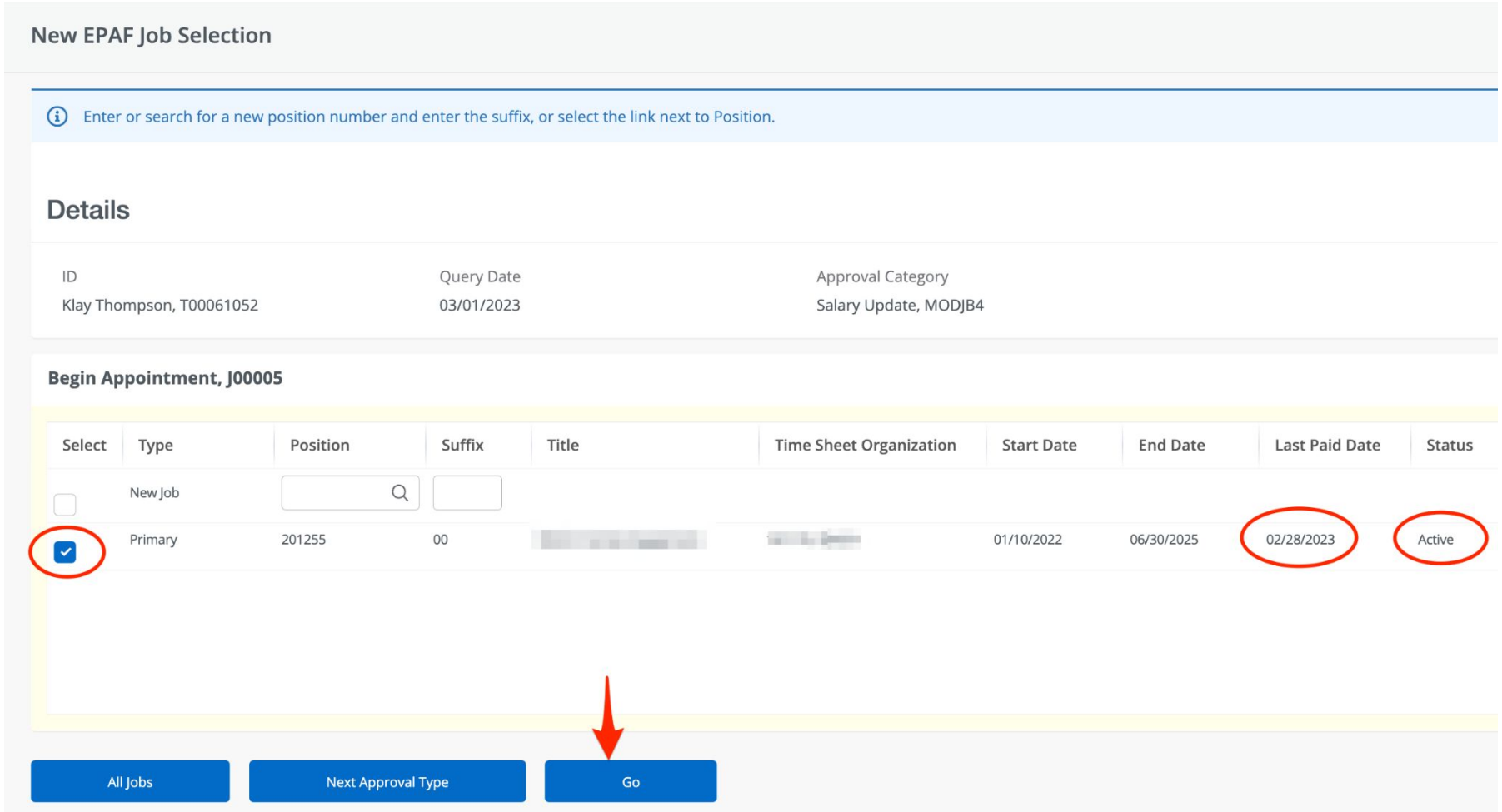
Proxy approver name captured in routing queue section

Now a Demo!

Step 1: Select an Employee & ePAF Approval Category

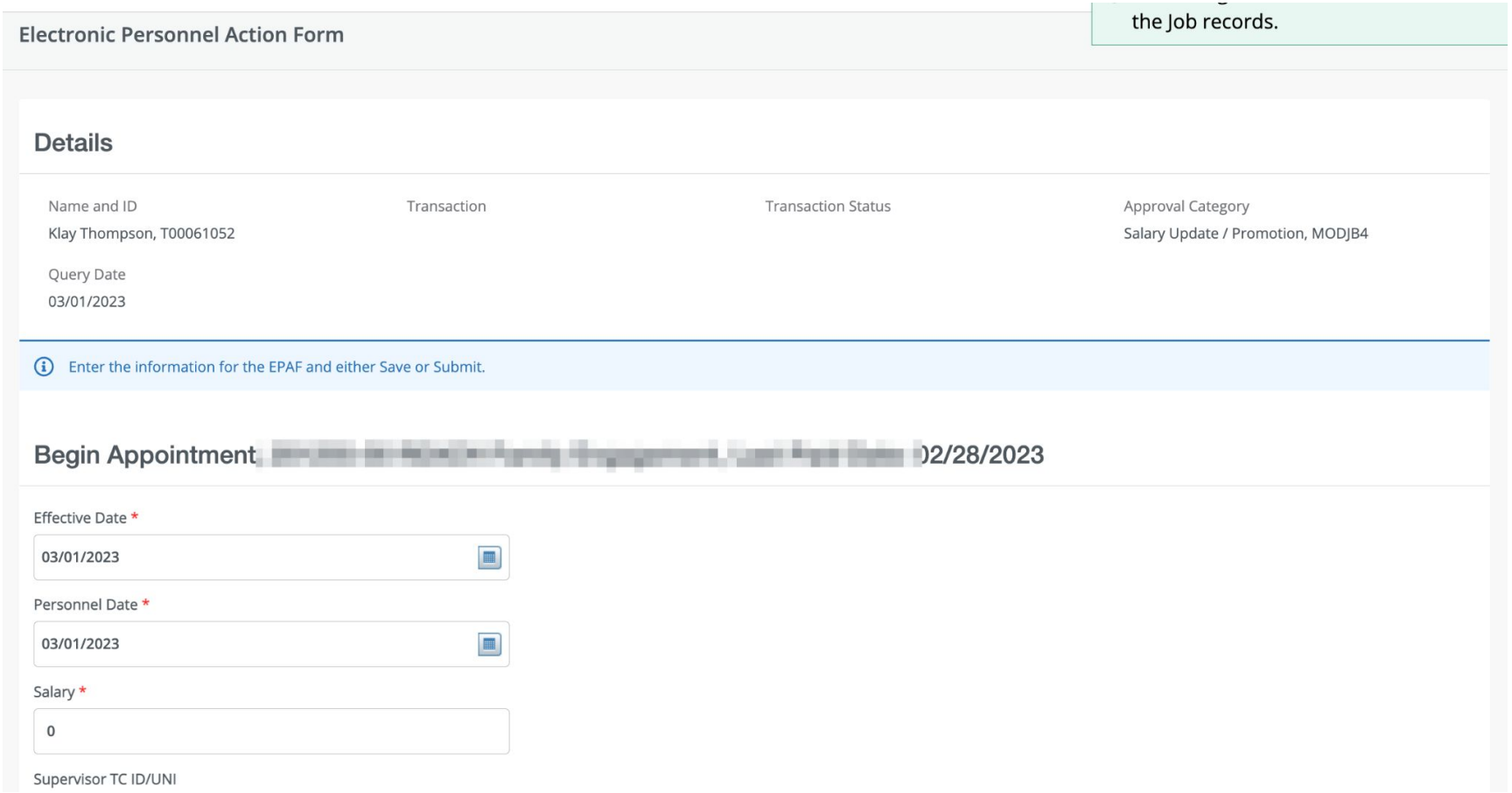


Step 2: Select Job



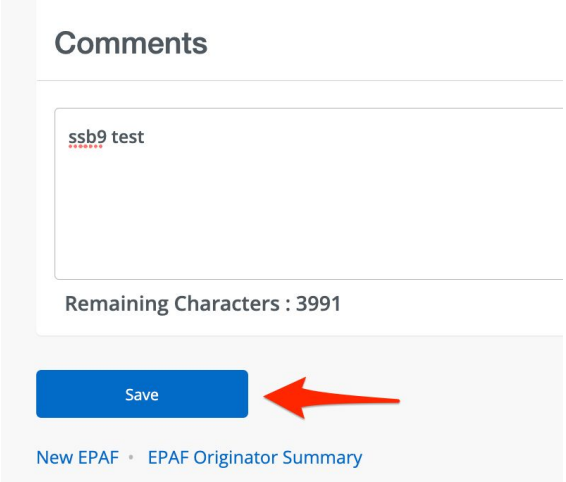
Step 3: Input Fields on ePAF

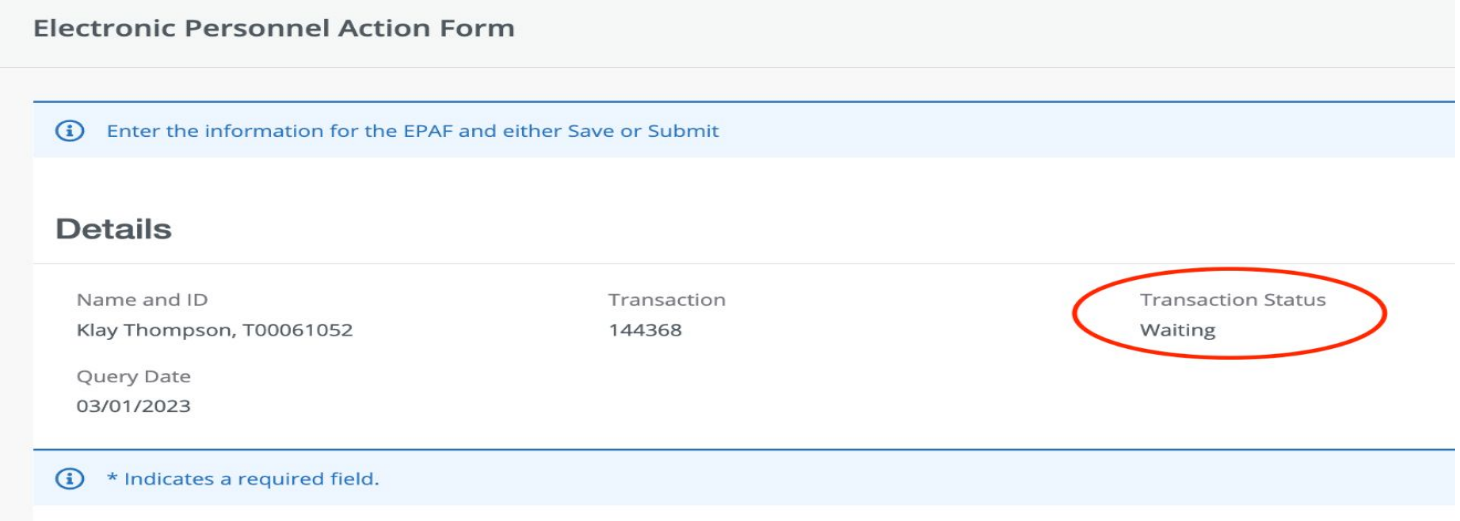
Fields to input will depend on the specific ePAF transaction selected; all mandatory fields marked by *



Step 4: Save ePAF

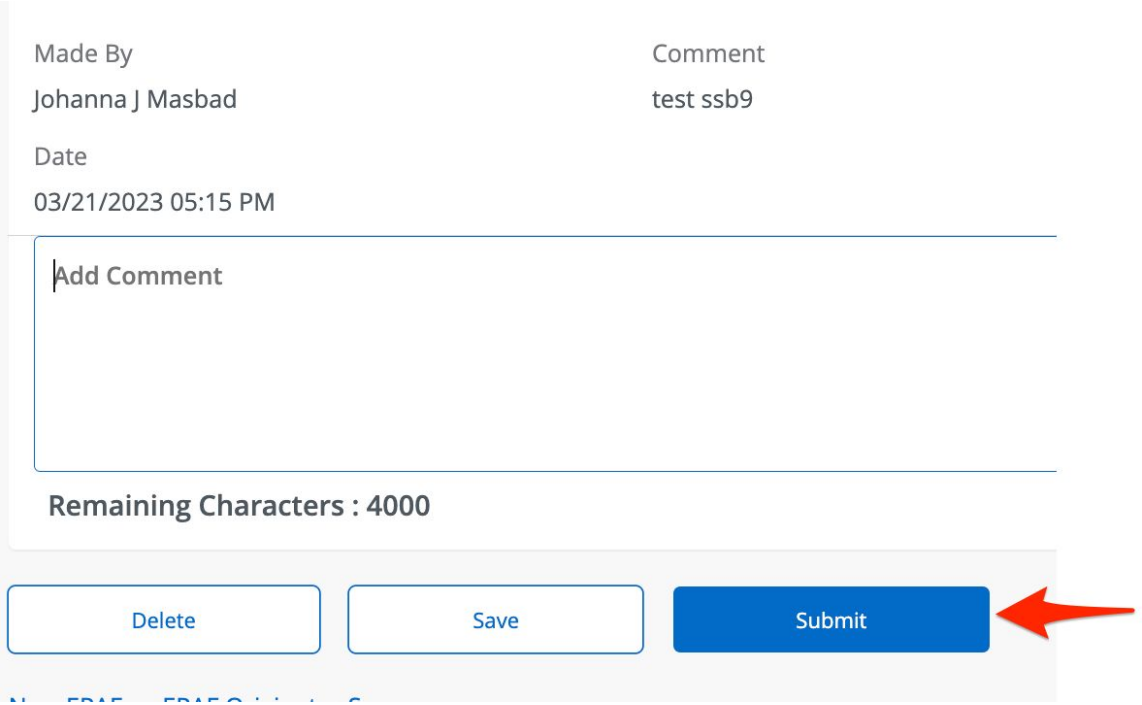
Once all fields are filled, click Save at the bottom of the ePAF





When you have saved your EPAF, the transaction status will populated from a blank field to “Waiting”

Step 5: Submit the ePAF



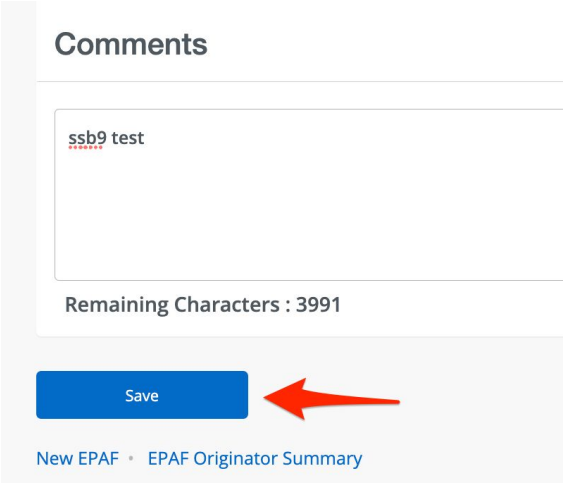
After **Updating** or **Saving** the EPAF, you can choose to **Submit** or **Delete** the EPAF from one of the icons listed under the Index.

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

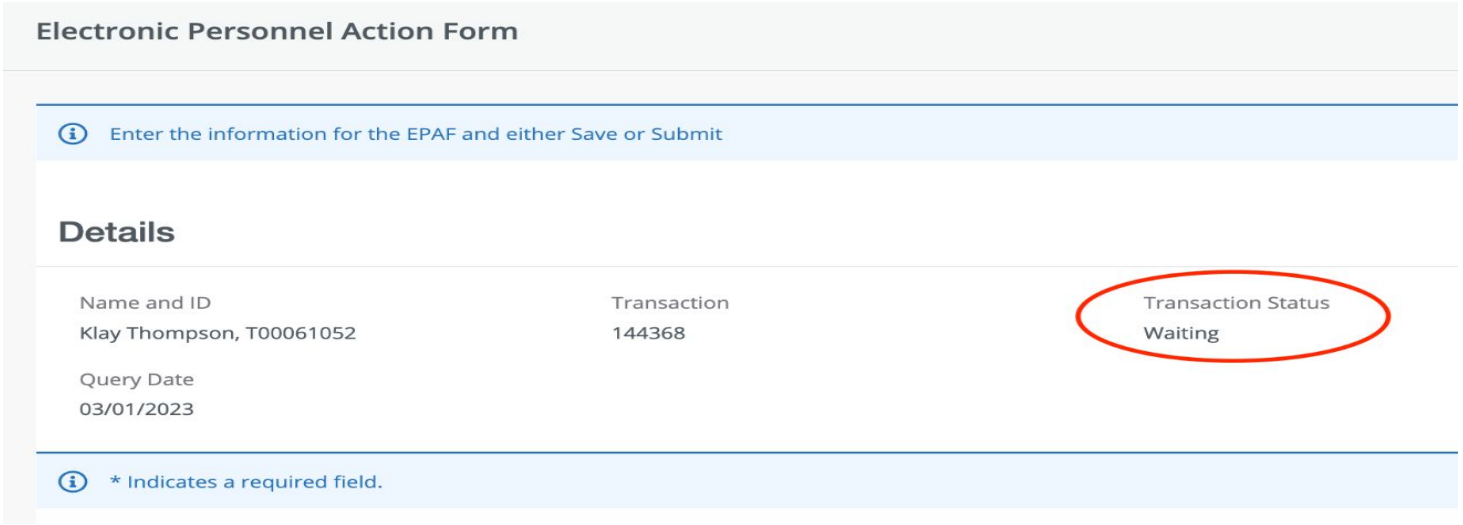
Remember to only press **Submit** or **Delete** once.

Successfully Saved ePAF

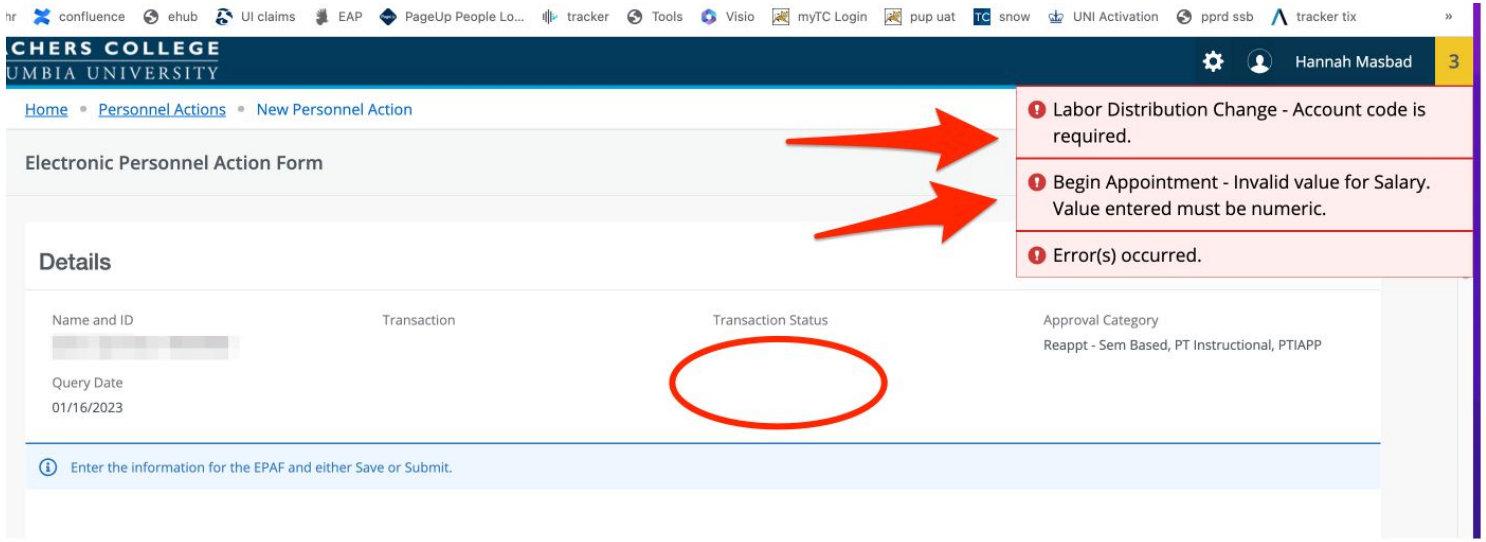
Once all fields are filled, click Save at the bottom of the ePAF



When you have saved your EPAF, the transaction status will populated from a blank field to “Waiting” and you will not see any error messages.

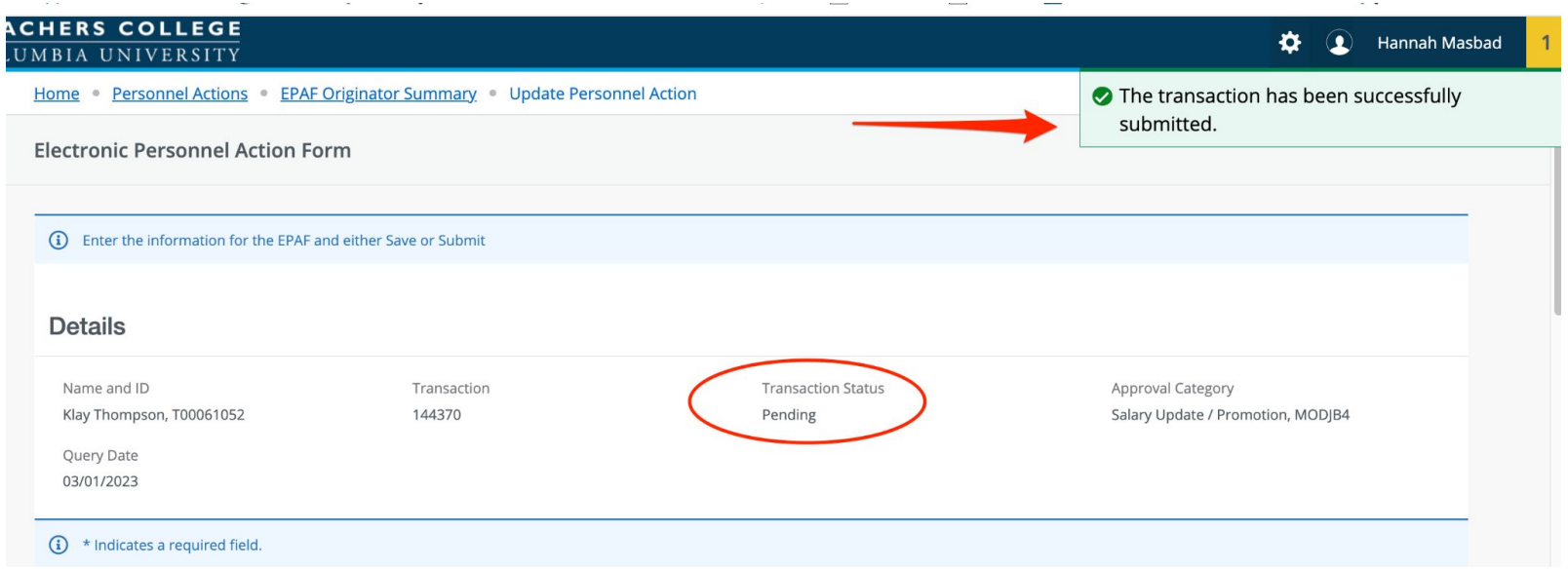


NOT Successfully Saved ePAF



- Any errors will be identified upon saving the ePAF.
- Any errors will show in the top left corner with a text description of the error(s).
- The **Transaction Status** will remain at BLANK until a successful save.
- Review and fix the error as needed. Click **Save** to save the changes.
- A list of common EPAF errors can be found at the end of this guide.

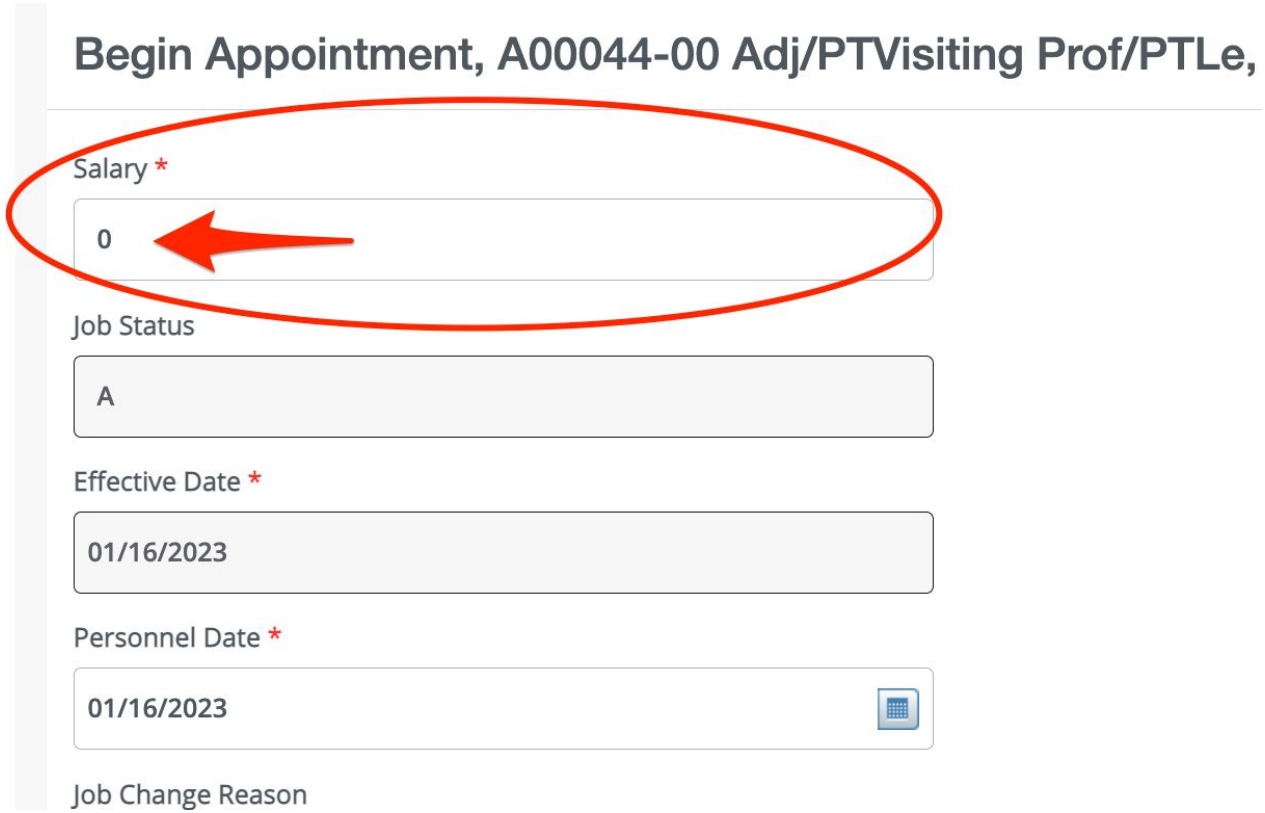
Successfully Saved ePAF



- 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.
- A list of common EPAF errors can be found at the end of this guide.

Defaulted Values, Common Errors and System Defects

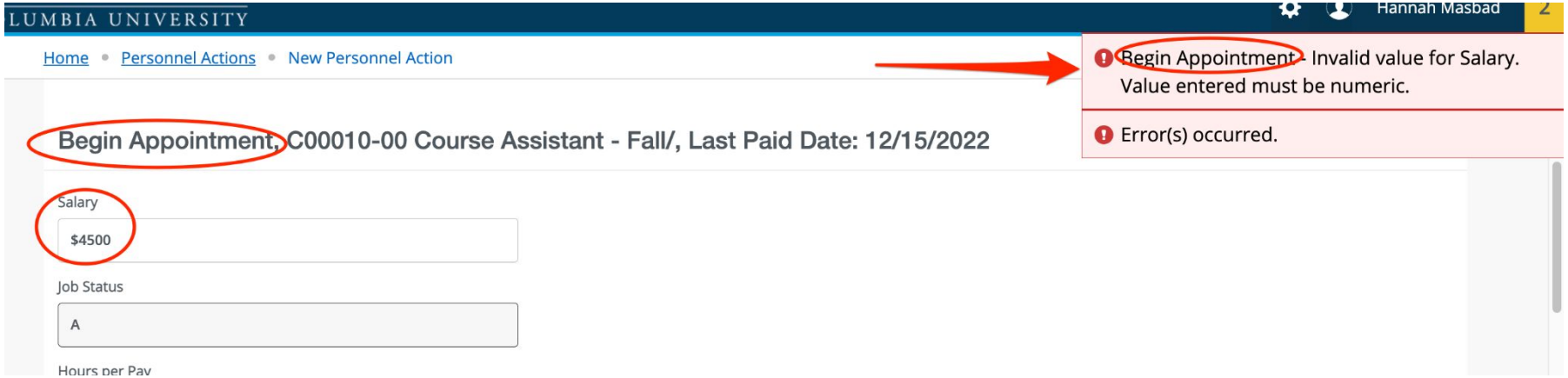
Defaulted Values: Salary/Hourly Rate



Any ePAFs with a **Salary** or **Hourly Rate** have been defaulted to “0”

The ePAF will NOT error out, but be sure to update this to the correct amount - otherwise your employee will not get paid.

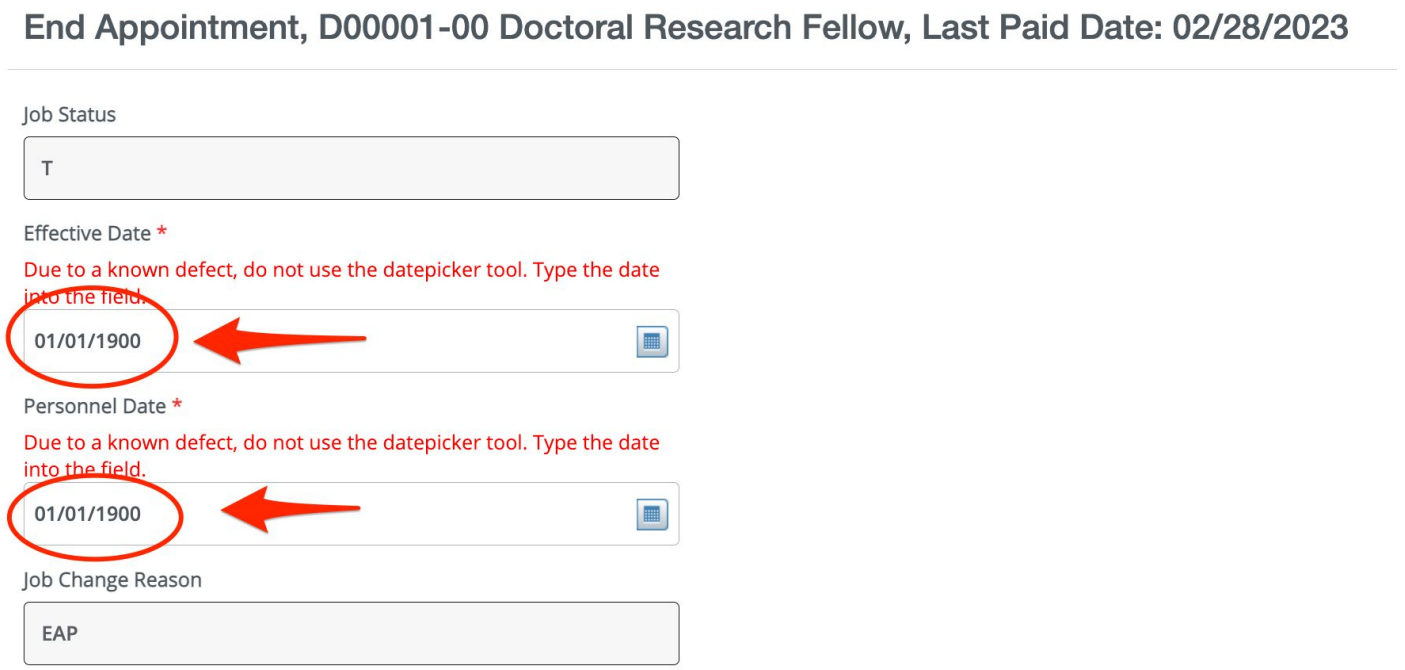
Error: Invalid Value for Salary. Value entered must be numeric.



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 or Hourly Rate field**.**

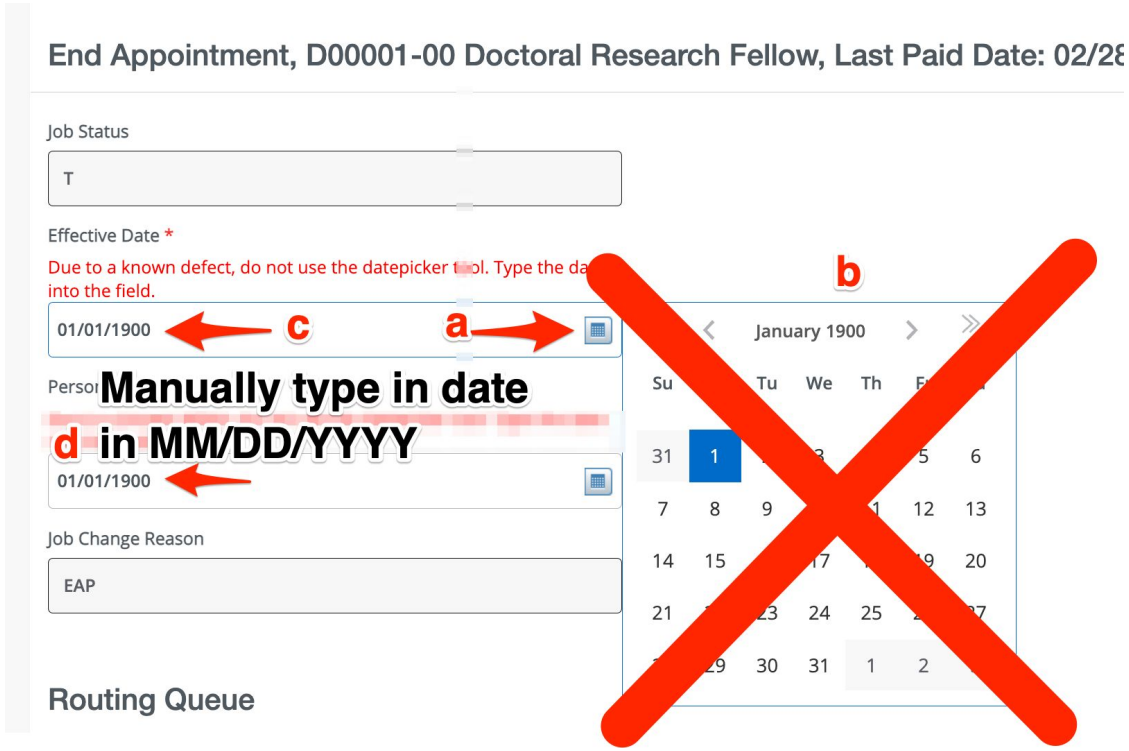
Be sure to remove the "$" sign and then, after reviewing, click submit.

Defaulted Values: End Appointment End Date = 01/01/1900



Some ePAFs will have 01/01/1900 defaulted into the date field. Update this field to the end date of the appointment/transaction.

Date Input: Manual Entry



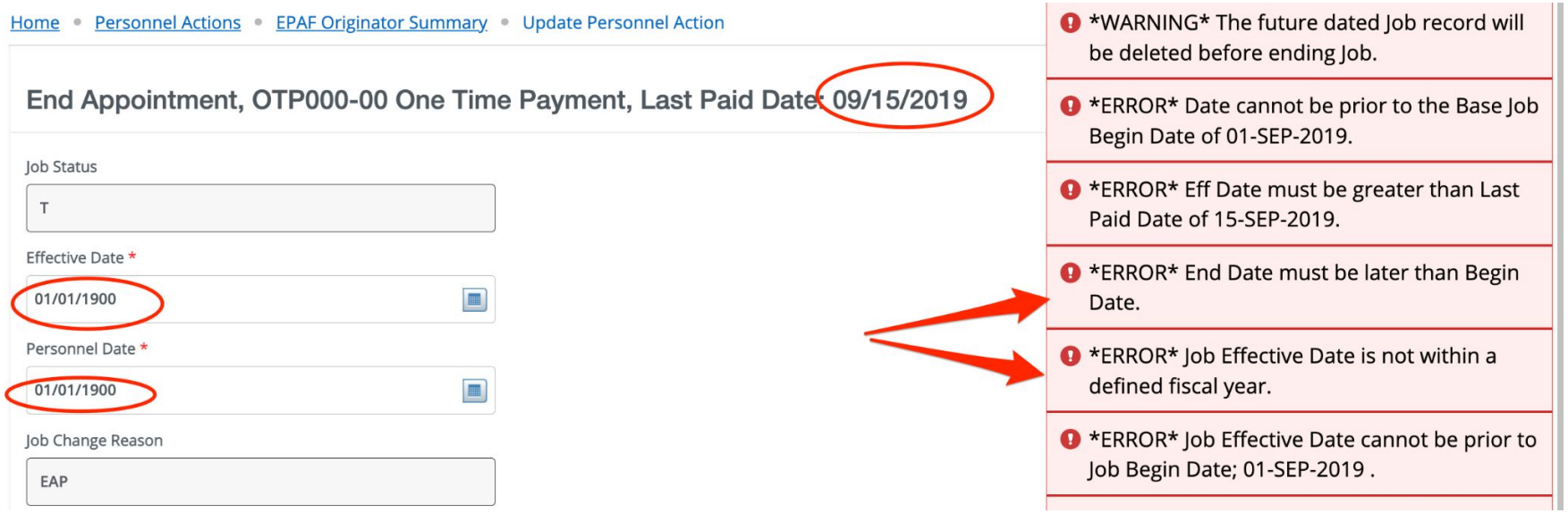
a. Click datepicker. Calendar will appear. Do not select date.

b. Close the calendar by click the datepicker icon again. Calendar will disappear.

c. Click into date field and cursor will appear.

d. Manually type in date in format MM/DD/YYYY

Error: Incorrect Date Inputs



Be sure manually enter the date on the end appointment. (**Do not use datepicker as it will override the dates in the begin appointment section**.)

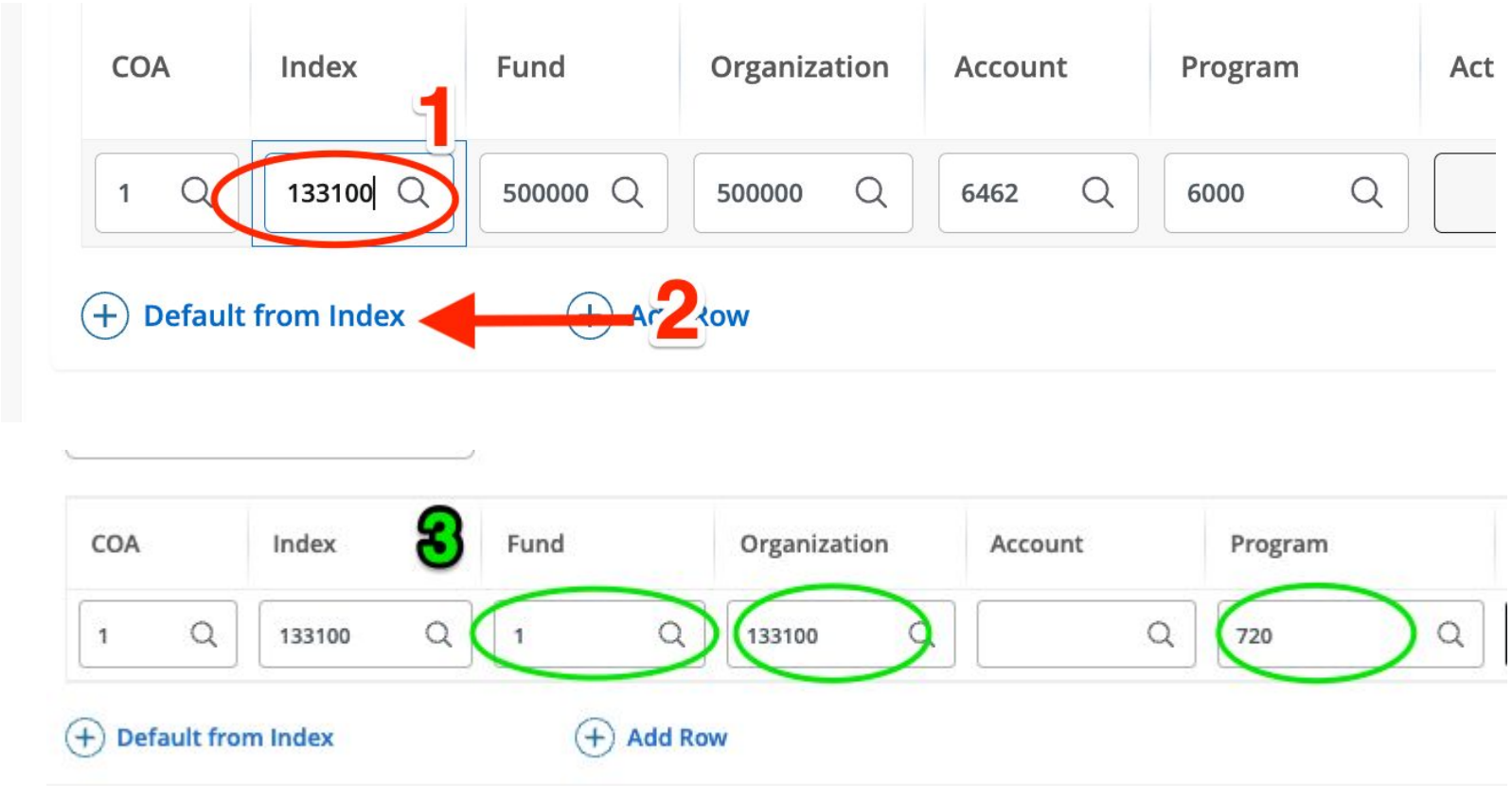
Funding Allocation: Default From Index

When updating the funding information, you should only update two fields **Index** and **Account**.

Step 1. Manually enter the Index field only

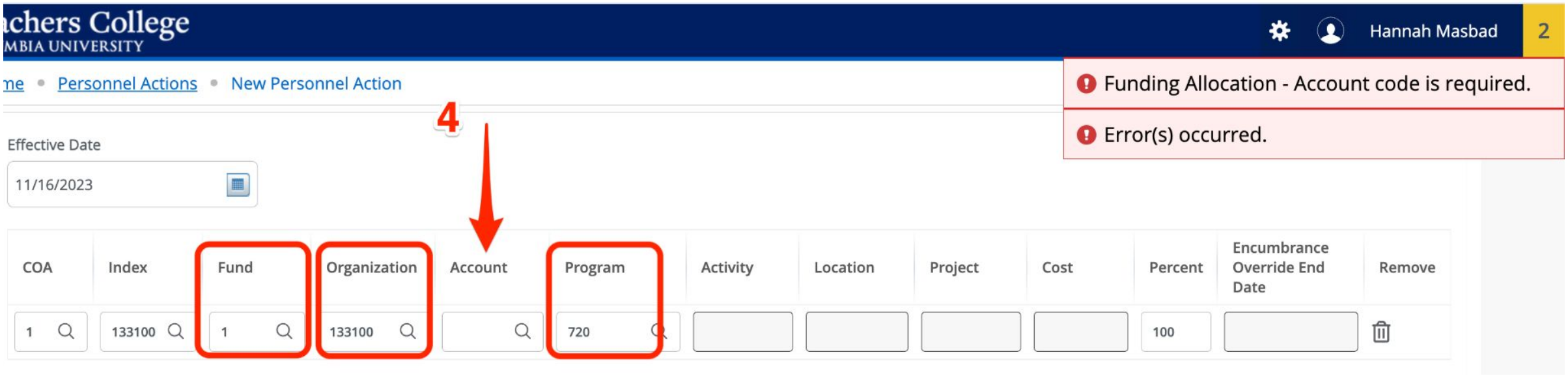
Step 2. Click Default from Index

Step 3. The Fund, Organization and Program fields will automatically populate



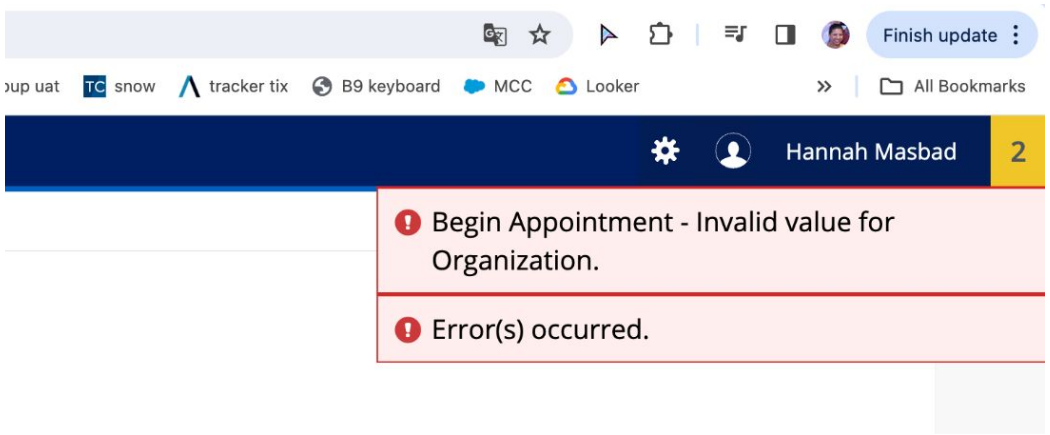
Error: Account Code is required

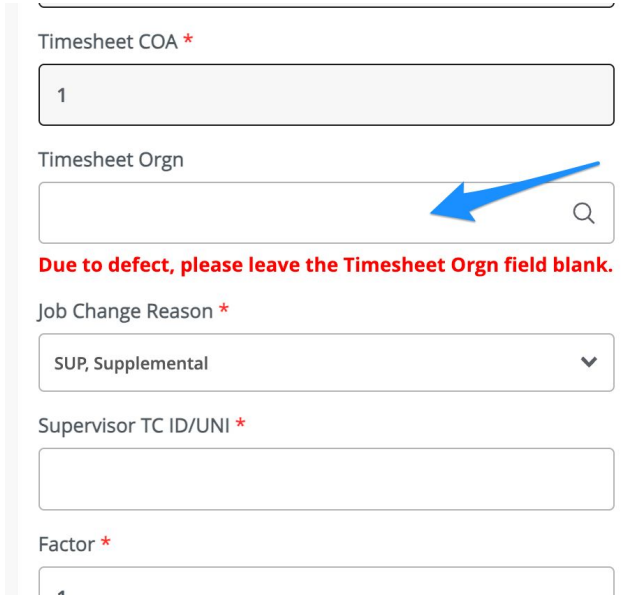
Step 4. Enter Account Code



Timesheet Orgn Field Defect

Defect: The **Timesheet Orgn** field causes error (shown below)

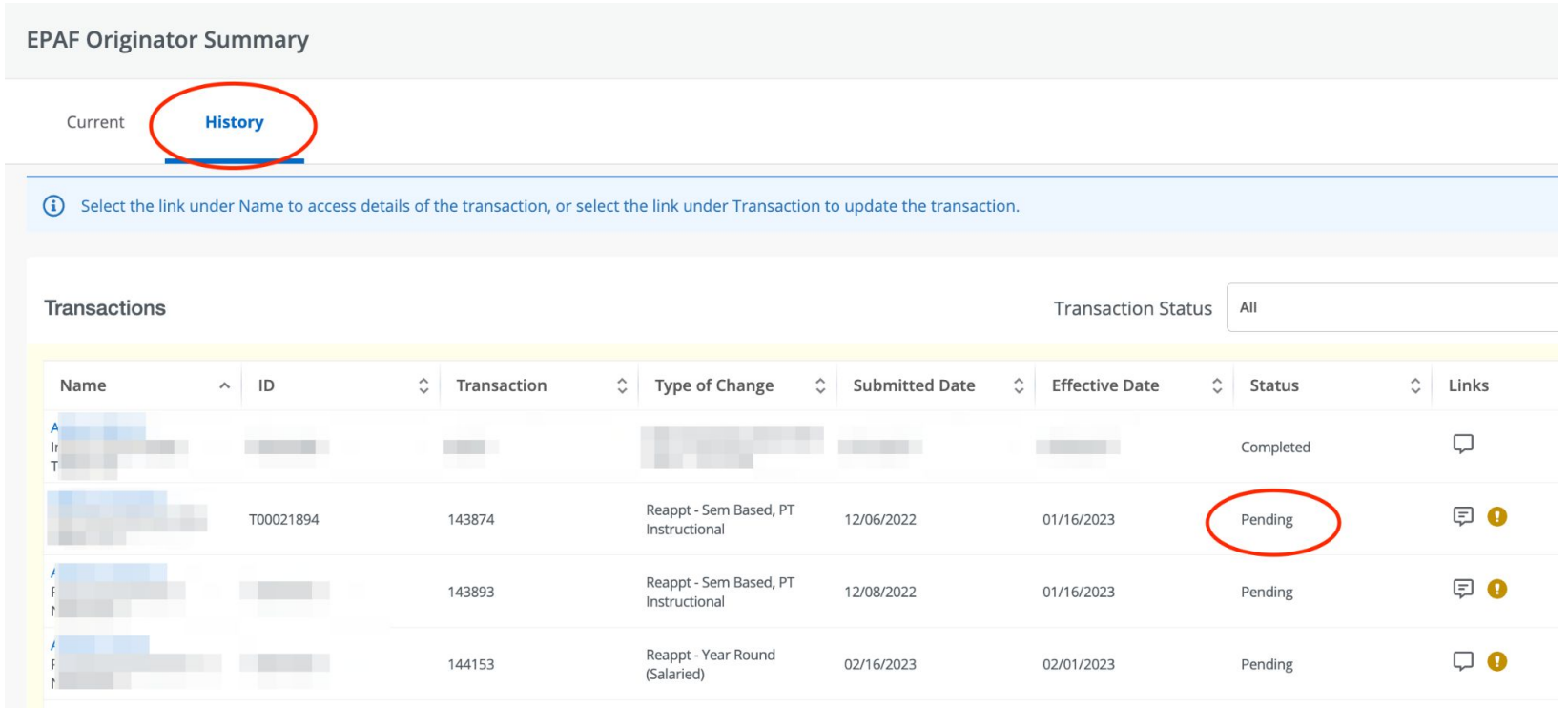




Resolution: Leave field Null

Other Items

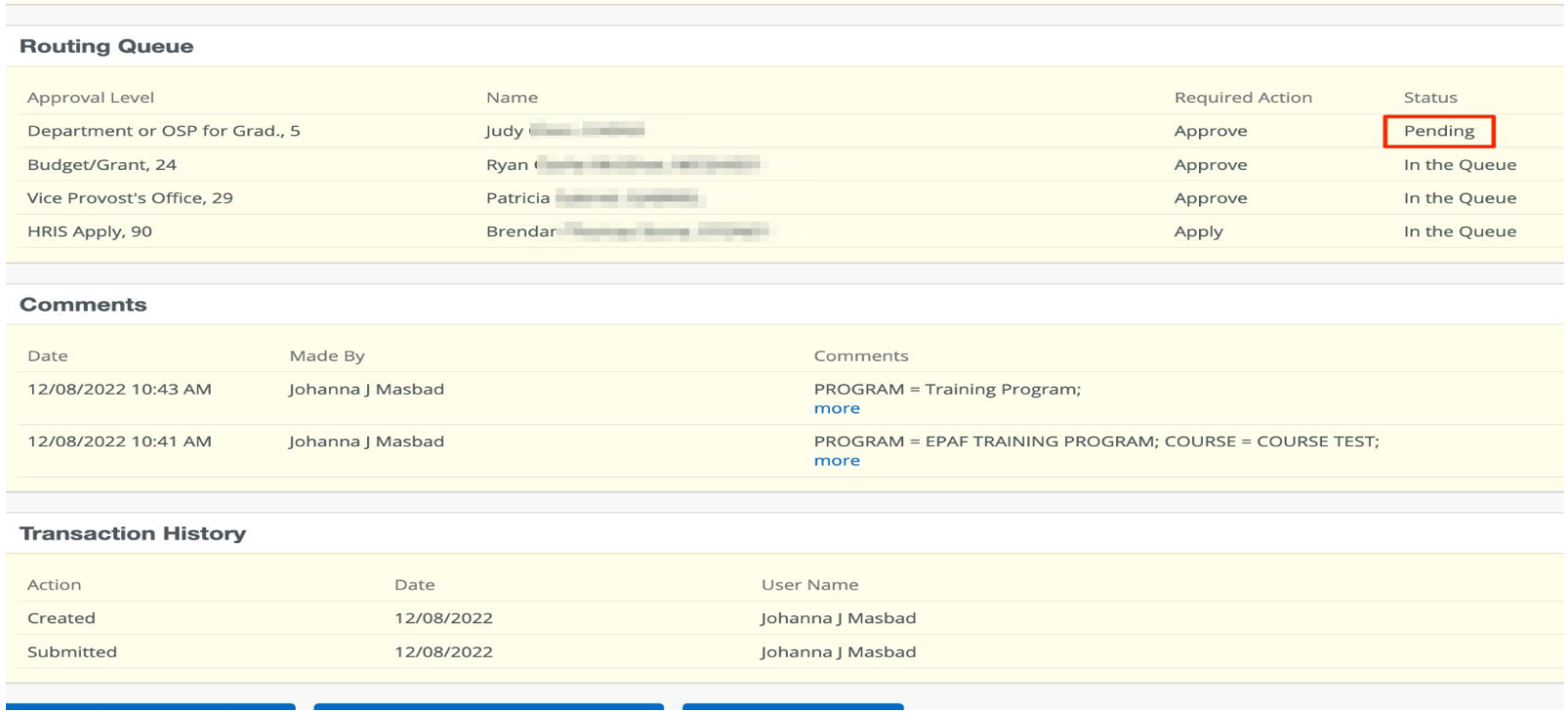
Tracking Submitted ePAFs



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.

Tracking Submitted ePAFs



Routing Queue

Approval Level	Name	Required Action	Status
Department or OSP for Grad., 5	Judy	Approve	Pending
Budget/Grant, 24	Ryan	Approve	In the Queue
Vice Provost's Office, 29	Patricia	Approve	In the Queue
HRIS Apply, 90	Brendar	Apply	In the Queue

Comments

Date	Made By	Comments
12/08/2022 10:43 AM	Johanna J Masbad	PROGRAM = Training Program; more
12/08/2022 10:41 AM	Johanna J Masbad	PROGRAM = EPAF TRAINING PROGRAM; COURSE = COURSE TEST; more

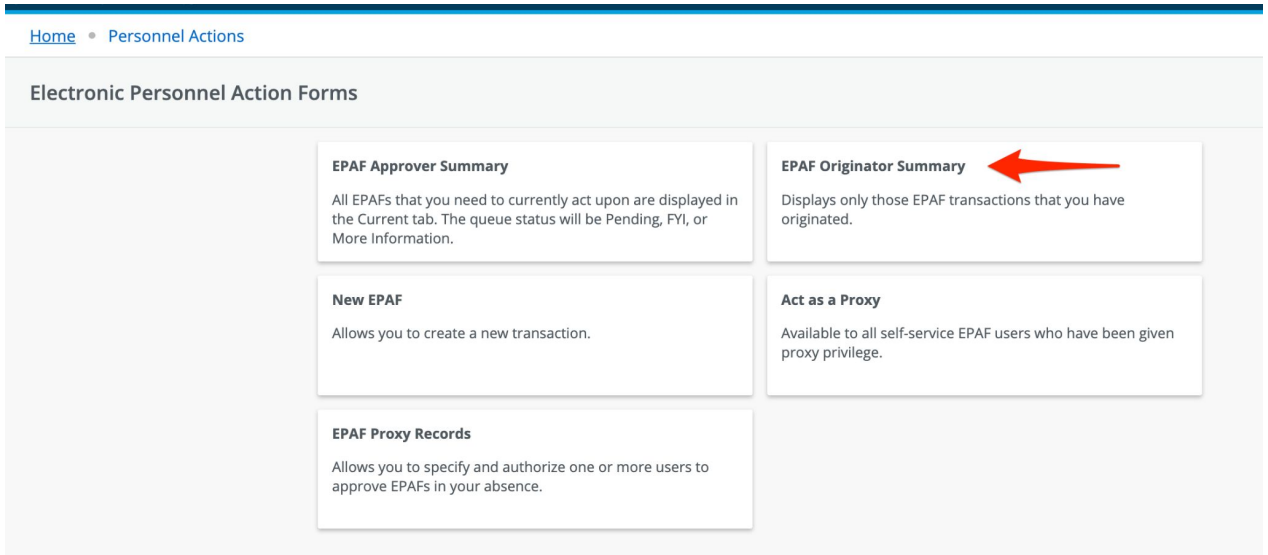
Transaction History

Action	Date	User Name
Created	12/08/2022	Johanna J Masbad
Submitted	12/08/2022	Johanna J Masbad

Monitoring Routing Queue. If an approver has a status of "Pending" this means that the ePAF is currently sitting with them for approval.

"In the Queue" means that the ePAF will go to this person, once the previous levels approve.

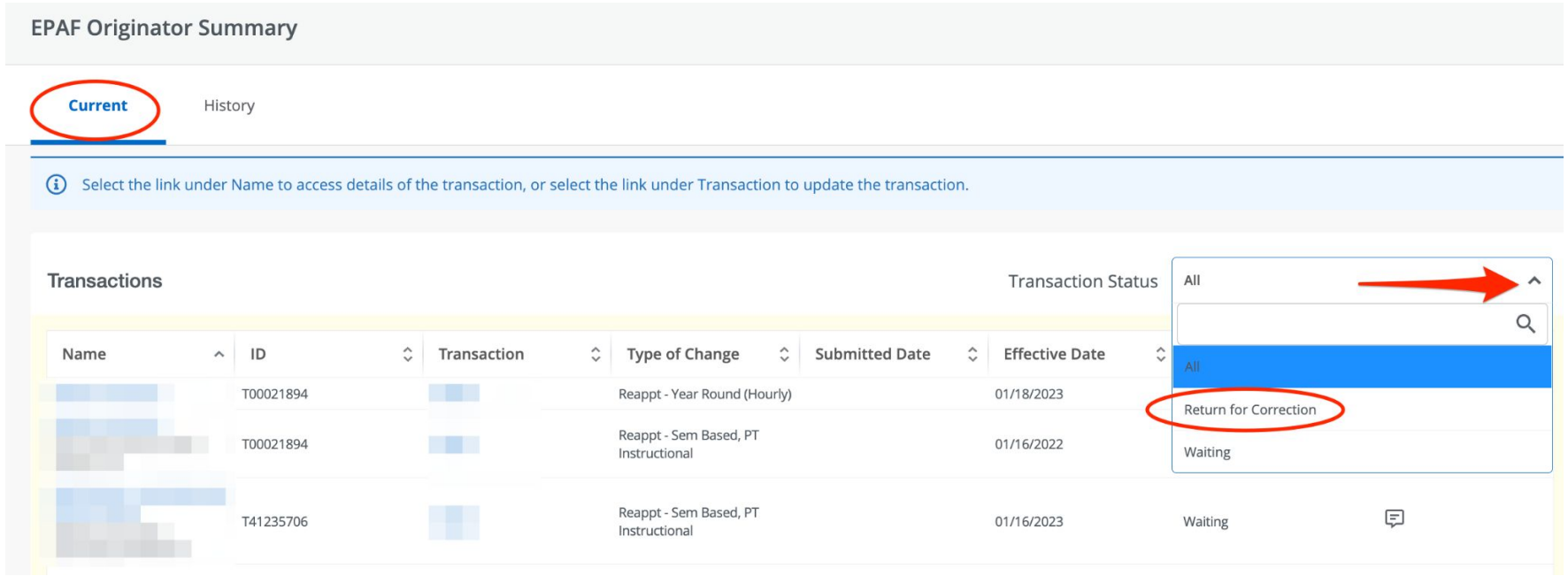
ePAFs Returned for Correction



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.

From the **EPAFS (Electronic Personnel Action Forms)** home screen, navigate to the **EPAF Originator Summary** tile

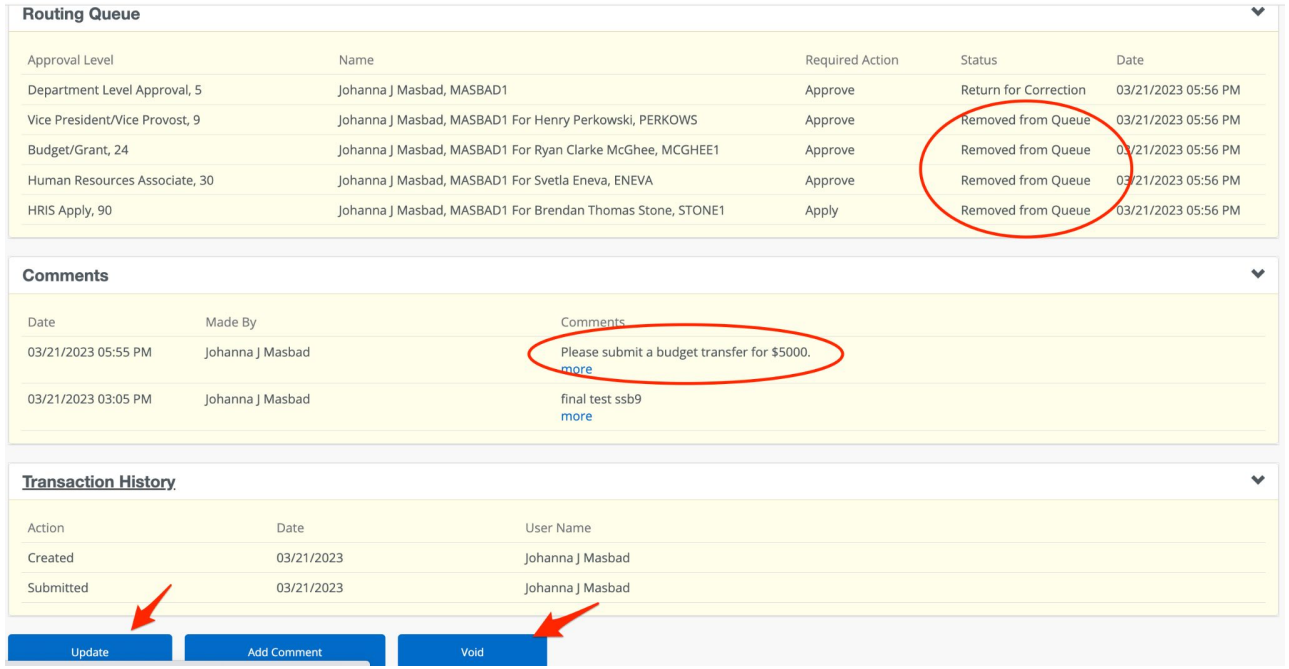
ePAFs Returned for Correction



In your **Current** tab, you can filter by **Transaction Status**. Click the drop down arrow and select **Return for Correction**. EPAFs that have been returned to you for correction will now populate the listing

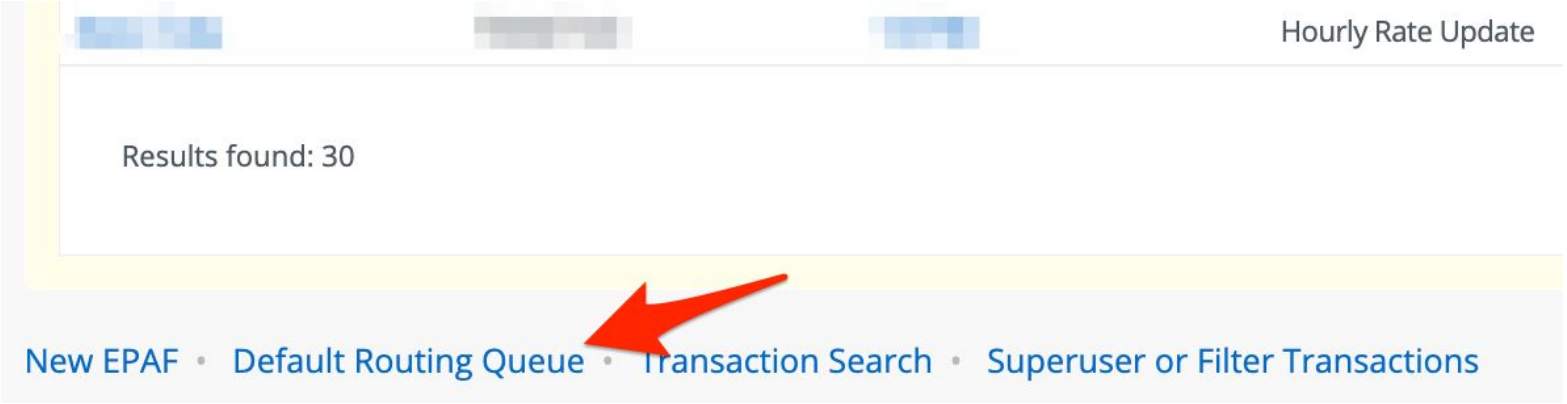
Click the employee's name to be taken to the ePAF.

ePAFs Returned for Correction



- Scroll down to the comments section to review the reason why the ePAF was returned.
- Click **Void** to delete the EPAF and remove it from your queue. No further action can be taken on the transaction.
- Click on **Update** to make changes. You'll be able to make any adjustments necessary on the ePAF fields. Click Save and then click **submit** to send the ePAF back to the routing queue

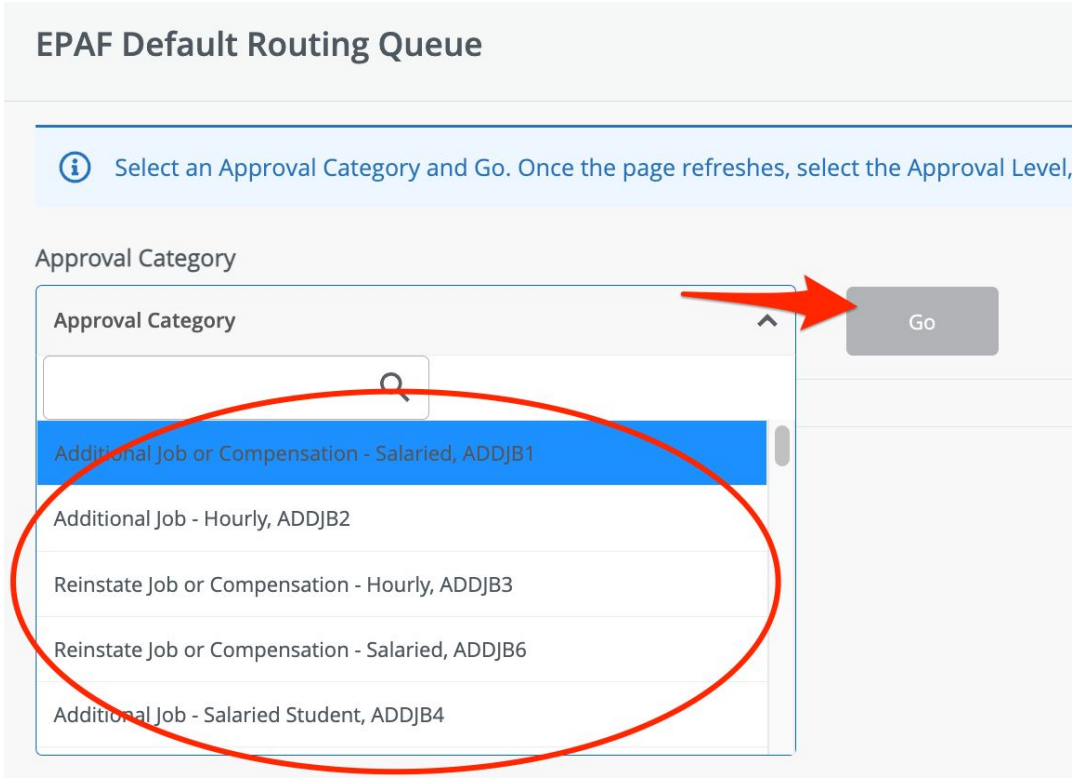
Establishing Default Routing Queues



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.

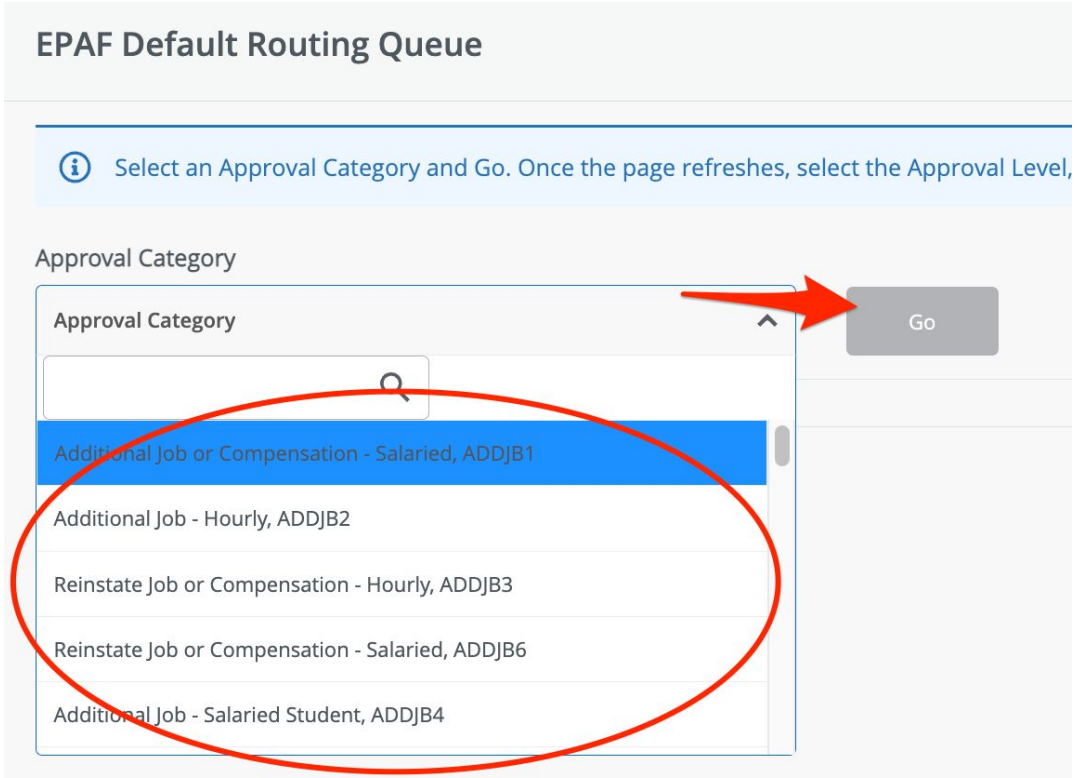
To establish Default Routing Queues, click on **EPAF Originator Summary** from your EPAF Menu.

Establishing Default Routing Queues



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

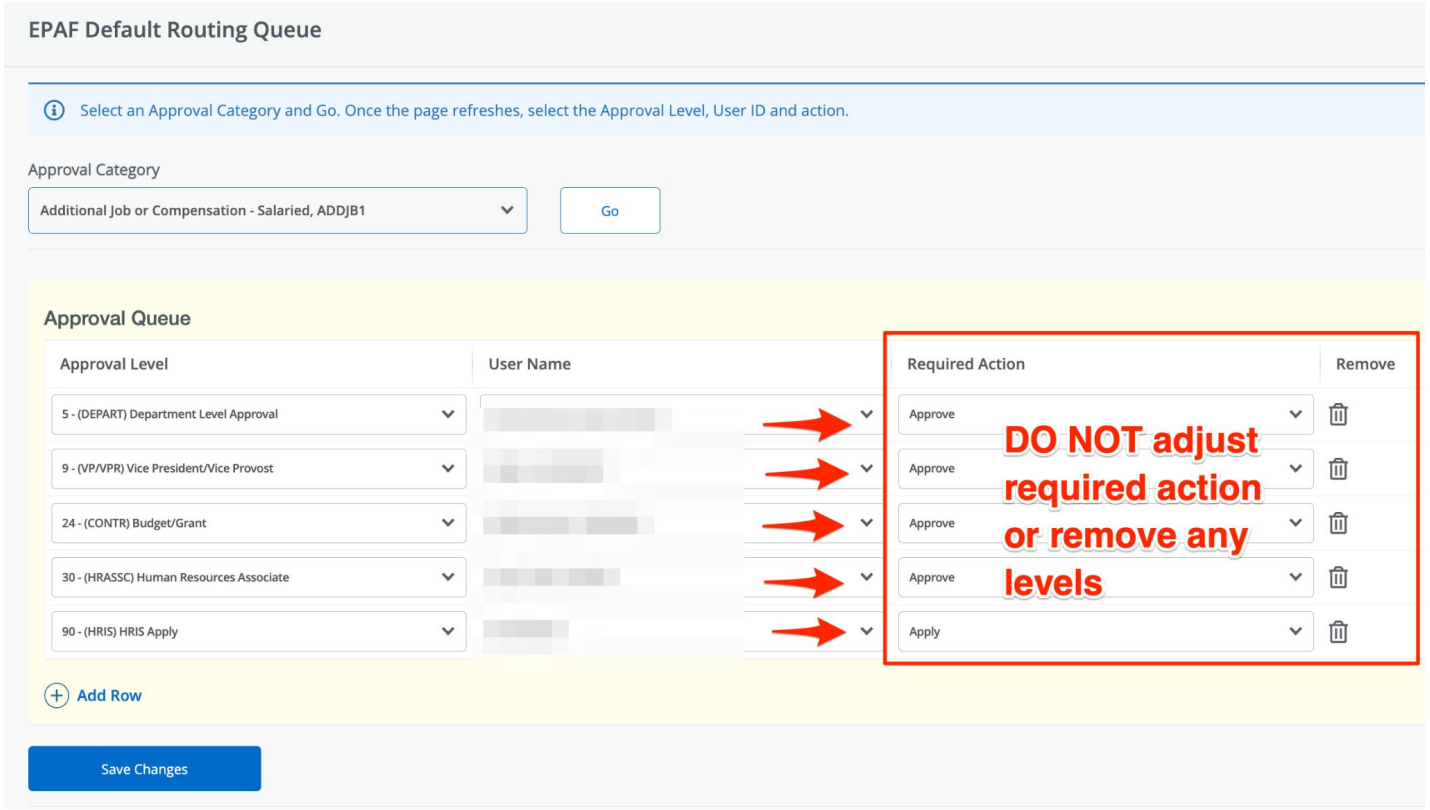


Select the EPAF you wish to establish **Default Routing Queues** for from the drop down (remember, you must set up default routing queues for **each** EPAF). Then click **GO**.

Establishing Default Routing Queues

Click on the drop down menu to select the user for each Approval Level. Please note that user names can be updated when creating new ePAFs. Click **Save Changes**.

You can establish the default routing queues for another EPAF by clicking on the **Approval Category** and clicking Go. You'll be presented with the mandatory approval levels for that ePAF. Select the user name from each level. Click **Save Changes**.



ePAF Transaction Glossary

ePAF Transaction Glossary

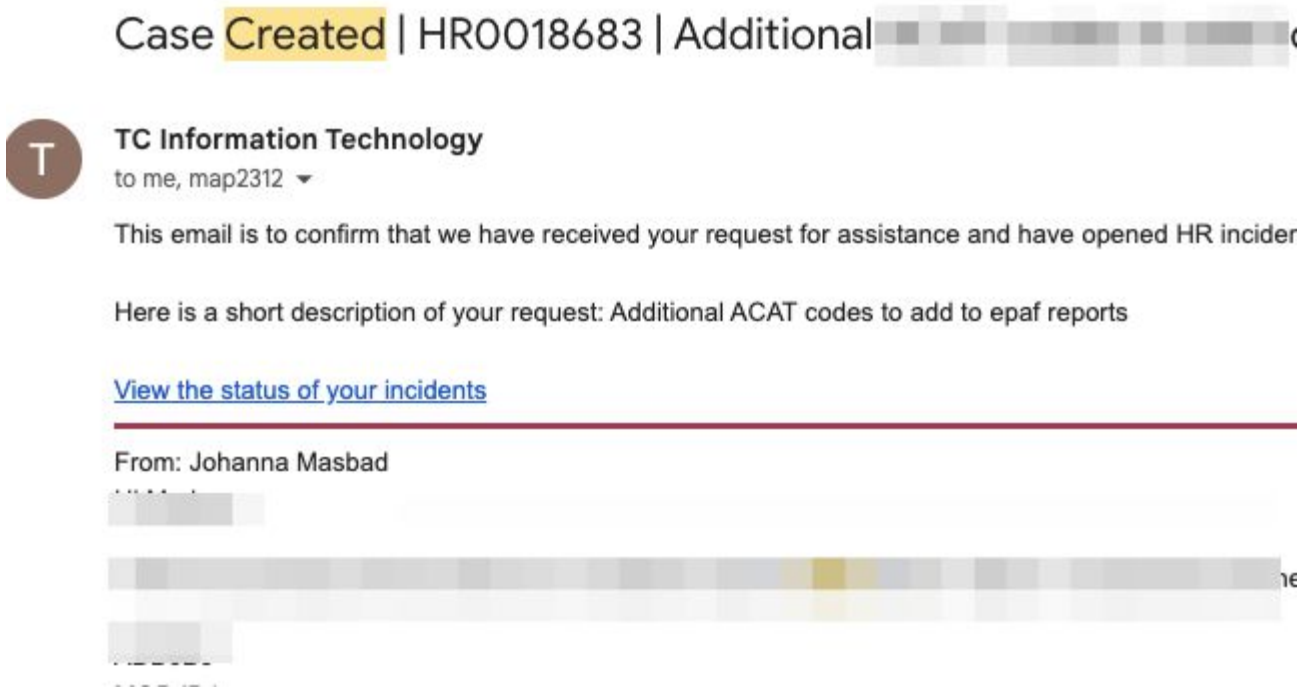
Transaction Status and Queue Status Guide		
Status	**Status Type**	**Definition**
Approved	Transaction Status / Queue Status	Indicates that the transaction has been approved by all parties and ready to be applied to Banner
Complete	Transaction Status	Indicates that the transaction has been applied to Banner
Disapproved	Transaction Status / Queue Status	Indicates that the transaction has been disapproved by an approver
Pending	Transaction Status	Indicates that the transaction requires action by the approver(s)
Removed From Queue	Queue Status	Indicates that the transaction no longer needs your action
Return for Correction	Transaction Status / Queue Status	Indicates that the transaction has been returned to the Originator for update/correction
Void	Transaction Status	Indicates that the transaction has been voided by an originator or superuser and is no longer a valid transaction
Waiting	Transaction Status	Indicates that the transaction is in the process of being created
Action Buttons Guide		
Action Buttons/Links	User Type	Function
Approve	Approver(s)	The transaction will progress to the next level of approval in the transaction queue
Comment	Originator / Approver(s)	Available on all transactions for users as a free text field to share additional information
Disapprove	Approver(s)	The transaction will be removed from all levels of approvals and no further action will be possible
Return for Correction	Approver(s)	The transaction will be returned to the Originator for update/correction
Update	Originator	Available on transactions that have been returned for correction and the originator can make changes and submit for approval
Void	Originator	The transaction will be removed from all levels of approvals and no further action will be possible
Summary Page Guide		
Summary Page Tabs	User Type	Definition
Current	Originator / Approver(s)	Transactions that require your action
In My Queue	Approver(s)	Transactions that will require your action after predecessor levels have been approved
History	Originator / Approver(s)	Transactions that you have already taken action on

Miscellaneous		
Field Name		**Usage**
Personnel Date (Begin Appointment)		Actual Start Date of appointment
Personnel Date (End Appointment)		Actual End Date of appointment

The End

Help

Contact: HRISTeam@tc.edu or your HR Rep 😄

** By emailing HRISTeam@tc.edu a ServiceNow ticket will automatically be created. You will receive a follow up email saying that a case has been created along with a case number.

Please correspond with us by replying to the email with the CASE NUMBER.