ePAF Originator Training

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

Electronic Personnel Action Form

Data entry forms used to initiate employee transactions

These transactions include:
- Reappointments
- Adjustments to Active Job (Salary/labor updates, title updates, termination of job)
- Additional Jobs/Compensation

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Advantages of ePAFs

- Easy To track
- Keyed in electronically
- Efficient
- Transparency
- Less room for data entry error

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# ePAF Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Originator</td>
<td>• Person who creates ePAF</td>
</tr>
<tr>
<td>Approver</td>
<td>• Reviews &amp; Takes Action&lt;br&gt;• Approver, Disapprove, Return for Correction</td>
</tr>
<tr>
<td>Proxy</td>
<td>• Delegated as proxy approver</td>
</tr>
<tr>
<td>FYI</td>
<td>• Only views and acknowledges</td>
</tr>
</tbody>
</table>
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

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How to Access the ePAF System

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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ePAF Originator Summary Screen

**Current:** listing of ePAFs that you have originated, but need further action by you

**History:** listing of all ePAFs that you have submitted

<table>
<thead>
<tr>
<th>Employee Name and TCID</th>
<th>ePAF Transaction Number</th>
<th>ePAF Type</th>
<th>Transaction Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professor, SP0108-01</td>
<td>T44194505</td>
<td>Job Termination for Transfer</td>
<td>Return for Correction</td>
</tr>
<tr>
<td></td>
<td>T17997300</td>
<td>Salary or Rate Update</td>
<td>Waiting</td>
</tr>
</tbody>
</table>

- Employee Name and TCID
- ePAF Transaction Number
- ePAF Type
- Transaction Status

Revised November 2020
# Transaction Status Key

<table>
<thead>
<tr>
<th>Status</th>
<th>Action Sitting With:</th>
<th>Action Needed:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waiting</td>
<td>ePAF Originator</td>
<td>ePAF needs to be submitted; has errors or is incomplete</td>
</tr>
<tr>
<td>Pending</td>
<td>ePAF Approver</td>
<td>ePAF has been submitted, but needs approvals</td>
</tr>
<tr>
<td>Approved</td>
<td>ePAF Approver</td>
<td>ePAF has all approvals; needs to be processed</td>
</tr>
<tr>
<td>Completed</td>
<td>N/A</td>
<td>ePAF has been processed and applicable tables/records updated</td>
</tr>
<tr>
<td>Return for Correction</td>
<td>ePAF Originator</td>
<td>ePAF has been returned to originator for correction when an error is detected; ePAF can be updated, saved and submitted again</td>
</tr>
<tr>
<td>Cancelled</td>
<td>N/A</td>
<td>ePAF has been cancelled; no further action needed.</td>
</tr>
<tr>
<td>Voided</td>
<td>N/A</td>
<td>ePAF has been voided; no further action needed.</td>
</tr>
<tr>
<td>Disapproved</td>
<td>N/A</td>
<td>ePAF has been disapproved; no further action needed.</td>
</tr>
</tbody>
</table>
Available Personnel Transactions

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, Union employees</td>
</tr>
<tr>
<td>Additional Job - Hourly</td>
<td>Substitution</td>
<td>Year Round</td>
<td>Secondary job</td>
<td>Hourly except for Executive, Student, Union employees</td>
</tr>
<tr>
<td>Reinstatement or Compensation (Salaried and Hourly)</td>
<td>Substitution</td>
<td>Year Round</td>
<td>Suppliemnt overages, lone-time payment</td>
<td>Secondary job</td>
</tr>
</tbody>
</table>
Reappointments

Reappointment ePAFs can only be used if:

- 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)
- Grants funded reappointments can be updated on reappointment ePAF

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# Reappointment ePAFs

<table>
<thead>
<tr>
<th>Approval Category Name</th>
<th>Applicable Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reappt - Year Round**</td>
<td>6211, 6244, 6213, 6242, 6432, 6412, 6254</td>
</tr>
<tr>
<td>Reappt - Course Assistant</td>
<td>6462</td>
</tr>
<tr>
<td>Reappt - Community Teachers</td>
<td>6142</td>
</tr>
<tr>
<td>Reappt - RA/TA</td>
<td>6531, 6422</td>
</tr>
<tr>
<td>Reappt - PT Instructional</td>
<td>6122, 6132, 6152</td>
</tr>
<tr>
<td>Reappt - College Work Study</td>
<td>7829</td>
</tr>
</tbody>
</table>

- Most reappointment ePAFs available on a semester basis only.
- ePAFs annotated by ** available year round.
- Be sure to [Select correct Applicable ePAF](#)
Before the beginning of each semester, HRIS will deliver a listing of employees and their position numbers that are eligible for the upcoming semester’s reappointment ePAF.

If you want to reappoint on a different index than they were previously paid on, you can confirm if employee has ever held that job. If not, must move transaction through PageUp.

You must select the correct reappointment ePAF for applicable account. Each ePAF has specific values defaulted based on the account.

Check with your Director of Academic Administration or HR Representative if you do not see your employee on the Excel spreadsheet and you believe that your employee qualifies for reappointment ePAF.
Visual Guide for ePAF Originators
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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Enter the TC ID of the employee in the **ID** field and press the **Tab** on your keyboard. *Reminder: You must enter an upper case ‘T’ in the TC ID.*

**Query Date should equal appointment effective date.**
Select the ePAF Approval Category

Select applicable Approval Category. (See Reappointment ePAF slide)
Select the Reappointment Job

A listing of active jobs (as of your Query Date) will automatically populate. Click Go.
Select the Reappointment Job

ID: T25234008
Query Date: 01/16/20
Approval Category: Reappt - PT Instructional, PTIAPP

<table>
<thead>
<tr>
<th>Search Type</th>
<th>Position</th>
<th>Suffix</th>
<th>Title</th>
<th>Time Sheet Organization</th>
<th>Start Date</th>
<th>End Date</th>
<th>Last Paid Date</th>
<th>Status</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td>202138</td>
<td>00</td>
<td>Director of NCSPE 111011, Economics &amp; Education</td>
<td>10/13/14</td>
<td>08/31/20</td>
<td>05/31/20</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click **All Jobs** to see a listing of all jobs that employee has held.
Select the Reappointment Job

Select the appropriate job you wish to reappoint.

**Reminder:** Employees may hold multiple jobs; make sure to select the **correct job.**

*Please refer to the Excel spreadsheet, sent by HRIS, for the correct position.*

Click the **GO** button to navigate to the **Electronic Personnel Action Form** page.
Enter the appointment salary under the **New Value** column next to **Salary**.

For semester based reappointment ePAFs, the **Effective Date** will be hard coded and align with the Begin Date of the semester.

In the **Personnel Date**, please enter the Actual Begin Date of the reappointment.

For general reappointments, both the **Effective Date** and **Personnel Date** fields will be enterable. Please input Actual Start Date of reappointment.

Enter **Supervisor TC ID/UNI** in ALL CAPS.

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Labor Distribution Section

- Labor Distribution to only be updated for grant funded reappointments
- **Effective Date** in Labor Distribution can only occur after last paid date
- **Effective Date** will default from Query Date

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End Record Info - Enter Personnel Date

The End Appointment section will also have additional dates. This **Effective Date** will coincide with the last day of the semester.

In the **Personnel Date**, please enter the Actual End Date of the reappointment.
Routing Queue

Define the **Routing Queue** for the EPAF by selecting the **Approval Levels**.

**Routing Queue** will vary dependent on **Approval Category** type

*You can establish* **Default Routing Queues**.

Click on the **magnifying glass** to input approval levels.

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Routing Queues Continued…

**Department Level Approval** - select the appropriate Director of Academic Administration for the appointment

**Budget/Grant** – based on funding source, select *Hernandez, John* for grant funded positions and select *Anderson, Joan* for all other funded positions

**Vice Provost’s Office** - select *Torres-Irizarry, Iraida (Graham, Robert)* for summer appointments

**Human Resources Associate** - select your designated representative

**HRIS Approval Level** - select *Feliz, Jennifer*
New Feature - Adding Approval Level

For transactions that require approval by both the Budget AND Grants offices

Select an empty approval level row. From the dropdown, select **27 - Grants**. Click the magnifying glass and select the approver. In **Required Action**, select Approve. Click **Save and Add New Rows**.
Dependent on ePAF reappointment type, you may need to input information in the Comment field. For example, Course Assistant reappointments require the course number to be inputted in the comment section.

Click on the Save and Add New Rows or the Save button to save your comments.
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.
Return 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.

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**).
Return for Correction Continued

Click on the Comments link or scroll down to see the reason that that EPAF was returned.

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.

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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.
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.
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**.
# EPAF Transaction Glossary

## 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>
Reappointment ePAF Info Chart

Based off the account, use this chart to determine which ePAF Approval Category to use and what to input for pay.

<table>
<thead>
<tr>
<th>E-CLASS</th>
<th>PAY</th>
<th>Determine Account</th>
<th>Use This ePAF Approval Category</th>
<th>Input This Type of Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>SM</td>
<td>6211</td>
<td>Reappt - Year Round</td>
<td>Annualized Salary</td>
</tr>
<tr>
<td>11</td>
<td>SM</td>
<td>6211</td>
<td>Reappt - Year Round</td>
<td>Annualized Salary</td>
</tr>
<tr>
<td>20</td>
<td>SM</td>
<td>6111</td>
<td>Reappt - Year Round</td>
<td>Annualized Salary</td>
</tr>
<tr>
<td>24</td>
<td>SM</td>
<td>6121</td>
<td>Reappt - Year Round</td>
<td>Annualized Salary</td>
</tr>
<tr>
<td>25</td>
<td>SM</td>
<td>6161</td>
<td>Reappt - Year Round</td>
<td>Annualized Salary</td>
</tr>
<tr>
<td>31</td>
<td>SM</td>
<td>6122</td>
<td>Reappt - PT Instructional</td>
<td>Appointment Salary</td>
</tr>
<tr>
<td>35</td>
<td>SM</td>
<td>6132</td>
<td>Reappt - PT Instructional</td>
<td>Appointment Salary</td>
</tr>
<tr>
<td>39</td>
<td>SM</td>
<td>6142</td>
<td>Reappt - Community Teachers</td>
<td>Appointment Salary</td>
</tr>
<tr>
<td>81</td>
<td>SM</td>
<td>6152</td>
<td>Reappt - PT Instructional</td>
<td>Appointment Salary</td>
</tr>
<tr>
<td>40</td>
<td>SM</td>
<td>6211</td>
<td>Reappt - Year Round</td>
<td>Annualized Salary</td>
</tr>
<tr>
<td>41</td>
<td>B2</td>
<td>6244</td>
<td>Reappt - Year Round</td>
<td>Hourly Rate</td>
</tr>
<tr>
<td>42</td>
<td>B2</td>
<td>6213</td>
<td>Reappt - Year Round</td>
<td>Hourly Rate</td>
</tr>
<tr>
<td>43</td>
<td>SM</td>
<td>6242</td>
<td>Reappt - Year Round</td>
<td>Annualized Salary</td>
</tr>
<tr>
<td>44</td>
<td>SM</td>
<td>6211</td>
<td>Reappt - Year Round</td>
<td>Annualized Salary</td>
</tr>
<tr>
<td>78</td>
<td>WK</td>
<td>6321</td>
<td>Reappt - Year Round</td>
<td>Hourly Rate</td>
</tr>
<tr>
<td>84</td>
<td>SM</td>
<td>6462</td>
<td>Reappt - Course Assistant</td>
<td>Appointment Salary</td>
</tr>
<tr>
<td>87</td>
<td>SM</td>
<td>6422</td>
<td>Reappt – RA/TA</td>
<td>Appointment Salary</td>
</tr>
<tr>
<td>89</td>
<td>B2</td>
<td>6412</td>
<td>Reappt - Year Round</td>
<td>Hourly Rate</td>
</tr>
<tr>
<td>90</td>
<td>B2</td>
<td>7829</td>
<td>Reappt – College Work Study</td>
<td>Hourly Rate</td>
</tr>
<tr>
<td>91</td>
<td>B2</td>
<td>6254</td>
<td>Reappt - Year Round</td>
<td>Hourly Rate</td>
</tr>
</tbody>
</table>

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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 to be reappointed using one of the reappointment ePAFs.

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 HRIS 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 HRIS (HRISTeam@tc.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 the HRIS Team at HRISTeam@tc.columbia.edu

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