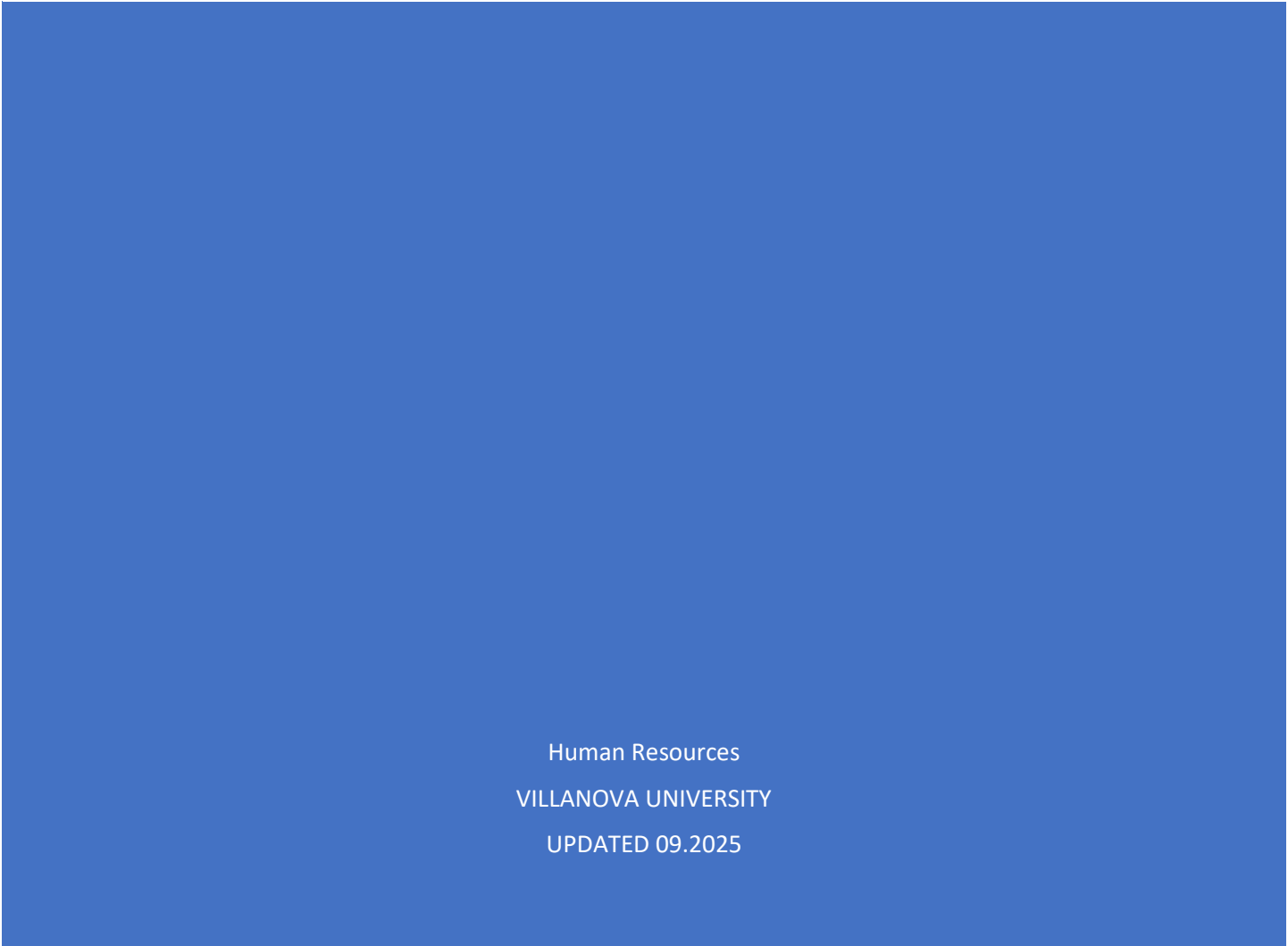


# ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES



Human Resources  
VILLANOVA UNIVERSITY  
UPDATED 09.2025

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## Purpose of EPAF Guide

The purpose of this guide is to provide instructions for processing actions related to existing staff employees using an Electronic PAF (EPAF) process within a department.

**Please Note:** Hiring a new employee to Villanova or an existing employee accepting a position from another division/college requires processing via the standard application process in PeopleAdmin.

## What is an EPAF?

EPAF stands for “Electronic Personnel Action Form” and replaces the manual entry and approval process for certain employment processes, including:

- Changing the labor distribution of a current, active position
- Changing an employee’s title that does not include salary adjustments
- Processing step increases for Public Safety employees
- Processing a current employee’s Promotion in Current Position number
- Processing a Current employee’s job change to a NEW position number
- Promotion in an employee’s new position number with a Grade up
- Processing an existing employee with a Change in Place
- Processing an employee’s Organizational Change with the same position number
- Changing a supervisor
- Processing an equity or salary adjustment in existing position number within the same division/college
- Processing an employee’s separation
- Processing Staff Default Earnings: beginning and/or ending default earnings

## When is an EPAF used?

- **Processing a Change to the Labor Distribution of a Current, Active Position**
  - Definition: This personnel action involves changing the distribution of labor for an existing, active position. This adjustment becomes necessary when the funding for the position originates from different sources over the employee's tenure, requiring the labor distribution to reflect the corresponding budget codes. This should not be used to change organizations. This change is not associated with a PeopleAdmin posting.
  - Example: A shift in grant funding necessitates a modification to how the position is funded, prompting a change in labor distribution.
  - Approval EPAF Category: “SLDCHG”
  - Who should Originate: Only designated trained employees with financial reporting duties, i.e., Director of Finance & Administration
- **Processing a Change to an Employee Title**
  - Definition: This personnel action involves changing the title of a position within the department without typically necessitating substantial changes to the job responsibilities, salary, or labor distribution. This EPAF type is not associated with a PeopleAdmin posting.
  - Example: The department is transitioning from using the title "coordinator" to "analyst."
  - Approval EPAF Category: “VTITLE”
  - Who should Originate: Only designated trained managers within department
- **Processing a Step Increase (for Public Safety Only)**
  - Definition: This personnel action is for employees in the Police Officer, Police Sergeant, and Police Lieutenant roles who are eligible to receive a 7% longevity step increase annually

- during their first five years of employment as a sworn officer.
  - Example: A Police Officer reaches their 1-year anniversary date so they will receive a 7% increase to their base salary on this date.
  - Approval EPAF Category: "STEPUB"
  - Who should Originate: Only designated trained employees with financial reporting duties, i.e., Director of Public Safety
- **Processing a Promotion in Place**
  - Definition: A promotion in a current position number signifies advancement within the same department and same job ladder, often accompanied by increased responsibilities. This typically necessitates a job title change and a corresponding adjustment in salary. A promotion is warranted when an employee advances to a position that is classified at a higher salary grade, or in certain circumstances, an acknowledgment of significant greater responsibilities within the same grade. This type of change is typically not associated with job postings in PeopleAdmin.
  - Example: The employee is receiving a promotion within the same department and moving from an Analyst III to a Sr. Analyst with an associated pay increase.
  - Approval EPAF Category: "PROM"
  - Who should Originate: Only designated trained employees with financial reporting duties, i.e., Director of Finance & Administration
- **Processing a Job Change in NEW Position Number**
  - Definition: Job Change to a New Position Number for the following three reasons:
    - New Job-Status Change "NJOBS"- Existing Employee movement from casual/temporary to staff, or other formal status change.
    - New Job-Lateral/Other (No Grade Change) "NJOBN"- Existing Employee New Job with no change in grade level; typically, same-level transfer.
    - New Job-Grade Down (Lower Level) "NJGDN"- Existing Employee New Job at a lower grade/level, e.g., by choice or due to restructuring.
  - Example: The employee is being promoted from the assistant soccer coach to head football coach
  - Approval EPAF Category: "TRPRO"
  - Who should Originate: Only designated trained employees with financial reporting duties, i.e., Director of Finance & Administration
- **Processing an existing employee to a New Position number – Grade up**
  - Definition: Used when an existing employee is going to a new position at a higher Grade/level ( exp. A promotion via new position)
  - Example: The employee is going to a new position number, with a new salary grade.
  - Approval EPAF Category: "SFNJGU"
  - Who Should Originate: Only designated trained employees with financial reporting duties, i.e., Director of Finance & Administration
- **Processing an existing employee with a Change in Place**
  - Definition: Current employee, using the same position number, to update a decrease in salary, change in job grade, or reclassification within in a career path – Used when it is NOT a promotion
  - Example: The employee is keeping their same position number, but may have an increase in salary, job grade or reclassification of some nature
  - Approval EPAF Category: "CHGRIP"
  - Who Should Originate: Only designated trained employees with financial reporting duties, i.e., Director of Finance & Administration

- **Processing an Organizational Change with same position**
  - Definition: Used when moving an existing employee with the same position to a new Organizational number
  - Example: Employee that is keeping same position within UTS moves from Technology Services to Project Management. Or Employee that is keeping the same position but is moving from division CLAS to Engineering
  - Approval EPAF Category: “DEPMV”
  - Who Should Originate: Only designated trained employees with financial reporting duties, i.e., Director of Finance & Administration
- **Processing a Supervisor Change**
  - Definition: This personnel action is initiated when there is a change in supervision for an employee, typically due to reorganization within the same department/division or the departure of the previous supervisor. It does not entail any modifications to the individual's job title, department, or other job-related aspects. This type of change is not associated with a PeopleAdmin posting.
  - Example: An employee's supervisor resigns, prompting the assignment of a new supervisor within the same department.
  - Approval EPAF Category: “SUPVS”
  - Who should Originate: Only designated trained managers within department
- **Processing Equity/Salary Adjustment within same position number**
  - Definition: This personnel action is utilized when an individual stays in their existing role and typically the salary grade remains unchanged, yet an increase has been provided due to business reasons such as a market review, equity adjustment, retention purposes, etc. It is distinct from a promotion because there are not substantial changes to the job. This action is not associated with job postings in PeopleAdmin.
  - Example: An employee resigned from their position due to salary and the department receives approval from compensation and budget to make a counter offer.
  - Approval EPAF Category: “PAYCHN “
  - Who Should Originate: Only designated trained employees with financial reporting duties i.e. Director of Finance & Administration, or an originating member of Human Resources.
- **Processing Employee Separations - Voluntary**
  - Definition: This personnel action involves separating an employee from Villanova University . It includes their last worked date to initiate terminating their default earnings, initiating the separation process for benefits, and providing their vacation payout, if applicable.
  - Example: Employee resigns and provides two weeks’ notice and does not have another role with the organization.
  - Approval EPAF Category: “TERMND”
  - Who should Originate: Voluntary separations should be handled by departmental approved originators. Involuntary separations should be managed by the designated HR Employee Relations representative.
- **Processing Staff Default Earnings**
  - Definition: This personnel action involves starting and ending staff default earnings. Default earnings are associated with an employee’s job in Banner and allows for automatic pay without requiring timesheet submission. Employees with seasonal or limited-term schedules (e.g., 9-, 10-, or 11-month appointments) with default earnings need to align pay periods with periods of active work. The employee remains in an active employee status in their current job during any period default earnings are turned off.

- Example: A 9-month employee is scheduled to stop working on 05/01 and resume working on 09/01.
- Approval EPAF Category: "SDFTEA"
- Who should Originate: Only designated trained employees with financial reporting duties, i.e., Director of Finance & Administration.

***Please note:*** EPAFs do NOT replace all PAF processes and if there is not an EPAF listed above for an action, the PAF form will be used until further notice.

## How to access the EPAF menu

- Go to myNOVA.villanova.edu
- Enter “EPAF”.
- Click the “EPAF” card under “Tasks” and you will be prompted to login.
- Click the “Electronic Personnel Action Forms (EPAF)” under “My Activities”
- Click “New EPAF”
- Enter the Employee’s Banner ID and hit the “Tab” key on your keyboard to populate the name of the individual
  - If you do not have the Employee’s Banner ID, search by last name, check the box “is an employee” and hit “Search”
- Enter the “Query Date” which is considered the effective date of the change which must:
  - Meet requirements of payroll
    - Review Pay Schedules in Payroll: [https://www1.villanova.edu/university/financial-affairs/payroll\\_secure.html](https://www1.villanova.edu/university/financial-affairs/payroll_secure.html)
    - Depending on type of EPAF, the Query Date is **typically but not always** at the beginning or end of a FUTURE pay period based on the employees’ pay schedule.
    - The EPAF must be able to be approved by all approvers according to the “EPAF Approval Deadline” on the payroll schedule for the change to take effect on the intended date.
  - Be in the date format: MM/DD/YYYY (Example: 08/01/2023)
- Select an “Approval Category” from the drop-down menu to indicate the type of EPAF you want to process:
  - **SLDCHG** – Staff Labor Distribution Change
  - **VTITLE** – Title Change ONLY
  - **STEPUB** – Step Increase (Public Safety Only)
  - **PROM** – Promotion in Place
  - **TRPRO** – Job Change to New Position Number
  - **STFNJG** – New Job – Grade up
  - **CHGRIP** – Change in Place
  - **DEPMV** – Department Move
  - **SUPVS** – Supervisor Change Update
  - **PAYCHN** – Equity Adjustment
  - **TERMED** – Employee Separation - Voluntary
  - **SDFTEA** – Updating Default Earnings
- Click “Go”

### New EPAF Person Selection

**i** Check the box to limit to search an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

First Name

Last Name


☒ is an employee or ☐


### Enter or Generate New ID


**i** \* Indicates a required field. Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

ID \*

Generate new ID

Query Date \*  

Approval Category \*  





## Processing Staff Labor Distribution changes (SLDCHG)

### New EPAF Selection Pages

There are only a few sections to complete before moving to edit and review the electronic personnel action form page.

#### New EPAF Person Selection Page

- Enter or Select the Banner ID, enter the “Query Date” (**Must be at the beginning of a future pay period** – Refer to ([payroll schedules](#)) and select the “Approval Category” “Staff Labor Distribution Change, SLDCHG.”
- Click the “Go” button to navigate to the “New EPAF Job Selection” page.

#### New EPAF Job Selection Page

- Click “All Jobs” button to view all active and terminated jobs the staff member has held, if applicable
- Select the radio button next to the job you want to update
- Click the “Go” button

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input type="checkbox"/>	New Job					
<input type="checkbox"/>	Secondary	010016	00	Lab Manager & Safety Officer	401, Human Resources	06/24/2025
<input checked="" type="checkbox"/>	Primary	433007	00	HRIS Analyst, Level 2	401, Human Resources	01/13/2025

**YOU ARE NOW READY TO COMPLETE THE ELECTRONIC PERSONNEL ACTION FORM PAGE**

**Electronic Personnel Action Form Page**

There are several sections to edit and review on the “Electronic Personnel Action Form” page:

**Edit/Review Jobs Labor Distribution Section**

- Review the “New Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and should not be changed
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF, click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date”
  - “Query Date” must be at the beginning of a future pay period. Refer to [payroll schedules](#)
- The current Index, Fund, Organization, Account and Program numbers will default from the employee’s job record in Banner
  - Review, and edit the index, fund, organization, account, or program field as needed:
    - Type in new index over old index
    - Click “Default from Index” to update the remaining fields
      - If the auto populate is incorrect, please reach out to budget to resolve before moving forward with EPAF
    - The “Account” field does not auto-populate; enter the account number directly into the Account field
  - After entering the labor distribution updates, click the “Save” button to save your changes.
    - Note: If you need to enter multiple indexes, please click “Save and Add New Rows”  
Funding must equal 100%
  - Please note the following:
    - The index is a shortcut for the organization/fund/program/activity codes. The index may change if the funding is changing.
      - Typically, index codes beginning with:
        - 2 or 3 (unrestricted funds)
        - 4 (restricted funds)
          - 420XXX and 426XXX = restricted funds which roll year to year
          - 424XXX and 425XXX = endowment spending funds which do not roll year to year
          - 421XXX = Research Support
        - 5XXXXX = Grants
      - Account codes are tied to the Position Status indicated in the job description, (i.e., Exempt/Non-Exempt and Full-Time/Part-Time). These codes should remain constant, only altering if the position description status changes. However, if additional funding sources are required, the account code should match across all funding lines.
      - Changing account codes impact the job status and could affect the employee’s benefits. Please reach out to your HR Campus Partner with questions.
  - Account Code:
    - Non-Exempt
      - 7231 (Non-Exempt Full Time Employees)
      - 7235 (Non-Exempt Part Time Employees)
      - 7234 (Non-Exempt Temp Employees)

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

- Exempt
  - 7221 (Exempt Full Time Employee)
  - 7223 (Exempt Temporary Employee)
  - 7224 (Exempt Part Time Employee)

Current

Effective Date

01/13/2025

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1	246130	101	401	7221	500					100	

New

Effective Date MM/DD/YYYY

06/30/2025

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1	246130	101	401	7221	500					100		

Default from Index

Add Row

### Edit/Review Routing Section

This section identifies the approval queue for the position.

- Default “Approval Levels” will populate based on the type of EPAF you selected. For each approval level, select the individuals that would be approving the EPAF for your department.
- Click the magnifying glass next to each “Approval Level” to select the approver “User Name” for each category. If there are other individuals that requested to be the designated approver, select their name instead of the recommended name below. Also consider if you know someone in the approval chain is on vacation, you may want to select an alternate approver.
- The default approval types for this EPAF are as follows:
  - 45 – (HRCP) HR Campus Partner
    - Select your HR Campus Partner in the “User Name” field – this will vary by department/college
  - 73 – (BUDGET) Budget
    - Select the Budget Office Representative in the “User Name” field
  - 74 – (HR) Human Resources – EPAF
    - Select NADINE MARINO in the “User Name” field
  - 98 – (PROAPP) EPAF Apply
    - Always select AUTOMIC SERVICE\_HR in the “User Name” field

Routing Queue

Approval Level	User Name	Required Action	Remove
45 - (HRCP) HR Campus Partner - EPAF	Not Selected	Approve	
73 - (BUDGET) Budget	EKIMMICH - Kimmich Mitchell, Elisabeth L.	Approve	
74 - (HR) Human Resources - EPAF	NMARIN02 - Marino, Nadine L.	Approve	
90 - (PROAPP) EPAF Apply	AUTOMIC_HR - AutomicService, HR	Apply	

Add Row

**NOTE: You may need to manually add additional approval levels to the EPAF:**

If this is a grant funded EPAF, add the Office of Grants & Contracts to the approval section:

- Click on “Add Row”
- Select “47 – (OGCRES) Office of Grants and Contracts Appr” in a blank row under “Approver Level”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”

Other Approvers that may need to be added:

- Click on “Add Row”
- 90 – “(SENLDR) Senior Leadership”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”

#### Edit Comment Section

Enter the following information in the Comments box:

- Enter details for the Budget Office on the funding changes outlined in the EPAF. If the change does not need to be made to the budget side, add a note indicating that the change should be on the NBAJOBS record only. The EPAF will still route to the Budget Office so it may continue through the approval routing process.
- Note any errors you experienced while completing the EPAF, or additional information that is pertinent to this EPAF, as applicable.

#### Save/Submit Section

- Click the “Save” button at the bottom of the page.

- Scroll down to review the information you entered on the EPAF
- Click the “Submit” button

- The EPAF will now route to the first level approver.

## Changing an Employee's Title – No Salary/Grade Change (VTITLE)

### New EPAF Selection Pages

There are only a few sections to complete before moving to edit and review the electronic personnel action form page.

### New EPAF Person Selection Page

- Select the Banner ID and enter the “Query Date” (Must be at the beginning of a future pay period. Refer to ([payroll schedules](#)) and select the “Approval Category” “Title Change ONLY, VTITLE.”
- Click the “Go” button to navigate to the “New EPAF Job Selection” page

**New EPAF Person Selection**

Check the box to limit to search an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/ITIN. Select Go. A percent sign may be used as a wildcard.

First Name:  Last Name:  ☐ Is an employee or ID:  or SSN/SIN/ITIN:

Enter or Generate New ID

\* indicates a required field. Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

ID \*

Generate new ID

Query Date \*

Approval Category \*

### New EPAF Job Selection Page

There will be a sub header above the jobs “Title Change ONLY – Staff, VTITLE”

- Click the “All Jobs” button to view all active and terminated jobs the staff member has.
- Select the radio button next to the job that requires a labor distribution change
- Click the “Go” button

ID:  Query Date:  Approval Category:

**Supervisor Update, SUPVCH**

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input type="checkbox"/>	New Job	<input type="text"/>	<input type="text"/>			
<input type="checkbox"/>	Secondary	010016	00	Lab Manager & Safety Officer	401, Human Resources	06/24/2025
<input checked="" type="checkbox"/>	Primary	433007	00	HRIS Analyst, Level 2	401, Human Resources	01/13/2025

**YOU ARE NOW READY TO COMPLETE THE ELECTRONIC PERSONNEL ACTION FORM PAGE**

**Electronic Personnel Action Form Page**


There are several sections to edit and review on the “Electronic Personnel Action Form” page:

**Edit Title Change ONLY Section**


- Review the “Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and cannot be changed.
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date”
  - “Query Date” must be at the beginning of a future pay period. Refer to [payroll schedules](#)
- Enter new “TITLE”
  - The previous title will be filled in this section. Remove it and insert the new title.
  - Note: A new job description must be approved by Compensation prior to requesting a title change in the system. Contact your HR Campus Partner for assistance if needed.
- Job Change Reason should be set to “TITLE” – **Can not be changed.**

Title Change ONLY - Staff, 433007-00 HRIS Analyst, Level 2, Last Paid Date: 06/08/2025


Jobs Effective Date (Not Enterable) \*

06/30/2025  Old Value: 06/01/2025

Title

HRIS Analyst, Level 2 

Job Change Reason (Not Enterable)

TITLE  Old Value: ANN, Annual Review Increase

**Edit/Review Routing Section**

This section identifies the approval queue for the position.

- Default “Approval Levels” will populate based on the type of EPAF you selected. For each approval level, select the individuals that would be approving the EPAF for your department.
- Click the magnifying glass next to each “Approval Level” to select the approver “User Name” for each category. If there are other individuals that requested to be the designated approver, select their name instead of the recommended name below. If you know a designated approver is on vacation, you may want to select an alternate approver.
- The default approval types for this EPAF are:
  - 44 – (FINMGR) Finance Managers – EPAF
    - Select your applicable Finance Manager in the “User Name” field – this will vary by department/college
  - 45 – (HRCP) HR Campus Partner
    - Select your HR Campus Partner in the “User Name” field – this will vary by department/college
  - 72 – (COMP) Compensation

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

- Always select KELSEY CHYKO in the “User Name” field
- 74 – (HR) Human Resources – EPAF
  - Always select NADINE MARINO in the “User Name” field
- 98 – (PROAPP) EPAF Apply
  - Always select AUTOMIC SERVICE\_HR in the “User Name” field

The screenshot shows a 'Routing Queue' table with the following data:

Approval Level	User Name	Required Action	Remove
44 - (FINMGR) Finance Managers - EPAF	Not Selected	Approve	
45 - (HRCP) HR Campus Partner - EPAF	Not Selected	Approve	
72 - (COMP) Compensation	KCHYKO - Chyko, Kelsey L.	Approve	
74 - (HR) Human Resources - EPAF	NMARIN02 - Marino, Nadine L.	Approve	
90 - (PROAPP) EPAF Apply	AUTOMIC_HR - AutomicService, HR	Apply	

Blue arrows point to the 'User Name' dropdowns for the first two rows. The last row is highlighted with a blue border. An 'Add Row' button is at the bottom left.

**NOTE: You may need to manually add additional approval levels to the EPAF:**

If this is a grant funded EPAF, add the Office of Grants & Contracts to the approval section:

- Click on “Add Row”
- Select “47 – (OGCRES) Office of Grants and Contracts Appr” in a blank row under “Approver Level”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”

Other Approvers that may need to be added:

- Click on “Add Row”
- 90 – “(SENLDR) Senior Leadership”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”

### Edit Comment Section

Enter the following information in the Comments box:

- Enter the reason for the title change
- Note any errors you experienced while completing the EPAF, or additional information that is pertinent to this EPAF.

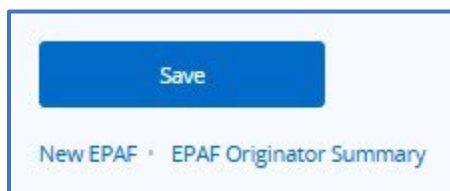
Example Comment:

Title changed from Coordinator to Analyst; title change approved by Compensation on 7/2/24.

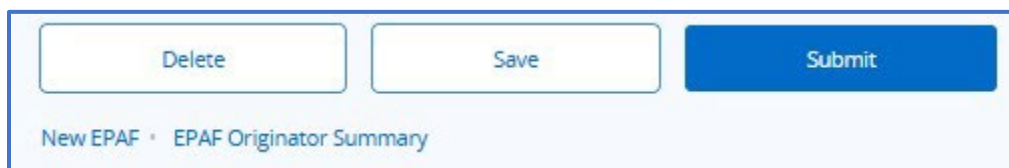
The screenshot shows a 'Comments' section with a text input area. Below the input area, it says 'Remaining Characters : 4000'.

Save/Submit Section

- Click the “Save” button at the bottom of the page.



- Scroll down to review the information you entered on the EPAF
- Click the “Submit” button



- The EPAF will now route to the first level approver.



## Processing a Step Increase for Public Safety ONLY (STEPB)

### New EPAF Selection Pages

There are only a few sections to complete before moving to edit and review the electronic personnel action form page.

### New EPAF Person Selection Page

- Enter or Select the Banner ID, enter the “Query Date” **(The query date should be effective the applicable anniversary date. A 7% longevity step increase is effective for Police Officer, Police Sergeant and Police Lieutenant on the anniversary date for the first five years of employment as a sworn officer - Refer to [payroll schedules](#) for pay period dates and submittal deadlines.)** and select the “Approval Category” “Step Increase (Public Safety Only), STEPUB.”
- Click the “Go” button to navigate to the “New EPAF Job Selection” page.

The screenshot shows the 'New EPAF Person Selection' form. At the top, there is a search section with fields for First Name, Last Name, ID, and SSN/SSN/TIN, along with a 'Search' button. Below this is the 'Enter or Generate New ID' section. It contains a redacted ID field with a blue arrow pointing to it. Below the ID field is a 'Generate new ID' section with a 'Query Date' field (containing '06/25/2025') and an 'Approval Category' dropdown menu, both with blue arrows pointing to them. At the bottom of this section is a blue 'Go' button with a blue arrow pointing to it.

### New EPAF Job Selection Page

- Click “All Jobs” button to view all active and terminated jobs the staff member has held
- Select the radio button next to the job you want to update
- Click the “Go” button

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

ID: 02569497
Query Date: 06/30/2025
Approval Category:

**Supervisor Update, SUPVCH**

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input type="checkbox"/>	New Job	<input type="text"/>	<input type="text"/>			
<input type="checkbox"/>	Secondary	010016	00	Lab Manager & Safety Officer	401, Human Resources	06/24/2025
<input checked="" type="checkbox"/>	Primary	433007	00	HRIS Analyst, Level 2	401, Human Resources	01/13/2025

All Jobs
Go

**YOU ARE NOW READY TO COMPLETE THE ELECTRONIC PERSONNEL ACTION FORM PAGE**

### Electronic Personnel Action Form Page

There are several sections to edit and review on the “Electronic Personnel Action Form” page:

#### Edit/Review Promotion in Current Position Section

- Review the new “Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and cannot be changed
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF, click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date.”
  - “Query Date” should be the employee’s applicable anniversary date. Refer to [payroll schedules](#) to make sure EPAF is submitted far enough in advance so that it is fully approved by the deadline of the pay period in which the employee’s anniversary date falls.
- Update/Input “Title”
  - Based on title reflected on approved Job Description. The title may stay the same, i.e., Staff Sergeant to Staff Sergeant
- Update/Input “Salary Grade”
  - The grade may stay the same, i.e., grade H to grade H
    - Provided by Compensation
- Update the rate based on type of position (Exempt or Non-Exempt)
  - For Non-Exempt positions: Update “Regular Rate” which will be the new Hourly Rate and leave “Annual Salary” blank
  - For Exempt positions: Update the “Annual Salary” which will be the new annual salary and leave “Regular Rate” blank
- Update/Input the “Timesheet Orgn”
  - Note: This PAF is a step increase in the same position number therefore the “Timesheet Orgn” should typically not change because “Timesheet Orgn” normally indicates department/organization
- Do not Change “Job Change Reason” – will auto populate to “STEP”
- “Supervisor ID”– Enter the Supervisor’s Banner ID only if there is corresponding supervisor change
  - Contact your Finance Manager or HR Campus Partner if you do not have the supervisor ID

Promotion in Current Position, 133014-00 Patrol Officer II, Last Paid Date: 09/17/2023

Jobs Effective Date (Not Enterable) \*

09/24/2025

Title \*

Salary Grade \*

Regular Rate

Annual Salary

Timesheet Orgn \*

Job Change Reason (Not Enterable)

STEP

Supervisor ID

#### Edit/Review Jobs Labor Distribution Section

- Review the “New Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and cannot be changed.
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date”
  - “Query Date” must be at the beginning of a future pay period. Refer to [payroll schedules](#)
- The current Index, Fund, Organization, Account and Program numbers will default from the employee’s job record in Banner
  - Review, input, and edit the index, fund, organization, account, or program field.
  - Type in new index over old index
  - Click “Default from Index” to update the remaining fields.
    - If the auto populate is incorrect, please reach out to budget to resolve before moving forward with EPAF.

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

- The “Account” field does not auto-populate, enter the account number directly into the Account field.
- After entering the labor distribution updates, click the “Save” button to save your changes.
  - If you need to enter multiple indexes, please click “Save and Add New Rows.” Funding must equal 100%
  - Please note the following:
    - The index is a shortcut for the organization/fund/program/activity codes. The index may change if the funding is changing.
    - Typically, index codes beginning with:
      - 2 or 3 (unrestricted funds)
      - 4 (restricted funds)
        - 420XXX and 426XXX = restricted funds which roll year to year
        - 424XXX and 425XXX = endowment spending funds which do not roll year to year
        - 421XXX = Research Support
      - 5XXXXX = Grants
    - Account codes are tied to the Position Status from the job description, (i.e., Exempt/Non-Exempt and Full-Time/Part-Time). The account code may change if the position status is changing.
    - Changing account codes impact the job status and could affect the employee’s benefits. Please reach out to your HR Campus Partner with questions.
      - Account Code:
        - Non-Exempt
          - 7231 (Non-Exempt Full Time Employees)
          - 7235 (Non-Exempt Part Time Employees)
          - 7234 (Non-Exempt Temp Employees)
        - Exempt
          - 7221 (Exempt Full Time Employee)
          - 7223 (Exempt Temporary Employee)

**Current**

Effective Date  
01/13/2025

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1	246130	101	401	7221	500					100	

**New**

Effective Date MM/DD/YYYY  
06/30/2025

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1	246130	101	401	7221	500					100		

⬅ Default from Index
➡ Add Row

### Edit/Review Routing Section

This section identifies the approval queue for the position.

- Default “Approval Levels” will populate based on the type of EPAF you selected. For each approval level, select the individuals that would be approving the EPAF for your department.

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

- Click the magnifying glass next to each “Approval Level” to select the approver “User Name” for each category. If there are other individuals that requested to be the designated approver, select their name instead of the recommended name below. If you know a designated approver is on vacation, you may want to select an alternate approver.
- The default approval types for this EPAF are as follows:
  - 45 – (HRCP) HR Campus Partner
    - Typically select JESSICA MARCIAL in the “User Name” field
  - 72 – (COMP) Compensation
    - Typically select KELSEY CHYKO in the “User Name” field
  - 73 – (BUDGET) Budget
    - Typically select Budget Office Representative to put in the “User Name” field
  - 74 – (HR) Human Resources – EPAF
    - Typically select NADINE MARINO in the “User Name” field
  - 90 – (SENLDR) Senior Leadership
    - Always Select ROGER A. DEMARESKE in the “User Name” field
  - 98 – (PROAPP) EPAF Apply
    - Always select AUTOMIC SERVICE\_HR in the “User Name” field

Approval Level	User Name	Required Action	Remove
45 - (HRCP) HR Campus Partner - EPAF	JMARCI06 - Marcial, Jessica M.	Approve	
72 - (COMP) Compensation	KCHYKO - Chyko, Kelsey L.	Approve	
73 - (BUDGET) Budget	EKIMMICH - Kimmich Mitchell, Elisabeth L.	Approve	
74 - (HR) Human Resources - EPAF	NMARIN02 - Marino, Nadine L.	Approve	
75 - (SENLDR) Senior Leadership	RDEMARES - Demareski, Roger A.	Approve	
90 - (PROAPP) EPAF Apply	AUTOMIC_HR - AutomicService, HR	Apply	

[+ Add Row](#)

### Edit Comment Section

Enter the following information in the Comments box:

- Enter the names of the existing and new supervisors, if applicable.
- Note any errors you experienced while completing the EPAF, or additional information that is pertinent to this EPAF, as applicable

Comments

Add Comment

Remaining Characters : 4000

### Save/Submit Section

- Click the “Save” button at the bottom of the page.



A screenshot of a web interface showing a blue button labeled "Save". Below the button, the text "New EPAF • EPAF Originator Summary" is displayed in a smaller font.

- Scroll down to review the information you entered on the EPAF
- Click the "Submit" button



A screenshot of a web interface showing three buttons: "Delete", "Save", and "Submit". The "Delete" and "Save" buttons are light blue, while the "Submit" button is dark blue. Below the buttons, the text "New EPAF • EPAF Originator Summary" is displayed in a smaller font.

- The EPAF will now route to the first level approver.

## Processing a Promotion in Place (PROM)

### New EPAF Selection Pages

There are only a few sections to complete before moving to edit and review the electronic personnel action form page.

### New EPAF Person Selection Page

- Enter or Select the Banner ID, enter the “Query Date” (Must be at the beginning of a future pay period - Refer to ([payroll schedules](#)) and select the “Approval Category” “Promotion in Current Position, PROM.”
- Click the “Go” button to navigate to the “New EPAF Job Selection” page.

**New EPAF Person Selection**

① Check the box to limit to search an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SSN/TIN. Select Go. A percent sign may be used as a wildcard.

First Name:  Last Name:  ☐ Is an employee or  ID:  SSN/SSN/TIN:

**Enter or Generate New ID**

② \* indicates a required field. Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

ID \*

Generate new ID

Query Date \*

Approval Category \*

### New EPAF Job Selection Page

- Click “All Jobs” button to view all active and terminated jobs the staff member has held
- Select the radio button next to the job you want to update
- Click the “Go” button

ID:  Query Date:  Approval Category:

**Supervisor Update, SUPVCH**

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input type="checkbox"/>	New Job	<input type="text" value=""/>	<input type="text" value=""/>			
<input type="checkbox"/>	Secondary	010016	00	Lab Manager & Safety Officer	401, Human Resources	06/24/2025
<input checked="" type="checkbox"/>	Primary	433007	00	HRIS Analyst, Level 2	401, Human Resources	01/13/2025

**YOU ARE NOW READY TO COMPLETE THE ELECTRONIC PERSONNEL ACTION FORM PAGE****Electronic Personnel Action Form Page**

There are several sections to edit and review on the “Electronic Personnel Action Form” page:

**Edit/Review Promotion in Current Position Section**

- Review the “Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and cannot be changed
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date”
  - “Query Date” must be at the beginning of a future pay period. Refer to [payroll schedules](#)
- Update “Title”
  - Based on title reflected on approved Job Description
- Update “Salary Grade”
  - Based on information reflected on the approved job Description and position.
    - Provided by Compensation
- Update the rate based on type of position (Exempt or Non-Exempt)
  - For Non-Exempt positions: Update “Regular Rate” which will be the new Hourly Rate and leave “Annual Salary” blank
  - For Exempt positions: Update the “Annual Salary” which will be the new annual salary and leave “Regular Rate” blank

**NOTE:** Do Not enter both an hourly rate and annual salary!
- Update the “Timesheet Orgn”
  - Note: This PAF is a promotion in the same position number therefore the “Timesheet Orgn” should typically not change because “Timesheet Orgn” normally indicates department/organization. If a department change is required, (for example, moving from Nursing to CLAS) a new position number should be created, and a different EPAF approval type should be used.
- Do not Change “Job Change Reason” – will auto populate to “PRIMP”
- “Supervisor ID”– Enter the Supervisor’s Banner ID only if there is corresponding supervisor change.
  - Contact your Finance Manager or HR Campus Partner if you do not have the supervisor ID



Promotion in Current Position, 433007-00 HRIS Analyst, Level 2, Last Paid Date: 08/03/2025

Jobs Effective Date (Not Enterable) \*

08/06/2025 Old Value: 06/01/2025

Title \*

Salary Grade \*

Regular Rate

Annual Salary

Timesheet Orgn \*

Job Change Reason (Not Enterable)

PRMIP Old Value: ANN, Annual Review Increase

Supervisor ID

#### Edit/Review Jobs Labor Distribution Section

- Review the “New Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and cannot be changed.
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF, click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date”
  - “Query Date” must be at the beginning of a future pay period. Refer to [payroll schedules](#)
- The current Index, Fund, Organization, Account and Program numbers will default from the employee’s job record in Banner
- Review, input, and edit the index, fund, organization, account, or program field.
  - Type in new index over old index
  - Click “Default from Index” to update the remaining fields.
    - If the auto populate is incorrect, please reach out to budget to resolve before moving forward with EPAF.
  - The “Account” field does not auto-populate, enter the account number directly into the Account field.
  - After entering the labor distribution updates, click the “Save” button to save your changes.
    - If you need to enter multiple indexes, please click “Save and Add New Rows.”

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

Funding must equal 100%

- Please note the following:
  - The index is a shortcut for the organization/fund/program/activity codes. The index may change if the funding is changing.
  - Typically, index codes beginning with:
    - 2 or 3 (unrestricted funds)
    - 4 (restricted funds)
      - 420XXX and 426XXX = restricted funds which roll year to year
      - 424XXX and 425XXX = endowment spending funds which do not roll year to year
      - 421XXX = Research Support
    - 5XXXXX = Grants
  - Account codes are tied to the Position Status from the job description, (i.e., Exempt/Non-Exempt and Full-Time/Part-Time). The account code may change if the position status is changing.
  - Changing account codes impact the job status and could affect the employee's benefits. Please reach out to your HR Campus Partner with questions.
    - Account Code:
      - Non-Exempt
        - 7231 (Non-Exempt Full Time Employees)
        - 7235 (Non-Exempt Part Time Employees)
        - 7234 (Non-Exempt Temp Employees)
      - Exempt
        - 7221 (Exempt Full Time Employee)
        - 7223 (Exempt Temporary Employee)

**NOTE:** Students and Temps have specific position numbers and cannot be promoted within the same position ID to a full-time status.

Current

Effective Date

01/13/2025

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1	246130	101	401	7221	500					100	

New

Effective Date MM/DD/YYYY

06/30/2025

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1	246130	101	401	7221	500					100		

Default from Index

Add Row

### Edit/Review Routing Section

This section identifies the approval queue for the position.

- Default "Approval Levels" will populate based on the type of EPAF you selected. For each approval level, select the individuals that would be approving the EPAF for your department.
- Click the magnifying glass next to each "Approval Level" to select the approver "User Name" for each category. If there are other individuals that requested to be the designated approver, select their

name instead of the recommended name below. Also consider if you know someone in the approval chain is on vacation, you may want to select an alternate approver.

- The default approval types for this EPAF are as follows:
  - 44 – (FINMGR) Finance Managers - EPAF
    - Select your FINANCE MANAGER in the “User Name” field – this will vary by department/college
  - 45 – (HRCP) HR Campus Partner
    - Select your HR Campus Partner in the “User Name” field – this will vary by department/college
  - 72 – (COMP) Compensation
    - Select KELSEY CHYKO in the “User Name” field
  - 73 – (BUDGET) Budget
    - Select Budget Office Representative to put in the “User Name” field
  - 74 – (HR) Human Resources – EPAF
    - Select NADINE MARINO in the “User Name” field
  - 90 – (SENLDR) Senior Leadership
    - Select your SENIOR LEADER in the “User Name” field – this will vary by college/department
  - 98 – (PROAPP) EPAF Apply
    - Always select AUTOMIC SERVICE\_HR in the “User Name” field

Routing Queue			
Approval Level	User Name	Required Action	Remove
44 - (FINMGR) Finance Managers - EPAF	Not Selected	Approve	
45 - (HRCP) HR Campus Partner - EPAF	Not Selected	Approve	
72 - (COMP) Compensation	Not Selected	Approve	
73 - (BUDGET) Budget	Not Selected	Approve	
74 - (HR) Human Resources - EPAF	Not Selected	Approve	
75 - (SENLDR) Senior Leadership	Not Selected	Approve	
90 - (PROAPP) EPAF Apply	Not Selected	Apply	

[+ Add Row](#)

**NOTE: You may need to manually add additional approval levels to the EPAF:**

If this is a grant funded EPAF, add the Office of Grants & Contracts to the approval section:

- Click on “Add Row”
- Select “47 – (OGCRES) Office of Grants and Contracts Appr” in a blank row under “Approver Level”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”

### Edit Comment Section

Enter the following information in the Comments box:

- Enter details for the Budget Office on how the promotion will be funded. For example, if a department has salary savings, the comment will include the PSP number or a reconciliation at the

position level. Any issues or questions related to funding should be directed to the Budget Office prior to submitting the EPAF.

- Enter the employee's schedule, which includes the number of hours a week worked, days employees typically are scheduled including remote days, and number of months employee works, i.e., M-F 35 Hour Work Week, 2 days Flexible, 12 Month Employee. Contact your HR Campus Partner with questions regarding notating the schedule.
- If the position requires background checks, please notate the background checks that need to be processed.
- Enter the names of the existing and new supervisors, if applicable.
- Note any errors you experienced while completing the EPAF, or additional information that is pertinent to this EPAF, as applicable

Example Comment:

Employee Schedule: M-F 35 Hour Work Week, Fully Remote, 9 Month Employee  
(Works from 08/01/2024 - 05/01/2024)

Background Checks: Child Abuse Clearances

Funding Source: Pool from PSP 711-226410

Supervisor is changing from Joe Jones to Bill Rodriguez

Comments

Add Comment

Remaining Characters: 4000

### Save/Submit Section

- Click the “Save” button at the bottom of the page.

Save

New EPAF · EPAF Originator Summary

- Scroll down to review the information you entered on the EPAF
- Click the “Submit” button

Delete

Save

Submit

New EPAF · EPAF Originator Summary

- The EPAF will now route to the first level approver.

## Processing a Job Change in NEW Position Number (TRPRO)

### New EPAF Selection Pages

There are only a few sections to complete before moving to edit and review the electronic personnel action form page.

### New EPAF Person Selection Page

- Select the Banner ID, enter the “Query Date” (**Must be at the last day of a future pay period - Refer to ([payroll schedules](#))**) and select the “Approval Category” “Promotion to New Position, TRPRO.”
- Click the “Go” button to navigate to the “New EPAF Job Selection” page

**New EPAF Person Selection**

Check the box to limit to search an Employees. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

First Name:  Last Name:  ☐ Is an employee or ID:  or SSN/SIN/TIN:

**Enter or Generate New ID**

\* indicates a required field. Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

ID \*

[Generate new ID](#)

Query Date \*

Approval Category \*

### New EPAF Job Selection Page

- You will see the sub header “Transfer out position – term, TRANOT”
- Select the job that should be terminated or transferred out of. Under the “Select” header, click the radial circle button. DO NOT CLICK GO.
- Click “NEXT APPROVAL TYPE”

**Transfer Out Position - Term, TRANOT**

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input type="checkbox"/>	New Job	<input type="text"/>	<input type="text"/>			
<input type="checkbox"/>	Secondary	010016	00	Lab Manager & Safety Officer	401, Human Resources	06/24/2025
<input checked="" type="checkbox"/>	Primary	433007	00	HRIS Analyst, Level 2	401, Human Resources	01/13/2025

New EPAF Job Selection Page

- You will still be in the New EPAF Job Section, but you should see the sub header “Promote Employee to New Posn within Your Organization, PROMJO”
- Enter the new “Position Number” and “Suffix” (will always be “00”). The position title and timesheet organization should auto populate. Under the “Select” header, click the radial circle button.
- Click the “Go” button

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input checked="" type="checkbox"/>	New Job	<input type="text" value=""/>	<input type="text" value=""/>			
<input type="checkbox"/>	Secondary	010016	00	Lab Manager & Safety Officer	401, Human Resources	06/24/2025
<input type="checkbox"/>	Primary	433007	00	HRIS Analyst, Level 2	401, Human Resources	01/13/2025

Buttons: All Jobs, Next Approval Type, Go

**YOU ARE NOW READY TO COMPLETE THE ELECTRONIC PERSONNEL ACTION FORM PAGE**

Electronic Personnel Action Form Page



There are several sections to edit and review on the “Electronic Personnel Action Form” page:

Edit/Review “Transfer Out Position – Term”



- Ensure that the sub header reflects the old Position Number and Title.
- Review the “Jobs Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and cannot be changed.
  - If you entered the wrong date in the “Query Date” field at the beginning of the EPAF, click the “Return to EPAF Menu” link at the top of the page and start the process over typing in the correct “Query Date.”
  - This action is going to terminate the old job in the employee’s record and the date must be the last day of the pay period, which is always a Sunday.
- You have 3 choices for *ENDING* the old position.
  - **STACH**: Status Change (Job Ending – still employed) Existing Employee is ending a job due to a status change (eg PT to FT, Regular to Casual ) and stating at the institution.
  - **XFERD**: Transfer (Division to Division) Existing Employee is transferring to a new job in another division, requiring job record closure
  - **JOBND**: Job Change (Same Division, New Job) Existing Employee is moving to a different position within the same position
- Do not Change Job Status – Should auto populate to “T”

Transfer Out Position - Ending Active Posn, 433007-00 HRIS Analyst, Level 2, Last Paid Date: 08/03/2025


Jobs Effective Date \*


08/06/2025  ☐ Remove  Old Value: 06/01/2025

Job Change Reason

JOBND, Job Change (Same Division/New)   Old Value: ANN, Annual Review Increase

Job Status (Not Enterable)

T  Old Value: Active



Edit/Review “Promote Employee to New Posn Within Your Organization”

- Ensure that the sub header reflects the new Position Number and Title.
- Enter the “Job Begin Date” and “Job Effective Date” – this should be the day AFTER the “Query Date” field and the first day of a pay period.
- Update the rate based on type of position (Exempt or Non-Exempt)
  - For Non-Exempt Positions: Update “Regular Rate” which would be the Hourly Rate and leave “Annual Salary” blank.
  - For exempt positions: Update the “Annual Salary” which would be the annual amount the employee should receive and leave the “Regular Rate” blank.

**NOTE:** Do Not enter both an hourly rate and annual salary!
- Enter the “Timesheet Orgn” for the new position
- Update “Salary Grade”
  - Based on information reflected on the approved job description and position
    - Provided by Compensation
    - Only enter the grade if it is changing
- You have 3 change reasons for how the new position is to be coded:
  - **NJOBS:** New Job-Status Change Existing Employee movement from casual/temporary to staff, or other formal status change.
  - **NJOBN:** New Job-Lateral/Other (No Grade Change) Existing Employee New Job with no change in grade level; typically, same-level transfer.
  - **NJGDN:** New Job-Grade Down (Lower Level)- Existing Employee New Job at a lower grade/level, e.g., by choice or due to restructuring.
- Do not Change Contract Type – will auto populate to “P”
- “Supervisor ID”– enter the Banner ID of the new supervisor.
  - Contact your Finance Manager or HR Campus Partner if you do not have the Supervisor ID

Promote Employee to New Posn within Your Organization, 255091-00 Parking Garage Attendant

Job Begin Date \*

Jobs Effective Date \*

Regular Rate

Annual Salary

Salary Grade

Not Selected

Job Change Reason

NJOBN, New Job - Lateral/Other


Contract Type (Not Enterable) \*

P

Supervisor ID

Old Value: Not Selected

Old Value:



#### Edit/Review Jobs Labor Distribution Section

- Review the “New Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and should not be changed
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date”
  - “Query Date” must be at the beginning of a future pay period. Refer to [payroll schedules](#)
- The current Index, Fund, Organization, Account and Program numbers will default from the employee’s job record in Banner
  - Review, input, and edit the index, fund, organization, account, or program field.
  - Type in new index over old index
  - Click “Default from Index” to update the remaining fields.
    - If the auto populate is incorrect, please reach out to budget to resolve before moving forward with EPAF.
  - The “Account” field does not auto-populate, enter the account number directly into the Account field.



## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

- After entering the labor distribution updates, click the “Save” button to save your changes.
  - Note: If you need to enter multiple indexes, please click “Save and Add New Rows.” Funding must equal 100%
- Please note the following:
  - The index is a shortcut for the organization/fund/program/activity codes. The index may change if the funding is changing.
  - Typically, index codes beginning with:
    - 2 or 3 (unrestricted funds)
    - 4 (restricted funds) Re
      - 420XXX and 426XXX = restricted funds which roll year to year
      - 424XXX and 425XXX = endowment spending funds which do not roll year to year
      - 421XXX = Research Support
    - 5XXXXX = Grants
  - Account codes are tied to the Position Status indicated in the job description, (i.e., Exempt/Non-Exempt and Full-Time/Part-Time). These codes should remain constant, only altering if the position description status changes. However, if additional funding sources are required, the account code should match across all funding lines.
  - Changing account codes impact the job status and could affect the employee’s benefits. Please reach out to your HR Campus Partner with questions.
    - Account Code:
      - Non-Exempt
        - 7231 (Non-Exempt Full Time Employees)
        - 7235 (Non-Exempt Part Time Employees)
        - 7234 (Non-Exempt Temp Employees)
      - Exempt
        - 7221 (Exempt Full Time Employee)
        - 7223 (Exempt Temporary Employee)
        - 7224 (Exempt Part Time Employee)

**NOTE:** Students and Temps have specific position numbers and cannot be promoted within the same position ID to a full-time status.

The screenshot shows the EPAF form interface. The 'Current' section displays a table with the following data:

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1	246130	101	401	7221	500					100	

The 'New' section contains a form for adding a new row. It includes an 'Effective Date' field (06/30/2025) and a table with the following fields:

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1	246130	101	401	7221	500					100		

Blue arrows point to the Index, Fund, Organization, Account, and Program fields in the 'New' section. At the bottom of the 'New' section, there are buttons for 'Default from Index' and 'Add Row'.

### Edit/Review Routing Section

This section identifies the approval queue for the position.

- Default “Approval Levels” will populate based on the type of EPAF you selected. For each approval

level, select the individuals that would be approving the EPAF for your department.

- Click the magnifying glass next to each “Approval Level” to select the approver “User Name” for each category. If there are other individuals that requested to be the designated approver, select their name instead of the recommended name below. Also consider if you know someone in the approval chain is on vacation, you may want to select an alternate approver.
- The default approval types for this EPAF are as follows.
  - 44 – (FINMGR) Finance Managers – EPAF
    - Select your FINANCE MANAGER in the “User Name” field – this will vary by department/college
  - 45 – (HRCPP) HR Campus Partner
    - Select your HR Campus Partner in the “User Name” field – this will vary by department/college
  - 72 – (COMP) Compensation
    - Always select KELSEY CHYKO in the “User Name” field
  - 73 – (BUDGET) Budget
    - Select a Budget Office Representative to put in the “User Name” field
  - 74 – (HR) Human Resources – EPAF
    - Always select NADINE MARINO in the “User Name” field
  - 90 – (SENLDR) Senior Leadership
    - Select your SENIOR LEADER in the “User Name” field – this will vary by college/department
  - 98 – (PROAPP) EPAF Apply
    - Always select AUTOMIC SERVICE\_HR in the “User Name” field

Approval Level	User Name	Required Action	Remove
44 - (FINMGR) Finance Managers - EPAF	Not Selected	Approve	
45 - (HRCPP) HR Campus Partner - EPAF	Not Selected	Approve	
72 - (COMP) Compensation	Not Selected	Approve	
73 - (BUDGET) Budget	Not Selected	Approve	
74 - (HR) Human Resources - EPAF	Not Selected	Approve	
75 - (SENLDR) Senior Leadership	Not Selected	Approve	
90 - (PROAPP) EPAF Apply	Not Selected	Apply	

+ Add Row

**NOTE: You may need to manually add additional approval levels to the EPAF:**

If this is a grant funded EPAF, add the Office of Grants & Contracts to the approval section:

- Click on “Add Row”
- Select “47 – (OGCRES) Office of Grants and Contracts Appr” in a blank row under “Approver Level”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”

Edit Comment Section

Enter the following information in the Comments box:

- Enter details for the Budget Office on how the promotion will be funded (something different here for labor distribution change). For example, if a department has salary savings, the comment will include the PSP number or a reconciliation at the position level. Any issues or questions related to funding should be directed to the Budget Office prior to submitting the EPAF.
- Enter the employee's schedule, which includes the number of hours a week worked, days employees typically are scheduled including remote days, and number of months employee works, i.e., M-F 35 Hour Work Week, 2 days Flexible, 12 Month Employee Contact your HR Campus Partner with questions regarding notating the schedule.
- If the position requires background checks, please notate the background checks that need to be processed.
- Enter the names of the existing and new supervisors, if applicable.
- Note any errors you experienced while completing the EPAF, or additional information that is pertinent to this EPAF, as applicable

Example Comment:

Employee Schedule: M-F 35 Hour Work Week, Fully Remote, 9 Month Employee  
(Works from 08/01/2024 - 05/01/2024)

Background Checks: Child Abuse Clearances

Funding Source: Pool from PSP 711-226410

Supervisor is changing from Joe Jones to Bill Rodriguez

Comments

Add Comment

Remaining Characters : 4000

Save/Submit Section

- Click the "Save" button at the bottom of the page.

Save

New EPAF • EPAF Originator Summary

- Scroll down to review the information you entered on the EPAF
- Click the "Submit" button

Delete Save Submit

New EPAF • EPAF Originator Summary

- The EPAF will now route to the first level approver.

## Promotion in an employee's new position number with a grade up (SFNJGU)

### New EPAF Selection Pages

There are only a few sections to complete before moving to edit and review the electronic personnel action form page.

### New EPAF Person Selection Page

- Enter or elect the Banner ID, enter the “Query Date” (**Must be at the beginning of a future pay period - Refer to ([payroll schedules](#))** and select the “Approval Category” “Supervisor Change Update, SUPVR.”
- Click the “Go” button to navigate to the “New EPAF Job Selection” page.

**New EPAF Person Selection**

① Check the box to limit to search an Employee. Enter the Last Name and/or First Name, or enter an ID, or enter the SSN/SSN/TIN. Select Go. A percent sign may be used as a wildcard.

First Name  Last Name  ☐ Is an employee or  ID  SSN/SSN/TIN

Enter or Generate New ID

② \* Indicates a required field. Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

ID \*

Generate new ID

Query Date \*

Approval Category \*

### New EPAF Job Selection Page

- You will see the sub header “Transfer out position – term, TRANOT”
- Select the job that should be transferred out of. Under the “Select” header, click the radial circle button. DO NOT CLICK GO.
- Click “NEXT APPROVAL TYPE”

**Transfer Out Position - Term, TRANOT**

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input type="checkbox"/>	New Job	<input type="text" value=""/>	<input type="text" value=""/>			
<input type="checkbox"/>	Secondary	010016	00	Lab Manager & Safety Officer	401, Human Resources	06/24/2025
<input checked="" type="checkbox"/>	Primary	433007	00	HRIS Analyst, Level 2	401, Human Resources	01/13/2025

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

- You will still be in the New EPAF Job Section, but you should see the sub header “Jobs update with Grade up as a change reason, NJGUPE”
- Enter the new “Position Number” and “Suffix” (will always be “00”). The position title and timesheet organization should auto populate. Under the “Select” header, click the radial circle button.
- Click the “Go” button

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input checked="" type="checkbox"/>	New Job	<input type="text"/>	<input type="text"/>			
<input type="checkbox"/>	Secondary	010016	00	Lab Manager & Safety Officer	401, Human Resources	06/24/2025
<input type="checkbox"/>	Primary	433007	00	HRIS Analyst, Level 2	401, Human Resources	01/13/2025

**YOU ARE NOW READY TO COMPLETE THE ELECTRONIC PERSONNEL ACTION FORM PAGE**

### Electronic Personnel Action Form Page

There are several sections to edit and review on the “Electronic Personnel Action Form” page:

#### Edit/Review Transfer Out Position – Ending Active Posn

- Ensure that the sub header reflects the old Position Number and Title.
- Enter in the “Jobs Effective Date” – This will be the last day of the pay period, which is always a Sunday
  - This action is going to terminate the old job in the employee’s record and the date must be the last day of the pay period, which is always a Sunday.
- You have 3 choices for Ending the position.
  - **STACH:** Status Change (Job Ending – still employed) Existing Employee is ending a job due to a status change (eg PT to FT, Regular to Casual ) and stating at the institution.
  - **XFERD:** Transfer (Division to Division) Existing Employee is transferring to a new job in another division, requiring job record closure
  - **JOBND:** Job Change (Same Division, New Job) Existing Employee is moving to a different position within the same position
- Do not Change Job Status – Should auto populate to “T”

#### Edit/Review Jobs update with Grade up as change reason

- Review the “Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and cannot be changed
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date”
  - “Query Date” must be at the beginning of a future pay period. Refer to [payroll schedules](#)

- Update “Title”
  - Based on title reflected on approved Job Description
- Update “Salary Grade”
  - Based on information reflected on the approved job Description and position.
    - Provided by Compensation
- Update the rate based on type of position (Exempt or Non-Exempt)
  - For Non-Exempt positions: Update “Regular Rate” which will be the new Hourly Rate and leave “Annual Salary” blank
  - For Exempt positions: Update the “Annual Salary” which will be the new annual salary and leave “Regular Rate” blank

**NOTE:** Do Not enter both an hourly rate and annual salary!
- Update the “Timesheet Orgn”
  - Note: This PAF is a promotion in the same position number therefore the “Timesheet Orgn” should typically not change because “Timesheet Orgn” normally indicates department/organization. If a department change is required, (for example, moving from Nursing to CLAS) a new position number should be created, and a different EPAF approval type should be used.
- Do not Change “Job Change Reason” – will auto populate to “NJGUP”
- “Supervisor ID”– Enter the Supervisor’s Banner ID only if there is corresponding supervisor change.
  - Contact your Finance Manager or HR Campus Partner if you do not have the supervisor ID

#### Edit/Review Jobs Labor Distribution Section

- Review the “New Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and should not be changed
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF, click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date”
  - “Query Date” must be at the beginning of a future pay period. Refer to [payroll schedules](#)
- The current Index, Fund, Organization, Account and Program numbers will default from the employee’s job record in Banner
  - Review, and edit the index, fund, organization, account, or program field as needed:
    - Type in new index over old index
    - Click “Default from Index” to update the remaining fields
      - If the auto populate is incorrect, please reach out to budget to resolve before moving forward with EPAF
    - The “Account” field does not auto-populate; enter the account number directly into the Account field
  - After entering the labor distribution updates, click the “Save” button to save your changes.
    - Note: If you need to enter multiple indexes, please click “Save and Add New Rows”  
Funding must equal 100%
  - Please note the following:
    - The index is a shortcut for the organization/fund/program/activity codes. The index may change if the funding is changing.
      - Typically, index codes beginning with:
        - 2 or 3 (unrestricted funds)
        - 4 (restricted funds)
          - 420XXX and 426XXX = restricted funds which roll year to year

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

- 424XXX and 425XXX = endowment spending funds which do not roll year to year
  - 421XXX = Research Support
  - 5XXXXX = Grants
- Account codes are tied to the Position Status indicated in the job description, (i.e., Exempt/Non-Exempt and Full-Time/Part-Time). These codes should remain constant, only altering if the position description status changes. However, if additional funding sources are required, the account code should match across all funding lines.
- Changing account codes impact the job status and could affect the employee's benefits. Please reach out to your HR Campus Partner with questions.
  - Account Code:
    - Non-Exempt
      - 7231 (Non-Exempt Full Time Employees)
      - 7235 (Non-Exempt Part Time Employees)
      - 7234 (Non-Exempt Temp Employees)
    - Exempt
      - 7221 (Exempt Full Time Employee)
      - 7223 (Exempt Temporary Employee)
      - 7224 (Exempt Part Time Employee)

Current

Effective Date

01/13/2025

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1	246130	101	401	7221	500					100	

New

Effective Date MM/DD/YYYY

06/30/2025

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1	246130	101	401	7221	500					100		

Default from Index

Add Row

### Edit/Review Routing Section

This section identifies the approval queue for the position.

- Default "Approval Levels" will populate based on the type of EPAF you selected. For each approval level, select the individuals that would be approving the EPAF for your department.
- Click the magnifying glass next to each "Approval Level" to select the approver "User Name" for each category. If there are other individuals that requested to be the designated approver, select their name instead of the recommended name below. If you know a designated approver is on vacation, you may want to select an alternate approver.
- The default approval types for this EPAF are as follows:
  - 44 – (FINMGR) Finance Managers - EPAF
    - Select your FINANCE MANAGER in the "User Name" field – this will vary by department/college
  - 45 – (HRCP) HR Campus Partner

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

- Select your HR Campus Partner in the “User Name” field – this will vary by department/college
- o 72 – (COMP) Compensation
  - Select KELSEY CHYKO in the “User Name” field
- o 73 – (BUDGET) Budget
  - Select Budget Office Representative to put in the “User Name” field
- o 74 – (HR) Human Resources – EPAF
  - Select NADINE MARINO in the “User Name” field
- o 90 – (SENLDR) Senior Leadership
  - Select your SENIOR LEADER in the “User Name” field – this will vary by college/department
- o 98 – (PROAPP) EPAF Apply
  - Always select AUTOMIC SERVICE\_HR in the “User Name” field

Routing Queue			
Approval Level	User Name	Required Action	Remove
44 - (FINMGR) Finance Managers - EPAF	Not Selected	Approve	
45 - (HRCPP) HR Campus Partner - EPAF	Not Selected	Approve	
72 - (COMP) Compensation	Not Selected	Approve	
73 - (BUDGET) Budget	Not Selected	Approve	
74 - (HR) Human Resources - EPAF	Not Selected	Approve	
75 - (SENLDR) Senior Leadership	Not Selected	Approve	
90 - (PROAPP) EPAF Apply	Not Selected	Apply	

[+ Add Row](#)

**NOTE: You may need to manually add additional approval levels to the EPAF:**

If this is a grant funded EPAF, add the Office of Grants & Contracts to the approval section:

- o Click on “Add Row”
- o Select “47 – (OGCRES) Office of Grants and Contracts Appr” in a blank row under “Approver Level”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”

### Edit Comment Section

Enter the following information in the Comments box:

- Note any errors you experienced while completing the EPAF, or additional information that is pertinent to this EPAF, as applicable

Example Comment:



Comments

Add Comment

Remaining Characters: 4000

Save/Submit Section

- Click the “Save” button at the bottom of the page.

Save

New EPAF • EPAF Originator Summary

- Scroll down to review the information you entered on the EPAF
- Click the “Submit” button

Delete Save Submit

New EPAF • EPAF Originator Summary

- The EPAF will now route to the first level approver.

## Processing an existing employee with a change in place (CHGRIP)

### New EPAF Selection Pages

There are only a few sections to complete before moving to edit and review the electronic personnel action form page.

#### New EPAF Person Selection Page

- Enter or elect the Banner ID, enter the “Query Date” (**Must be at the beginning of a future pay period - Refer to ([payroll schedules](#))** and select the “Approval Category” “Supervisor Change Update, SUPVR.”
- Click the “Go” button to navigate to the “New EPAF Job Selection” page.

#### New EPAF Job Selection Page

- Click “All Jobs” button to view all active and terminated jobs the staff member has held
- Select the radio button next to the job you want to update
- Click the “Go” button

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input type="checkbox"/>	New Job					
<input type="checkbox"/>	Secondary	010016	00	Lab Manager & Safety Officer	401, Human Resources	06/24/2025
<input checked="" type="checkbox"/>	Primary	433007	00	HRIS Analyst, Level 2	401, Human Resources	01/13/2025

**YOU ARE NOW READY TO COMPLETE THE ELECTRONIC PERSONNEL ACTION FORM PAGE****Electronic Personnel Action Form Page**

There are several sections to edit and review on the “Electronic Personnel Action Form” page:

**Edit/Review Staff Change to job, same Position number, JBCHIP, Section**

- Review the “Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and cannot be changed
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date”
  - “Query Date” must be at the beginning of a future pay period. Refer to [payroll schedules](#)
- Update “Title”
  - Based on title reflected on approved Job Description
- Update “Salary Grade”
  - Based on information reflected on the approved job Description and position.
    - Provided by Compensation
- Update the rate based on type of position (Exempt or Non-Exempt)
  - For Non-Exempt positions: Update “Regular Rate” which will be the new Hourly Rate and leave “Annual Salary” blank
  - For Exempt positions: Update the “Annual Salary” which will be the new annual salary and leave “Regular Rate” blank

**NOTE:** Do Not enter both an hourly rate and annual salary!
- Update the “Timesheet Orgn”
  - Note: This PAF is a promotion in the same position number therefore the “Timesheet Orgn” should typically not change because “Timesheet Orgn” normally indicates department/organization. If a department change is required, (for example, moving from Nursing to CLAS) a new position number should be created, and a different EPAF approval type should be used.
- Do not Change “Job Change Reason” – will auto populate to “CHGIP”
- “Supervisor ID”– Enter the Supervisor’s Banner ID only if there is corresponding supervisor change.
  - Contact your Finance Manager or HR Campus Partner if you do not have the supervisor ID

Staff Change to job, same position number, 433007-00 HRIS Analyst, Level 2, Last Paid Date: 08/03/2025

Jobs Effective Date (Not Enterable) \*

08/07/2025 🕒 Old Value: 06/01/2025

Title

Salary Grade

Regular Rate

Annual Salary

Timesheet Orgn

Job Change Reason (Not Enterable) \*

CHGIP 🕒 Old Value: ANN, Annual Review Increase

Supervisor ID

### Edit/Review Jobs Labor Distribution Section

- Review the “New Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and should not be changed
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF, click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date”
  - “Query Date” must be at the beginning of a future pay period. Refer to [payroll schedules](#)
- The current Index, Fund, Organization, Account and Program numbers will default from the employee’s job record in Banner
  - Review, and edit the index, fund, organization, account, or program field as needed:
    - Type in new index over old index
    - Click “Default from Index” to update the remaining fields
      - If the auto populate is incorrect, please reach out to budget to resolve before moving forward with EPAF
    - The “Account” field does not auto-populate; enter the account number directly into the Account field
  - After entering the labor distribution updates, click the “Save” button to save your changes.

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

- Note: If you need to enter multiple indexes, please click “Save and Add New Rows”  
Funding must equal 100%
- Please note the following:
  - The index is a shortcut for the organization/fund/program/activity codes. The index may change if the funding is changing.
    - Typically, index codes beginning with:
      - 2 or 3 (unrestricted funds)
      - 4 (restricted funds)
        - 420XXX and 426XXX = restricted funds which roll year to year
        - 424XXX and 425XXX = endowment spending funds which do not roll year to year
        - 421XXX = Research Support
      - 5XXXXX = Grants
  - Account codes are tied to the Position Status indicated in the job description, (i.e., Exempt/Non-Exempt and Full-Time/Part-Time). These codes should remain constant, only altering if the position description status changes. However, if additional funding sources are required, the account code should match across all funding lines.
  - Changing account codes impact the job status and could affect the employee’s benefits. Please reach out to your HR Campus Partner with questions.
    - Account Code:
      - Non-Exempt
        - 7231 (Non-Exempt Full Time Employees)
        - 7235 (Non-Exempt Part Time Employees)
        - 7234 (Non-Exempt Temp Employees)
      - Exempt
        - 7221 (Exempt Full Time Employee)
        - 7223 (Exempt Temporary Employee)
        - 7224 (Exempt Part Time Employee)

Current

Effective Date

01/13/2025

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1	246130	101	401	7221	500					100	

New

Effective Date MM/DD/YYYY

06/30/2025

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1	246130	101	401	7221	500					100		

Default from Index

Add Row

### Edit/Review Routing Section

This section identifies the approval queue for the position.

- Default “Approval Levels” will populate based on the type of EPAF you selected. For each approval

level, select the individuals that would be approving the EPAF for your department.

- Click the magnifying glass next to each “Approval Level” to select the approver “User Name” for each category. If there are other individuals that requested to be the designated approver, select their name instead of the recommended name below. If you know a designated approver is on vacation, you may want to select an alternate approver.
- The default approval types for this EPAF are as follows:
  - 44 – (FINMGR) Finance Managers - EPAF
    - Select your FINANCE MANAGER in the “User Name” field – this will vary by department/college
  - 45 – (HRCPP) HR Campus Partner
    - Select your HR Campus Partner in the “User Name” field – this will vary by department/college
  - 72 – (COMP) Compensation
    - Select KELSEY CHYKO in the “User Name” field
  - 73 – (BUDGET) Budget
    - Select Budget Office Representative to put in the “User Name” field
  - 74 – (HR) Human Resources – EPAF
    - Select NADINE MARINO in the “User Name” field
  - 90 – (SENLDR) Senior Leadership
    - Select your SENIOR LEADER in the “User Name” field – this will vary by college/department
  - 98 – (PROAPP) EPAF Apply

Approval Level	User Name	Required Action	Remove
44 - (FINMGR) Finance Managers - EPAF	Not Selected	Approve	
45 - (HRCPP) HR Campus Partner - EPAF	Not Selected	Approve	
72 - (COMP) Compensation	Not Selected	Approve	
73 - (BUDGET) Budget	Not Selected	Approve	
74 - (HR) Human Resources - EPAF	Not Selected	Approve	
75 - (SENLDR) Senior Leadership	Not Selected	Approve	
90 - (PROAPP) EPAF Apply	Not Selected	Apply	

[Add Row](#)

**NOTE: You may need to manually add additional approval levels to the EPAF:**

If this is a grant funded EPAF, add the Office of Grants & Contracts to the approval section:

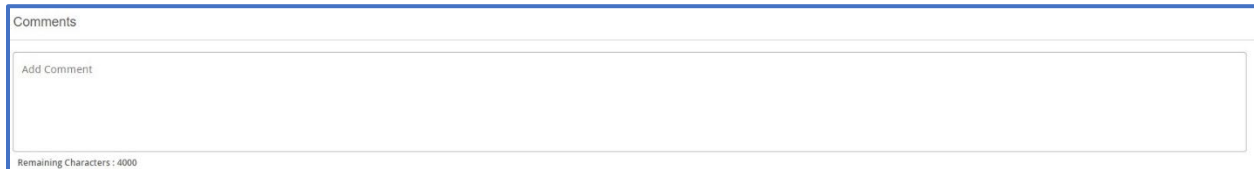
- Click on “Add Row”
- Select “47 – (OGCRES) Office of Grants and Contracts Appr” in a blank row under “Approver Level”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”

#### Edit Comment Section

Enter the following information in the Comments box:

- Note any errors you experienced while completing the EPAF, or additional information that is pertinent to this EPAF, as applicable

Example Comment:



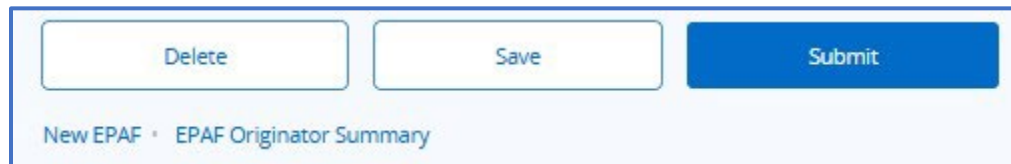
The screenshot shows a 'Comments' section with a text area for adding a comment. The text area is empty and has a placeholder text 'Add Comment'. Below the text area, it says 'Remaining Characters: 4000'.

#### Save/Submit Section

- Click the “Save” button at the bottom of the page.
- 



- Scroll down to review the information you entered on the EPAF
- Click the “Submit” button



The EPAF will now route to the first level approver.

## Processing an employee's Organizational Change with the same position number (DEPMV)

### New EPAF Selection Pages

There are only a few sections to complete before moving to edit and review the electronic personnel action form page.

### New EPAF Person Selection Page

- Enter or elect the Banner ID, enter the “Query Date” (**Must be at the beginning of a future pay period - Refer to ([payroll schedules](#))** and select the “Approval Category” “Supervisor Change Update, SUPVR.”
- Click the “Go” button to navigate to the “New EPAF Job Selection” page.

### New EPAF Job Selection Page

- Click “All Jobs” button to view all active and terminated jobs the staff member has held
- Select the radio button next to the job you want to update
- Click the “Go” button

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input type="checkbox"/>	New Job					
<input type="checkbox"/>	Secondary	010016	00	Lab Manager & Safety Officer	401, Human Resources	06/24/2025
<input checked="" type="checkbox"/>	Primary	433007	00	HRIS Analyst, Level 2	401, Human Resources	01/13/2025



**YOU ARE NOW READY TO COMPLETE THE ELECTRONIC PERSONNEL ACTION FORM PAGE****Electronic Personnel Action Form Page**

There are several sections to edit and review on the “Electronic Personnel Action Form” page:

**Edit/Review Organizational Change on Employee Home Screen**

- Update “Home Organization” field with the new code.
  - If you do not know the specific number, click on the magnifying glass. You can review the entire list here
- Update and match the field of “Distribution Orgn” to match “Home Organization” field
  - If you do not know the specific number, click on the magnifying glass. You can review the entire list here
- If you know the “District Code” please enter it. If you do not, leave it as “Not Selected”
- Update the “Location Code” field with the new location. OR leave it as is if it is not being changed.

**Organization Change on Employee Home Screen**

Home Organization

Distribution Orgn

District Code

Not Selected

Location Code

**Edit/Review Department Move, Org Changes with same job**

- Review the “Job Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and should not be changed
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF, click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date”
  - “Query Date” must be at the beginning of a future pay period. Refer to [payroll schedules](#)
- Update the “Timesheet Orgn”
- Do not Change “Job Change Reason” – will auto populate to “DEPMV”

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

- “Supervisor ID” – Enter the Supervisor’s Banner ID only if there is corresponding supervisor change.
  - Contact your Finance Manager or HR Campus Partner if you do not have the supervisor ID

Department Move, Org Changes with same job, 433007-00 HRIS Analyst, Level 2, Last Paid Date: 08/03/2025

Jobs Effective Date (Not Enterable) \*

08/07/2025 Old Value: 06/01/2025

Timesheet Orgn

Job Change Reason (Not Enterable) \*

DEPMV Old Value: ANN, Annual Review Increase

Supervisor ID

### Edit/Review Jobs Labor Distribution Section

- Review the “New Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and should not be changed
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF, click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date”
  - “Query Date” must be at the beginning of a future pay period. Refer to [payroll schedules](#)
- The current Index, Fund, Organization, Account and Program numbers will default from the employee’s job record in Banner
  - Review, and edit the index, fund, organization, account, or program field as needed:
    - Type in new index over old index
    - Click “Default from Index” to update the remaining fields
      - If the auto populate is incorrect, please reach out to budget to resolve before moving forward with EPAF
    - The “Account” field does not auto-populate; enter the account number directly into the Account field
  - After entering the labor distribution updates, click the “Save” button to save your changes.
    - Note: If you need to enter multiple indexes, please click “Save and Add New Rows” Funding must equal 100%
  - Please note the following:
    - The index is a shortcut for the organization/fund/program/activity codes. The index may change if the funding is changing.
      - Typically, index codes beginning with:
        - 2 or 3 (unrestricted funds)
        - 4 (restricted funds)
          - 420XXX and 426XXX = restricted funds which roll year to year
          - 424XXX and 425XXX = endowment spending funds which do not roll year to year

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

- 421XXX = Research Support
  - 5XXXXX = Grants
- Account codes are tied to the Position Status indicated in the job description, (i.e., Exempt/Non-Exempt and Full-Time/Part-Time). These codes should remain constant, only altering if the position description status changes. However, if additional funding sources are required, the account code should match across all funding lines.
- Changing account codes impact the job status and could affect the employee's benefits. Please reach out to your HR Campus Partner with questions.
- Account Code:
  - Non-Exempt
    - 7231 (Non-Exempt Full Time Employees)
    - 7235 (Non-Exempt Part Time Employees)
    - 7234 (Non-Exempt Temp Employees)
  - Exempt
    - 7221 (Exempt Full Time Employee)
    - 7223 (Exempt Temporary Employee)
    - 7224 (Exempt Part Time Employee)

Current

Effective Date: 01/13/2025

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1	246130	101	401	7221	500					100	

New

Effective Date MM/DD/YYYY: 06/30/2025

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1	246130	101	401	7221	500					100		

⊕ Default from Index
⊕ Add Row

### Edit/Review Routing Section

This section identifies the approval queue for the position.

- Default “Approval Levels” will populate based on the type of EPAF you selected. For each approval level, select the individuals that would be approving the EPAF for your department.
- Click the magnifying glass next to each “Approval Level” to select the approver “User Name” for each category. If there are other individuals that requested to be the designated approver, select their name instead of the recommended name below. If you know a designated approver is on vacation, you may want to select an alternate approver.
- The default approval types for this EPAF are as follows:
  - 44 – (FINMGR) Finance Managers - EPAF
    - Select your FINANCE MANAGER in the “User Name” field – this will vary by department/college
  - 45 – (HRCP) HR Campus Partner

- Select your HR Campus Partner in the “User Name” field – this will vary by department/college
- 72 – (COMP) Compensation
  - Select KELSEY CHYKO in the “User Name” field
- 73 – (BUDGET) Budget
  - Select Budget Office Representative to put in the “User Name” field
- 74 – (HR) Human Resources – EPAF
  - Select NADINE MARINO in the “User Name” field
- 90 – (SENLDR) Senior Leadership
  - Select your SENIOR LEADER in the “User Name” field – this will vary by college/department
- 98 – (PROAPP) EPAF Apply

**NOTE: You may need to manually add additional approval levels to the EPAF:**

If this is a grant funded EPAF, add the Office of Grants & Contracts to the approval section:

- Click on “Add Row”
- Select “47 – (OGCRES) Office of Grants and Contracts Appr” in a blank row under “Approver Level”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”

Edit Comment Section

Enter the following information in the Comments box:

- Note any errors you experienced while completing the EPAF, or additional information that is pertinent to this EPAF, as applicable

Example Comment:

Comments

Add Comment

Remaining Characters : 4000

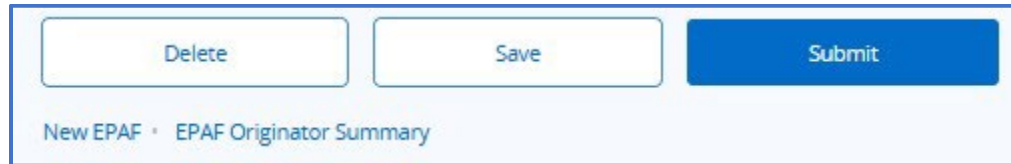
Save/Submit Section

- Click the “Save” button at the bottom of the page.

Save

[New EPAF](#)
[EPAF Originator Summary](#)

- Scroll down to review the information you entered on the EPAF
- Click the “Submit” button



The screenshot shows the bottom section of the EPAF form. It contains three buttons: 'Delete' (light blue), 'Save' (light blue), and 'Submit' (dark blue). Below these buttons is a breadcrumb trail that reads 'New EPAF > EPAF Originator Summary'.

The EPAF will now route to the first level approver.

## Processing Supervisor Changes (SUPVS)

### New EPAF Selection Pages

There are only a few sections to complete before moving to edit and review the electronic personnel action form page.

#### New EPAF Person Selection Page

- Enter or elect the Banner ID, enter the “Query Date” (**Must be at the beginning of a future pay period - Refer to ([payroll schedules](#))** and select the “Approval Category” “Supervisor Change Update, SUPVR.”
- Click the “Go” button to navigate to the “New EPAF Job Selection” page.

The screenshot shows the 'New EPAF Person Selection' form. At the top, there is a search section with fields for First Name, Last Name, ID, and SSN/SIN/TIN, along with a 'Search' button. Below this is a section titled 'Enter or Generate New ID'. It contains a required field for 'ID \*' with a red border, a 'Generate new ID' link, a required field for 'Query Date \*' with a calendar icon, and a required dropdown for 'Approval Category \*'. At the bottom of this section is a blue 'Go' button. Four blue arrows point to the ID field, the Query Date field, the Approval Category dropdown, and the Go button.

#### New EPAF Job Selection Page

- Click “All Jobs” button to view all active and terminated jobs the staff member has held
- Select the radio button next to the job you want to update  
**Note:** In instances where the employees may hold multiple active jobs within their employee record, it is crucial to accurately assign supervisors to ensure proper approval of timesheets and expenses; however, the primary supervisor designation will be utilized for performance reviews (PeopleAdmin) and Outlook organizational charts.
- Click the “Go” button

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

ID: 02569497 Query Date: 06/30/2025 Approval Category: Supervisor Change Update, SUPVR

Supervisor Update, SUPVCH

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input type="checkbox"/>	New Job					
<input type="checkbox"/>	Secondary	010016	00	Lab Manager & Safety Officer	401, Human Resources	06/24/2025
<input checked="" type="checkbox"/>	Primary	433007	00	HRIS Analyst, Level 2	401, Human Resources	01/13/2025

All Jobs Go

**YOU ARE NOW READY TO COMPLETE THE ELECTRONIC PERSONNEL ACTION FORM PAGE**

### Electronic Personnel Action Form Page

There are several sections to edit and review on the “Electronic Personnel Action Form” page:

#### Edit/Review “Supervisor Update” Section

- Review the “Jobs Effective Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and cannot be changed
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF, click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date”
  - “Query Date” must be at the beginning of a future pay period. Refer to [payroll schedules](#)
- Do not Change “Job Change Reason” – will auto populate to “SUPVS”
- “Supervisor ID” – Enter the Supervisor’s Banner ID (the old supervisor ID number will be auto populated, remove it and type the new one in)
  - Contact your Finance Manager or HR Campus Partner if you do not have the Supervisor ID

Supervisor Update, 433007-00 HRIS Analyst, Level 2, Last Paid Date: 06/08/2025

Jobs Effective Date \*

06/30/2025 Remove Old Value: 06/01/2025

Job Change Reason (Not Enterable)

SUPVS Old Value: ANN, Annual Review Increase

Supervisor ID

00486724

#### Edit/Review Routing Section

This section identifies the approval queue for the position.

- Default “Approval Levels” will populate based on the type of EPAF you selected. For each approval level, select the individuals that would be approving the EPAF for your department.
- Click the magnifying glass next to each “Approval Level” to select the approver “User Name” for each category. If there are other individuals that requested to be the designated approver, select their name instead of the recommended name below. If you know a designated approver is on vacation, you may want to select an alternate approver.
- The default approval types for this EPAF are as follows.
  - 45 – (HRCPP) HR Campus Partner
    - Select your HR Campus Partner in the “User Name” field – this will vary by department/college
  - 72 – (COMP) Compensation
    - Select KELSEY CHYKO in the “User Name” field
  - 74 – (HR) Human Resources – EPAF
    - Select NADINE MARINO in the “User Name” field
  - 98 – (PROAPP) EPAF Apply
    - Always select AUTOMIC SERVICE\_HR in the “User Name” field

Approval Level	User Name	Required Action	Remove
45 - (HRCPP) HR Campus Partner - EPAF	Not Selected	Approve	
72 - (COMP) Compensation	KCHYKO - Chyko, Kelsey L.	Approve	
74 - (HR) Human Resources - EPAF	NMARIN02 - Marino, Nadine L.	Approve	
90 - (PROAPP) EPAF Apply	AUTOMIC_HR - AutomicService, HR	Apply	

+ Add Row

**NOTE: You may need to manually add additional approval levels to the EPAF:**

If this is a grant funded EPAF, add the Office of Grants & Contracts to the approval section:

- Click on “Add Row”
- Select “47 – (OGCRES) Office of Grants and Contracts Appr” in a blank row under “Approver Level”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”

Other Approvers that may need to be added:

- Click on “Add Row”
- 90 – “(SENLDR) Senior Leadership”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”
- Click on “Add Row”
- Select “44 – (FINMGR) Finance Managers – EPAF” in a blank row under “Approver Level”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”



Edit Comment Section

Enter the following information in the Comments box:

- Enter the name of the existing and new supervisor, reason for the supervisor change, and whether the change is temporary or permanent.
- Note any errors you experienced while completing the EPAF, or additional information that is pertinent to this EPAF.

Example Comment:

Jane Smith's supervisor is changing from Joe Jones to Bill Rodriguez on a temporary basis due to Joe's retirement. This is a temporary move which will be updated when Joe's replacement is hired.

Comments

Add Comment

Remaining Characters : 4000

Save/Submit Section

- Click the "Save" button at the bottom of the page.

Save

[New EPAF](#) • [EPAF Originator Summary](#)

- Scroll down to review the information you entered on the EPAF
- Click the "Submit" button

Delete Save Submit

[New EPAF](#) • [EPAF Originator Summary](#)

- The EPAF will now route to the first level approver.

## Processing Equity Adjustment (PAYCHN)

### New EPAF Selection Pages

There are only a few sections to complete before moving to edit and review the electronic personnel action form page.

### New EPAF Person Selection Page

- Enter or Select the Banner ID, enter the “Query Date” (**Must be at the beginning of a future pay period - Refer to ([payroll schedules](#))** and select the “Approval Category” “Equity Adjustment, PAYCHN.”
- Click the “Go” button to navigate to the “New EPAF Job Selection” page.

### New EPAF Job Selection Page

- Click “All Jobs” button to view all active and terminated jobs the staff member has held
- Select the radio button next to the job you want to update
- Click the “Go” button

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input type="checkbox"/>	New Job					
<input type="checkbox"/>	Secondary	010016	00	Lab Manager & Safety Officer	401, Human Resources	06/24/2025
<input checked="" type="checkbox"/>	Primary	433007	00	HRIS Analyst, Level 2	401, Human Resources	01/13/2025

**YOU ARE NOW READY TO COMPLETE THE ELECTRONIC PERSONNEL ACTION FORM PAGE**

**Electronic Personnel Action Form Page**

There are several sections to edit and review on the “Electronic Personnel Action Form” page:


**Edit/Review Pay Change Section**

- Review the “Jobs Effective Date” and “Personnel Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and cannot be changed
  - If the incorrect date was entered in the “Query Date” field at the beginning of the EPAF, click the “New EPAF” link at the bottom of the page and start the process over entering the correct “Query Date.”
  - **“Query Date” must be at the beginning of a future pay period.** Refer to [payroll schedules](#)
- Update the rate based on type of position (Exempt or Non-Exempt)
  - For Non-Exempt positions: Update “Regular Rate” which will be the new Hourly Rate and leave “Annual Salary” blank
  - For Exempt positions: Update the “Annual Salary” which will be the new annual salary and leave “Regular Rate” blank



**NOTE:** Do Not enter both an hourly rate and annual salary!
- Update “Salary Grade”
  - Based on information reflected on the approved job description and position
    - Provided by Compensation
    - Enter salary grade only if it is changing
- Do not Change “Job Change Reason” – will auto populate to “EQUIT”

Pay Change, 433007-00 HRIS Analyst, Level 2, Last Paid Date: 06/08/2025


Jobs Effective Date (Not Enterable) \*

06/30/2025  Old Value: 06/01/2025


Personnel Date

06/30/2025  ☐ Remove  Old Value: 06/01/2025



Annual Salary




Regular Rate



Salary Grade

Job Change Reason (Not Enterable)

EQUIT  Old Value: ANN, Annual Review Increase

Edit/Review Routing Section

This section identifies the approval queue for the position.

- Default “Approval Levels” will populate based on the type of EPAF you selected. For each approval level, select the individuals that would be approving the EPAF for your department.
- Click the magnifying glass next to each “Approval Level” to select the approver “User Name” for each category. If there are other individuals that requested to be the designated approver, select their name instead of the recommended name below. Also consider if you know someone in the approval chain is on vacation, you may want to select an alternate approver.
- The default approval types for this EPAF are as follows:
  - 45 – (HRCP) HR Campus Partner
    - Select your HR Campus Partner in the “User Name” field – this will vary by department/college
  - 72 – (COMP) Compensation
    - Select KELSEY CHYKO in the “User Name” field
  - 73 – (BUDGET) Budget
    - Select a Budget Office Representative to put in the “User Name” field
  - 74 – (HR) Human Resources – EPAF
    - Select NADINE MARINO in the “User Name” field
  - 90 – (SENLDR) Senior Leadership
    - Select your SENIOR LEADER in the “User Name” field – this will vary by college/department
  - 98 – (PROAPP) EPAF Apply
    - Always select AUTOMIC SERVICE\_HR in the “User Name” field

Approval Level	User Name	Required Action	Remove
45 - (HRCP) HR Campus Partner - EPAF	Not Selected	Approve	
72 - (COMP) Compensation	KCHYKO - Chyko, Kelsey L.	Approve	
73 - (BUDGET) Budget	EKIMMICH - Kimmich Mitchell, Elisabeth L.	Approve	
74 - (HR) Human Resources - EPAF	NMARIN02 - Marino, Nadine L.	Approve	
75 - (SENLDR) Senior Leadership	Not Selected	Approve	
90 - (PROAPP) EPAF Apply	AUTOMIC_HR - AutomicService, HR	Apply	

+ Add Row

**NOTE: You may need to manually add additional approval levels to the EPAF:**

If this is a grant funded EPAF, add the Office of Grants & Contracts to the approval section:

- Click on “Add Row”
- Select “47 – (OGCRES) Office of Grants and Contracts Appr” in a blank row under “Approver Level”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”

Typically, the finance manager should be originating this EPAF; however, if another individual originates the EPAF, the designated finance manager must be added to the approval queue.

- Click on “Add Row”
- Select “44 – (FINMGR) Finance Managers - EPAF in a blank row under “Approver Level”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”

### Edit Comment Section

Enter the following information in the Comments box:

- Enter details for the Budget Office on how the salary adjustment will be funded. For example, if a department has salary savings, the comment will include the PSP number or a reconciliation at the position level. Any issues or questions related to funding should be directed to the Budget Office prior to submitting the EPAF.
- Note any errors you experienced while completing the EPAF, or additional information that is pertinent to this EPAF, as applicable

Example Comment:

Funding Source: Pool from PSP 711-226410

Comments

Add Comment

Remaining Characters : 4000

### Save/Submit Section

- Click the “Save” button at the bottom of the page.

Save

New EPAF • EPAF Originator Summary

- Scroll down to review the information you entered on the EPAF
- Click the “Submit” button

Delete

Save

Submit

New EPAF • EPAF Originator Summary

- The EPAF will now route to the first level approver.

## Processing Separations – Voluntary (TERMND)

### New EPAF Selection Pages

There are only a few sections to complete before moving to edit and review the electronic personnel action form page.

### New EPAF Person Selection Page

- Enter or Select the Banner ID, enter the “Query Date” (**must be the employee's last day of work**) and select the “Approval Category” “Employee Separation, TERMND.”  
**Note:** The last day of work cannot be a holiday, vacation or other “paid time off” day. Contact your HR Campus Partner with questions.
- Click the “Go” button to navigate to the “New EPAF Job Selection” page

**New EPAF Person Selection**

① Check the box to limit to search an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SSN/TIN. Select Go. A percent sign may be used as a wildcard.

First Name  Last Name  ☐ Is an employee or  ID  or  SSN/SSN/TIN

**Enter or Generate New ID**

① \* Indicates a required field. Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

ID \*

Generate new ID

Query Date \*

Approval Category \*

### New EPAF Job Selection Page

There will be a sub header above the jobs “End Existing Default Earnings”

- Click the “All Jobs” button to view all active and terminated jobs the staff member has.
- Select the radio button next to the job that requires ending default earnings
- Click the “Go” button

ID  Query Date  Approval Category

**Supervisor Update, SUPVCH**

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input type="checkbox"/>	New Job	<input type="text" value=""/>	<input type="text" value=""/>			
<input type="checkbox"/>	Secondary	010016	00	Lab Manager & Safety Officer	401, Human Resources	06/24/2025
<input checked="" type="checkbox"/>	Primary	433007	00	HRIS Analyst, Level 2	401, Human Resources	01/13/2025

## YOU ARE NOW READY TO COMPLETE THE ELECTRONIC PERSONNEL ACTION FORM PAGE

### **Electronic Personnel Action Form Page**

There are several sections to edit and review on the “Electronic Personnel Action Form” page:

#### Review Employee Separation

- Review the “Last Work Date” – this is the same date you entered in the “Query Date” field at the beginning of the EPAF and cannot be changed.
  - If you entered the wrong date in the “Query Date” field at the beginning of the EPAF, you need to click the “Return to EPAF Menu” link at the top of the page and start the process over typing in the correct “Query Date.”

#### Edit/Review Job Detail Separation

- Enter the Jobs Effective Date– this date should be the same as your “Query Date” date you entered at the beginning of the EPAF.
- Do not Change “Job Change Reason” – will auto populate to “EQUIT”

Job Detail Separation, Reason, 433007-00 HRIS Analyst, Level 2, Last Paid Date: 08/03/2025

Jobs Effective Date \*

Job Change Reason (Not Enterable) \*

#### Edit/Review Routing Section

This section identifies the approval queue for the position.

- Default “Approval Levels” will populate based on the type of EPAF you selected. For each approval level, select the individuals that would be approving the EPAF for your department.
- Click the magnifying glass next to each “Approval Level” to select the approver “User Name” for each category. If there are other individuals that requested to be the designated approver, select their name instead of the recommended name below. If you know a designated approver is on vacation, you may want to select an alternate approver.
- The default approval types for this EPAF are:
  - 45 – (HRCPP) HR Campus Partner
    - Select your HR Campus Partner in the “User Name” field – this will vary by department/college
  - 74 – (HR) Human Resources – EPAF
    - Always select NADINE MARINO the “User Name” field
  - 98 – (PROAPP) EPAF Apply
    - Always select AUTOMIC SERVICE\_HR in the “User Name” field

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

Routing Queue			
Approval Level	User Name	Required Action	Remove
45 - (HRCPI) HR Campus Partner - EPAF	Not Selected	Approve	
74 - (HR) Human Resources - EPAF	NMARIN02 - Marino, Nadine L.	Approve	
90 - (PROAPP) EPAF Apply	AUTOMIC_HR - AutomicService, HR	Apply	

[Add Row](#)

**Note: it is recommended not to have too many approver levels to avoid delaying the processing of the EPAF.**

### Edit Comment Section

Enter the following information in the Comments box:

- Enter Vacation Allotment Information, if applicable.
- Enter Resignation Information and Reason, if applicable.
- Enter Rehire Eligibility, if applicable.
- Enter confirmation that [IT Offboarding Form](#) was submitted
- Use this section to note any errors you experienced while completing the EPAF, or additional information that is pertinent to this EPAF.

Example Comment:

Vacation: Eligible for 23 days; used 13 days so far in 2024

Resignation Reason: Career growth

Rehire: Eligible for rehire

IT Offboarding Request form: Submitted July 11, 2024

Comments
<div>Add Comment</div> <div>Remaining Characters : 4000</div>

### Save/Submit Section

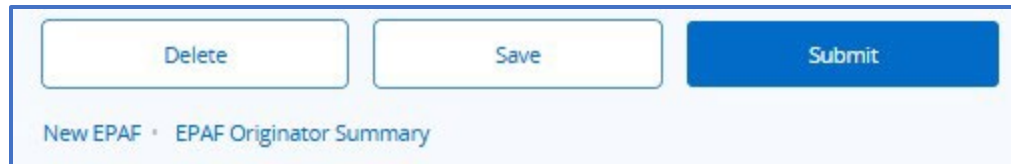
- Click the “Save” button at the bottom of the page.

Save

[New EPAF](#) • [EPAF Originator Summary](#)

- Scroll down to review the information you entered on the EPAF
- Click the “Submit” button





The image shows a user interface for the EPAF Originator Summary. It features three buttons at the top: 'Delete' (light blue), 'Save' (light blue), and 'Submit' (dark blue). Below these buttons is a light blue bar containing the text 'New EPAF • EPAF Originator Summary'.

- The EPAF will now route to the first level approver.

## Process Staff Default Earnings (SDFTEA)

### New EPAF Selection Pages

There are only a few sections to complete before moving to edit and review the electronic personnel action form page.

### New EPAF Person Selection Page

- Select the Banner ID and enter the “Query Date”. The Query Date is dependent on why default earnings are changing:
  - **Scenario 1 - To end default earnings and add back default earnings within the same EPAF** - use the day after the last day the employee will be paid. This should always be a Monday. (This is the scenario that should be used for 9-, 10- and 11-month employees whose default earnings end and restart during the course of the year.)
  - **Scenario 2 - To only stop default earnings** - use the date after the last day the employee will be paid. This is typically a Monday.
  - **Scenario 3 - To only start default earnings** - use the date on which the employee will start working and be paid. This should typically be a Monday and ideally at the beginning of a pay period.
- Refer to [payroll schedules](#).
- Select the “Approval Category” “To end old default earnings, to enter new Default Earnings, SDFTEA.”
  - Click the “Go” button to navigate to the “New EPAF Job Selection” page

The screenshot shows the 'New EPAF Person Selection' form. At the top, there is a search bar with fields for First Name, Last Name, ID, and SSN/SSN/TIN, along with a 'Search' button. Below this is a section titled 'Enter or Generate New ID'. It contains a red-bordered 'ID \*' field with a blue arrow pointing to it. Below the ID field is a 'Generate new ID' section with a 'Query Date \*' field (containing '06/25/2025') and an 'Approval Category \*' dropdown menu, both with blue arrows pointing to them. At the bottom of this section is a blue 'Go' button with a blue arrow pointing to it.

### New EPAF Job Selection Page

- Click the “All Jobs” button to view all active and terminated jobs the staff member has held, if applicable.
- Select the radio button next to the active job you want to update.
- Click the “Go” button

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

ID: 02569497

Query Date: 06/30/2025

Approval Category: Supervisor Change Update, SUPVR

**Supervisor Update, SUPVCH**

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input type="checkbox"/>	New Job	<input type="text"/>	<input type="text"/>			
<input type="checkbox"/>	Secondary	010016	00	Lab Manager & Safety Officer	401, Human Resources	06/24/2025
<input checked="" type="checkbox"/>	Primary	433007	00	HRIS Analyst, Level 2	401, Human Resources	01/13/2025

[All Jobs](#)

[Go](#)

**YOU ARE NOW READY TO COMPLETE THE ELECTRONIC PERSONNEL ACTION FORM PAGE**

### Electronic Personnel Action Form Page

There are several sections to edit and review on the “Electronic Personnel Action Form” page:

#### ***Scenario # 1 To end default earnings and add back default earnings within the same EPAF:***

##### Edit/Review Existing Default Earnings

- Review the “New Value Effective Date MM/DD/YYYY Earnings” for existing default pay line. On the first line, enter the end date only.
  - In the “End Date MM/DD/YYYY” field, enter the Query Date. (example- if the last day the employee should be paid is 5/25/2025, the end date will be 5/26/2025).
    - NOTE: This should typically be on the day after a week’s pay or a Monday. Employees should be paid for a full week of pay and default earnings may not stop in the middle of the week. Each pay week is Monday – Sunday.
- Click “Add Row”
- On the next line, enter a “New Value Effective Date MM/DD/YYYY” Earnings under the current default earnings line.
  - In the “Effective Date MM/DD/YYYY” field, enter the date that the employee should start being paid.
    - NOTE: This should typically be at the beginning of the pay period or a Monday. Employees should be paid for a full week of pay and default earnings may not start in the middle of the week. Each pay week is Monday – Sunday.
  - Choose Earnings “REG, Regular Earnings”.
  - Insert the Hours or Units per Pay (this should match the current value).
  - Leave the Deemed Hours, Special Rate, and End Date fields empty.

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

Current							
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date	
08/08/2022	REG, Regular Earnings	70			1		

New Value							
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date	Remove
08/08/2022	REG, Regular Earnings	70			1		
					1		

(+ Add Row)

### ***Scenario # 2 To only stop default earning***

#### Edit/Review Existing Default Earnings

- Review the “New Value Effective Date MM/DD/YYYY Earnings” for existing default pay line. On the first line, enter the end date only.
  - In the “End Date MM/DD/YYYY” field, enter the Query Date. (example- if last day the employee should be paid is 5/25/2025, the end date will be 5/26/2025).
    - NOTE: This should typically be on the day after a week’s pay or a Monday. Employees should be paid for a full week of pay and default earnings may not stop in the middle of the week. Each pay week is Monday – Sunday.

End Existing Default Earnings, 713023-00 HRIS Analyst, Director, Last Paid Date: 06/08/2025

Current							
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date	
08/08/2022	REG, Regular Earnings	70			1		

New Value							
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date	Remove
08/08/2022	REG, Regular Earnings	70			1		

(+ Add Row)

### ***Scenario # 3 To only start default earnings***

#### Edit/Review Existing Default Earnings

- Enter a “New Value Effective Date MM/DD/YYYY Earnings”
  - In the “Effective Date MM/DD/YYYY” field, enter the date that the employee should start being paid.
    - NOTE: This should typically be at the beginning of the pay period or a Monday. Employees should be paid for a full week of pay and default earnings may not start in the middle of the week. Each pay week is Monday – Sunday.
  - Choose Earnings “REG, Regular Earnings”.
  - Insert the Hours or Units per Pay (i.e. typically 70 hours for a 35 hour per week employee paid on a bi-weekly basis).
  - Leave the Deemed Hours, Special Rate, and End Date fields empty.

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

Current						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
08/08/2022	REG, Regular Earnings	70			1	

New Value							
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date	Remove
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Remove"/>

+ Add Row

### Edit/Review Routing Section

This section identifies the approval queue for the position.

- Default “Approval Levels” will populate based on the type of EPAF you selected. For each approval level, select the individuals that would be approving the EPAF for your department.
- Click the magnifying glass next to each “Approval Level” to select the approver “User Name” for each category. If there are other individuals that requested to be the designated approver, select their name instead of the recommended name below. If you know a designated approver is on vacation, you may want to select an alternate approver.
- The default approval types for this EPAF are:
  - 44 – (FINMGR) Finance Managers – EPAF
    - Select your applicable Finance Manager in the “User Name” field – this will vary by department/college
  - 45 – (HRCF) HR Campus Partner
    - Select your HR Campus Partner in the “User Name” field – this will vary by department/college
  - 72 - (COMP) Compensation
    - Always select KELSEY CHYKO in the “User Name” Field
  - 74 – (HR) Human Resources – EPAF
    - Always select NADINE MARINO in the “User Name” field
  - 98 – (PROAPP) EPAF Apply
    - Always select AUTOMIC SERVICE\_HR in the “User Name” field

Routing Queue			
Approval Level	User Name	Required Action	Remove
44 - (FINMGR) Finance Managers - EPAF	Not Selected	Approve	<input type="button" value="Remove"/>
45 - (HRCF) HR Campus Partner - EPAF	Not Selected	Approve	<input type="button" value="Remove"/>
72 - (COMP) Compensation	KCHYKO - Chyko, Kelsey L.	Approve	<input type="button" value="Remove"/>
74 - (HR) Human Resources - EPAF	NMARIN02 - Marino, Nadine L.	Approve	<input type="button" value="Remove"/>
90 - (PROAPP) EPAF Apply	AUTOMIC_HR - AutomicService, HR	Apply	<input type="button" value="Remove"/>

+ Add Row

**NOTE: You may need to manually add additional approval levels to the EPAF:**

If this is a grant funded EPAF, add the Office of Grants & Contracts to the approval section:

- Click “Add Row”
- 47 – “(OGCRES) Office of Grants and Contracts Appr” in a blank row under “Approver level:

- Click the magnifying glass in the “User Name: field to select the approver in the “User Name” field
- Select “Approve from the drop-down list under “Required Action”

Other Approvers that may need to be added:

- Click “Add Row”
- Select “90 – (SENLDLDR) Senior Leadership” in a blank row under “Approver Level”
  - Click the magnifying glass in the “User Name” field to select the approver
  - Select “Approve” from the drop-down list under “Required Action”

### Edit Comment Section

Enter the following information in the Comments box:

- Summary of the EPAF action (end date and start date of the staff member’s default earnings).
- Note any errors you experienced when completing the EPAF, or additional information that is pertinent to this EPAF, as applicable.

Example Comment:

Employee Group: 11 Month Employee

End default earnings effective: 05/25/2025

Resume default earnings effective: 06/23/2025

Comments

Remaining Characters : 4000

### Save/Submit Section

- Click the “Save” button at the bottom of the page.

Save

New EPAF • EPAF Originator Summary

- Scroll down to review the information you entered on the EPAF
- Click the “Submit” button

Delete

Save

Submit

New EPAF • EPAF Originator Summary

- The EPAF will now route to the first level approver.

## Sample Email Notification

- **Approval Email:**

-----Original Message-----

From: [hr@villanova.edu](mailto:hr@villanova.edu) <[hr@villanova.edu](mailto:hr@villanova.edu)>

Sent: Friday, June 16, 2023 6:01 AM

To: Susan Farnam <[susan.farnam@villanova.edu](mailto:susan.farnam@villanova.edu)>

Subject: EPAF Action Required

Dear Colleague,

An EPAF for position GACHEM-Graduate Assistant is waiting for approval. The transaction number for the EPAF is: 60357. You are the next approver for this EPAF, and it will not be routed to the next Approver Level until you have taken action against it.

To approve this EPAF, please login into myNOVA and search for Novasis. Once you have accessed Novasis, navigate to the employee tab and then click on the "Electronic Personnel Action Form" link.

On the EPAF Main Menu, click the "EPAF Approver Summary" link. This page will show you all transactions (including the one referenced above) for you to approve. Click on the "Name" of the transaction you want to approve. This will bring you to the EPAF Preview page where you can click "Approve" to process the transaction.

Once you approve the transaction, it will be routed to the next approver level identified in the EPAF process.

Thank you for your attention to this matter.

- **Return for Correction Email:**

-----Original Message-----

From: [hr@villanova.edu](mailto:hr@villanova.edu) <[hr@villanova.edu](mailto:hr@villanova.edu)>

Sent: Tuesday, June 27, 2023 11:48 AM

To: Maura Ewing <[maura.ewing@villanova.edu](mailto:maura.ewing@villanova.edu)>

Subject: EPAF Action Required

Dear Colleague,

An EPAF for position GACHEM-Graduate Assistant has been returned for corrections. The transaction number for the EPAF is: 57893. Please review the comments and correct the EPAF and re-submit for approval.

To correct this EPAF, please login into myNOVA and search for Novasis. Once you have accessed Novasis, navigate to the employee tab and then click on the "Electronic Personnel Action Form" link.

On the EPAF Main Menu, click on "EPAF Originator Summary." This page will show you all transactions you have submitted and any that are returned for corrections.

Click on the "Name" of the transaction you want to correct. This will bring you to the EPAF Preview page where you can make changes to the EPAF.

Scroll to the bottom of the page and click "Save" and then "Submit".

Once you submit the transaction, it will be routed to the next approver level identified in the EPAF process.

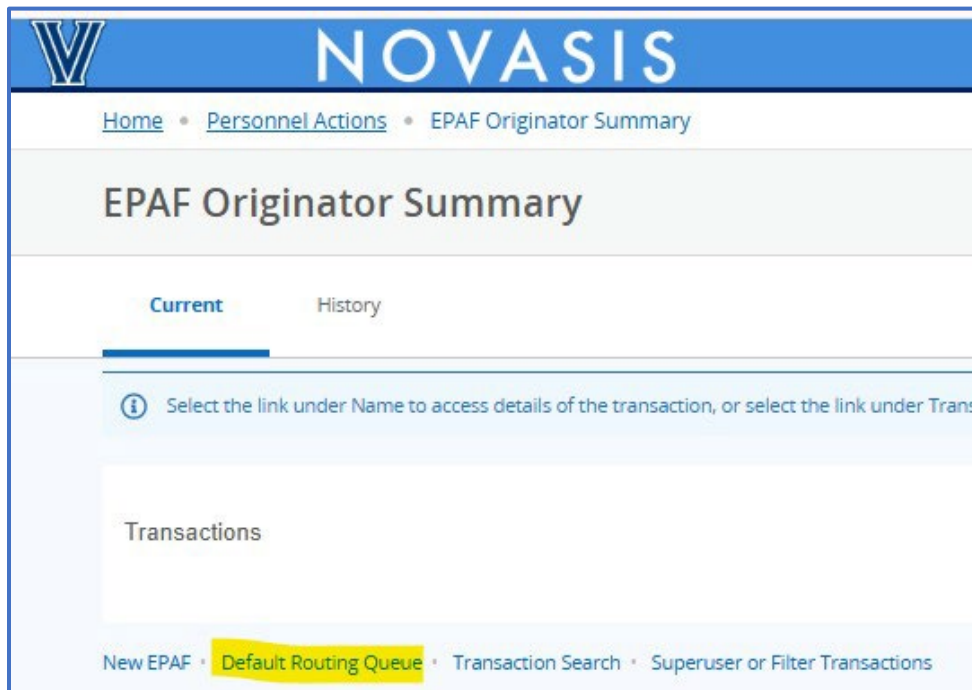
Thank you for your attention to this matter.



## Customizing the EPAF Approval Process for individual originators

If you have the same routing queue for each EPAF you create and do not want to manually select approvers each time you create one, you can customize your routing queues:

- Click the “EPAF Originator Summary” link on the EPAF main menu
- Click the “EPAF Originator Summary” link
- Click on the “Default Routing Queue”



- Select an “Approval Category” from the drop down menu
- Click the “Go” button

## ELECTRONIC PERSONNEL ACTION FORMS (EPAF) EMPLOYEE STAFF CHANGES

- Enter the required approval levels, the levels will display, you will need to pick the user names for each level:
  - 44 – (FINMGR) Finance Managers – EPAF
    - Select your FINANCE MANAGER in the “User Name” field – this will vary by department/college
    - If you do not see your Senior Leader, please email [hrpaf@villanova.edu](mailto:hrpaf@villanova.edu)
  - 45 – (HRCPP) HR Campus Partner
    - Select your HR Campus Partner in the “User Name” field – this will vary by department/college
  - 72 – (COMP) Compensation
    - Select KELSEY CHYKO in the “User Name” field
  - 73 – (BUDGET) Budget
    - Select your Budget office representative in the “User Name” field
  - 74 – (HR) Human Resources – EPAF
    - Select NADINE MARINO in the “User Name” field
  - 90 – (SENLDR) Senior Leadership
    - Select your SENIOR LEADER in the “User Name” field – this will vary by college/department
    - If you do not see your Senior Leader, please email [hrpaf@villanova.edu](mailto:hrpaf@villanova.edu)
  - 98– (PROAPP) EPAF Apply
    - Always select AUTOMIC SERVICE\_HR in the “User Name” field
- Add an additional level by clicking the “Approval Level” drop down menu and selecting the level
- Use the magnifying glass to select the approver’s name
- Select “Approve” from the “Required Action” drop down menu

Approval Category: Supervisor Change Update, SUPVR

Go

Approval Queue

ⓘ Mandatory Levels defaulted from Electronic Approval Category Form (NTRACAT).

Approval Level	User Name	Required Action
45 - (HRCPP) HR Campus Partner - EPAF	Emrick, Rose (REMRICK)	Approve
72 - (COMP) Compensation	Chyko, Kelsey L. (KCHYKO)	Approve
74 - (HR) Human Resources - EPAF	Marino, Nadine L. (NMARIN02)	Approve
90 - (PROAPP) EPAF Apply	AutomicService, HR (AUTOMIC_HR)	Apply

+ Add Row

Save Changes

- Click the “Save & Add New Rows” button when you have updated all your default approval levels
- Repeat this step for each “Approval Category” of the EPAF approval queues you want to update

## Setting up Proxy Access

**Overview:** Depending on the number of approval levels for which you have been set up as an approver, you can nominate separate individuals as your proxies for each approval level. For example, if you are set up as an approver at both the Department Head and Provost levels, you can nominate different individuals as your proxy for each level.

When a transaction has been approved by a proxy or Superuser, the Name field displayed on the Preview page in Employee Self-Service will show the proxy's name, proxy ID, and the original user. For example, the following will appear on the Preview page: Rose Burns, A11111111, for Linda Goodwin. This allows anyone viewing the EPAF to see that the record was approved by a proxy, as well as the name of the original approver.

**Note:** Individuals you nominate as proxies will not assume your HR security, even if they are assigned Superuser capabilities. Ensure that the Proxy to your transactions has appropriate security established in Banner for their tasks.

You can also use the EPAF Proxy Records page to remove an individual from your proxy list.

### To Set Up or Remove a Proxy at an Approval Level:

- Log into [MyNova](#)
- Search and select **Novasis**
- Click **Employee**
- Click **Electronic Personnel Action Menu**
- Click **EPAF Proxy Records**
- Select the approval level from the list, and click **Go**.
  - *Note: Only those approval levels where you have been defined on the Electronic Approval Level Rules (NTRALVL) page will be presented to you.*
- Select the name of the proxy from the list.
- Select the **Add** or **Remove** indicator.
- Click **Save**.

## Appendix A: FAQs

### GENERAL QUESTIONS

#### QUESTION

What is an EPAF?

#### RESPONSE

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?

**FIRST:** An Originator creates an EPAF in Banner Self-Service from the Employee menu.

**NEXT:** One or more Approvers approve the EPAF in Banner SelfService.

**LAST:** An Applier in Human Resources applies the information from an approved EPAF to Banner.

Who is an Originator?

An Originator is a person who creates an EPAF.

Who is an Approver?

An Approver is a person who reviews an EPAF, and either approves, disapproves, or returns the EPAF to the Originator for correction.

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 Finance Managers, Office of Grants & Contracts, and Human Resources.

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 they originate.

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?

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).

The Applier for all EPAF's will be the group "EPAF Apply" and the user in this group will always be "AUTOMIC\_HR". EPAF's will be applied twice a day through an AUTOMIC process.

## GENERAL QUESTIONS (cont.)

### QUESTION

What is the difference between “**Approve**”, “**FYI**”, and “**Apply**” in the Routing Queue section?

### RESPONSE

**Approve** – 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.

**FYI** – 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.

**Apply** – This is the final step of the EPAF process. An automated process associated with the user “AUTOMIC\_HR” applies the EPAF transaction information to Banner.

How do I access EPAFs through Self-Service?

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.

Can I set up a proxy for EPAFs?

Only Approvers and Appliers can set up proxies to handle their EPAF duties while they are absent.

I have a proxy set up for web time entry timesheet approvals. Do I need to set up a proxy for EPAFs?

Yes. Proxies for web time entry timesheet approvals are not related to proxies for EPAF approvals.

## ORIGINATORS

### QUESTION

Can a department have more than one Originator?

Our department's Originator is out on leave. Can someone else make corrections to an EPAF he/she created?

How do I know which EPAF to use?

What do all the different dates in the body of an EPAF mean?

After I have made corrections to an EPAF, do I need to save the EPAF again?

How will I know if my transaction has been saved or submitted successfully?

How do I check the status of my EPAF?

Why does the queue status say "Waiting" instead of "Pending?"

### RESPONSE

Yes. A department can have more than one Originator. However, an EPAF can only be corrected by the Originator who created it.

No. Since an Originator cannot designate a Proxy, another Originator in the department would need to create a new EPAF if it is something that cannot wait. If there is not anyone else to create a new EPAF, contact Human Resources at [hrpaf@villanova.edu](mailto:hrpaf@villanova.edu) for assistance.

EPAF access is managed by HR. If you are unsure of what EPAF to use or you do not see the EPAF you need in your menu, please contact your HR Campus Partner for assistance.

**Effective Date:** The date the transaction will take effect in Banner. This will usually be the beginning or ending of a payroll date

**Personnel Date:** The date the action actually took effect. This will generally match the effective date.

Yes. You always need to save an EPAF after you have made changes. When it is ready for approval, you can submit it.

You need to save your EPAF before you submit it. You will receive a message at the top of the EPAF screen telling you that your save or submit was successful. If you receive error messages, you will need to resolve them before you save or submit.

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.

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?	It Depends. 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 cannot resolve the problem, call Human Resources 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. Contact Human Resources for assistance.
What is the difference between “voiding” and “deleting” and EPAF?	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. Be careful! There is no prompt to confirm that you want something deleted.
I need to change some information on an EPAF. What should I do?	<b>If you have saved (but not submitted) the EPAF</b> , you can access it from your Originator Summary and make your changes. <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. <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. <b>If the EPAF has a transaction status of “Completed,”</b> it has been applied to Banner. You can either: 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 2. Submit an EPAF with corrected information on it.
What can I do if my EPAF Approver is on leave, and they have not designated a proxy?	You can contact Human Resources 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 be appropriate to assume that responsibility.

How can I make someone default to the Routing Queue rather than having to search for or type their username each time?

Additional approval levels, as well as specific people, can be set up to automatically default by setting up a Default Routing Queue.

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.

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.

What if I want to choose a person to be in my routing queue, but I do not 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 Human Resources at [hrpaf@villanova.edu](mailto:hrpaf@villanova.edu).



## APPROVERS

### QUESTION

What information am I expected to approve?

### RESPONSE

It is understood that not all approvers will have the knowledge to approve all fields on the EPAF. However, Finance Managers, Compensation, Budget, Human Resources & Senior Leaders are required to review information in the EPAF for accuracy.

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 Grants & Contracts if the EPAF is associated with a grant). 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?

Use the Approver Summary screen to check the status of your EPAFs:

- The **Current** tab displays EPAFs you need to act on.
- The **In My Queue** tab displays EPAFs that have been submitted, but that have not reached you yet.
- The **History** tab shows EPAFs you have already acted on.

What is “return for correction”?

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.

Will I receive a notification that I need to approve an EPAF?

Yes. Emails are generated twice a day and are sent to anyone who has EPAFs needing corrections, approval or available for FYI.

How do I designate a proxy to handle my approvals while I am gone?

EPAF approver proxies are separate from web time entry 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.