

EPAF User Guide for Banner 9

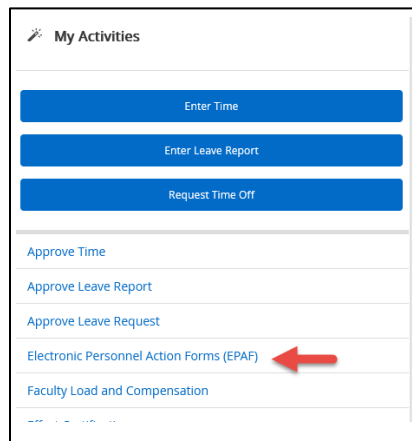
*EPAFs are Electronic Personnel Action Forms used through Banner Self-Service.
Before creating an EPAF for the first time, set up the default approval routing.*

Table of Contents

How to Access Electronic Personnel Action Forms (EPAF)	1
Setup Default Routing for EPAFs	1
EPAF – Choosing your Approval Category and entering the EPAF	2
For Approvers Only – Navigating Approver Summary EPAF	3

How to Access Electronic Personnel Action Forms (EPAF)

1. Log onto URSA
2. Click the Employee Tab and then **Employee Dashboard**.
3. Choose **Electronic Personnel Action Forms (EPAF)** and **New EPAF**.



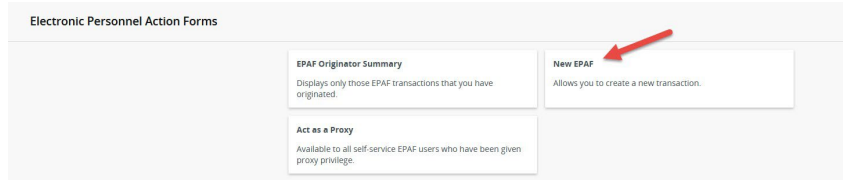
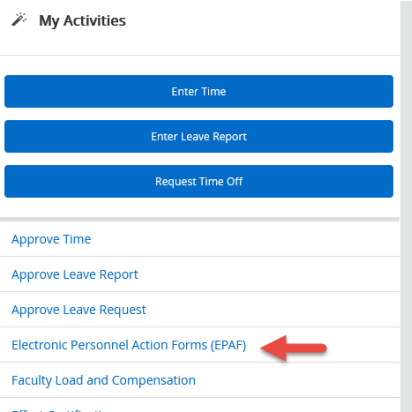
Setup Default Routing for EPAFs

1. Select **Electronic Personnel Action Form**.
2. Click **EPAF Originator Summary**, then **Default Routing Queue**.
3. Select appropriate Approval Category (name of EPAF) from drop down list.
4. Click **Go** – the mandatory approval levels for the selected EPAF type will appear.
5. Select users for each approval level from the drop-down list.
6. Click **Save Changes**
7. If adding another approval level, select Required Action from drop down list for each user
 - a. **Approve** = Required
 - i. Student EPAF approval categories are 84 for Approval
 - ii. GATA and Faculty approval categories are 86 for Approval
 - b. **Apply** = This is always 94 for all Approval Categories

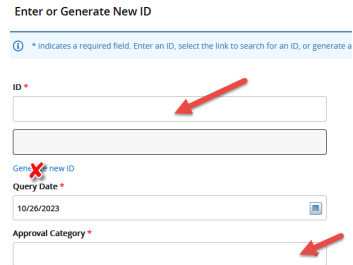
EPAF User Guide for Banner 9

Submitting an EPAF

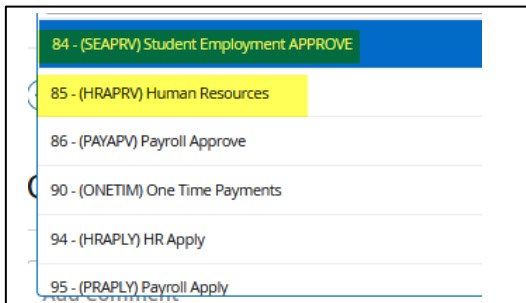
1. Log onto URSA
2. Click the Employee Tab and then **Employee Dashboard**.
3. Choose **Electronic Personnel Action Forms (EPAF)** and **New EPAF**.



4. Enter **Bear ID**, Effective Date and the Approval Category.



5. Click Go
6. Complete all fields that are NOT grayed out
NOTE: Be sure and update FOAP if needed!!
8. Confirm approval levels are accurate in the **Routing Queue**.
 - a. These should be pre-populated because of [Default Routing](#). If you have not setup Default Routing, select names from the drop-down list.:
 - i. Student EPAFs are 84 Approve and 94 Apply
 - ii. GATA and Faculty EPAFS are 86 Approve and 94 Apply

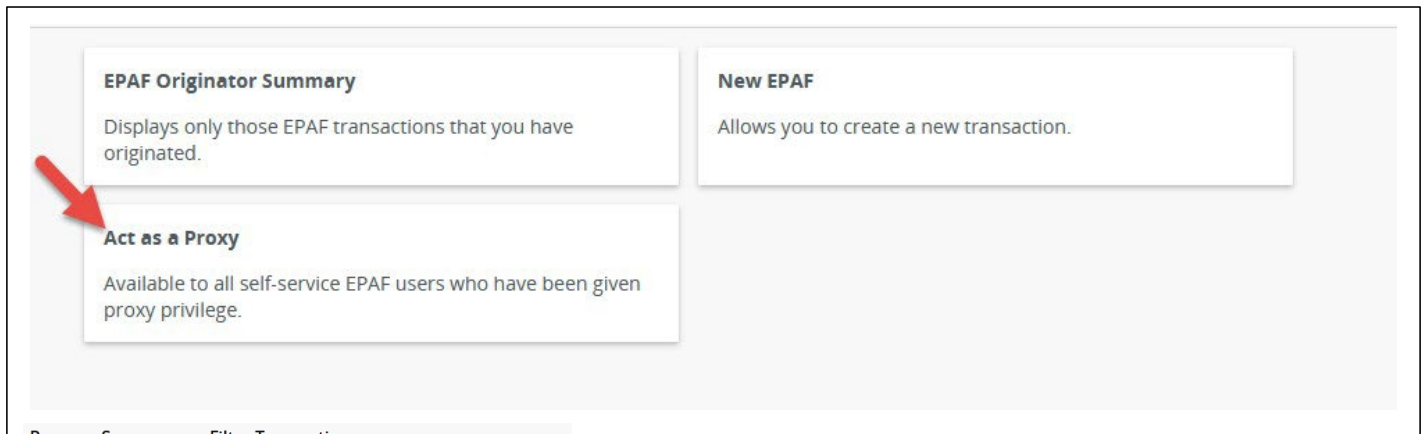


12. Add **Comments**, if necessary.
13. Click **Save**, then **Submit**. If no Errors, status will move to **Pending**.

EPAF User Guide for Banner 9

For Approvers Only –(Student Employment and Payroll)

1. Log onto URSA
2. Click the **Employee tab** and then **Employee Dashboard**.
3. Choose **Electronic Personnel Action Forms (EPAF)** under **My Activites**
4. Click on **"Act as a Proxy "**



Proxy or Superuser or Filter Transactions

Act as a proxy or a superuser and enter the following criteria to filter transactions.

Proxy For

Self

Act as a Superuser

Submitted From Date

MM/dd/yyyy

Submitted To Date

MM/dd/yyyy

Transactions Per Page

25

Go

Do Not enter dates to pull in all EPAFS

5. Review and Approve the EPAF, or "Add Comment" and "Return for Correction". DO NOT VOID

