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.

		Enter Tir	me	
		Enter Leave	Report	
		Request Tir	ne Off	
Approve Time	2			
Approve Leav	e Report			
Approve Leav	e Request			
Electronic Pe	sonnel Acti	on Forms	(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 alway 94 for all Approval Categories

EPAF User Guide for Banner 9

Submitting an EPAF

1. Log onto URSA

My Activities

- 2. Click the Employee Tab and then Employee Dashboard.
- 3. Choose Electronic Personnel Action Forms (EPAF) and New EPAF.

Enter Time	Electronic Personnel Action Forms		
Enter Leave Report	EP	AF Originator Summary	New EPAF
Request Time Off		splays only those EPAF transactions that you have ginated.	Allows you to create a new transactio
		t as a Proxy	
ve Time		ailable to all self-service EPAF users who have been given oxy privilege.	
ve Leave Report			
e Leave Request			
ronic Personnel Action Forms (EPAF)			
ty Load and Compensation			
	1		

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

 * Indicates a required field 	l. Enter an ID), select the lin	k to search for	an ID, or generate
D *				
Senex enew ID				
Query Date *				
10/26/2023				
Approval Category *				

Enter or Generate New ID

- 5. Click Go
- 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 <u>Default Routing</u>. 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

-	84 - (SEAPRV) Student Employment APPROVE
	85 - (HRAPRV) Human Resources
	86 - (PAYAPV) Payroll Approve
(90 - (ONETIM) One Time Payments
-	94 - (HRAPLY) HR Apply
1	95 - (PRAPLY) Payroll 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 Employement and Payroll)

1. Log onto URSA

Г

- 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 "

EPAF Originator Summary	New EPAF
Displays only those EPAF transactions that you have originated.	Allows you to create a new transaction.
Act as a Proxy	
Available to all self-service EPAF users who have been given proxy privilege.	

Proxy For		
Self	~ ~	•
Act as a Superuser		
submitted From Date		
MM/dd/yyyy		De Neterster deter
		Do Not enter dates to pull in all EPAFS
submitted To Date		
MM/dd/yyyy		
Transactions Per Page		

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

Add Comment	Approve	Return for Correction	×