

# Human Resources Information Systems Electronic Personnel Action Forms (EPAF) Reference Manual for Approvers

The Electronic Personnel Action Form (EPAF) provides a process for submission and approval of paperless personnel actions. EPAF's actions are grouped by category. Each category has the specific fields needed for the selected transaction. Originators can view current data based on the PAF security in Web\*Salary.

It is the responsibility of the approver to review each EAPF submitted to verify the transaction is valid, reasonable, and within the budget guidelines of the area. The EPAF can be approved, disapproved, and returned for correction. There is an audit trail of all approval/disapproval history.

Approved EPAFs are applied to the Banner system. The updated information displays on Web\*Salary and DrexelOne.

Requests to approve EPAFs can be found on the Human Resources Manager Forms page. http://www.drexel.edu/hr/management/forms/duforms/

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# 1. Accessing EPAFS

Log into DrexelOne.

drexelone	
Payroll	Development and Certification
Direct Deposit Advice / Pay Stub <u>Time Reporting and Leave Balances</u> <u>Tax Forms</u> <u>More BannerWeb Employee Services &gt;&gt;</u> View Benefits, Payroll, Job History Information and more	<u>Conflict of Interest Progra</u> <u>Career Pathway</u> Learning and Performance

- Select the **Employee** Tab.
- Select More BannerWeb Employee Services.

#### Go to the **Electronic Personnel Action** menu.

Personal Information Employee Services
Employee Main Menu
Every effort has been made by the University to provide accurate, up-to-date information. However, errors can occur. By using the information contained herein, t responsible for errors, omissions in information herein nor shall it be held liable for any special, consequential, or exemplary damages resulting, in whole or in part
<ul> <li>Conflict of Interest Program         Annual Conflict of Interest and Code of Conduct review is required by all Full Time and Part Time Faculty and Professional Staff (Adjuncts, Bargaining Units, an     </li> <li>Benefits and Deductions         Provide links to all benefits offered, your current benefit elections, and general information regarding benefits     </li> <li>Pay Information         View Pay Stubs, Direct Deposit Advice, Earnings and Deductions History     </li> <li>Tax Forms         View your current tax exemptions and allowances, and update resident withholding.     </li> </ul>
If you wish to make an update to non-resident withholding, please contact the tax office. For W-4 instructions and worksheets, click here Time Reporting Create or approve time sheets, leave reports, and view leave balances and activity
Current and Past Jobs View your job history
Electronic Personnel Action Forms     Web Based EPAFs are available on line for originators and approvers!     Electronic Redistributions
Select Electronic Personnel Action Forms

#### Go to Approver form.

Personal Information Employee Services
Electronic Personnel Action Form
EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy
Select Approver Summary

## 2. Approving EPAFs

Approval actions can be done from the EPAF Approver Summary page or from the EPAF Preview Page.

The **Current** tab will display items in your approval queue. The **In My Queue** tab displays transactions that have been submitted for your approval but require another approvers action before it moves into your queue. The **History** tab displays all prior transactions that you have approved.

EPAF Approver Summary								
Current / In My Queue / History								
Select the link under Name to access detail	ails of the tra	ansaction.						
Queue Status: All Go	_							
			New EPA	AF Update Proxies	Search   Proxy or	Superuser or Filter Ti	ransacti	ons
Select All Reset Save					Return to EPAF Me	nu		
Jump to Bottom								
EPAF Transactions								
▲ Name ▼	Å ID ⊽	A Transaction ▼	▲ Type of Change ▽	▲ Submitted Date ▼	▲ Effective Date	A Required Action	Action	Links
Heath, Dick Student Employee, 100608-00	55665365	681904	Student Rehire - Biweekly	Jul 20, 2016	Sep 01, 2016	Approve		Comments Warnings
Oswald, Clara O. Temp Lighting Designer, 100524-00	44332211	681907	Temporary Exempt Rehire	Jul 20, 2016	Aug 01, 2016	Approve		Comments
Roddenberry, Eugene R. Monthly Student Employee, 157325-00	14205472	681905	Student New Hire - Monthly	Jul 20, 2016	Sep 01, 2016	Approve		**Comments
1 - 3 of 3								
Return to Top								
**Comments Exist								
Select All Reset Save								

- Select the **Current** to view the EPAFS in your approval queue.
- Set the Queue Status to Pending.
- Click on the Employee name to link to the EPAF detail on the EPAF Preview page.
- You can view and approve each EPAF individually by clicking on their names, or you can approve them all at once by selecting "Select All" in the **Action** column.
- If you chose "Select All," you should see the boxes in the **Action** column checked. Once this box is checked, select Save, and your EPAFs will be approved.
- You cannot return an EPAF for correction from this page. You must access the detail of the EPAF by clicking on the Employee's name.

### **EPAF** Preview Page

EPAF Preview					
Name and ID:         Clar           Transaction:         681           Transaction Status:         Pen           Approval Category:         Tem           Previous         Next I           Approve         Disapprove	a O Oswald, 443: 907 ding nporary Exempt R	32211 Sehire, TMEXRH	Job and Suffix: 100524-00, Te Query Date: Aug 01, 2016 Last Paid Date: May 31, 2016	mp Lighting Designer	
				Approver Actions	Approval Types   Default Earnings   Routing Queue   EPAF Approver Summary
Jump to Bottom					Return to EPAP Menu
• - indicates a required	field.				
Enter Job Information	n, 100524-00	Temp Lightii	ng Designer, Last Paid Date	e: May 31, 2016	
Enter Changes	Current Valu	e New Value			
Job Begin Date:	10/01/2015				
Job Effective Date: *	05/31/2016	08/01/2016			
Retro/Effective Date:	05/31/2016				
Contract/Salary: *	******	24000			
Number of Pays: 🙀	8	12			
Number Pays Periods: #	8	12			
Hours per Pay: 🗶	20	75			
Timesheet Orgn: 🙀	3645	3645			
Timesheet COA:	D	D			
Job Category:	Primary	Secondary			
Job Change Reason:	EXPIR	REHIR			
Job Status:	Terminated	Active			
Step: Job End Date:	05/21/2010	v			
pop end Date:	05/31/2016	-	]		
Enter Default Earning	s, 100524-00	Temp Lighti	ing Designer, Last Paid Dat	e: May 31, 2016	
Current					
Effective Date Earnin	gs Hours of	r Units Per P	ay Deemed Hours Special I	Rate Shift End Date	
10/01/2015 REG, R	egular	20	.00	1	
New					
Effective Date Earning	gs Hours o	r Units Per P	ay Deemed Hours Special I	Rate Shift End Date	
Aug 01, 2016 REG, R	egular	75	.00	1	

After revising the EPAF detail, select the appropriate action:

- **Approve** moves the EPAF to the next approver.
- **Disapprove** stops the EPAF from processing. A comment must be added if the EPAF is disapproved.
- **Return for Correction** moves the EPAF back to the Originator for updates. After the EPAF is re-submitted, it must be approved by all approvers before it is completed. A comment must be added if the EPAF is returned for correction.
- **More Information** is an indicator that the EPAF is under review by an approver, but no action has been taken. This does not send the EPAF to either the originator or other approvers.
- Click on EPAF Approver Summary at the bottom of the page to return to the list of EPAFs to be approved.

## Adding a Comment

EPAF Preview					
Name and ID:	Clara O Oswald, 44332211	Job and Suffix: 100524-00, Temp Lighting Designer			
Transaction:	681907	Query Date: Aug 01, 2016			
Transaction Status	: Pending	Last Paid Date: May 31, 2016			
Approval Category	Approval Category: Temporary Exempt Rehire, TMEXRH				
😌 Previous 🛛 Next 🤤	•				
Approve Disapp	rove Return for Correction Mo	re Info Add Comment			

A comment must be entered if the EPAF is disapproved, returned for correction, or if the More Info box is selected.

- The **Add Comment** link takes the approver to the page to enter a comment.
- Any comments entered will be viewable by all the originator and all approvers. The comment will become part of the employee's official personnel file.

Example of comment	Comment	
	Example of comment	

Comment	t
Date:	Jul 19, 2016 09:09:56 AM
Made by:	Margaery L Tyrell, SLJ59
Comments	: Example of comment
	~
	~

*Tip*: When you save the transaction, the comment moves out of the comment box and is listed above with the user name

Click on EPAF Approver Summary at the bottom of the page to return to the list of EPAFs to be approved.

## 3. Proxy

An approver can delegate approval function to a proxy using the EPAF Proxy Records function. The person designated as a proxy assumes the same security role and can view the same information as the approver. Any actions taken by the proxy will indicate both the proxy's name and for whom they were acting as an approver.

The person acting as Proxy must have EPAF access set up before they can be a proxy for an approver. To request access, complete an EPAF Request form. The form can be found on the Human Resources page for Management Forms http://www.drexel.edu/hr/management/forms/duforms/

#### a. Adding a Proxy

Electronic Personnel Action Form	
EPAF Approver Summary	
EPAF Originator Summary	
EPAF Proxy Records	
Act as a Proxy	
RELEASE: 8.9.D	

• Select EPAF Proxy Records

#### **Define Approval Level for Proxy**

PAF Proxy Records	
pproval Level: Department, HR0050 V	
ame Remove Add	
ceener, Taylor K. (TKH23)	
Save	
EPAF Approver Summary	
Return to EPAF Menu	
ELEASE: 8.9.D	
2016 Ellucian Company L.P. and its affiliates.	

- Select Approval Level. Proxies are set up within an Approval Level.
- Use the pull down menu to view a list of names *Tip:* type in the first letter of the last name to help narrow the search.
- Click on Add to add the person to your proxy list.
- Click on Save.

### b. Removing a Proxy

There are no effective dates assigned to proxy access. Once the need for a proxy is no longer in effect, the proxy access should be removed.

Electronic Personnel Action Form
EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy
RELEASE: 8.9.D

• Select EPAF Proxy Records

EPAF Proxy Records		
Approval Level: Department, HR0050 🗸		
Name	Remove Add	
Sceener, Taylor K. (TKH23)		
Not Selected	✓ □	
Save		
		EPAF Approver Summary
		Return to EPAF Menu
RELEASE: 8.9.D		

- Select Approval Level.
- Click on **Remove** next to the name of the proxy.
- Click on Save.

### c. Acting as a Proxy

An approver must assign a proxy. A proxy cannot select approvers for whom they can take actions. Once an approver has assigned a proxy, the proxy will be able to select the approver's name, and then review and approve transactions as appropriate.

Electronic Personnel Action Form	
EPAF Approver Summary EPAF Originator Summary New EPAF	
EPAF Proxy Records Act as a Proxy	
RELEASE: 8.9.D	

• Select Act as a Proxy

#### **Select Approver**

Proxy or Superuser or	Filter Transactions
Rct as a proxy or a superuser and	enter the following criteria to filter transactions.
Proxy For:	Lannister, Cersei L.
Act as a Superuser:	
Submitted From Date: MM/DD/YYYY	07/01/2016
Submitted To Date: MM/DD/YYYY	07/15/2016
Transactions Per Page:	25 🗸
Go	

- Select the name of the person for whom you want to act as a proxy from the drop down menu
- (Optional) Select the time range for which you want to want to view submitted EPAFs
- Clicking on **Go** will take you to the Approver Summary page. The Approver Summary will display a listing of transactions pending approval. Follow the instructions for reviewing and approving EPAF actions.

# 4. EPAF Approver Summary History

The **EPAF Approver Summary** contains EPAFs where you have been listed as an approver. The History tab displays all EPAFs that have been approved by you.

Electronic Personnel Action Form	
EPAF Approver Summary 🗡	
EPAF Originator Summary	
New EPAF	
EPAF Proxy Records	
Act as a Proxy	

• Select the EPAF Approver Summary

EPAF Approver Summary									
Current In My Queue History	ails of the trai	nsaction.							
Queue Status: All Removed from Queue	Go								
	New EPAF   Update Proxies   Search   Proxy or Superuser or Filter Transactions Return to EPAF Menu								
1 - 3 of 3									
Jump to Bottom									
EPAF Transactions	A ==								
▲ Name ▼		▲ Transaction	I▲ Type of Change ▼	▲ Submitted Date	A Effective Date ▼	Links			
Heath, Dick Student Employee, 100608-00	55665365	627286	Termination from University - Retirement	Jun 11, 2016	Jun 11, 2016	**Comments			
Oswald, Clara O. Temp Lighting Designer, 100524-00	44332211	627283	NEA or Volunteer - Rehire or Extend End Date	Jun 11, 2016	Jun 11, 2016	**Comments			
Roddenberry, Eugene R. Monthly Student Employee, 157325-00	14205472	627280	Faculty Reappoinment - No Pay Change or Promotion	Jun 10, 2016	Jun 10, 2016	**Comments			
1 - 3 of 3									
Return to Top									
**Comments Exist									

• Click on the **History** Tab.