EPAF - Frequently Asked Questions

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What is EPAF

1. What is an EPAF?
It is a Banner Electronic Personnel Action Form (EPAF) located on the Self Service portal (http://myut.utoledo.edu/) used for routing and approval for certain proposed changes to employee or job information.

2. What is an EPAF used for?
EPAF is used for employment transactions, such as hiring students. Managers can hire new students, add additional positions, and end current positions when students are leaving.

3. Who uses EPAF?
EPAF is used by units to initiate changes to an employee’s personnel or job information. Each unit will designate a person to be an originator who initiates the transaction, and an approver who approves the transaction.

4. What do I need to do if one of my EPAF approvers or originators is on vacation or terminates?
It is recommended that more than one originator is established for each unit. If an approver is going to be out of the office, they should set-up a proxy who can approve transactions while they are on vacation. Please inform Payroll when an originator or approver has left the University.

Originators

1. How do I determine the employees in my unit who will be an EPAF originator?
You will probably want to consider those employees who have previously handled student employment transactions on paper (SEPAs) within your department.

2. Can there be more than one originator per office?
Yes, there can be as many originators per office as the unit decides.

3. Can anyone initiate an EPAF for any employee?
Yes, anyone who has security access to EPAFs can initiate an EPAF for any employee. However, only the home department will see current values for this employee.

4. What happens if I initiate and submit an EPAF, then realize there is an error in it?
If it has not gone through final approval, you can contact the next approver in the queue and have them return it to you for correction. If it has already been approved, contact Career Services for student EPAFs.
5. If I make a mistake on an EPAF and submit the information, how can I go back and correct it?
The persons in the routing queue can send it back to you as a "Return for Correction" or as an originator, "Void" the transaction and start over again.

6. What do I do if I need to make a change to a job record after an EPAF has been approved and is in a "complete" status?
If the transaction is in a "complete" status, contact your campus Payroll office.

7. Is there any way to add comments to EPAFs?
Yes, you may add comments in the transaction comment area accessible in the Comments section below the Routing queue.

8. What do I do if I complete an EPAF and I send it on for approval and then I realize that I have made an error?
If the status is still waiting, you can go back in and correct the error. If the status is pending, you have to let the next person in the approval queue return it to you for correction and then correct the error. If the status is Approved or Complete you should contact Career Services for student EPAFs.

9. Will paperwork still be needed?
No

Approvers

1. How are EPAF routing queues set up?
All EPAFs are set up with University-defined required approval levels. The originator can choose additional levels beyond these required approval levels.

2. Does the originator need to identify people to fulfill various approver levels defined in the EPAF?
Yes, each EPAF transaction needs one or more approvers and one applier. The originator must define who will fulfill these requirements (from the list of Approvers) when initiating the EPAF.

3. Can the approver list be customized for a specific Unit?
No, when selecting approvers/appliers for approval routes, lists include all system-wide approvers/appliers.

4. Do approvers need to be selected every time? Or can Banner set up default approvers for EPAF transactions?
Yes, you can set up default approvers by clicking on the Originator Summary page, then click on Default Routing Queue. If the defaults are not set-up, then you will enter the approvers every time you create an EPAF.

5. If the originator selects the wrong approver, can he or she re-rout it?
If the originator has not submitted the EPAF, he or she may make changes prior to the submission. However, once it is submitted, the originator may only make changes to the transaction if it has been returned for correction. He or she may request the approver to return the transaction.
Approval Process

1. Are transactions sent to Approvers sequentially?
Yes, as soon as an EPAF transaction is initiated, it is instantly sent to the first approver in the approval queue. Each approver in the queue will need to take action (except for FYI) before the EPAF transaction is sent to the next approver.

2. How will users know the status of an EPAF transaction?
The originator and approvers who are in the transaction queue can check the status of the EPAF by clicking on the Summary page then click on the History tab.

3. What is the time period that an EPAF has to be processed?
An EPAF must be processed within the payroll time period. If an EPAF is received and the date on the transaction has passed Payroll will return the EPAF for the date to be changed for the next pay cycle.

4. Can I apply approval to a document if an approver at a level below mine still needs to approve it?
No. Banner sends transactions sequentially through the approval queue, so the first approver must take action before the second approver can, and so on.

5. How will I know that there are documents awaiting my approval?
Also upon logging into a Banner HR session, a message box will appear letting you know that there are transactions pending action from you as an approver, and clicking "Yes" to this message will bring you to a list of documents needing your action.

6. There is an error on the EPAF document. Should I disapprove the document or return it for corrections?
Returning the document for a correction is the preferred method. Disapproving the document will stop the transaction and you will be required to enter a new document. Don't forget to add a transaction comment explaining why it was returned.

7. What is the purpose of the hold for "More Information"?
This approver action allows an approver to hold an EPAF if he or she needs more information before taking action on the transaction.

8. What do I do if I apply approval and I am the last (or only) approver of an EPAF document, and realize there was a mistake on the document?
You will need to contact your campus Payroll to have them intervene in the system.

9. When an approver returns an EPAF for correction to the originator, how does the approver notify the originator of the necessary changes?
The approver will use the transaction comments box to document what changes are required.

10. Can the approver see current values in the EPAF if the originator cannot?
The approver can see the current values if he or she has Banner security access.
11. What happens if the Approver ignores the transaction, and there is no Proxy assigned for the approver?
The EPAF will remain in the system until the approver takes action. For an extreme circumstance, please contact your campus Payroll.

12. If you are not an Approver in the queue can you see the transaction?
No, only the originator and the approvers who are part of the routing queue and a proxy of an approver can view the transaction.

13. Can an approver change the names in the approval queue?
No, only the originator can set up and change the routing queue.

14. Can I disapprove an EPAF after I have approved it?
No, you would need to contact the next level approver and ask them to either disapprove the EPAF or ask the Originator to void the EPAF.

15. Do I need to set up a proxy for approving EPAFs?
It is a good idea to setup at least one proxy in the event you are not available to complete or approve EPAFs.

EPAF Roles

1. Does the Proxy have the same security as the Approver?
Yes, the proxy will see only what you would see as an approver. This applies only to the EPAF role.

2. Can you add an FYI after the EPAF is completed?
No.

3. Approval Category and Approval Type are two fields on the EPAF. Will the Originator have to ensure the relationship between the two is valid?
The approval type field defaults in after the approval category is selected.