2022

EPAF (ELECTRONIC PERSONNEL ACTION FORM)

Manual
Change in Supervisor

(previously known as Supervisor Information Update Form)

The supervisor (Direct Report) listed in Banner is defined as the person who is responsible for completing evaluations (responsible for the employee's performance, discipline, etc.).

Table of Contents

Requesting access

The supervisor (Direct Report) listed in Banner is defined as the person who is responsible for completing evaluations (responsible for the employee's performance, discipline, etc.).

- Place your request through the [ePAF Access Request Form](#)
- Once access is granted you will receive an email to confirm the access has been set-up
- **Please note** that if you are in need of originator and approver access you need to submit this form twice.

Accessing EPAF's

- Click the link Personnel Action (utoledo.edu): https://bannerepaf.utoledo.edu/

EPAF Dates

Query Date	• Equals today's date. • Did the assignment start before today's date? Yes, refer to the Personnel Date
Jobs Effective Date	If the employee was recently paid the date will be **one date** past the last paid date
Personnel Date	Can by any date

Personnel Action Type

- Select the "Personnel Action Type"[1]

    o Student Employee: FWS
    o Grad student Emp
    o Sutdent Employee
    o Staff
    o Faculty

Personal Action Type	Student Employee/Student Grants	Grad Student Emp (GA ang GA Grant)	Student Employee: FWS	Staff	Faculty
EPAF Types aka Select Action	• New Hire • Rehire • Additional Position • Rate Change • Change End Date	• New Hire • Rehire • Additional/New Position • Change Stipend and Date • Labor Distribution Change • Change End date	• New Hire • Rehire • Additional Position • Change End Date	• Change in Supervisor	•

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[1] Personal Action Type and EPAF Types are based on access

Select Funding Type

- Select the "Funding Type"
  - This position was, is or will be funded by a grant

    OR

  - Grant funds are not associated with this proposal

Rocket Number/Search by name

- Enter the "Rocket Number"

    OR

- Click on "Search by name"

- In the Search box, enter as little or as much as you want
  - You can use the wild card %
  - Examples using a wild card
    - First Name example Barb%
    - Last Name example Rard%
  - Click "Search"

- Once you have identified the employees name
  - Click on "Select"

Enter Query Date[2]

- Enter as "mm/dd/yyyy"
- What date do I enter?
  - Enter today's date
- After you enter the date select "Next"

Personnel Action Type *	Staff
Funding Type *	○ This position was, is or will be funded by a grant
	● Grant funds are not associated with this proposal
Rocket Number *	R00167800 or **Search** by name
Name	Rardin, Barbara L
Primary Position	HRIS Administrator
Timesheet Organization	105760, Human Resources
Query Date *	10/19/2021 mm/dd/yyyy)

NEXT

Select Action

- Select the action or a.k.a. EPAF Types (see page 4) from the list
  - Refer to the specific EPAF documentation on what is needed to be entered.
- Click "Next"

Select Action:

Staff–Change in Supervisor

NEXT

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[2] Refer to *EPAF Dates*, see page 4

EPAF Values to Enter

Selecting the position

- The change will be the employee's "Primary" position in the column heading "Type"
    - Make sure the radio button is selected
    - Click "Go"

Staff-Change in Supervisor, CHGSP

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									○
	Primary	935080	00	HRIS Analyst 1	105760, Human Resources	Feb 15, 2021		Jul 16, 2021	Active	●

All Jobs

Go

Enter the values

Item	Current Value	New Value
Jobs Effective Date[3]	The latest value in Banner.	Date needs to be one day past the "Last Paid Date" (i.e., 01/01/2022)
Personnel Date[4]		This date can be any date
Supervisor ID[5]		Rocket number of the supervisor
Supervisor Position		PCN of supervisor, refer to *How to find your PCN and Suffix #*, see page 8
Supervisor Suffix		Suffix for Supervisor. Most of the time it will be 00 (zero zero), refer to *How to find your PCN and Suffix #*, see page 8

Before:

Staff-Change in Supervisor, 935268-00 HRIS Administrator, Last Paid Date: Dec 31, 2021

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY✱	08/09/2021	
Personnel Date: MM/DD/YYYY✱	08/09/2021	
Job Change Reason: ✱(Not Enterable)	09	116
Salary Group: ✱(Not Enterable)	2022	2022
Supervisor ID: ✱	R00057855	
Supervisor Position: ✱	992916	
Supervisor Suffix: ✱	00	

After:

Staff-Change in Supervisor, 935268-00 HRIS Administrator, Last Paid Date: Jan 14, 2022

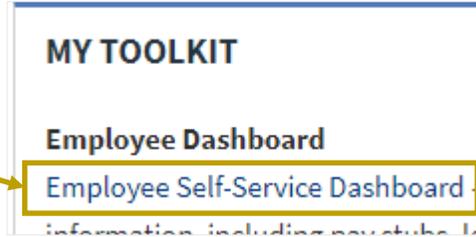| Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY✱	08/09/2021	01/15/2022
Personnel Date: MM/DD/YYYY✱	08/09/2021	07/01/2021
Job Change Reason: ✱(Not Enterable)	09	116
Salary Group: ✱(Not Enterable)	2022	2022
Supervisor ID: ✱	R00057855	R00057855
Supervisor Position: ✱	992916	992916
Supervisor Suffix: ✱	00	00

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[3] Refer to the *EPAF Dates*, see page 4
[4] Refer to the *EPAF Dates*, see page 4
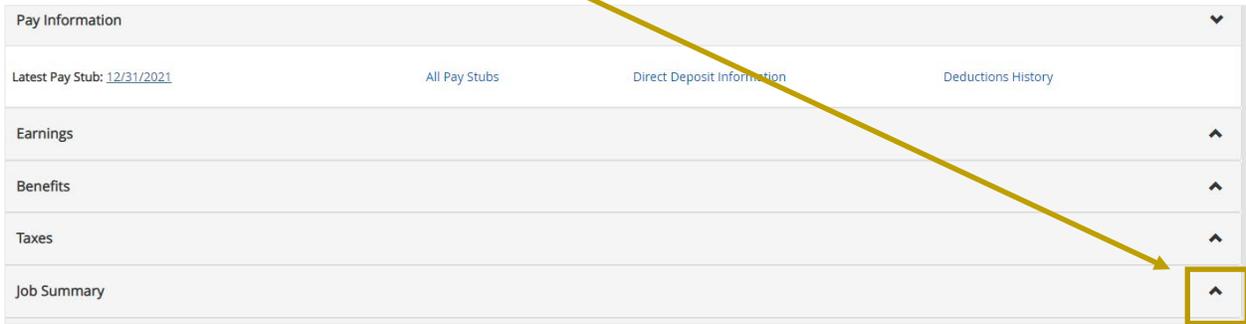[5] Refer to the *EPAF Dates*, see page 4
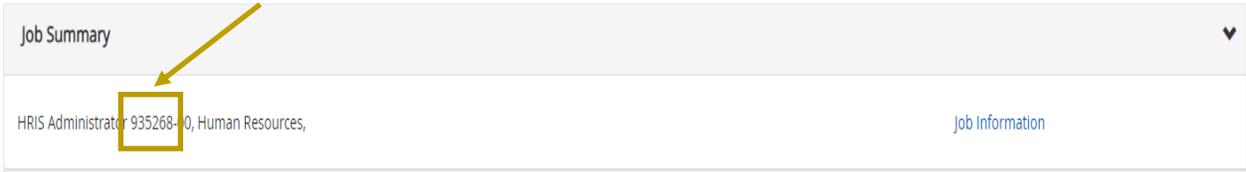
How to find your PCN and Suffix

- Log into your myUT (utoledo.edu)
- Select "Employee Self-Service Dashboard"

MY TOOLKIT

Employee Dashboard

Employee Self-Service Dashboard –

information, including nay stubs, l

- Under the Job Summary, click the "up arrow"

Pay Information				⌄
Latest Pay Stub: 12/31/2021	All Pay Stubs	Direct Deposit Information	Deductions History	
Earnings				⌃
Benefits				⌃
Taxes				⌃
Job Summary				⌃

- The data will now be expanded for your information.
  - Your PCN

Job Summary		⌄
HRIS Administrator 935268-00, Human Resources,	Job Information	

- Your Suffix is to the right of your PCN

Job Summary		⌄
HRIS Administrator 935268-00, Human Resources,	Job Information	
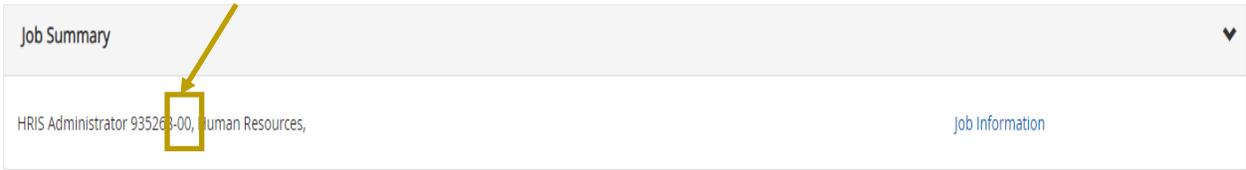
Routing Queue

Routing Queue

Approval Level	User Name	Required Action
10 - (MGMT) Management	🔍	Approve
91 - (HRIS) HRIS	🔍	FYI
99 - (HRAPPL) HR Apply/Superuser	🔍	Apply

Approvers for the following levels

Approval Level	Username to enter	Required Action
10 – (MGMT) Management	See *How to enter an Approver or Search for one*	Approve
91 – (HRIS) HRIS	MCARDENAS	Approve
99 – (HRAPPL) HR Apply/Superuser	BANWORX	Apply

How to enter an Approver or Search for one

- Enter the users name (i.e., Jcoyne2) in the field

    OR

- Select the magnifying glass to search for the supervisor in one of two ways:

    - First way
        - Scroll down
        - Click on the name
        - The name will be highlighted
        - Click on "Select"
        - i.e. JCOYNE2

        OR

Valid Values - Work - Microsoft Edge

🔒 https://selfservice.utoledo.edu/prod/bwpkepaf.P_DispValidValues...

Search [   ] Go

Valid Values

Search: [   ] Go

**User Names,
10 - Management**

Chauvin, Gordon G. (GCHAUVI)
Cheng, Liang (LCHENG3)
Clark, Sara F. (SCLARK23)
Coleman, Maria R. (MCOLEMA6)
Colombo, Peggy M. (PCOLOMB)
Corkins, Debbie L. (DCORKIN)
Cox, Sherry (SCOX3)
Coyne, Jeffrey A. (JCOYNE2)
Cullum, Sarah (SCULLUM)
Cutcher, Ashley L. (AWICKER3)
Czechowski, Aaron J. (ACZECHO)
D'Emilio, Dominic A. (DDEMILI)
Davis, Claudia (CLDAVIS)
Davis, Debra A. (DDAVIS6)
Delaney, Katherine K. (KDELANE2)

[Select]

Exit Window

    - Second way—searching for the supervisor
        - Enter the supervisors name in the "Search" field
        - Click on "Go"
        - Click on the name
        - The name will be highlighted
        - Click on "Select"
        - i.e. JCOYNE2

Valid Values

Search: [Coyne] Go

**User Names,
10 - Management**

Coyne, Jeffrey A. (JCOYNE2)

Comment

Comment

[comment text box]

- Enter text here as to why the change is being made.
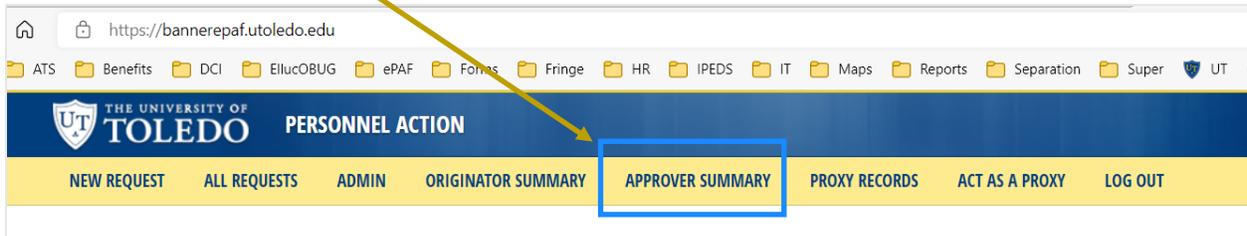
Submitting the EPAF

- Click on "Save"

Save

Return to Top

- Click on "Submit"

Approval Category:
Save Submit Delete

Jump to Bottom
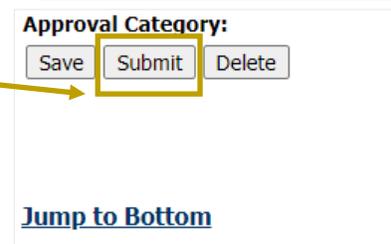
Approving the EPAF

- Log in to [Personnel Action (utoledo.edu): https://bannerepaf.utoledo.edu/](https://bannerepaf.utoledo.edu/)
- Click on Approver Summary

- Sign in with your organization account
  - User name
  - Password
- Click "Sign in"

How to Approve

There are two (2) ways to approve an EPAF

- First way to approve an EPAF
  - Check the box in Actions
  - Click on "Save"
  - The EPAF is approved and removed from your queue

- Second way to approve an EPAF
  - Click on the name
  - Review the details
  - Is the information correct?
    - **Yes**, click on "Approve"
    - **No**, Click on "Return for Correction"

Warnings vs Errors

- Warning are okay
- Errors please email HRsupport@utoledo.edu for assistance and make sure you let us know the name of the employee and the transaction ID
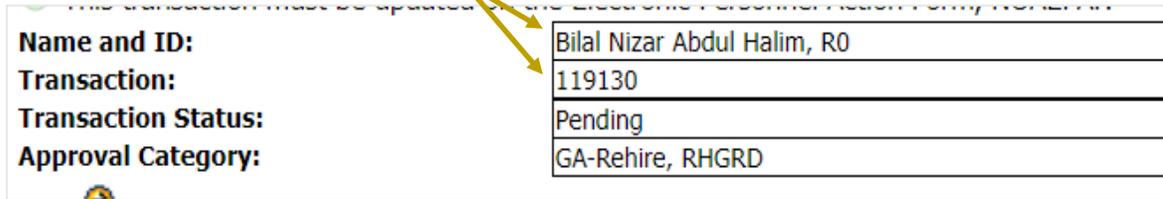
Name and ID:	Bilal Nizar Abdul Halim, R0
Transaction:	119130
Transaction Status:	Pending
Approval Category:	GA-Rehire, RHGRD

Questions

- Please contact HRsupport@utoledo.edu

Definitions

Item	Definition
Contract Types	Primary—is the first active job Secondary—is the second active job
Created	The Originator who created the EPAF
Delete	The EPAF is deleted, and you will have to create a new EPAF all over
ePAF	Electronic Personnel Action Form
ePAF Approver Summary	A summary page that is available to all ePAF approvers and has three tabs. **Current**—displays ePAF transactions that will require action by you as an approver **In my Queue**—displays ePAF transactions that will require action by you as the approver in the future **History**—displays ePAF transactions that you have previously acted on as an approver
ePAF Originator Summary	A summary page that is available to all ePAF originators to check the status of ePAF transactions they have created. **Current**—displays ePAF transactions that require action by you as the originator with transaction statuses of Waiting or Return for Corrections. **History**—displays ePAF transactions that have already been submitted by you as the Originator
ePAF Proxy Records	To Proxy an ePAF if you have been set-up as a Proxy
Error	You can't submit the ePAF until the error is cleared
New EPAF	To create a new ePAF
Originator	The person who creates the ePAF
PCN	Position Control Number
Queue status	Reference the current routing status of the ePAF with the individual defined in the approval queue. The queue statuses are: **Acknowledge**—The person listed as FYI has viewed the EPAF transaction **Applied**—ePAF transaction has been applied to database **Approved**—ePAF transaction has been approved by the Approver. **Dis-Approved**—ePAF transaction has been disapproved by the Approver **FYI**—ePAF transaction is for information only. No action required **In the queue**—ePAF transaction nis on the way but requires an action prior to your level. **Pending**—ePAF transaction is ready for action by the approver **Removed from Queue**—The originator has voided the ePAF and is no longer in the queue **Return for Correction**—ePAF transaction has been returned to the originator for correction by the approver **Void**—ePAF transaction has been voided by the originator.
Submitted	ePAF was submitted by the Originator to the Approver
Transaction number	Unique number for a transaction; automatically generated by Banner

Definitions (continued)

Transaction Status	Reference the status of the ePAF itself. Displayed at the Originator Summary and at the top of each ePAF transaction. The transaction statues are:
	Approved—Indicates the EPAF transaction has been approved by all necessary approvers but has not yet been applied to the database by payroll.
	Cancelled—Indicates that the EPAF transaction has been cancelled after it has already been applied to the database.
	Complete—Indicated the EPAF transaction has been applied to the database by payroll.
	Disapproved—Indicates the EPAF has been disapproved by an approver.
	Partially completed—Indicated a portion of the EPAF transaction has been applied to the database by payroll and the remaining portion of the EPAF transaction will be applied to the database at a later date.
	Pending—Indicates the EPAF transaction requires positive action by the approver(s).
	Return for Correction—Indicates the EPAF transaction has been returned to the originator for correction by an approver. The originator will need to update the EPAF transaction as needed and submit again for approval. When an EPAF transaction has been returned for correction, it isas if the EPAF transaction was never submitted for approval. Therefore, all approvers in the routing queue will need to approve the EPAF transaction even if they had previously approved it before it was returned for correction.
	Void—Indicate the originator has voided the EPAF transaction and it is no longer a valid transaction. Only originators can void an EPAF transaction.
	Waiting—Indicates the EPAF transaction is in the process of being created by the originator and has not yet been submitted for approval. The EPAF transaction will not display on the EPAF Approver Summary while in waiting status.
Warnings	Nothing to worry about
Wild Card	%