



THE UNIVERSITY OF  
**TOLEDO**

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.....	3
Accessing EPAF's.....	3
EPAF Dates .....	4
Personnel Action Type.....	4
EPAF Types aka Select Action.....	4
Select Funding Type .....	5
Rocket Number/Search by name .....	5
Enter Query Date.....	6
Select Action .....	6
EPAF Values to Enter.....	7
Selecting the position.....	7
Enter the values .....	7
How to find your PCN and Suffix #.....	8
Routing Queue .....	9
Approvers for the following levels.....	9
How to enter an Approver or Search for one .....	9
Comment .....	10
Submitting the EPAF.....	10
Approving the EPAF .....	11
How to Approve .....	12
Warnings vs Errors .....	13
Questions .....	13
Definitions.....	14
Definitions (continued).....	15

## 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.

**THE UNIVERSITY OF TOLEDO**

### ePAF Access Request

**THIS REQUEST IS ONLY FOR ACTIVE EMPLOYEES OF THE UNIVERSITY**  
Banner Electronic Personnel Action Forms (ePAFs) are used for actions for Graduate Assistants (GAs) and student workers and also Staff and Faculty change in supervisor. Please complete this form to request access to be an ePAF originator or approver. Keep in mind that you cannot be listed as an approver for an action that you originate. For questions regarding student workers, contact StudentEmpServ@UToledo.Edu. For questions regarding Graduate Assistants, contact GradAssist@UToledo.Edu.

Your request will be sent to HRsupport@Utoledo.edu and access will be granted within 24-48 hours of receipt of the request.

**\*NOTE\* If you need both originator and approver access you will need to submit this form twice.**

Hi, Christina. When you submit this form, the owner will see your name and email address.

\* Required

Your Information

1. Rocket # \*

Enter your answer

This question is required.

2. First Name \*

Enter your answer

This question is required.

## Accessing EPAF's

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

← → ↻ 🏠 <https://bannerepaf.utoledo.edu>

Pers Acad ATS ElucianOBUG ePAF HR IPEDS IT Maps Reports Salary Fringe SharePoint Share Point UT Banner Access Dir Dynamic

### THE UNIVERSITY OF TOLEDO PERSONNEL ACTION

NEW REQUEST ALL REQUESTS ADMIN ORIGINATOR SUMMARY APPROVER SUMMARY PROXY RECORDS ACT AS A PROXY LOG OUT

Personnel Action Type \*

Rocket Number \*  or Search by name

**NEXT**

## EPAF Dates

Query Date	<ul style="list-style-type: none"> <li>• Equals today's date.</li> <li>• Did the assignment start before today's date? Yes, refer to the Personnel Date</li> </ul>
Jobs Effective Date	If the employee was recently paid the date will be <b>one date</b> past the last paid date
Personnel Date	Can by any date

## Personnel Action Type

- Select the "Personnel Action Type"<sup>1</sup>

- Student Employee: FWS
- Grad student Emp
- Student Employee
- Staff
- 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	<ul style="list-style-type: none"> <li>• New Hire</li> <li>• Rehire</li> <li>• Additional Position</li> <li>• Rate Change</li> <li>• Change End Date</li> </ul>	<ul style="list-style-type: none"> <li>• New Hire</li> <li>• Rehire</li> <li>• Additional/New Position</li> <li>• Change Stipend and Date</li> <li>• Labor Distribution Change</li> <li>• Change End date</li> </ul>	<ul style="list-style-type: none"> <li>• New Hire</li> <li>• Rehire</li> <li>• Additional Position</li> <li>• Change End Date</li> </ul>	<ul style="list-style-type: none"> <li>• Change in Supervisor</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>

<sup>1</sup> 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

Personnel Action Type \* Student Employee

Funding Type \*  This position was, is or will be funded by a grant  
 Grant funds are not associated with this proposal

Rocket Number \*  or Search by name

NEXT

OR

- Grant funds are not associated with this proposal

## Rocket Number/Search by name

- Enter the “Rocket Number”

Personnel Action Type \* Student Employee

Funding Type \*  This position was, is or will be funded by a grant  
 Grant funds are not associated with this proposal

Rocket Number \* R001 or Search by name

Name Rardin, Barbara Louise  
 Date of Birth 11/07/1965  
 College  
 Degree  
 Major  
 Concentration (if available)  
 Program

NEXT

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”

First Name: Barbara

Last Name: Rardin

SEARCH

- Once you have identified the employees name
  - Click on “Select”

Rocket Number	Full Name
	Busch Girard, Amber R
	Erard, Kimberly June
	Everard, Robert D

## Enter Query Date<sup>2</sup>

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

The screenshot shows a form with the following fields and values:

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

Annotations include a yellow box around the "NEXT" button and a yellow box around the "Query Date" field. Arrows point from the list items to these elements.

## 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”

The screenshot shows a dropdown menu titled "Select Action:" with the selected option "Staff-Change in Supervisor" highlighted by a yellow box. Below the dropdown is a "NEXT" button, also highlighted by a yellow box. An arrow points from the list item to the dropdown, and another arrow points from the list item to the "NEXT" button.

<sup>2</sup> 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
<input type="text"/>	<input type="radio"/> New Job									<input type="radio"/>
	<input checked="" type="radio"/> Primary	935080	00	HRIS Analyst 1	105760, Human Resources	Feb 15, 2021		Jul 16, 2021	Active	<input checked="" type="radio"/>

All Jobs

Go

### Enter the values

Item	Current Value	New Value
Jobs Effective Date <sup>3</sup>	The latest value in Banner.	Date needs to be one day past the "Last Paid Date" (i.e., 01/01/2022)
Personnel Date <sup>4</sup>		This date can be any date
Supervisor ID <sup>5</sup>		Rocket number of the supervisor
Supervisor Position		PCN of supervisor, refer to <i>How to find your PCN and Suffix #</i> , see page 8
Supervisor Suffix		Suffix for Supervisor. Most of the time it will be 00 (zero zero), refer to <i>How to find your PCN and Suffix #</i> , 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	<input type="text"/>
Personnel Date: MM/DD/YYYY*	08/09/2021	<input type="text"/>
Job Change Reason: *(Not Enterable) 09		116
Salary Group: *(Not Enterable)	2022	2022
Supervisor ID: *	R00057855	<input type="text"/>
Supervisor Position: *	992916	<input type="text"/>
Supervisor Suffix: *	00	<input type="text"/>

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

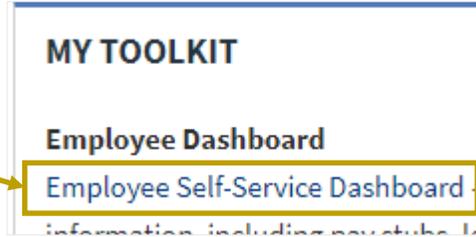
<sup>3</sup> Refer to the *EPAF Dates*, see page 4

<sup>4</sup> Refer to the *EPAF Dates*, see page 4

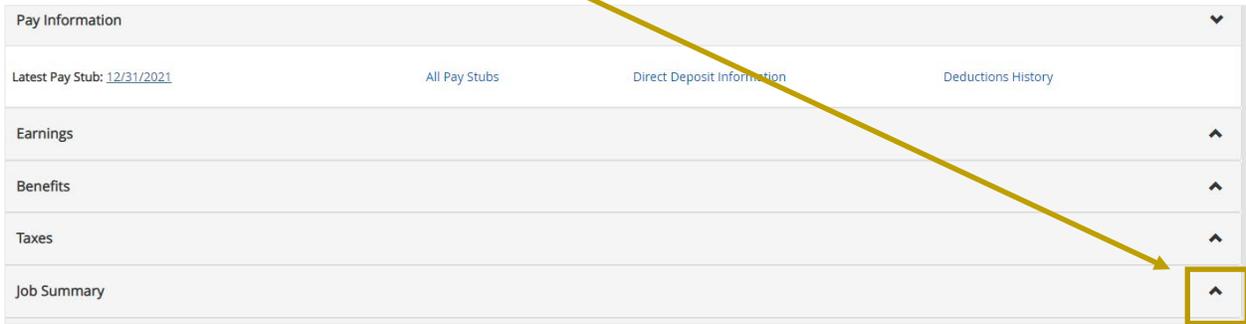
<sup>5</sup> Refer to the *EPAF Dates*, see page 4

How to find your PCN and Suffix #

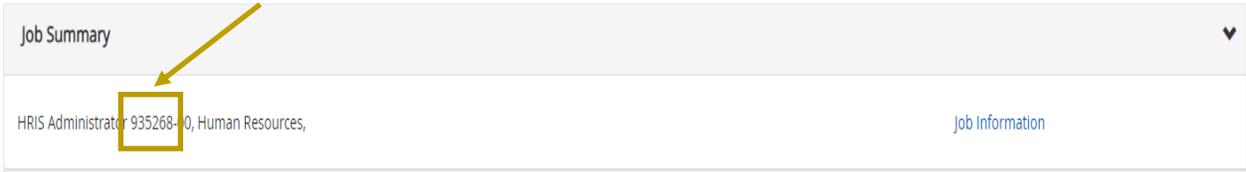
- Log into your [myUT \(utoledo.edu\)](https://utoledo.edu)
- Select “Employee Self-Service Dashboard”



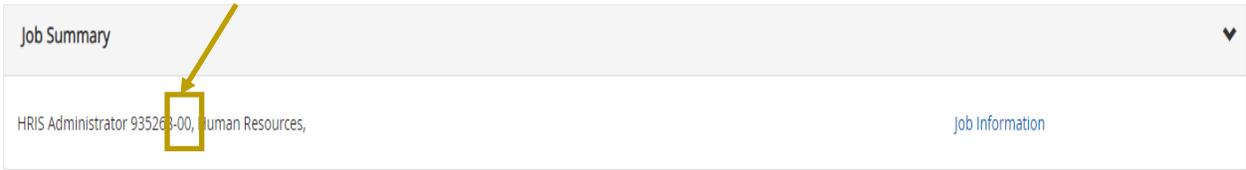
- Under the Job Summary, click the “up arrow”



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



- Your Suffix is to the right of your PCN



## Routing Queue

Approval Level	User Name	Required Action
10 - (MGMT) Management	<input type="text"/>	Approve
91 - (HRIS) HRIS	<input type="text"/>	FYI
99 - (HRAPPL) HR Apply/Superuser	<input type="text"/>	Apply

### Approvers for the following levels

Approval Level	Username to enter	Required Action
10 – (MGMT) Management	See <a href="#">How to enter an Approver or Search for one</a>	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

- 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 - Work - Microsoft Edge  
 https://selfservice.utoledo.edu/prod/bwpkepaf.P\_DisValidValues...  
 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. (DDEMIL1)  
 Davis, Claudia (CLDAVIS)  
 Davis, Debra A. (DDAVIS6)  
 Delaney, Katherine K. (KDELANE2)  
 Select  
 Exit Window

Valid Values  
 Search: Coyne  Go  
 User Names,  
 10 - Management  
 Coyne, Jeffrey A. (JCOYNE2)

## Comment

Comment

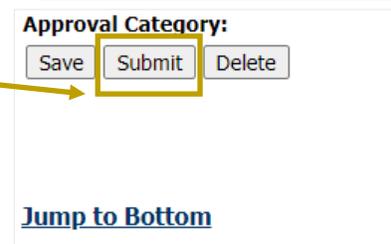
- Enter text here as to why the change is being made.

## Submitting the EPAF

- Click on "Save"

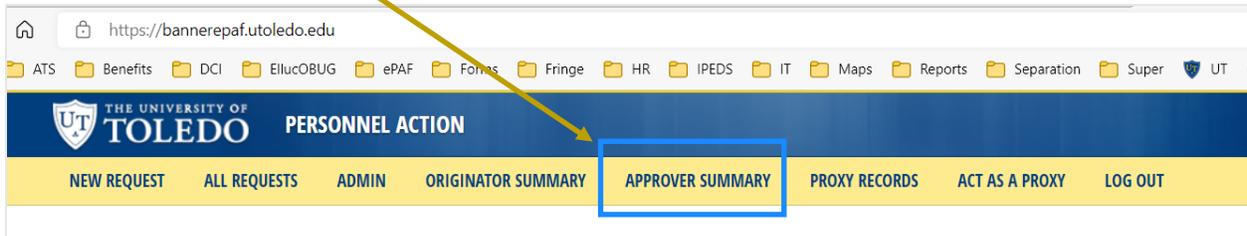


- Click on "Submit"



## 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"

A screenshot of the sign-in page for The University of Toledo. The page title is "The University of Toledo". Below the title, it says "Sign in with your organizational account". There are two input fields: the first contains the email address "brardin@rockets.utoledo.edu" and the second contains a masked password ".....". A blue "Sign in" button is located at the bottom of the form. A yellow arrow points from the third bullet point in the list above to this button.

## 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

**EPAF Approver Summary**

Current | **In My Queue** | History

Select the link under Name to access details of the transaction.

✓ You are acting as a Superuser.  
 ✓ Filtering On

Queue Status: All | Pending | Go

[New EPAF](#) | [Update Proxies](#) | [Search](#) | [Proxy or Superuser](#) | [Filter Transactions](#)  
[Return to EPAF Menu](#)

Select All | Reset | Save

1 - 25 of 355 | Next

[Jump to Bottom](#)

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action Links
<a href="#">Abdul Halim, Bilal N.</a> Graduate Assistants - Pooled, P99679-00		119130	GA-Rehire	Jan 12, 2022	Jan 12, 2022	Approve	<input type="checkbox"/> **Comments

- 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"

**EPAF Preview**

✓ You are acting as a Superuser.  
 ✓ This transaction must be updated on the Electronic Personnel Action Form, NOAEPAF.

**Name and ID:** Bilal Nizar Abdul Halim, Job an  
**Transaction:** 119130 Query  
**Transaction Status:** Pending Last P  
**Approval Category:** GA-Rehire, RHGRD

Next

Approve | Return for Correction | Void | [Add Comment](#)

[Approval Types](#) | [Default Earnin](#)

[Jump to Bottom](#)

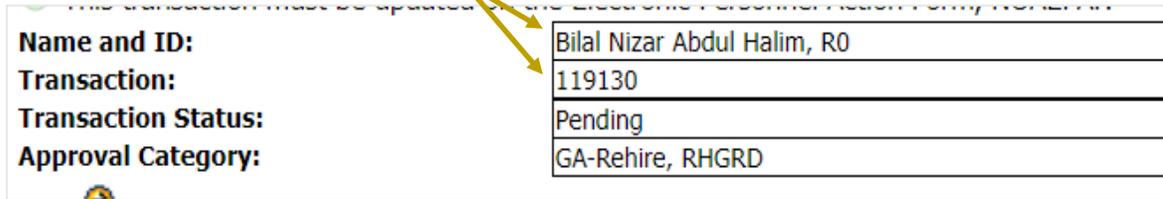
\* - indicates a required field.

**GA-Rehire, P99679-00 Graduate Assistants - Pooled, Last Paid Date: Aug 06, 2021**

Enter Changes	Current Value	New Value
Employee Status:	Active	Active
Term Reason Code:		-
Termination Date:		-

## Warnings vs Errors

- Warning are okay
- Errors please email [HRsupport@utoledo.edu](mailto:HRsupport@utoledo.edu) for assistance and make sure you let us know the name of the employee and the transaction ID



<b>Name and ID:</b>	Bilal Nizar Abdul Halim, R0
<b>Transaction:</b>	119130
<b>Transaction Status:</b>	Pending
<b>Approval Category:</b>	GA-Rehire, RHGRD

## Questions

- Please contact [HRsupport@utoledo.edu](mailto: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. <b>Current</b> —displays ePAF transactions that will require action by you as an approver <b>In my Queue</b> —displays ePAF transactions that will require action by you as the approver in the future <b>History</b> —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. <b>Current</b> —displays ePAF transactions that require action by you as the originator with transaction statuses of Waiting or Return for Corrections. <b>History</b> —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: <b>Acknowledge</b> —The person listed as FYI has viewed the EPAF transaction <b>Applied</b> —ePAF transaction has been applied to database <b>Approved</b> —ePAF transaction has been approved by the Approver. <b>Dis-Approved</b> —ePAF transaction has been disapproved by the Approver <b>FYI</b> —ePAF transaction is for information only. No action required <b>In the queue</b> —ePAF transaction is on the way but requires an action prior to your level. <b>Pending</b> —ePAF transaction is ready for action by the approver <b>Removed from Queue</b> —The originator has voided the ePAF and is no longer in the queue <b>Return for Correction</b> —ePAF transaction has been returned to the originator for correction by the approver <b>Void</b> —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	<p>Reference the status of the ePAF itself. Displayed at the Originator Summary and at the top of each ePAF transaction. The transaction statuses are:</p> <p><b>Approved</b>—Indicates the EPAF transaction has been approved by all necessary approvers but has not yet been applied to the database by payroll.</p> <p><b>Cancelled</b>—Indicates that the EPAF transaction has been cancelled after it has already been applied to the database.</p> <p><b>Complete</b>—Indicated the EPAF transaction has been applied to the database by payroll.</p> <p><b>Disapproved</b>—Indicates the EPAF has been disapproved by an approver.</p> <p><b>Partially completed</b>—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.</p> <p><b>Pending</b>—Indicates the EPAF transaction requires positive action by the approver(s).</p> <p><b>Return for Correction</b>—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 is as 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.</p> <p><b>Void</b>—Indicate the originator has voided the EPAF transaction and it is no longer a valid transaction. Only originators can void an EPAF transaction.</p> <p><b>Waiting</b>—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.</p>
Warnings	Nothing to worry about
Wild Card	%

<b>A</b>	
Accessing EPAF's .....	3
Approvers for the following levels .....	9
Approving the EPAF .....	11

<b>C</b>	
Comment .....	10

<b>D</b>	
Definitions .....	14
Definitions (continued) .....	15

<b>E</b>	
Enter Query Date .....	6
Enter the values .....	7
EPAF Dates .....	4
EPAF Types aka Select Action .....	4
EPAF Values to Enter .....	7

<b>H</b>	
How to Approve .....	12
How to enter an Approver or Search for one .....	9
How to find your PCN and Suffix # .....	8

<b>J</b>	
Jobs Effective Date .....	4

<b>P</b>	
Personnel Action Type .....	4
Personnel Date .....	4

<b>Q</b>	
Query Date .....	4
Questions .....	13

<b>R</b>	
Requesting access .....	3
Rocket Number/Search by name .....	5
Routing Queue .....	9

<b>S</b>	
Select Action .....	6
Select Funding Type .....	5
Select the "Funding Type" .....	5
Select the "Personnel Action Type" .....	4
Selecting the position .....	7
Submitting the EPAF .....	10

<b>W</b>	
Warnings vs Errors .....	13