THE UNIVERSITY OF TOLEDO

GO TO PERSONNEL ACTION LINK (a.k.a. EPAF-Electronic Personnel Action Form)

- https://bannerepaf.utoledo.edu/
- You may need to log in using your university credentials
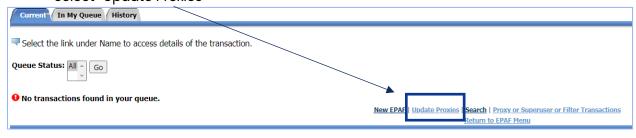
WHO CAN SET-UP PROXY ACCESS

- Only an Approver can be set-up as a Proxy

SETTING UP PROXY ACCESS
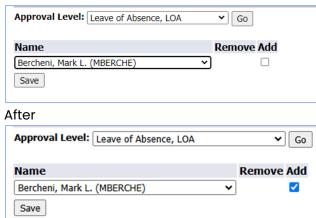
- From the Menu select "Approver Summary"

| 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]

- Select "Update Proxies"

Current | **In My Queue** | **History**

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

Queue Status: All ▲▼ [Go]

🛇 No transactions found in your queue.

New EPAF | Update Proxies | Search | Proxy or Superuser or Filter Transactions
Return to EPAF Menu

- Select the "Approval Level" (i.e. Leave of Absence, LOA)
- Click "Go"

EPAF Proxy Records

Approval Level: Leave of Absence, LOA ⌄ [Go]

- Search for the name in the list
  NOTE: only those employees who have been tied to the approval level will be in the list
- Select the name
- Click the box under "Add" and a check will be placed in the box.
- Click "Save"

Before

Approval Level: Leave of Absence, LOA [⌄] [Go]

Name	Remove	Add
Bercheni, Mark L. (MBERCHE) [⌄]		☐

[Save]

After

Approval Level: Leave of Absence, LOA [⌄] [Go]

Name	Remove	Add
Bercheni, Mark L. (MBERCHE) [⌄]		☑

[Save]

APPROVING AS A PROXY ACCESS

- From the Menu select "Act as a Proxy"

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]

- In the field "Proxy For" click the drop down arrow.
  - Select the user you are "Proxying for"
  - Click on "Go"
  - Follow the steps in "Approving the EPAF"

Proxy or Superuser or Filter Transactions

The approver may select a person to proxy, choose to act as a Superuser page. All proxy users will need to have an active Banner account. If the p

Proxy For: [Halsey, Mark A. ⌄]
Act as a Superuser: ☐
Submitted From Date: MM/DD/YYYY [   ]
Submitted To Date: MM/DD/YYYY [   ]
Transactions Per Page: [25 ⌄]
[Go]