

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 EPAF 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/>

Table of Contents:

1. Accessing EPAFs.....	2
2. Approving EPAFs	3
3. Proxy	6
a. Adding a Proxy	6
b. Removing a Proxy.....	7
c. Acting as a Proxy	8
4. EPAF Approver Summary	9

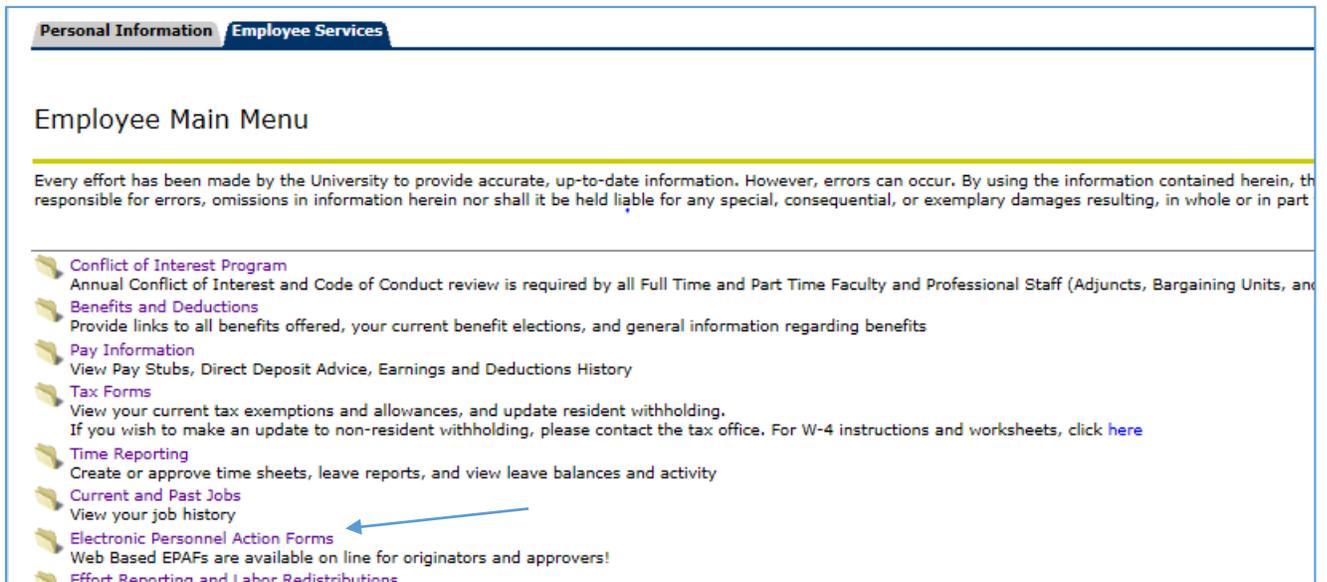
1. Accessing EPAFS

Log into DrexelOne.



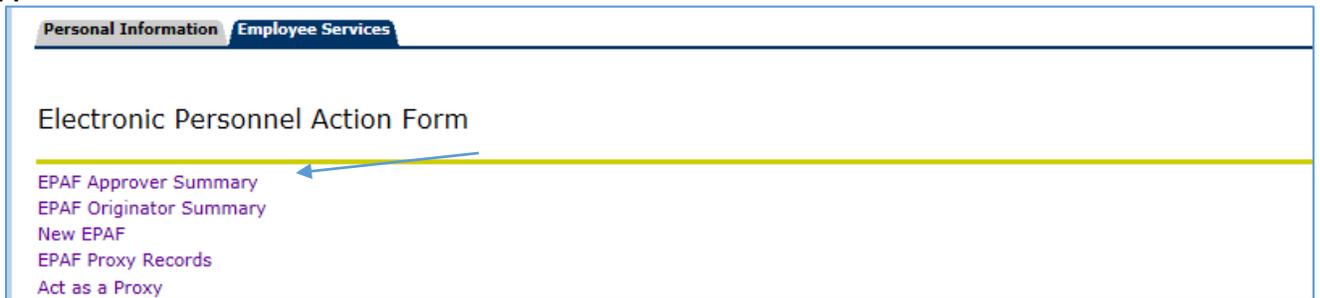
- Select the **Employee** Tab.
- Select **More BannerWeb Employee Services**.

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



- Select **Electronic Personnel Action Forms**

Go to **Approver** form.



- 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 details of the transaction.

Queue Status: **All** Pending

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

1 - 3 of 3
[Jump to Bottom](#)

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Heath, Dick Student Employee, 100608-00	55665365	681904	Student Rehire - Biweekly	Jul 20, 2016	Sep 01, 2016	Approve	<input type="checkbox"/>	Comments Warnings
Oswald, Clara O. Temp Lighting Designer, 100524-00	44332211	681907	Temporary Exempt Rehire	Jul 20, 2016	Aug 01, 2016	Approve	<input type="checkbox"/>	Comments
Roddenberry, Eugene R. Monthly Student Employee, 157325-00	14205472	681905	Student New Hire - Monthly	Jul 20, 2016	Sep 01, 2016	Approve	<input type="checkbox"/>	**Comments

1 - 3 of 3
[Return to Top](#)
****Comments Exist**

- 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: 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: Temporary Exempt Rehire, TMEXRH

[Previous](#) [Next](#)

 [Add Comment](#)

Approver Actions

[Approval Types](#) | [Default Earnings](#) | [Routing Queue](#) |
[EPAF Approver Summary](#)
[Return to EPAF Menu](#)

[Jump to Bottom](#)

* - indicates a required field.

Enter Job Information, 100524-00 Temp Lighting Designer, Last Paid Date: May 31, 2016

Enter Changes	Current Value	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:	0	0
Job End Date:	05/31/2016	-

Enter Default Earnings, 100524-00 Temp Lighting Designer, Last Paid Date: May 31, 2016

Current					
Effective Date	Earnings	Hours or Units	Per Pay	Deemed Hours	Special Rate Shift End Date
10/01/2015	REG, Regular		20.00		1
New					
Effective Date	Earnings	Hours or Units	Per Pay	Deemed Hours	Special Rate Shift End Date
Aug 01, 2016	REG, Regular		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: Temporary Exempt Rehire, TMEXRH	

⏪ Previous Next ⏩

[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.

Comment

Example of comment

Comment

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

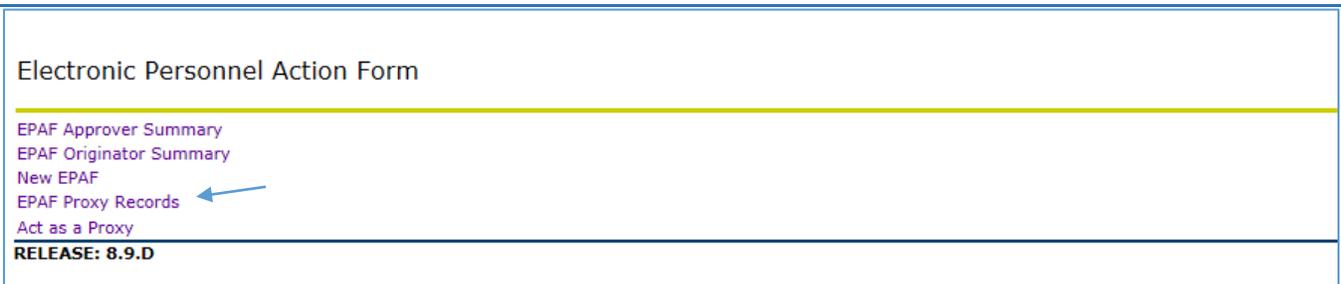
Click on **EPAF Approver Summary** at the bottom of the page to return to the list of EPAFs to be approved.

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



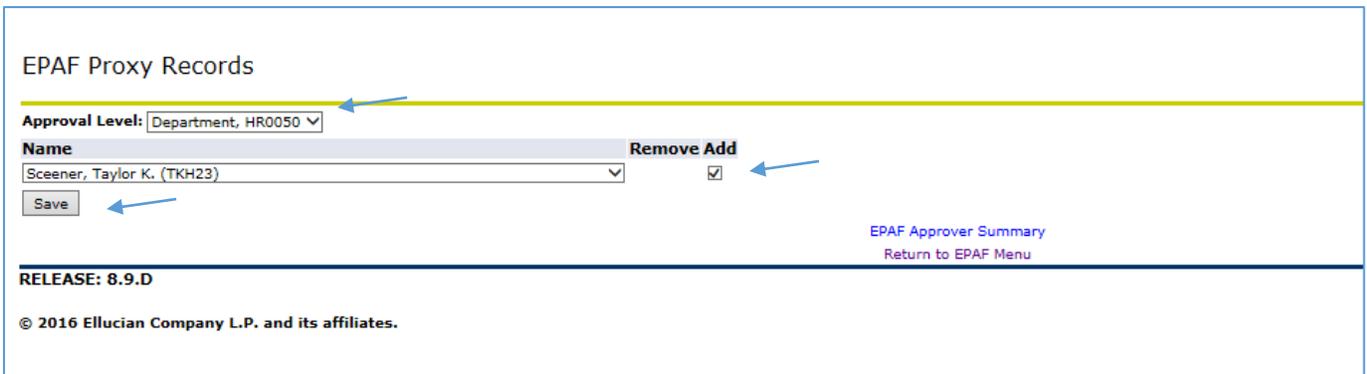
Electronic Personnel Action Form

[EPAF Approver Summary](#)
[EPAF Originator Summary](#)
[New EPAF](#)
[EPAF Proxy Records](#) ←
[Act as a Proxy](#)

RELEASE: 8.9.D

- Select **EPAF Proxy Records**

Define Approval Level for Proxy



EPAF Proxy Records

Approval Level: Department, HR0050

Name	Remove	Add
Sceener, Taylor K. (TKH23)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save

[EPAF Approver Summary](#)
[Return to EPAF Menu](#)

RELEASE: 8.9.D

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- 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:

Name	Remove	Add
Sceener, Taylor K. (TKH23)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="text" value="Not Selected"/>	<input type="checkbox"/>	<input type="checkbox"/>

[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

Act 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

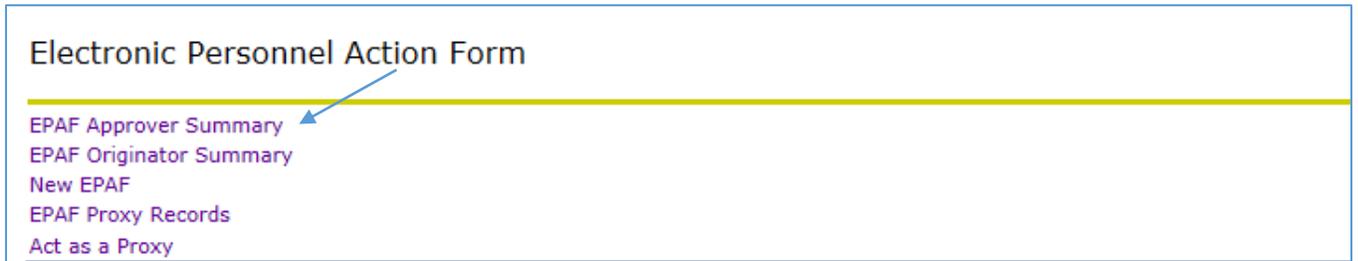
Transactions Per Page: 25

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 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.



- Select the **EPAF Approver Summary**

EPAF Approver Summary

Current In My Queue **History**

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

Queue Status: All [Go]
Removed from Queue

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

1 - 3 of 3
Jump to Bottom

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	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 Reappointment - 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.