



Electronic Personnel Action Form Guide Adjunct Faculty Employees



Human Resources Information Systems
www.drexel.edu/hr

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Understanding Web-Based EPAFs

General Information

An Electronic Personnel Action Form (EPAF) processes the same information as a paper PAF. EPAFs can currently be used to process appointments for the following approval categories:

- Adjunct Faculty Rehires

Additional Assistance

In addition to the information in this manual, there is help built into DrexelOne. Simply select Bannerweb Help in the upper right corner to see a basic description of what is currently on the screen.

Additional Assistance Visual Aid

The screenshot displays the DrexelOne web interface. At the top, the header reads "DrexelOne @ Drexel University". Below the header, there are navigation links: "back to Employee Resources Tab", "Personal Information", and "Student Service". The main content area is titled "New EPAF Person Selection". It contains a form with fields for "ID", "Query Date" (set to 11/15/2006), and "Approval Category" (set to Not Selected). A "Go" button is at the bottom of the form. An information icon (i) is next to the "ID" field, with a tooltip that reads: "Enter an ID, select the link to search for a person. After entering the ID, if the person exists in the database, his or her name will be displayed. To search for a person, select the search icon." Below the form, there is a "RELEASE: 7.3" label. On the right side of the page, there are icons for "e-mail", "calendar", "groups", "logout", and "help". A "BANNERWEB HELP" link is also visible. An orange arrow points from a callout box that says "Select here for additional help." to the "BANNERWEB HELP" link. An overlaid window titled "New EPAF Person Selection" provides detailed instructions: "A new EPAF transaction is started on this page. The user will have the option to enter an EPAF for a current employee or to start an EPAF for a new person. After entering the ID, if the person exists in the database, his or her name will be displayed. To search for a person, select the search icon." It also states: "A new ID may be entered or generated. Type in the ID or select the Generate icon." and "Other required field is the Query Date. Values displayed under current values will be as of the Query Date." Finally, it explains: "An Approval Category is required and selected from the pull-down list. If Approval Groups have been established, then only those categories assigned to the user will be displayed." At the bottom of the overlaid window is a link for "Exit Help".

Setting up Default Routing

Once default routing is set up for a particular category, you will not have to set routing up for each individual EPAF within that category.

Step 1: Log in to DrexelOne (<http://one.drexel.edu/cp/home/loginf>).

Step 2: Select Employees tab.

Step 3: Under Payroll section, select More BannerWeb Employee Services.

Step 4: Select Electronic Personnel Action Forms.

Step 5: Select EPAF Originator Summary.

Step 6: Select Default Routing Queue.

Step 7: From the Approval Category drop down menu, select the type of employee that you want to set up in your routing for. Select Go.

Step 8: Set up the routing levels. There are pre-set approval levels and required actions that correspond to each individual Approval Category, which will default into the routing fields when you select the Approval Category and select Go. Simply input the User ID for the appropriate levels if you would like to use the default levels. If you would like to add approvers to the default levels, please use the following steps:

Sub Step 1: Select the user level for the appropriate level of the routing.

Sub Step 2: Enter User ID for approval levels under the User Name field. If you don't know the User Names for your approvers, use the magnifying glass to search for them.

Sub Step 3: Select drop down menu under Required Action to change these defaults.

Grant funded positions must include PI and GRANTS in the routing. The following are standard approval levels for routing:

Approval Category	Action
DEPT	FYI or Approve
DEPBUD	Approve
HUMRES	Approve
HRADMIN	Apply

Step 9: When finished entering approvers, select Save and Add New Rows. If the employee is not research funded, you can exit the screen.

Step 10: Repeat for as many employee types as necessary.

Step 6 Visual Aid

EPAF Originator Summary

Current History

 Select the link under Name to access details of the transaction, or select the link under Transaction to update the

Transaction Status:

 No transactions found in your queue.

[New EPAF](#) | [Default Routing Queue](#) | [Search](#) | [Superuser or Filter Transactions](#)
[Return to EPAF Menu](#)

Steps 7-10 Visual Aid

EPAF Default Routing



Select an Approval Category, then, select the Approval Level

Select type of employee from the drop down menu. Select Go.

Select here to change default required actions.

Approval Category:

Use magnifying glass to find approver's User ID or enter User ID in User Name field.

		User Name	Required Action
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected

Select when finished entering routing information or if you need to add more rows.

Creating an EPAF

Adjunct Faculty EPAFs must be submitted by the 10th of the month of hire. If the 10th of the month of hire has passed, please submit on a paper PAF.

Step 1: Log in to DrexelOne (<http://one.drexel.edu/cp/home/loginf>).

Step 2: Select Employees tab.

Step 3: Under Payroll section, select More BannerWeb Employee Services.

Step 4: Select Electronic Personnel Action.

Step 5: Select New EPAF.

Step 6: Enter the university ID of the person you want to create an EPAF for. If you don't know the person's university ID, click on the magnifying glass on the right to search for the person.

Step 7: Enter the Start Date in the Query Date field. (Date must be in MM/DD/YYYY format).

Step 8: Select the type of employee from the Approval Category drop down menu.

Step 9: Once ID, Query Date, and Approval Category are selected, click Go.

Step 10: Enter position number for employee in the Position field. If you don't know the position number, click on the magnifying glass to search for it. *Make sure you select the position number that corresponds to the correct term.* If you are renewing a position that the employee has already had, simply select the job under Existing Jobs.

Step 11: Enter Suffix as 00. (Disregard if you selected an existing job.)

Step 12: When Position number and Suffix are completed, select Create.

Steps 6-9 Visual Aid

New EPAF Person Selection



Enter an ID, select the link to search for an ID, or generate an ID. Enter

Click here to search for a university ID.

* - indicates a required field.

Enter Start Date here.

ID: *



Query Date: MM/DD/YYYY *

11/03/2006

Approval Category: *

Not Selected

Go

Click here when you are ready to move forward.

Click here to select the type of employee.

Steps 10-12 Visual Aid

New EPAF Job Selection



Enter or search for a new position number and enter the suffix, or select the link under Title.

ID:

Query Date:

Approval Category:

Here you will see the employee's name, ID, Start Date, and the type of employee the person will be hired as.

New Job

Position:



Suffix:

Suffix should always be 00.

Create

Click here to search for a position number.

Existing Jobs

Number and Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
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All Jobs

Positions that employee has already had – they can be renewed.

Creating an EPAF

Step 13: Under the Start section, enter the information pertaining to each field in the EPAF:

Job Begin Date: Enter the employee's Start Date in MM/DD/YYYY format.

Job Category: Keep as Secondary.

Job Effective Date: Keep as defaulted date.

Contact Salary: Enter rate of pay without Dollar Signs or commas – use decimal points.

Example: 2000.00 (will pay employee \$2,000 for term)

Job Change Reason: Keep as REHIR.

Number of Pays: Keep as defaulted number.

Number Pays Periods: Keep as defaulted number.

Job Status: Keep as A.

Timesheet Orgn: Enter organization number.

Job End Date: Keep as null (–).

Salary Encumbrance: Keep as null (–).

Step: Keep as 0.

FTE: Keep as .006.

Step 14: Under the End section, enter the information pertaining to each field in the EPAF:

Job Effective Date: Keep as defaulted date.

Job Change Reason: Keep as EXPIR.

Job Status: Keep as T.

Steps 13-14 Visual Aid

Electronic Personnel Action Form

Here you will see information for the employee as well as information for the position that you are hiring the employee for.

 Enter the information for the EPAF and either Save or Submit.

Name and ID:
Transaction:
Transaction Status:
Approval Category:

Job and Suffix:
Query Date:
Last Paid Date:

Save

Term 1 Start

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		
Job Category:		Secondary 
Job Effective Date: MM/DD/YYYY(Not Overrideable)		10/01/2006
Contract/Salary:		
Job Change Reason: (Not Overrideable)		REHIR
Number of Pays: (Not Overrideable)		3
Number Pays Periods: (Not Overrideable)		3
Job Status: (Not Overrideable)		A
Timesheet Orgn:		
Job End Date: MM/DD/YYYY(Not Overrideable)		-
Salary Encumbrance: (Not Overrideable)		
Step: (Not Overrideable)		0
FTE: (Not Overrideable)		.006

Term 1 End

Item	Current Value	New Value
Job Effective Date: MM/DD/YYYY(Not Overrideable)		12/31/2006
Job Change Reason: (Not Overrideable)		EXPIR
Job Status: (Not Overrideable)		T

Creating an EPAF

Step 15: Enter Routing Information, if necessary. (If you set up default routing, it should automatically populate here.)

Sub Step 1: Select the user level for the appropriate level of the routing.

Sub Step 2: Enter User ID for approval levels under the User Name field. If you don't know the User Names for your approvers, use the magnifying glass to search for them.

Sub Step 3: Select drop down menu under Required Action to change these defaults.

Grant funded positions must include PI and GRANTS in the routing. The following are standard approval levels for routing:

Approval Category	Action
DEPT	FYI or
DEPBUD	Approve
HUMRES	Approve
HRADMIN	Apply

Step 16: Enter Comments, if necessary.

Step 17: Review the information you entered in the EPAF.

Step 18: When finished entering all information in the EPAF, select Save. (You MUST save your EPAF before submitting it!)

Step 19: If you are ready to send the EPAF into your routing queue, select Submit. If you need to trash the EPAF and start over, select Delete.

HINT 1: You will know that your EPAF was submitted successfully by an alert at the top of your screen.

HINT 2: Remember to periodically review your outstanding EPAFs to ensure that they are all approved in a timely fashion. If you find that your EPAF has not been approved, check the comments section to see if there are notes as to why it has not yet been approved.

HINT 3: If you entered comments and then received an error when you saved, your comments are still saved even though you don't see them in the Comments box.

Steps 15-19 Visual Aid

Routing Queue

Approval Level	User Name	Required Action
10 - (DEPT) Department Head		Approve
15 - (DEPBUD) College/School Budget Admin		Approve
98 - (HUMRES) HRIS		Approve
99 - (HRADMN) HR System Administration		Apply
Not Selected 		Not Selected 
Not Selected 		Not Selected 
Not Selected 		Not Selected 
Not Selected 		Not Selected 

Save and Add New Rows

Comment

Enter comments here if ne

Transaction History

Action	Date	User Name
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Save Submit Delete

You will see your transaction history information here.

Select Save when finished entering information.
Select Submit if ready to send EPAF into routing queue.
Select Delete if you want to delete the EPAF entirely.

Hint 1 Visual Aid

Electronic Personnel Action Form



The transaction has been successfully submitted.

Approving an EPAF

Step 1: Log in to DrexelOne (<http://one.drexel.edu/cp/home/loginf>).

Step 2: Select Employees tab.

Step 3: Under Payroll section, select More BannerWeb Employee Services.

Step 4: Select Electronic Personnel Action Forms.

Step 5: Select EPAF Approver Summary.

Step 6: By choosing “All” from the Queue Status list, you will see all of the EPAFs that exist within your department. By choosing “Pending” from the Queue Status list, you will see all of the EPAFs that are waiting for your approval. 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.

Step 7: If you chose “Select All,” you should see the boxes in the Action column checked. Once this box is checked, simply select Save, and your EPAFs will be approved.

Step 8: If you selected one EPAF to view, review the EPAF. If it is correct and you want to approve it, select Approve. If you want to return the EPAF to the originator for correction, select Return for Correction.

HINT: You know that your EPAF has been approved when you see “Transaction successfully completed” at the top of the screen and Transaction Status has changed to “Approved.”

Steps 6-7 Visual Aid

EPAF Approver Summary

Current In My Queue History

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

Filtering on

Choose which EPAFs you want to view from menu and select Go.

Queue Status: All Pending Go

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

Select All Reset Save

1 - 25 of 8410 Next

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action Links
						Approve	☐ ** Comments Warnings
						Approve	☐ ** Comments Warnings

Click "Select All" if you want to approve all of your EPAFS at once.

Will be checked if you chose "Select All" option.

Step 8 Visual Aid

EPAF Preview

You are acting as a Superuser.

Name and ID:

Transaction:

Transaction Status:

Approval Category:

Next

Job and Suffix:

Query Date:

Last Paid Date:

Approve

Return for Correction

Void

[Add Comment](#)

Select the appropriate action after reviewing the EPAF. You can also add a comment to the EPAF by selecting "Add Comment."

Setting up a Proxy

Step 1: Log in to DrexelOne (<http://one.drexel.edu/cp/home/loginf>).

Step 2: Select Employees tab.

Step 3: Under Payroll section, select More BannerWeb Employee Services.

Step 4: Select Electronic Personnel Action Forms.

Step 5: Select EPAF Proxy Records.

Step 6: From the Approval Level drop down menu, select the approval level of your proxy. Select Go.

Step 7: From the Name drop down menu, select the name of the person you are assigning as a proxy. Check “Add” box to add proxy. Select Save.

Step 8: Repeat for as many Approval Levels as necessary.

HINT: To remove a person as a proxy, go to the EPAF Proxy Records screen and check the box under remove. Select Save.

Step 6 Visual Aid

EPAF Proxy Records

Select Approval Level of Proxy here.

Approval Level:

- Budget Approval, BUDGET
- College/School Budget Admin, DEPBUD
- Department Head, DEPT
- HR System Administration, HRADMN
- HRIS, HUMRES

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

RELEASE: 7.3

Step 7 Visual Aid

EPAF Proxy Records

Approval Level:

Click arrow to access drop down menu to find employee name.

Name

Click here once you have selected a name and then select Save.

Acting as a Proxy

The person who you want to act as a proxy for must first set you up for access as a proxy (see page 14).

Step 1: Log in to DrexelOne (<http://one.drexel.edu/cp/home/loginf>).

Step 2: Select Employees tab.

Step 3: Under Payroll section, select More BannerWeb Employee Services.

Step 4: Select Electronic Personnel Action Forms.

Step 5: Select Act as a Proxy.

Step 6: From the Proxy For drop down menu, select the name of the person you want to act as a proxy for.

Step 7: Select Superuser if the person you are a proxy for is a Superuser.

Step 8: Select Go.

Steps 6-8 Visual Aid

Proxy or Superuser or Filter Transac



Act as a proxy or a superuser and enter the following criteria

Click here to select who you want to act as a proxy for.

Proxy For:

Self

Act as a Superuser:

☐

Submitted From Date: MM/DD/YYYY

Click here if the person you are a proxy for is a Superuser.

Submitted To Date: MM/DD/YYYY

Transactions Per Page:

25

Go

Frequently Asked Questions

Q: What does it mean when the EPAF's Transaction Status is "Waiting"?

A: The EPAF is waiting for you to submit it. Select Submit at the bottom of the page.

Q: When is the last day an EPAF for a monthly employee can be created and submitted?

A: The EPAF must be submitted by the 10th day of the month of hire.

Start Date	Due Date
October 1	October 10

Q: What do I do if I receive a warning?

A: You can ignore all warnings.

Q: What are some common error messages?

A: See list below.

Error Message	Suggested Action
New effective date cannot be after employee's termination date.	Email HRIS the error message.
First Name, SSN, birth date, sex code, or ethnic code incomplete.	Email HRIS the error message.

Q: How do I view all of the employee's previous positions?

A: Once you decide to create an EPAF and enter the employee's ID number, start date, and Approval Category, select Go. You will then see two choices: you can either enter a position number for the employee to be hired in to, or you can select one of the employee's previous positions that are listed on the page. For more information, please see page 6, step 10.

