This reference guide provides step-by-step instructions for using the EPAF functionality in Self Service Banner.

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- EPAF Overview:
The Electronic Personnel Action Form (EPAF) allows paperless processing of personnel actions. This process enables MTSU to expedite personnel actions rapidly, through an electronic approval process and provide an audit trail of all approval/disapproval history. Departments will use the EPAF process to create change(s) to job records and to submit the changes through a predetermined approval queue (routing). Changes include terminations of student and temporary hourly positions, student and temporary hourly hires and rehires of students or temporary hourly positions. The EPAF will replace the existing paper form Personnel Event Form (PEF) and PAF for student and temporary hourly positions. Once approved, the EPAF actions will be applied to Banner by Human Resource Services. **NOTE: HRS is not currently allowing hires or rehires of temporary hourly workers by EPAF. A paper PAF must be submitted.**

An EPAF is originated in the department by the individual who is authorized to generate payroll transactions for the department. Once the EPAF is originated, it is saved and submitted to an approval routing queue. In Banner, there are mandatory (required) approval levels for each EPAF that is routed through before any changes can be applied to the employee’s record.
Human Resource Services develops and maintains EPAF Groups and mandatory approval requirements.

- **EPAF Categories:**
The Banner Human Resources module has been set up to process EPAF’s for changes that departments initiate and approve for student and temporary employees. The Banner system uses a category code to identify the type of change processed. The following EPAF’s Categories have been developed for departmental use.

<table>
<thead>
<tr>
<th>EPAF</th>
<th>PURPOSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>HIREST</td>
<td>Process a NEW student worker hire</td>
</tr>
<tr>
<td>GRHIST</td>
<td>Process a NEW student hire into a grant position</td>
</tr>
<tr>
<td>REHIST</td>
<td>Process a REHIRE of a student worker</td>
</tr>
<tr>
<td>GRRHST</td>
<td>Process a REHIRE of a student into a grant position</td>
</tr>
<tr>
<td>TERMST</td>
<td>Process a termination of a student worker position</td>
</tr>
<tr>
<td>GRTERM</td>
<td>Process a termination of a student grant position</td>
</tr>
<tr>
<td>RATEST</td>
<td>Process a Pay Rate Change for a student position</td>
</tr>
<tr>
<td>GRRATE</td>
<td>Process a Pay Rate Change for a student grant position</td>
</tr>
<tr>
<td>TORGST</td>
<td>Process a Timekeeping Location Change for a student position</td>
</tr>
<tr>
<td>GRTORG</td>
<td>Process a Timekeeping Location Change for a student grant position</td>
</tr>
<tr>
<td>HIRESW</td>
<td>Process a NEW Federal Work Study position <em>(Financial Aid Office Only)</em></td>
</tr>
<tr>
<td>REHISW</td>
<td>Process a REHIRE of Federal Work Study position <em>(Financial Aid Only)</em></td>
</tr>
<tr>
<td>TERMSW</td>
<td>Terminate a Work Study position <em>(Financial Aid Office Only)</em></td>
</tr>
<tr>
<td>TORGSW</td>
<td>Timekeeping location <em>(Financial Aid Office Only)</em></td>
</tr>
</tbody>
</table>

- **EPAF Approval Types:**
For each EPAF, one or more approval types are required. These approval types establish the fields that can be entered and the types of routing queue required for the specific action. The approval types will be the same as the approval category above. Current approval types include:
  - PI – Principal Investigator – only for grant related EPAF’s
  - RS – Research Services – only for grant related EPAF’s
  - DEPTHD – Department Head – all EPAF’s – except grants (only needs PI)
  - HRAPP – Human Resource Services – used on all EPAF’sd – the “Applier”

*Please note:* If you will be processing the same type of EPAF repeatedly, you can set default routing approval types. You will need to set your default routing approval’s prior to creating an EPAF. Instructions for setting default approvals is covered in the section below.
Setting Default Routing Queues:
Department heads can set default routing queues by following these steps. This allows another individual to approve EPAF’s that have been submitted for approval:

1. Log into Pipeline and click on the employee tab. Click on “Electronic Personnel Action Form” link.

2. Click on “EPAF Originator Summary”

3. Click on “Default Routing Queue” at the bottom of the page.

4. Use drop down under “Approver Category” and select the EPAF type you want to set up default routing queue on.

5. Click “Go”

6. Each mandatory approver level will default per EPAF category. Type in the user name of the approver that must take action on the EPAF (this should be the Department Head except for grants). You can use the search function to locate a user name. Once you
type in the user name, hit tab and the full name should appear in the next block. The right side box should indicate “Approve.”

7. The last approver will be the HR Applier. Type in user name is MHRW00001 and hit tab. This will route the EPAF to Human Resources for processing. The box on the right should indicate “Applier.”

8. Click “Save and Add New Rows.”

Each time you originate an EPAF, the approval queue should automatically populate, but can be overridden.

- Creating an EPAF:
The EPAF process begins when it is necessary to start, restart or end a job record for a student worker or a temporary hourly worker. In order to update the system with the new information, an EPAF must be initiated in Banner Self Service (Pipeline). Before entering an EPAF, the originator will need to gather the necessary information to complete the online form. *Although search options are available throughout the EPAF process, it will be helpful to obtain*:
  a) Banner ID for the individual,  
  b) the position number,  
  c) the timekeeping org number and  
  d) appropriate dates of hire

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “RaiderNet” tab.
3. Click on the “Employee” tab.
4. Click on the “Electronic Personnel Action Form” link.

<table>
<thead>
<tr>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Sheet</td>
</tr>
<tr>
<td>Leave Report</td>
</tr>
<tr>
<td>Electronic Personnel Action Forms</td>
</tr>
<tr>
<td>Benefits and Deductions</td>
</tr>
</tbody>
</table>
5. Click on the “New EPAF” link. Once you click here, you will automatically be taken to the New EPAF Person Selection Screen.

6. Enter the Banner ID number (M number) of the employee and tab. If the Banner ID is not known, you can click the magnify icon to initiate a search by name. Once the ID has been entered, hit the tab button to default the name.

7. Under “Approval Category” use drop down box and select the type of EPAF you want to create. If the individual has never worked in the position before, it will be a hire. If they have worked in the position before, it will be a rehire.

8. You will be on the “New EPAF Job Selection” page.

If this is a HIRE EPAF, you will need to enter the position number and suffix 00 and click “go.”

9. If rehiring an individual into a previous position, you will click on the “All Jobs” button, which should display all prior position numbers for this individual. Use the radio button
on the right hand side under “Select” to click the position number to process the transaction on. Click “Go” to proceed. **YOU MUST ENSURE THAT YOU ARE SELECTING THE CORRECT POSITION NUMBER WITH THE CORRECT SUFFIX NUMBER!**

10. You will now be on the “Electronic Personnel Action Form” page. Basic information should be defaulted in, including name and ID.

```
Name and ID: Lane E Brown, M01279652
Transaction:                         Query Date:  Nov 01, 2014
Transaction Status:                
Approval Category:  Hire Student, HIREST

* - indicates a required field.

Student Hire, 333880-00 Student Help-Recycling
```

11. You should also see the transaction, position number and department.

```
Student Hire, 114881-00 Student Tutors-Comp Inf System

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Status: (Not Enterable)</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Employee Class Code: (Not Enterable)</td>
<td>AD, Administrative / Professional</td>
<td></td>
</tr>
<tr>
<td>19 Form Indicator: (Not Enterable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19 Expiration Date: DD/MM/YYYY(Not Enterable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Begin Date: DD/MM/YYYY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract Type:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jobs Effective Date: DD/MM/YYYY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Status: (Not Enterable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Change Reason: (Not Enterable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Step: (Not Enterable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regular Rate:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timesheet Orgn: *</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

12. Next is the body of the EPAF where you can change the “Job Begin Date” which will default to the current date. If the individual has no other positions active, you will need to change the Contract type from “Secondary” to “Primary.”
13. You can change the rate of pay (minimum wage will default) and you MUST enter the T-Org with the “T”.

14. MTSU EPAF’s have been developed using defaults. The only fields that are required is the Timesheet Organization Code (T Code) and Routing Queue for approvals. You must enter a T-Org before proceeding and add approval levels. **At this time, the search option for T Codes is not functional. You will need to contact the HR office if you need a T-Org. You can also get a listing of Timekeeping Org codes on the HRS web page at [http://www.mtsu.edu/hrs/leavereporting/index.php](http://www.mtsu.edu/hrs/leavereporting/index.php). If you previously set up routing queues for approvers, then this information will also default. If not, you must enter the user name of the department head (Approver) and HR (Apply). The HR user name is MHRW00001.**

15. When using a Rehire EPAF, you will see existing data in the body of the EPAF on the left and new value fields on the right. The same areas can be entered (the effective date, primary/secondary, pay rate, and T-Org).

16. Once the “New Values” are correct (either by entry or default) and you have the correct approver entry (department head and HR), then you will click the “Save” button at either the top or bottom of page. You will get a green ✔️ indicating successful EPAF save.

17. Click the “Submit” button to submit the EPAF for approval. The EPAF automatically routes to the approvers in the order of their approver levels.
Once you have submitted the EPAF, if there are any data issues within the EPAF data, Banner will display one of two messages. “Error Messages” will prevent a transaction from being submitted successfully. The originator must make the necessary correction(s) as identified. Once the error has been corrected, the originator should be able to save and submit the transaction successfully. “Warning Messages” will not prevent a transaction from being submitted. If a warning message is received, the transaction can be completed (submitted). However, after submitting the EPAF, additional action may be necessary.

### How to track EPAF’s:
To review the status of an EPAF action that has been originated and submitted, the originator should log into Pipeline:
- click on the “Employee” tab.
- click on the “Electronic Personnel Action Form” link
- click the “EPAF Originator Summary” link.
- under “Transaction Status” you will have the option to view current transactions that are waiting, transactions that have been returned for correction, or all items that need to be updated and submitted.
- once you select type of transactions, click “Go”

The Current Tab will show items that need to be updated and submitted, while the History Tab will indicate the status of an EPAF that has been submitted.

- the status will be displayed under “Transaction Status”
- you can select the EPAF for review by clicking on the individual’s name. You will be able to review the EPAF in its entirety.
Please note: If you will be processing the same type of EPAF repeatedly, you can set default routing approval types. You will need to set your default routing approval’s prior to creating an EPAF. Instructions for setting default approvals is covered in the section below.

✓ scroll down to the Routing Queue section of the transaction for information on who has or has not seen and/or approved the EPAF. Possible status of the EPAF include:

- Approved – EPAF has been approved and waiting to be applied by HR.
- Waiting – originator needs to complete – the EPAF is still in originator’s queue.
- Pending – approver has received but not taken action
- Return for correction
- In the Queue – pending future approver action
- Disapproved – EPAF has been removed from the queue from an approver and will not go any further in the EPAF process.
- Voided – EPAF has been removed from the queue due to the request of the department or due to processing errors when HR attempted to apply transaction.

- How to delete an EPAF:
  If an EPAF action was initiated, but not completed, the EPAF transaction will remain in the “waiting” status. The EPAF transaction must be completed and submitted to the approval routing queue OR the action can be deleted by following these instructions.

**Only “waiting” items can be deleted.**
- Go to the “EPAF Originator Summary”
- Click on the transaction you wish to delete
- Click the delete button

- Troubleshooting EPAF Processing Errors:
  If you experience a problem or error message while processing an EPAF action:

  - Check the ‘Error and Warning Messages’ section on the top of the EPAF page. Messages about the status of data entry and submission are provided and may help you determine what needs to be done to clear the error. **NOTE:** System error checking is built into the functioning of Banner and will **STOP YOU** from continuing with the EPAF process. **Data entry** errors that you make **WILL NOT** stop the EPAF submittal process. Examples of data entry errors are wrong
position numbers, suffixes, rates of pay, and T Codes. EPAFs with these errors can be returned to you for correction during the Approval process. Errors not caught and corrected are applied to Banner and paid with the wrong information.

- Check that all required data has been entered in the EPAF fields. Verify that the information entered is typed correctly. Review all dates for the correct format MM/DD/YYYY. Amounts should not contain ‘$’ or ‘,’.

- Check dates entered in fields to ensure they are appropriate for each field.

- Check that you have completed all of the necessary information fields – all approval types; approval routing queue.

To make a correction to a field, click on the field and overwrite the information. ‘Save’ your changes and ‘Submit’.

If the above suggestions do not solve your issue/error and you are unable to successfully submit the transaction, contact Human Resource Services:

- **EPAF Approvers**
  1. Log into Pipeline using your regular Pipeline credentials.
  2. Click on the “RaiderNet” tab.
  3. Click on the “Employee” tab.
  4. Click on the “Electronic Personnel Action Form” link.
  5. Click on “EPAF Approver Summary”
  6. Use drop down under “Queue Status”
     a) Select “all” to approve all, click save to submit; or
     b) Select each name to review before approval, click approve; or
     c) Select return for correction to return EPAF to originator

- **Designating a Proxy Approver**
  - Log into Pipeline using your regular Pipeline credentials.
  - Click on the “RaiderNet” tab.
  - Click on the “Employee” tab.
  - Click on the “Electronic Personnel Action Form” link.
  - Click on the “EPAF Proxy Records” link.
Select the “Approval Level” for which you wish to designate a Proxy Approver from the drop down menu and click “Go”

From the NAME drop down menu, select the individual to designate as the Proxy Approver. All employee names will display here alphabetically. Click the “Add” box next to the individual’s name and then click “Save.”

- **Act as a Proxy Approver**
  - Log into Pipeline using your regular Pipeline credentials.
  - Click on the “RaiderNet” tab.
  - Click on the “Employee” tab.
  - Click on the “Electronic Personnel Action Form” link.
  - Select “Act as a Proxy”
- Select the individual you wish to Proxy for with the drop down menu.
  - Leave the fields below Proxy for blank and leave transactions at 25.

  ▪ **Proxy For:**
  ▪ **Act as a Superuser:**
  ▪ **Submitted From Date:** MM/DD/YYYY
  ▪ **Submitted To Date:** MM/DD/YYYY
  ▪ **Transactions Per Page:** 25

- Click “Go” and you will have access to approve, acknowledge, or return EPAF’s at the approval level for which you have been designated by the EPAF approver.