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# Intro to ePAF System Training

# What We'll Cover Today

- What is an ePAF?
- How to Access ePAFs
- ePAF Approver
- Act as a Proxy
- ePAF Originator
- New ePAF
- Defaulted Values, Common Errors and System Defects
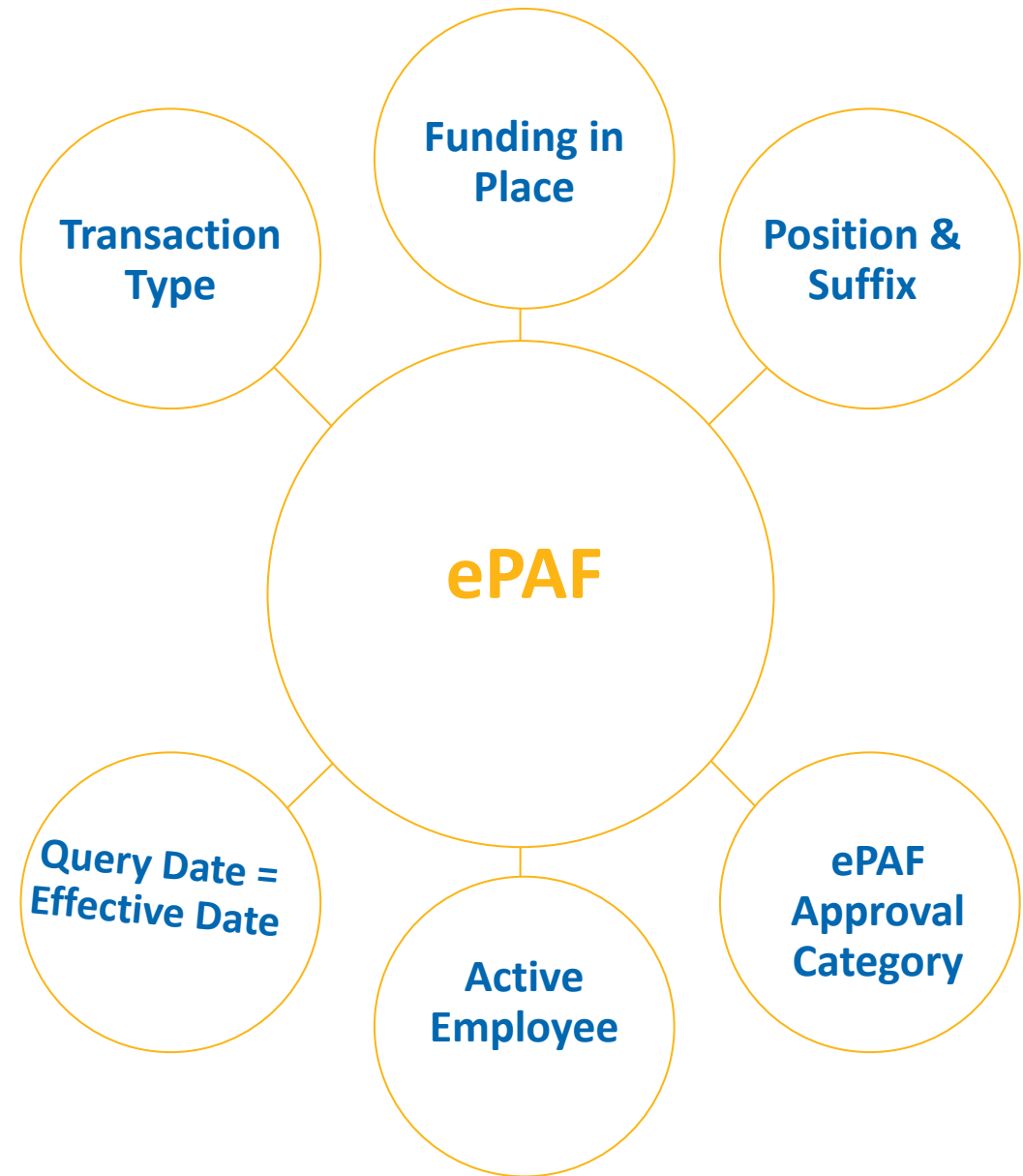- Other Items
- EPAF Transaction Glossary

# What is an ePAF?

# What is an ePAF?

Electronic Personnel Action Form

→

Data entry forms used to initiate employee transactions

→

These transactions include:

- Reappointments
- Transfers
- Rehires (for College Work Study appointments only)
- Labor/Hourly Rate Updates
- Termination of Jobs

# Main Components of an ePAF

Elements that must be in order prior to moving transactions through the ePAF system.



Transaction Type

Funding in Place

Position & Suffix

ePAF

Query Date = Effective Date

Active Employee

ePAF Approval Category

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# Available ePAF Approval Categories

Approval Category

Approval Category

Additional Job - Salaried Student, ADDJB4

Additional Job - Hourly, ADDJB2

Additional Job - College Work Study, CWSADD

----------------------------------------------------------, BRK1

Salary Update / Promo, MODJB4

Go

- Ordered by transaction type:
  - Additional Jobs
  - Adjustments to Active Jobs
  - Terminations/ Transfers
  - Reappointments

- Line breaks distinguish groupings

# How to Determine Which ePAF to Use

- [Detailed Chart of ePAFs](Detailed Chart of ePAFs)

### Chapter 2: Detailed Listing of ePAFs

| Transaction Type | ePAF Approval Category | Availability | Personnel Transactions | Scope |
|---|---|---|---|---|
| Additional Compensation or Job | Additional Job or Compensation - Salaried | Year Round | Supplemental income, overages, bonuses, one-time payments, Secondary job | Salaried except for Executive, Student, Union employees |
| | Additional Job - Hourly | Year Round | Secondary job | Hourly except for Student, Union employees |
| | Reinstate Job or Compensation - Hourly | Year Round | Supplemental income, overages, bonuses, one-time payments | Hourly except for Student, Union employees |
| | Reinstate Job or Compensation - Salaried | Year Round | Supplemental income, overages, bonuses, one-time payments | Salaried except for Executive, Student, Union employees |
| | Additional Job | | | Student |

# ePAF User Guides

- Always available on the HR Website

  **TCHR Website** > Employee Resources > Managers's Toolkit > HR Systems' Guides Always Available on the HR Website



HR Systems Guides (SSB9)

## EPAFS

General Information and Tools

- Intro to SSB9 ePAFs - Originator & Approver Training
- Conversion and Reappointment ePAF Training
- Detailed Listing of ePAFs - SSB9
- Position Guidance for Additional Compensation or Job
- Pooled Positions Crosswalk
- Determining a Position Number for a Supplemental Compensation for FT Employee
- Additional Job or Compensation ePAF - Common Issues Guide

## How To:

Additional Compensation or Job

- Additional Compensation or Job - Salaried - SSB9
- Additional Job - Hourly - SSB9
- Additional Job - CWS - SSB9
- Additional Job - Salaried Student - SSB9
- Reinstate Job or Compensation - Salaried - SSB9

# How to Access ePAFs

# Log into the TC Portal



Log into the TC Portal, click on the **Employee Resources** tab, then navigate to the **Employee Self-Service** section. Click on **Employee Dashboard**

# New Employee Dashboard



Within the Employee Dashboard, navigate to the **Electronic Personnel Action Form (EPAF)** and click the link

# ePAF Home Screen

**Electronic Personnel Action Forms**

**EPAF Approver Summary**

All EPAFs that you need to currently act upon are displayed in the Current tab. The queue status will be Pending, FYI, or More Information.

**EPAF Originator Summary**

Displays only those EPAF transactions that you have originated.

**New EPAF**

Allows you to create a new transaction.

**Act as a Proxy**

Available to all self-service EPAF users who have been given proxy privilege.

**EPAF Proxy Records**

Allows you to specify and authorize one or more users to approve EPAFs in your absence.

# ePAF Approver

# ePAF Approver Summary



Where you go to see all the ePAFs you need to OR have approved.

# ePAF Approver Summary



**Current**
ePAFs sitting with you for action

**In My Queue**
ePAFs that will eventually come to you once the previous levels have approved

**History**
ePAFs that you have approved and are no longer sitting with you for action

# Your Role as an ePAF Approver

Approve

Disapprove

Return for Correction

Acknowledge
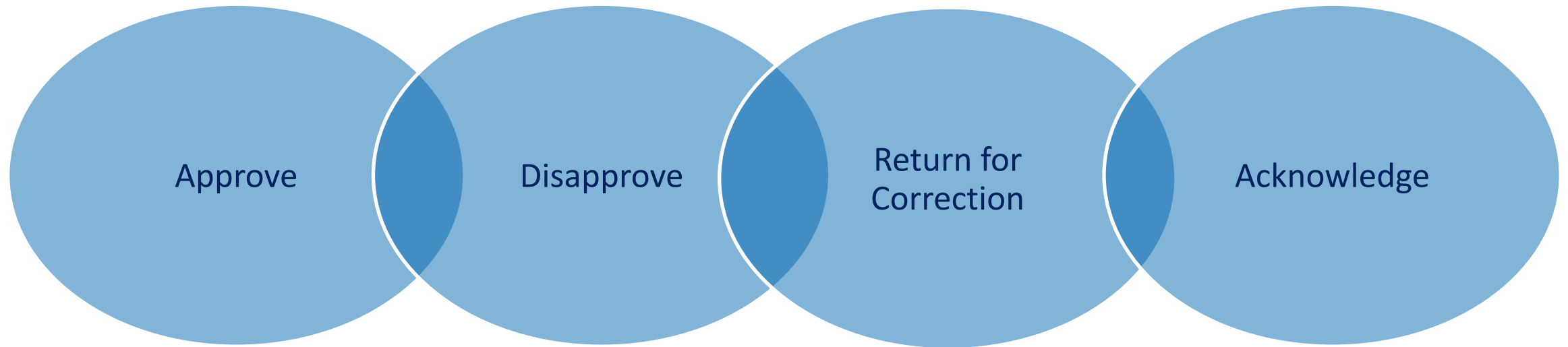
# How to Approve an ePAF (Method 1)

1. Click the Current tab

2. Click the employee name to take you to the ePAF for review

3. Review the ePAF.

4. Scroll to the bottom. Click one of the action buttons, and/or Add a comment.



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# How to Approve an ePAF (Method 1)

**Transaction History**

| Action | Date | User Name |
|---|---|---|
| Created | 03/21/2023 | Johanna J Masbad |
| Submitted | 03/21/2023 | Johanna J Masbad |

**4**

Add Comment | Approve | Disapprove | Return for Correction | More Info

**Add Comment**
Adds comment to ePAF where all users can see

**Approve**
Approves the ePAF and moves to the next approval level

**Disapprove**
Returns ePAF to Originator; They can return it to themselves, update and re-submit if they wish; Please add comment

**Return for Correction**
Returns ePAF to Originator; They can update and re-submit if they wish; Please add comment

**More Info**
Removes it from your main queue, but still sitting with you for action; Common use if you need to wait for outside information before approving

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# How to Approve an ePAF (Method 2)



1. Click the Current tab

2. Click the employee name to take you to the ePAF for review

3. From the ePAF Approver Summary home screen, click the box in the Action column

4. Click Save

# Act as a Proxy

# Act as a Proxy



Where you go to approve an ePAF as a proxy approver

**must be requested in advance by supervisor submitting HR Systems Access Request Form

# Act as a Proxy

# Act as a Proxy

You'll be taken to the ePAF Approver Summary screen of the person you're proxy approving for as indicated by the "Filtering On" in the upper right corner

# Act as a Proxy

**Routing Queue**

| Approval Level | Name | Required Action | Status |
|---|---|---|---|
| Budget/Grant, 24 | Ryan Clarke McGhee, MCGHEE1 | Approve | Pending |
| HRIS Apply, 90 | Brendan Thomas Stone, STONE1 | Apply | In the Queue |

Approver Proxy has access to same actions as actual approver

**Comments**

| Date | Made By | Comments |
|---|---|---|
| 02/01/2023 10:24 AM | Saeedullah Jan | TEST: Reappt - Summer B, FT Faculty FAAPP2 more |

**Transaction History**

**Approver Action Buttons**

| Action | Date | |
|---|---|---|
| Created | 02/01/2023 | Saeedullah Jan |
| Submitted | 02/01/2023 | Saeedullah Jan |

[Add Comment] [Approve] [Disapprove] [Return for Correction] [More Info]

**Routing Queue**

| Approval Level | Name | Required Action | Status | Date |
|---|---|---|---|---|
| Budget/Grant, 24 | Johanna J Masbad, MASBAD1 For Ryan Clarke McGhee, MCGHEE1 | Approve | Approved | 03/21/2023 04:16 PM |
| HRIS Apply, 90 | Brendan Thomas Stone, STONE1 | Apply | Pending | |

Proxy approver name captured in routing queue section

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# ePAF Originator

# ePAF Originator Summary

Where you go to see all ePAFs that you have originated



Home • Personnel Actions

**Electronic Personnel Action Forms**

**EPAF Approver Summary**

All EPAFs that you need to currently act upon are displayed in the Current tab. The queue status will be Pending, FYI, or More Information.

**EPAF Originator Summary**

Displays only those EPAF transactions that you have originated.

**New EPAF**

Allows you to create a new transaction.

**Act as a Proxy**

Available to all self-service EPAF users who have been given proxy privilege.

**EPAF Proxy Records**

Allows you to specify and authorize one or more users to approve EPAFs in your absence.

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# ePAF Originator Summary

**Current**
ePAFs sitting with you for action

**History**
ePAFs that you have originated and successfully submitted and are no longer sitting with you for action

**Transaction Status**
Ability to filter different statuses by clicking drop down menu



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.

Transactions                                    Transaction Status    All

| Name | ID | Transaction | Type of Change | Submitted Date | Effective Date | Status | Links |
|------|-----|-------------|----------------|----------------|----------------|--------|-------|
| Amanda | T00021894 | 143959 | Reappt - Year Round (Hourly) | | 01/18/2023 | Waiting | |
| | T00021894 | 143851 | Reappt - Sem Based, PT Instructional | | 01/16/2022 | Waiting | |
| | | | Reappt - Sem Based, PT | | | | |

**Employee Name**
By clicking name, you'll be taken to the ePAF details

**Status**
ePAF Transaction status (see next slide)

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# ePAF Transaction Status Key

| Transaction Status | What It Means | Action Needed |
|---|---|---|
| Waiting | Indicates that the transaction is in the process of being created | ePAF Originator needs to review and submit |
| Return for Correction | Indicates that the transaction has been returned to the Originator for update/correction | ePAF Originator needs to review, update and submit |
| Disapproved | Indicates that the transactions has been disapproved by an Approver | ePAF Originator can chose to return it to themselves for correction, update, save and submit again |
| Pending | Indicates that the transaction requires action by the approver(s) | Approver needs to review and approved |
| Approved | Indicates that the transaction has been approved by all parties | HRIS needs to review and process |
| Complete | Indicates that the transaction has been applied to Banner; no further action needed | No Action |
| Void | Indicates that the transaction has been voided by an originator or superuser and is no longer a valid transaction; no action can be taken on this ePAF | No Action |

# Your Role as an ePAF Originator

Create ePAFs

Input applicable information (varies based on each ePAF)

- Personnel Start Date
- Personnel End Date
- Salary/Hourly Rate
- Supervisor
- Comments

Track, review and make changes to ePAFs
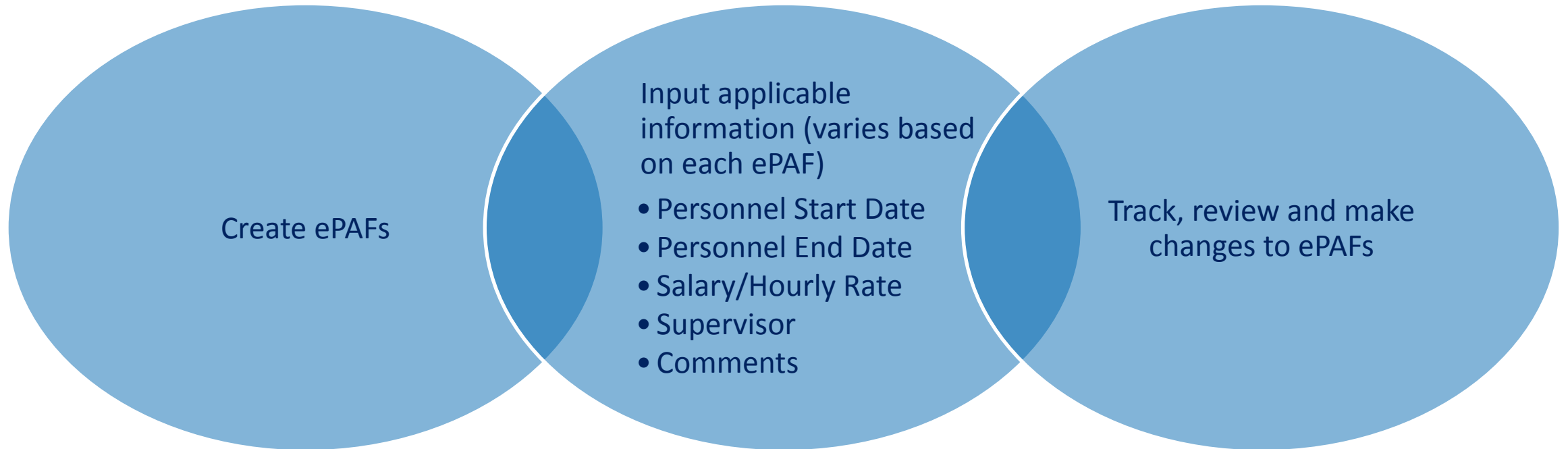
# New ePAF

# New ePAF

Where you go as an Originator to create a new employee transaction

Home • Personnel Actions

**Electronic Personnel Action Forms**

**EPAF Approver Summary**

All EPAFs that you need to currently act upon are displayed in the Current tab. The queue status will be Pending, FYI, or More Information.

**EPAF Originator Summary**

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Available to all self-service EPAF users who have been given proxy privilege.

**EPAF Proxy Records**

Allows you to specify and authorize one or more users to approve EPAFs in your absence.

# New ePAF Person Selection Screen

**New EPAF Person Selection**

ⓘ Check the box to limit to search an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

First Name          Last Name                                    N/SIN/TIN        **If needed, employee**
                                            ☐ Is an employee  or                  **search functionality via**          Search
                                                                                  **First & Last Name**

**Enter or Generate New ID**

ⓘ * indicates a required field. Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

ID *

⬅ **Input employee's TCID**

**Employee name will populate once TCID is entered**

Query Date *

03/21/2023  📅    ⬅ **Input the effective date of the transaction**

Approval Category *

[ ▼ ]    ⬅ **Select the ePAF approval category**

[ Go ]    ⬅ **Clicking Go will lock in your ePAF approval category selection**

# New ePAF Job Selection Screen



A. **Position/Suffix** - Where you manually input a position number if granting someone a brand new job

B. **End Date** - Displays the job end date; important for reappointments

C. **Status** - Displays the status of the job; important to select an active job for any epafs that make adjustments to an active job

D. **All Jobs** - by clicking you will see a listing of all jobs the employee has held at the College; this is important to review especially for reappointments

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# Now a Demo!

# Step 1: Select an Employee & ePAF Approval Category

# Step 2: Select Job

# Step 3: Input Fields on ePAF

Fields to input will depend on the specific ePAF transaction selected; all mandatory fields marked by *

# Step 4: Save ePAF

Once all fields are filled, click Save at the bottom of the ePAF

**Comments**

> ssb9 test

Remaining Characters : 3991

[ Save ]  ⬅

New EPAF · EPAF Originator Summary

**Electronic Personnel Action Form**

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

**Details**

Name and ID
Klay Thompson, T00061052

Transaction
144368

Transaction Status
Waiting

Query Date
03/01/2023

ⓘ  * Indicates a required field.

When you have saved your EPAF, the transaction status will populated from a blank field to "Waiting"

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# Step 5: Submit the ePAF

Made By

Johanna J Masbad
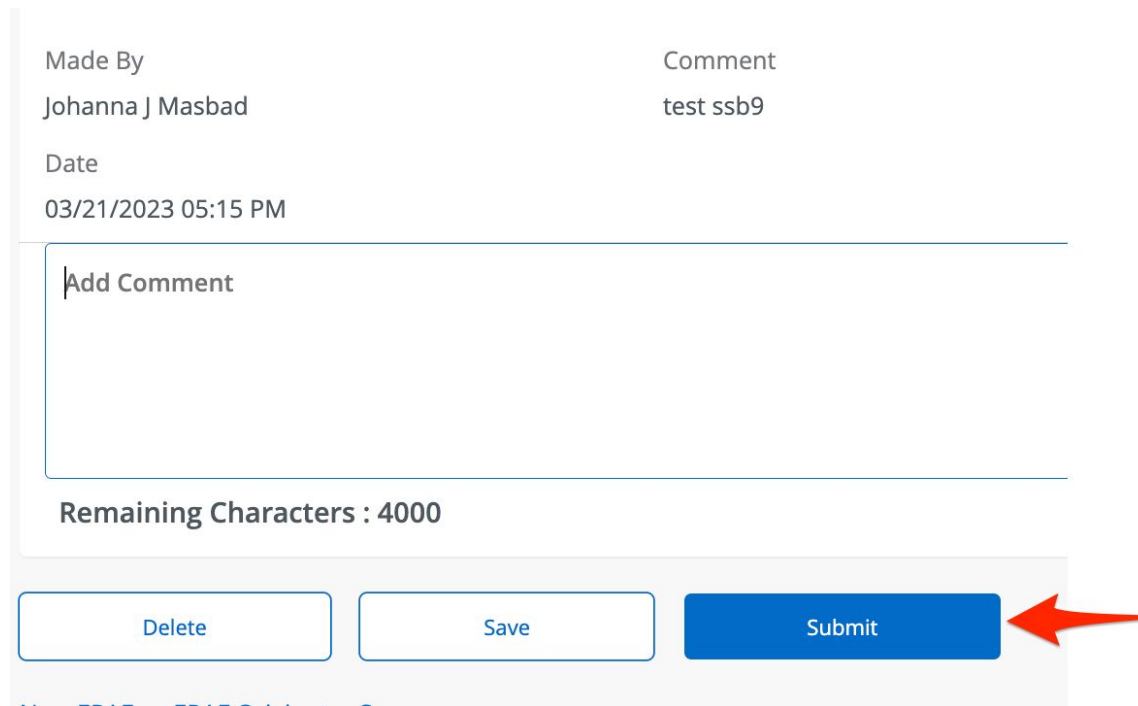
Date

03/21/2023 05:15 PM

Comment

test ssb9

Add Comment

Remaining Characters : 4000

| Delete | Save | Submit |
| --- | --- | --- |

After **Updating** or **Saving** the EPAF, you can choose to **Submit** or **Delete** the EPAF from one of the icons listed under the Index.

The EPAF will <u>not</u> be submitted until you **Submit** the EPAF. If the **Transaction Status** still shows '*Waiting'* the EPAF has <u>not</u> been submitted.

Remember to only press **Submit** or **Delete** once.

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# Successfully Saved ePAF

Once all fields are filled, click Save at the bottom of the ePAF

When you have saved your EPAF, the transaction status will populated from a blank field to "Waiting" and you will not see any error messages.

**Comments**

ssb9 test

Remaining Characters : 3991

Save

New EPAF · EPAF Originator Summary

**Electronic Personnel Action Form**

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

**Details**

Name and ID
Klay Thompson, T00061052

Transaction
144368

Transaction Status
Waiting

Query Date
03/01/2023

ⓘ * Indicates a required field.

# NOT Successfully Saved ePAF



- Any errors will be identified upon saving the ePAF.
- Any errors will show in the top left corner with a text description of the error(s).
- The **Transaction Status** will remain at BLANK until a successful save.
- Review and fix the error as needed. Click **Save** to save the changes.
- A list of common EPAF errors can be found at the end of this guide.

# Successfully Saved ePAF



- When you have successfully submitted your EPAF, you will see a green check mark at the top with the statement "**Your transaction has been successfully submitted.**"
- You can confirm that your EPAF was successfully submitted by reviewing the
- **Transaction Status**. It should be in a **'Pending'** status.
- A list of common EPAF errors can be found at the end of this guide.

# Defaulted Values, Common Errors and System Defects

# Defaulted Values: Salary/Hourly Rate



Begin Appointment, A00044-00 Adj/PTVisiting Prof/PTLe,

Salary *

0

Job Status

A

Effective Date *

01/16/2023

Personnel Date *

01/16/2023

Job Change Reason

Any ePAFs with a **Salary** or **Hourly Rate** have been defaulted to "0"

The ePAF will NOT error out, but be sure to <u>update this to the correct amount</u> - otherwise your employee will not get paid.

# Error: Invalid Value for Salary. Value entered must be numeric.



If you receive an error that says "**Invalid value for Salary. Value entered must be numeric.**," this means you have put a "$" (dollar sign) in the salary section on the EPAF. You cannot put a "$" sign in the Salary or Hourly Rate field.

Be sure to remove the "$" sign and then, after reviewing, click submit.

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# Defaulted Values: End Appointment End Date = 01/01/1900



End Appointment, D00001-00 Doctoral Research Fellow, Last Paid Date: 02/28/2023

Job Status

T

Effective Date *

Due to a known defect, do not use the datepicker tool. Type the date into the field.
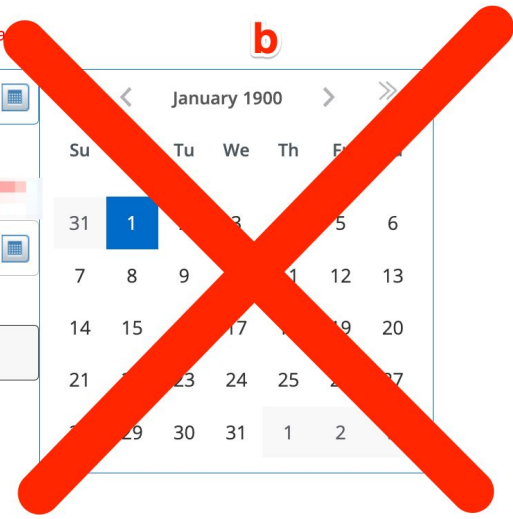
01/01/1900

Personnel Date *

Due to a known defect, do not use the datepicker tool. Type the date into the field.

01/01/1900

Job Change Reason

EAP

Some ePAFs will have 01/01/1900 defaulted into the date field. Update this field to the end date of the appointment/transaction.

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# Date Input: Manual Entry



a. Click datepicker. Calendar will appear. Do not select date.

b. Close the calendar by click the datepicker icon again. Calendar will disappear.

c. Click into date field and cursor will appear.

d. Manually type in date in format MM/DD/YYYY

# Error: Incorrect Date Inputs



Be sure manually enter the date on the end appointment. (**Do not use datepicker as it will override the dates in the begin appointment section**.)

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# Funding Allocation: Default From Index

When updating the funding information, you should only update two fields **Index** and **Account**.

**Step 1**. Manually enter the Index field only

**Step 2**. Click Default from Index

**Step 3.** The Fund, Organization and Program fields will automatically populate

# Error: Account Code is required

**Step 4.** Enter Account Code

# Timesheet Orgn Field Defect

**Defect**: The **Timesheet Orgn** field causes error (shown below)



**Resolution**: Leave field Null

# Other Items

# Tracking Submitted ePAFs



As an EPAF originator, you can track, review the status of, and make changes to your EPAF by returning to the **EPAF Originator Summary** screen and clicking on the **History** tab.

From the **History** tab, an EPAF originator can click on the name of the employee and see where the EPAF is in the **Routing Queue** and any **comments** associated with the EPAF.

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# Tracking Submitted ePAFs



**Monitoring Routing Queue**. If an approver has a status of "Pending" this means that the ePAF is currently sitting with them for approval.

"In the Queue" means that the ePAF will go to this person, once the previous levels approve.

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# ePAFs Returned for Correction



If an approver needs you to make a change on the EPAF, they will return the EPAF for correction. If you receive an email notification that indicates that you have an EPAF in your queue, the EPAF has been returned to you.

From the **EPAFS (Electronic Personnel Action Forms)** home screen, navigate to the **EPAF Originator Summary** tile

# ePAFs Returned for Correction



In your **Current** tab, you can filter by **Transaction Status**. Click the drop down arrow and select **Return for Correction**. EPAFs that have been returned to you for correction will now populate the listing

Click the employee's name to be taken to the ePAF.

# ePAFs Returned for Correction



- Scroll down to the comments section to review the reason why the ePAF was returned.

- Click **Void** to delete the EPAF and remove it from your queue. No further action can be taken on the transaction.

- Click on **Update** to make changes. You'll be able to make any adjustments necessary on the ePAF fields. Click Save and then click **submit** to send the ePAF back to the routing queue

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# Establishing Default Routing Queues
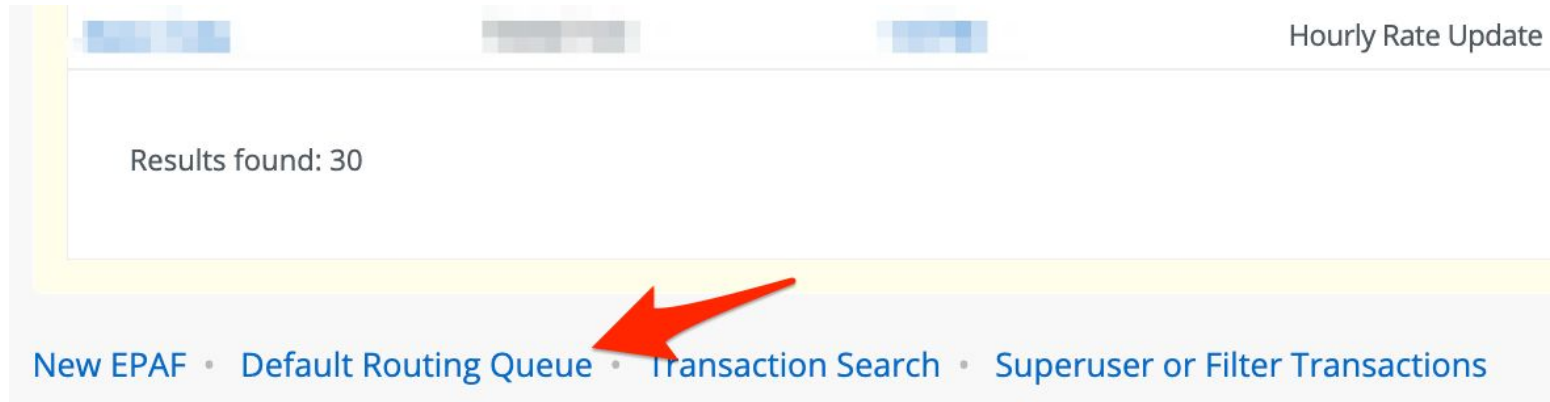


Default Routing Queues allow you to automatically populate approvers in your Routing Queue. You must create a default routing queue for **each** EPAF (i.e. setting up a default routing queue for Course Assistant EPAFs does not automatically set up a routing queue for Course Assistant EPAFs.

To establish Default Routing Queues, click on **EPAF Originator Summary** from your EPAF Menu.

# Establishing Default Routing Queues



Select the EPAF you wish to establish **Default Routing Queues** for from the drop down (remember, you must set up default routing queues for **each** EPAF). Then click **GO**.

# Establishing Default Routing Queues



Select the EPAF you wish to establish **Default Routing Queues** for from the drop down (remember, you must set up default routing queues for **each** EPAF). Then click **GO**.

# Establishing Default Routing Queues

Click on the drop down menu to select the user for each Approval Level. Please note that user names can be updated when creating new ePAFs. Click **Save Changes**.

You can establish the default routing queues for another EPAF by clicking on the **Approval Category** and clicking Go. You'll be presented with the mandatory approval levels for that ePAF. Select the user name from each level. Click **Save Changes**.



**EPAF Default Routing Queue**

ⓘ Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category

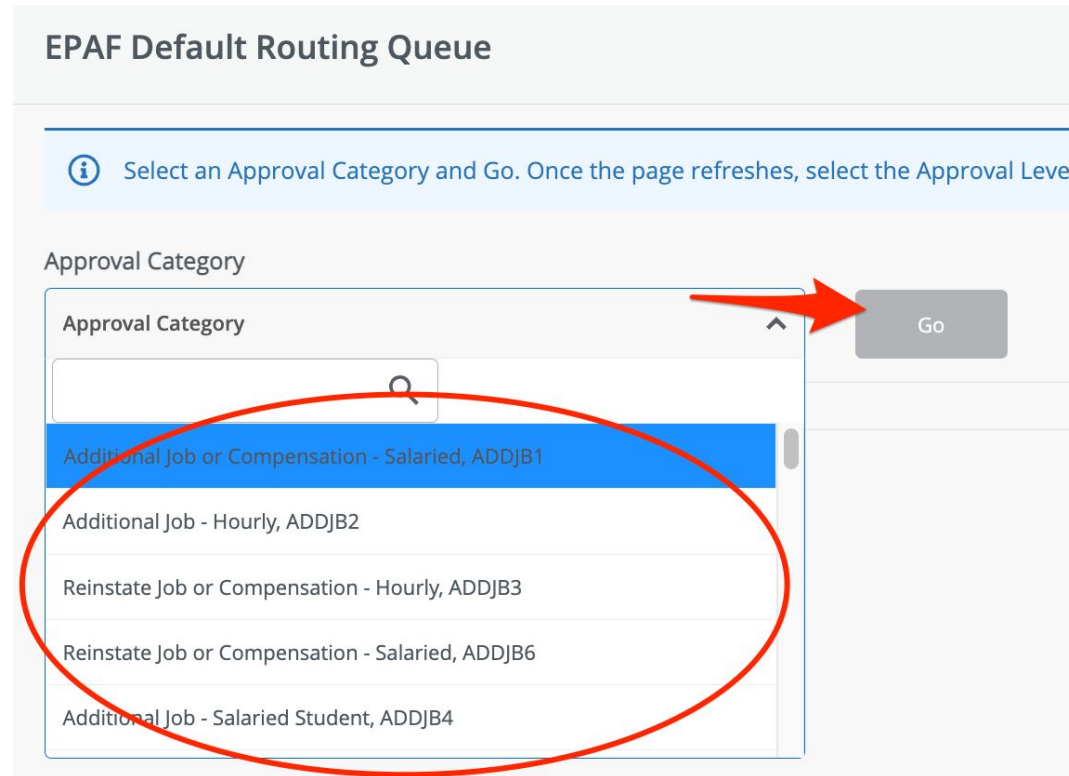Additional Job or Compensation - Salaried, ADDJB1 ⌄     Go

**Approval Queue**

| Approval Level | User Name | Required Action | Remove |
|---|---|---|---|
| 5 - (DEPART) Department Level Approval ⌄ | | Approve ⌄ | 🗑 |
| 9 - (VP/VPR) Vice President/Vice Provost ⌄ | | Approve ⌄ | 🗑 |
| 24 - (CONTR) Budget/Grant ⌄ | | Approve ⌄ | 🗑 |
| 30 - (HRASSC) Human Resources Associate ⌄ | | Approve ⌄ | 🗑 |
| 90 - (HRIS) HRIS Apply ⌄ | | Apply ⌄ | 🗑 |

**DO NOT adjust required action or remove any levels**

⊕ Add Row

Save Changes

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# ePAF Transaction Glossary

## Transaction Status and Queue Status Guide

| Status | Status Type | Definition |
|---|---|---|
| Approved | Transaction Status / Queue Status | Indicates that the transaction has been approved by all parties and ready to be applied to Banner |
| Complete | Transaction Status | Indicates that the transaction has been applied to Banner |
| Disapproved | Transaction Status / Queue Status | Indicates that the transaction has been disapproved by an approver |
| Pending | Transaction Status | Indicates that the transaction requires action by the approver(s) |
| Removed From Queue | Queue Status | Indicates that the transaction no longer needs your action |
| Return for Correction | Transaction Status / Queue Status | Indicates that the transaction has been returned to the Originator for update/correction |
| Void | Transaction Status | Indicates that the transaction has been voided by an originator or superuser and is no longer a valid transaction |
| Waiting | Transaction Status | Indicates that the transaction is in the process of being created |

## Action Buttons Guide

| Action Buttons/Links | User Type | Function |
|---|---|---|
| Approve | Approver(s) | The transaction will progress to the next level of approval in the transaction queue |
| Comment | Originator / Approver(s) | Available on all transactions for users as a free text field to share additional information |
| Disapprove | Approver(s) | The transaction will be removed from all levels of approvals and no further action will be possible |
| Return for Correction | Approver(s) | The transaction will be returned to the Originator for update/correction |
| Update | Originator | Available on transactions that have been returned for correction and the originator can make changes and submit for approval |
| Void | Originator | The transaction will be removed from all levels of approvals and no further action will be possible |

## Summary Page Guide

| Summary Page Tabs | User Type | Definition |
|---|---|---|
| Current | Originator / Approver(s) | Transactions that require your action |
| In My Queue | Approver(s) | Transactions that will require your action after predecessor levels have been approved |
| History | Originator / Approver(s) | Transactions that you have already taken action on |

## Miscellaneous

| Field Name | | Usage |
|---|---|---|
| Personnel Date (Begin Appointment) | | Actual Start Date of appointment |
| Personnel Date (End Appointment) | | Actual End Date of appointment |

# Help

Contact: HRISTeam@tc.edu or your HR Rep 😄

** By emailing HRISTeam@tc.edu a ServiceNow ticket will automatically be created. You will receive a follow up email saying that a case has been created along with a case number.

Please correspond with us by replying to the email with the CASE NUMBER.



Case Created | HR0018683 | Additional

**TC Information Technology**
to me, map2312

This email is to confirm that we have received your request for assistance and have opened HR incider

Here is a short description of your request: Additional ACAT codes to add to epaf reports

View the status of your incidents

From: Johanna Masbad

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