EPAF (Electronic Personnel Action Form) Manual for Student Employment

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What is an EPAF?

An EPAF is an Electronic Personnel Action Form; an online form, originated by a department to submit data changes to a student employee's Banner record.

The Student Employment EPAFs will allow you to:

- ☐ Hire a student employee
- ☐ Promote a student employee by both title and pay rate
- ☐ Terminate student employee (end job record)

Purpose

The purpose of the Student Employment EPAFS is to increase efficiency and accuracy in processing for student employee personnel actions. Supervisors will be able to enter, modify, and track their personnel requests.

Advantages

With an EPAF, you can quickly find where the process is in the approval queue, or if it is complete and entered into Banner.

Policy

- ☐ Student Employees will all be paid within the current pay steps
- ☐ Promotions will include new title, job description, and pay rate
- ☐ Do not share student information

Helpful Terms and Definitions

- **EPAF** – Electronic Personnel Action Form (EPAF), used to quickly change information in Banner. The departments will be able to enter desired changes using Banner instead of the traditional referral forms, and watch as the form flows through the approval queue.

- **Originator** – The designated department personnel authorized to create an EPAF. The Originator will correctly input the necessary information within the EPAF. This is a very important role as the Originator is the first step in making sure that an employee's appointment is accurately set up and maintained within Banner.

- **Approver/Applier** – Approvers are the individuals authorized to review and approve the information within an EPAF. Appliers are individuals who apply the approved EPAFs. For the purpose of student employment, the Student Employment and Communications Manager will be the only approver and applier.

- **EPAF Approval Category** – The reason for an update or change. There are three approval categories for student employment. Choosing the right EPAF Approval Category will help avoid Returns for Correction.

    o Hiring for Student Employee, SEHIRE

    o Promotion for Student Employee (Job Title and Hourly Rate), SEPROM

    o Termination for Student Employees, SETERM

- **Effective Date** - The date that the EPAF will take effect. This date must be after the last paid date; if not you will receive an error.

- **Warnings** – Potential problem with the information entered. A warning informs the originator and applier of potential issues, but will allow the EPAF to process.

- **Errors** – Will **not** allow the EPAF to progress to the approval levels. Errors must be corrected.

- **Approval Queue**- the sequence of approver/applier, in this case the Student Employment Manager

- **Last paid date**- the date payroll was last disbursed to the student. No changes can be made prior to this date as the payroll cycle has already passed.

How to Troubleshoot and Correct Errors

- Errors- will not allow the EPAF to progress to the approval levels. Errors must be corrected.
- Warnings- informs the originator of potential issues, but will allow the EPAF to process.

Warning or Error Messages	Solutions
A duplicate transaction, xxxxx, for this person exists for this approval category at waiting status.	There is already a transaction started for this student for this position. Check the Originator Summary and delete, void, or update any existing waiting status transactions.
ERROR First Name, SSN/SIN or Birth Dare are incomplete, or Sex code is invalid. Valid Values M(ale), F(emale), or N(ot available).	The student has not been set up as an employee because of missing student employment paperwork. Direct the student to the Office of Financial Aid and Student Employment to complete these forms.
ERROR A Primary Job has not been defined for this employee	The student does not have a primary job. You will need to change the contract type to Primary instead of Secondary.
This approval category does not allow the creation of a person record.	Student ID entered does not exist in the Banner System. Check that you have entered the correct number.
There are no active jobs based on the Query Date.	Student ID entered is a valid number, but they do not have an active job for the date entered.
No transactions found in your queue.	Confirm you are in the correct tab. The CURRENT tab will contain the transactions waiting for you to take an action. The HISTORY tab show all submitted transactions.
ERROR Eff Date must be greater than Last Paid Date of DD-MMMYYYY.	You are trying to change a date that has already been processed for payroll. To correct the error you must enter a date greater than last paid date or date of submitted student employment paperwork. Contact the Office of Financial Aid if a retro payment is required.
User Id must be entered for Routing Queue	Refer back to the Set Up Approval Queue, as this step has not been completed for this approval queue type. This is a onetime set up. Unfortunately, banner will not recognize you have corrected the Approval Queue for any in progress. You will need to delete any in progress EPAFs and begin again.
ERROR Begin Date must equal the first Jobs Detail Effective Date.	A transaction for the position already exits. You must delete/void the transaction and create a new transaction under the correct position or suffix
ERROR The activity code must be filled in for approval type STLBR	In the Job Labor Distribution section you must enter INST under the activity field

ERROR First Labor Dist Effective Date must equal the Job Begin Date	The student was not set up as an employee by the date entered. The earliest you can set up the new position is stated as the current hire date. All dates must match to submit successfully.
ERROR Current hire date must be later than original hire date.	The student was not set up as an employee by the date entered. The earliest you can set up the new position is stated as the current hire date
ERROR ID is not defined as employee.	The student has not been set up as an employee because of missing student employment paperwork. Direct the student to the Office of Financial Aid and Student Employment to complete these forms.
ERROR Invalid Date for Current Hire Date. Format is MM/DD/YYYY	Date was not entered correctly. Return to incorrect date and reenter in the correct format of MM/DD/YYYY
ERROR Not a valid active position.	The position code entered does not exist or has been deactivated. Please contacted the Student Employment Manager at ext. 6908
ERROR User cannot be listed more than once in same level with same required action indicator	There are two entries in the approval queue. Remove one of the entries. There should only be one name under each approval queue.
ERROR First Labor Dist Effective Date must equal the Job Begin Date	The effective date entered for the Job Labor Dist section does not equal the Job Begin date entered for the position under the Job Record section
ERROR This employee already has a primary job.	If the student already has a primary job set up in Banner no other job can be listed as primary. You must correct the contract type by selecting "Secondary"
ERROR Base Job record must exist to create a new job.	DELETE or VOID the transaction. Return to the New EPAF screen and create a new EPAF transaction using your position code and the suffix 01 or the next consecutive suffix.
ERROR Job Detail record must exist to create a new job.	DELETE or VOID the transaction. Return to the New EPAF screen and create a new EPAF transaction using your position code and the suffix 01 or the next consecutive suffix.

Set Up Approval Queue

Approval Queue set up is required in order to have the submitted EPAFs sent to the Student Employment Manager for approval. **This is a onetime set up.**
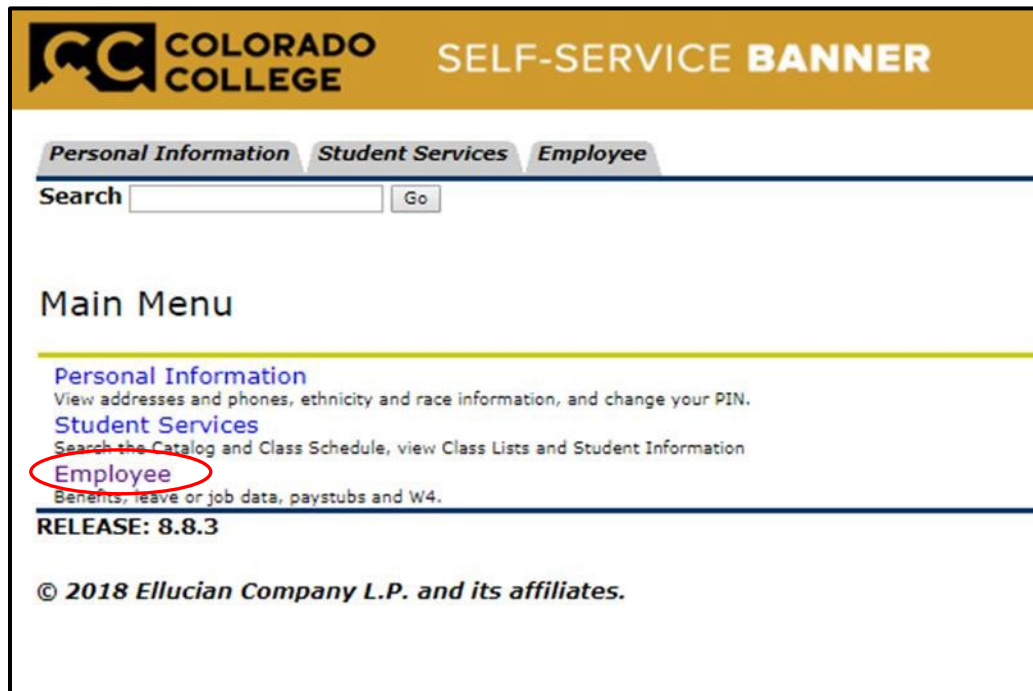
1) Enter the Sign Into CC icon on the Colorado College main homepage

2) Once on the Sign Into CC page select the Banner (SSB)
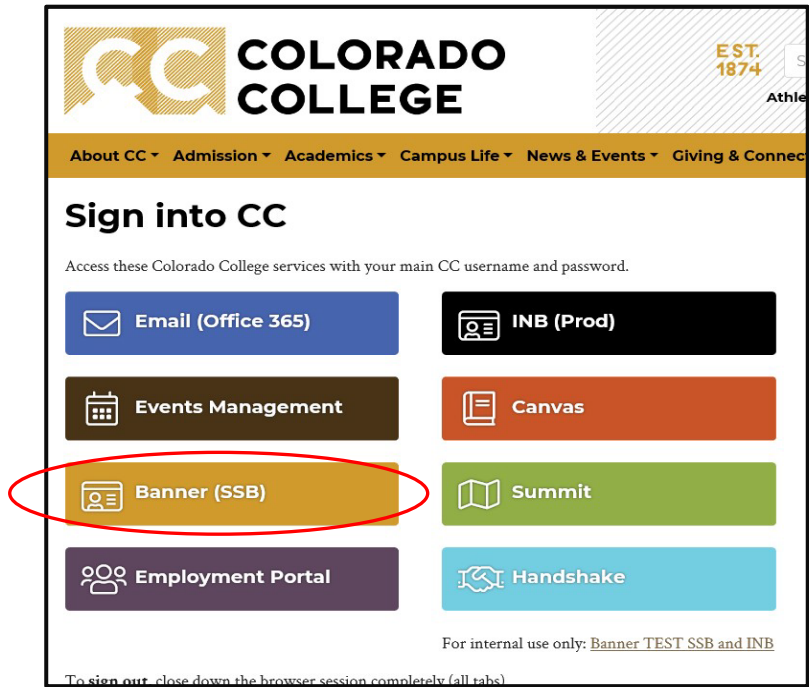
3) On the next screen select the Employee link

4) Select the EPAF link

5) Select EPAF Originator Summary

6) In the next screen, you will see a review of all currently outstanding EPAF transactions. On the bottom of the screen, select "Default Routing Queue". **If you have **not** completed an EPAF before you may not show any transactions

7) This screen is where you will set up the approver of all submitted student employment EPAFs. Use the drop down option for Approval Category to select each EPAF then select Go:

The approval categories:

    a. Hiring for Student Employee, SEHIRE
    b. Promotion for Student Employee (Job Title & Hourly Rate), SEPROM
    c. Termination for Student Employees, SETERM

You will need to use the drop down option to select and set up **each** approval category.

Personal Information | Student Services | **Employee**

Search [ ] Go

EPAF Default Routing Queue

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

Approval Category: [Not Selected ▾] [Go]

Approval Queue

Approval Level	User Name		Required Action
Not Selected ▾ 🔍	[ ]		Not Selected ▾
Not Selected ▾ 🔍	[ ]		Not Selected ▾
Not Selected ▾ 🔍	[ ]		Not Selected ▾
Not Selected ▾ 🔍	[ ]		Not Selected ▾

[Save and Add New Rows]

EPAF Originator Summary

Return to EPAF Menu

RELEASE: 8.8

8) Once the Go option is selected, the screen will appear as below. The drop down box under **Approval Level** should be selected to say " 75 - (FINAPP)" and the **Required Action** should be selected to say "Apply Select the magnifying glass icon under username. This will provide a list of approvers.

9) The box below will appear in which you will highlight Strawbridge, Lisa M. (LSTRAWBRIDGE) then click Select

10) Be sure that the Required Action section is set to "Apply"
   a. Now that your approver has chosen then click the "Save and Add New Rows" button below the Approval Queue section.

EPAF Default Routing Queue

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

Approval Category: Hiring for Student Employee, SEHIRE ▾ | Go

Approval Queue

Approval Level	User Name		Required Action
75 - (FINAPP) FA Student Worker Apply ▾ 🔍	LSTRAWBRIDGE	Lisa Marley Strawbridge	Not Selected ▾
Not Selected ▾ 🔍			Not Selected ▾
Not Selected ▾ 🔍			Not Selected ▾
Not Selected ▾ 🔍			Not Selected ▾

[Save and Add New Rows]

EPAF Originator Summary
Return to EPAF Menu

11) Now that the selection has been saved you will receive the message shown below

EPAF Default Routing Queue

✔ Your change was saved successfully.
💬 Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: Hiring for Student Employee, SEHIRE ▾ | Go

Approval Queue

Approval Level	User Name		Required Action	Remove
75 - (FINAPP) FA Student Worker Apply ▾ 🔍	LSTRAWBRIDGE	Lisa Marley Strawbridge	Apply ▾	☐
Not Selected ▾ 🔍			Not Selected ▾	
Not Selected ▾ 🔍			Not Selected ▾	
Not Selected ▾ 🔍			Not Selected ▾	
Not Selected ▾ 🔍			Not Selected ▾	

[Save and Add New Rows]

EPAF Originator Summary
Return to EPAF Menu

12) You will need to do this for all three EPAFs ensuring that there is an approver selected. Otherwise, the completed EPAF will not go to anyone for approval. Using the Approval Category drop down arrow select the other categories of SETERM and SEPROM and select Go. This will bring you to a fresh page where you will set up the Approval Queue.

EPAF Default Routing Queue

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

Approval Category: Promotion for Student Employee (Job Title & Hourly Rate), SEPROM ⌄ [Go]

Approval Queue

Approval Level	User Name		Required Action
75 - (FINAPP) FA Student Worker Apply ⌄ 🔍	LSTRAWBRIDGE	Lisa Marley Strawbridge	Apply ⌄
Not Selected ⌄ 🔍			Not Selected ⌄
Not Selected ⌄ 🔍			Not Selected ⌄
Not Selected ⌄ 🔍			Not Selected ⌄
Not Selected ⌄ 🔍			Not Selected ⌄

✔ Mandatory Levels defaulted from Electronic Approval Category Form (NTRACAT).

[Save and Add New Rows]

EPAF Originator Summary
Return to EPAF Menu

New Hire EPAF

1) Enter the Sign Into CC icon on the Colorado College main homepage

2) Once on the Sign Into CC page select the Banner (SSB)

3) On the next screen select the Employee link

4) Select the last link labeled EPAF

5) Select the link for New EPAF

COLORADO COLLEGE — SELF-SERVICE **BANNER**

Personal Information   Student Services   **Employee**

Search [   ] [Go]

Electronic Personnel Action Form

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

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6) Find your student's ID number.
   a. **If you know your student's ID number skip to step 7**
   b. If you do not know the student's ID number, click the 'Search' button at the far right of the ID field. **Do not** click the 'Generate ID' button. i.

ID: * [   ] [   ] 👤 🔍   Search for ID number

'Generate ID' button
Do not click

The following *Person Search* query screen will display:
- ☐ **Check the 'Employee' box**
- ☐ Enter the last name and/or first name
- ☐ Click the 'Go' button

7) Input the student employee's ID number, query date (Student's first working day format MM/DD/YYYY), and approval category (Hiring for Student Employee, SEHIRE)
    a. Once the information is complete, select the GO button.

This is the student's first working day

8) On the new screen that comes up there will be a field to enter your student's position number and suffix. Then select the 'Go' button.
   a. Any positions that the student currently has will show up under Employee Job Assignments
   b. Suffix- the next sequential number
      i. **For Example**: If the student is being hired for a new position in the Financial Aid Office the position code is still CS0002 and but the suffix is now 01. If this were a new position outside of the currently held positions such as the Worner desk, the suffix would then be 00.

9) The next screen of the EPAF will provides fields that are enterable and some that already have a default.

SELF-SERVICE BANNER — COLORADO COLLEGE

| Personal Information | Student Services | **Employee** |

Search [   ] Go

RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

Electronic Personnel Action Form

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

Name and ID: ▆▆▆▆▆▆▆
Transaction: **Query Date:** May 18, 2018
Transaction Status:
Approval Category: Hiring for Student Employee, SEHIRE

[Save]

Approval Types | Account Distribution | Routing Queue | Comments | Transaction History
New EPAF | EPAF Originator Summary
[Retur]n to EPAF Menu

Jump to Bottom

Confirm date of personnel action matches first working day

* - indicates a required field.

New Student Employee Record

Item	Current Value	New Value
Current Hire Date: MM/DD/YYYY*	09/25/2017	05/18/2018
I9 Form Indicator: (Not Enterable)	Received	[ ]
Home Organization: *(Not Enterable)	180051, Financial Aid Office	[ ]
Home COAS: *(Not Enterable)	T	T
Employee Class Code: *(Not Enterable)	SS, Students	SS
Employee Status: *(Not Enterable)	Active	A

I9 Form Indicator Status Key:
Has completed paperwork:
- T- temporary
- R- received

Has not completed paperwork:
- Blank
- Not received

Job Record, CS0002-01 Student Worker

Confirm Dates (They should all be the same)

Enter job title

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		05/18/2018
Jobs Effective Date: MM/DD/YYYY*		05/18/2018
Title: *		Test
Step: *		1
Timesheet Orgn: *	🔍	
Contract Type: *		Secondary ▾
Salary Grade: *(Not Enterable)		1
Job Change Reason: *(Not Enterable)		00001
Job Status: *(Not Enterable)		A
Workers Comp Code: *(Not Enterable)		P

Specify Step (Step 1 = $12.00/hr, Step 2= $12.40/hr)

Confirm timesheet org as this is where the timesheet will display

Contract Type: identifies the primary and secondary position.
- **Primary Positions:** are the first active position. If there are no other active position then the position is primary.
- **Secondary Positions**: if student already holds a primary positions then all other held positions are secondary

Job Labor Distribution, CS0002-01 Student Worker

Current
Effective Date: 05/18/2018
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New
Effective Date: MM/DD/YYYY 05/18/2018

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
🔍 T		🔍 110002	180051	614001	SS	🔍 INST				100.00	
🔍		🔍				🔍					
🔍		🔍				🔍					
🔍		🔍				🔍					
🔍		🔍				🔍					

Total: 100.00

✔

[Default from Index] [Save and Add New Rows]

Type 'INST' under activity

Confirm Fund and Organization code

FOAP defaults from the entered position code
 a. Verify correct FOAP numbers before continuing
 b. Recommendation: confirm these are the correct fund codes because this will determine the funding source of the student's wages

Ensure the routing queue is correctly designated. This tells the EPAF where to go for approvals.

If these fields are blank, manually type in the information shown below. To have this information default automatically refer back to the Set Approval Queue instructions on page 7.

Routing Queue

Approval Level		User Name		Required Action
75 - (FINAPP) FA Student Worker Apply	🔍	LSTRAWBRIDGE	Lisa Marley Strawbridge	Apply
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected

Save and Add New Rows

Comment

Approval Types | Account Distribution | Routing Queue | Comments | Transaction History

Save

You are able to comment in the box that displays below the Routing Queue information. This is not a requirement and should only be used for pertinent information, like FOAP changes!

Comment

Approval Types | Account Distribution | Routing Queue | Comments | Transaction History

Save
Return to Top

New EPAF | EPAF Originator Summary

10) Click on Save button at bottom of screen
  a. Look for the message at the top of page 5 stating "The transaction has been successfully submitted" with the green check mark
  b. **Click on Submit** – If there are errors in the EPAF you will see them now. Refer to the troubleshooting section on page 5, correct your errors, then Save and Submit again.

Name and ID: [REDACTED]
Transaction: 9900
Transaction Status: Waiting
Approval Category: Hiring for Student Employee, SEHIRE
Save   Submit   Delete

Approval

  c. If the warnings below appear your transaction has successfully completed and these warnings can be ignored

Errors and Warning Messages

Type	Message Type	Description
Job Record	WARNING	*WARNING* Total FTE for this position is greater than budgeted FTE.
Job Record	WARNING	*WARNING* Encumbrance has been set to 0, because method is Value Input.

* - indicates a required field.

11) When EPAF has been submitted correctly, your status should move from Waiting, to Pending or Approved. You have now successfully completed the new hire EPAF

CC COLORADO COLLEGE   SELF-SERVICE BANNER

Personal Information   Student Services   **Employee**

Search [   ] Go   RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

Electronic Personnel Action Form

✓ The transaction has been successfully submitted.
💬 Enter the information for the EPAF and either Save or Submit

Name and ID: [REDACTED]   **Job and Suffix:** CS0002-01, Student Worker
Transaction: 9900   **Query Date:** May 18, 2018
Transaction Status: Approved   **Last Paid Date:**
Approval Category: Hiring for Student Employee, SEHIRE

Approval Types | Account Distribution | Errors | Routing Queue | Comments | Transaction History
New EPAF | EPAF Originator Summary
Return to EPAF Menu

Jump to Bottom

Errors and Warning Messages

Type	Message Type	Description
Job Record	WARNING	*WARNING* Total FTE for this position is greater than budgeted FTE.
Job Record	WARNING	*WARNING* Encumbrance has been set to 0, because method is Value Input.

* - indicates a required field.

You must save *and* **SUBMIT** an EPAF for it to come to student employment for approval

Promotion EPAF

1) Enter the Sign Into CC icon on the Colorado College main homepage
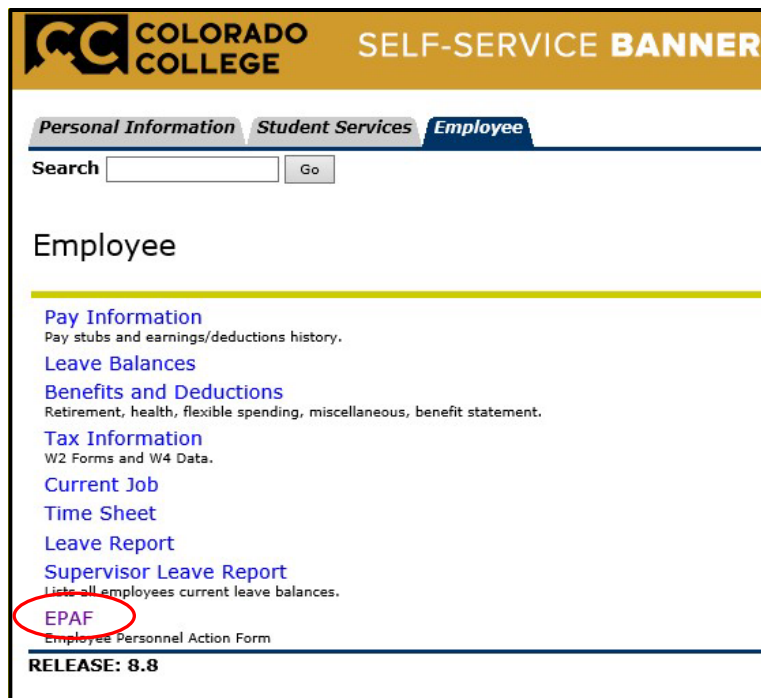

2) Once on the Sign Into CC page select the Banner (SSB)

3) On the next screen select the Employee link
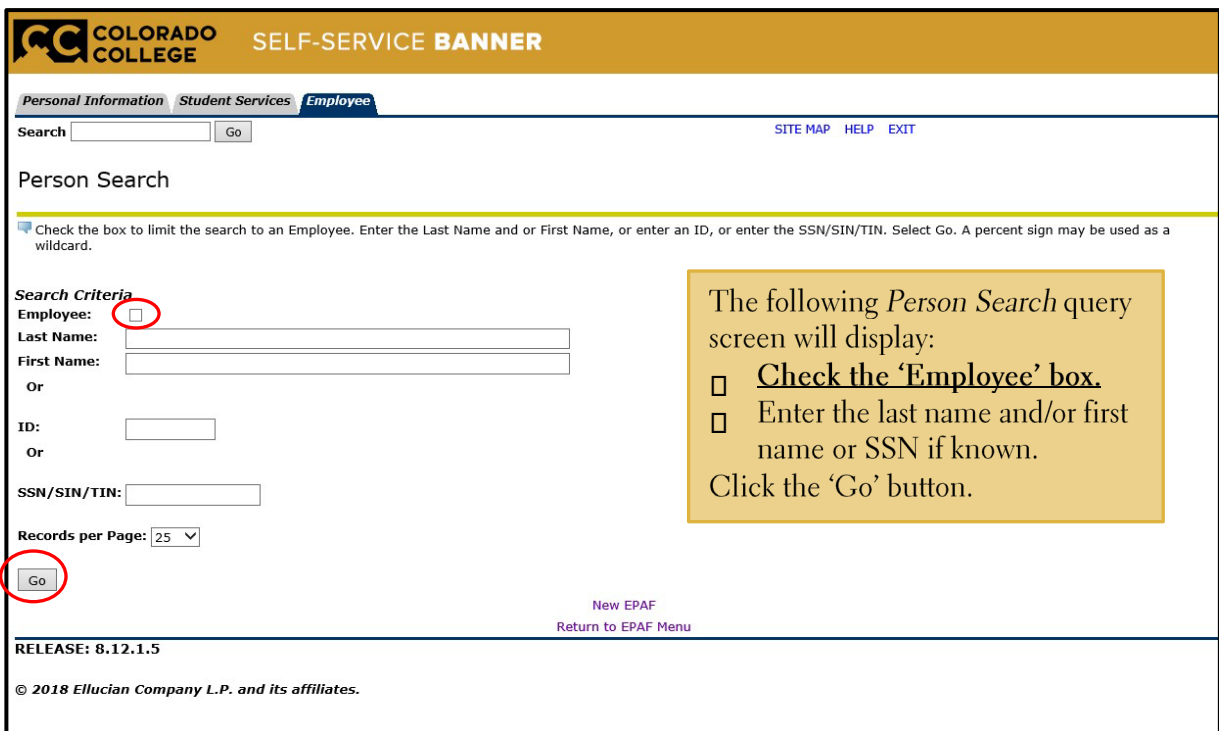

4) Select the last link labeled EPAF

5) Select the link for New EPAF

Electronic Personnel Action Form

Colorado College — Self-Service Banner

Personal Information | Student Services | **Employee**

Search [ ] Go

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

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6) Input your ID number, query date (date the action is to take effect), and the Approval Category.
   a. Approval Category Options (Select the action)
      i. Promotion for Student Employee (Job Title & Hourly Rate), SEPROM
   b. **If you know your student's ID number skip to step 7**
   c. If you do not know the student's ID number, click the 'Search' button at the far right of the ID field. **Do not** click the 'Generate ID' button.

ID: * [   ] [   ] 🧍🔍

Search for ID number

'Generate ID' button
Do not click

The following *Person Search* query screen will display:
- **Check the 'Employee' box.**
- Enter the last name and/or first name or SSN if known.

Click the 'Go' button.

7) Input the student employee's ID number, query date (Student's first working day format MM/DD/YYYY), and approval category (Promotion for Student Employee Job Title and Hourly Rate, SEPROM)

   ➢ Once the information is complete, select the GO button.

8) The next screen to appear will display all currently active jobs. Select the position you wish to promote by selecting the radio dial to the right of the position under Select. Then select Go.

9) On the next screen, you will have the option the change the title for this promotion. As there are only two pay bands, there is no other option than to promote to step 2. While on this screen, confirm/review the effective date.
   a. For more information on the pay Step, please review the page on Helpful Terms and Definitions
   b. Be sure the Routing Queue is set up as seen below
      i. Approval Level: 75-(FINAPP) FA Student Worker Apply ii. User Name:**LSTRAWBRIDGE**

Electronic Personnel Action Form

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

Name and ID:
Transaction: **Query Date:**   May 30, 2018
Transaction Status: **Last Paid Date:** Apr 21, 2018
Approval Category: Promotion for Student Employee (Job Title & Hourly Rate), SEPROM

[Save]

Approval Types | Routing Queue | Comments | Transaction History
New EPAF | EPAF Originator Summary
Return to EPAF Menu

Jump to Bottom

* - indicates a required field.

Student Employee Promotion, CS0002-00 Student Intern I FA, Last Paid Date: Apr 21, 2018

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	12/22/2017	05/30/2018
Title: *	Student Intern I FA	Student Intern II
Step: *(Not Enterable)	0	2
Job Change Reason: *(Not Enterable)	00021	00005

Routing Queue

username is: LSTRAWBRIDGE

Approval Level	User Name		Required Action
75 - (FINAPP) FA Student Worker Apply	🔍 KCLINTON	Kristen Elizabeth Clinton	Apply
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected

[Save and Add New Rows]

Comment

You are able to comment in the box that display below the Approval Level section. This is <u>not</u> a requirement and should only be used for pertinent information

Comment

[   ]

[Save]   Approval Types | Account Distribution | Routing Queue | Comments | Transaction History
Return to Top

New EPAF | EPAF Originator Summary

10) Then select the Save button first then the Submit button. Look for the message at the top of page stating "The transaction has been successfully submitted"
   a. Click on Submit – If there are errors in the EPAF you will see them now. Refer to the trouble-shooting section on page, correct your errors, then Save and Submit again.
   b. If only warnings appear your transaction has successfully completed and these warnings can be ignored

Termination EPAF

1) Enter the Sign Into CC icon on the Colorado College main homepage

2) Once on the Sign Into CC page select the Banner (SSB)
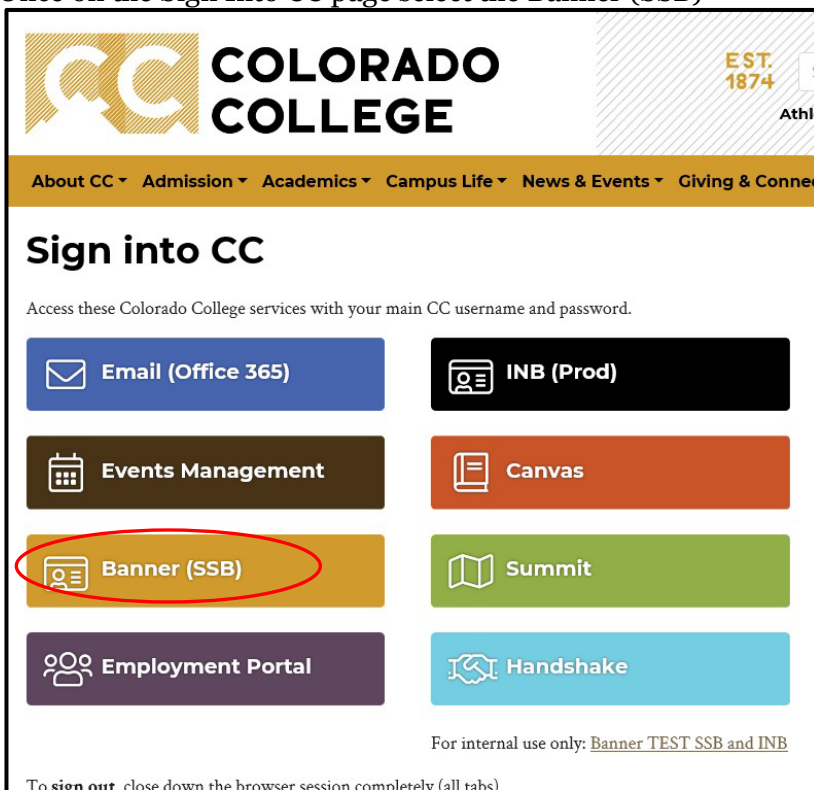
3) Enter your Self-Service Banner and select Employee link

4) Select the last link labeled EPAF
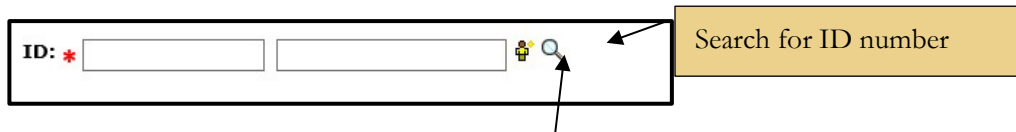
5) Select the link for New EPAF

6) Input your ID number, query date (date the action is to take effect), and the Approval Category.
   ➢ Approval Category Options (Select the action)
      i. Termination for Student Employees, SETERM
   ➢ **If you know your student's ID number skip to step 7**
   ➢ If you do not know the student's ID number, click the 'Search' button at the far right of the ID field. **Do not** click the 'Generate ID' button. i.

Search for ID number

'Generate ID' button
Do not click

The following *Person Search* query screen will display:

☐ **Check the 'Employee' box.**

☐ Enter the last name and/or first name or SSN if known.

Click the 'Go' button.

7) Input the student employee's ID number, query date (Student's last working day format MM/DD/YYYY), and approval category (Termination for Student Employees, SETERM)

   ➢ Once the information is complete, select the GO button.

Student's last working day

*If the TERM EPAF is being submitted a significant period of time (months-years) after the student has stopped working, there are likely new job records that will prohibit the TERM EPAF from submitting properly. **If you receive an error message when trying to submit contact student employment**.

8) The next screen to appear will display all currently active jobs. Select the position you wish to terminate by selecting the radio dial to the right of the position under Select. Then select Go.

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: May 31, 2018
Approval Category: Student Employment Termination, SETERM

Student Employee Termination, STTERM

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									○
	Primary	CS0002	00	Student Intern I FA	180051, Financial Aid Office	Sep 25, 2017		Apr 21, 2018	Active	◉
	Secondary	CS0002	01	Test	180051, Financial Aid Office	May 18, 2018			Active	○

[All Jobs]

[Go]

New EPAF
Return to EPAF Menu

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9) On the next screen, you will have the option enter the date for this termination. Use the format MM/DD/YYYY.
  ➢ Be sure the Routing Queue is set up as seen below
    ➢ Approval Level: 75-(FINAPP) FA Student Worker Apply
    ➢ User Name: LSTRAWBRIDGE

username is:

LSTRAWBRIDGE

There should only be ONE row filled out for the Approval Level.

You are able to comment in the box that display below the Approval Level section. This is <u>not</u> a requirement and should only be used for pertinent information.

10) Then select the Save button first then the Submit button. Look for the message at the top of page stating "The transaction has been successfully submitted"
  ➢ Click on Submit – If there are errors in the EPAF you will see them now. Refer to the trouble-shooting section on page 5, correct your errors, then Save and Submit again.

username is: LSTRAWBRIDGE

How do I know what I have submitted?

1) From the EPAF menu, you can click on the EPAF Originator Summary, or if you have just submitted an EPAF, you can click on the EPAF Originator Summary link at the bottom of the page.
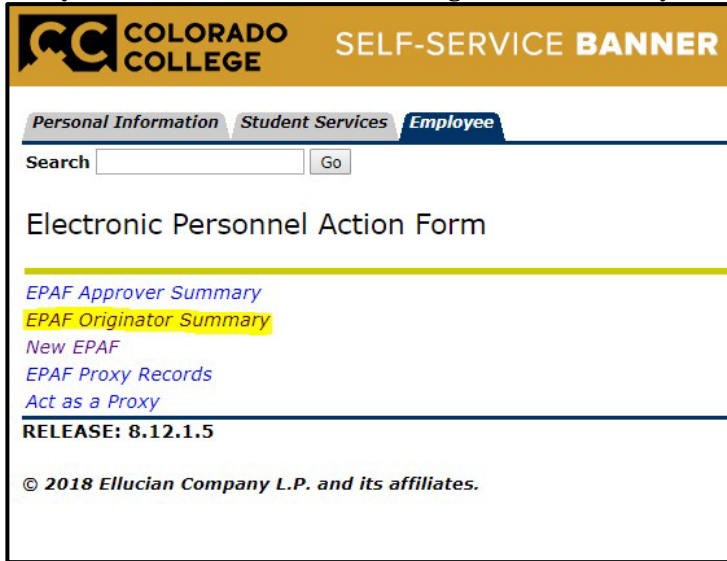
2) You will see the following screen showing the current transactions pending approval or returned for correction

3) To view transactions that have been approved
   a. Click on History Tab
   b. Then click on the Go button to continue
   c. The list will default to All. If you want to see a different status, then choose a different Transaction Status from the drop down and click on the Go button.
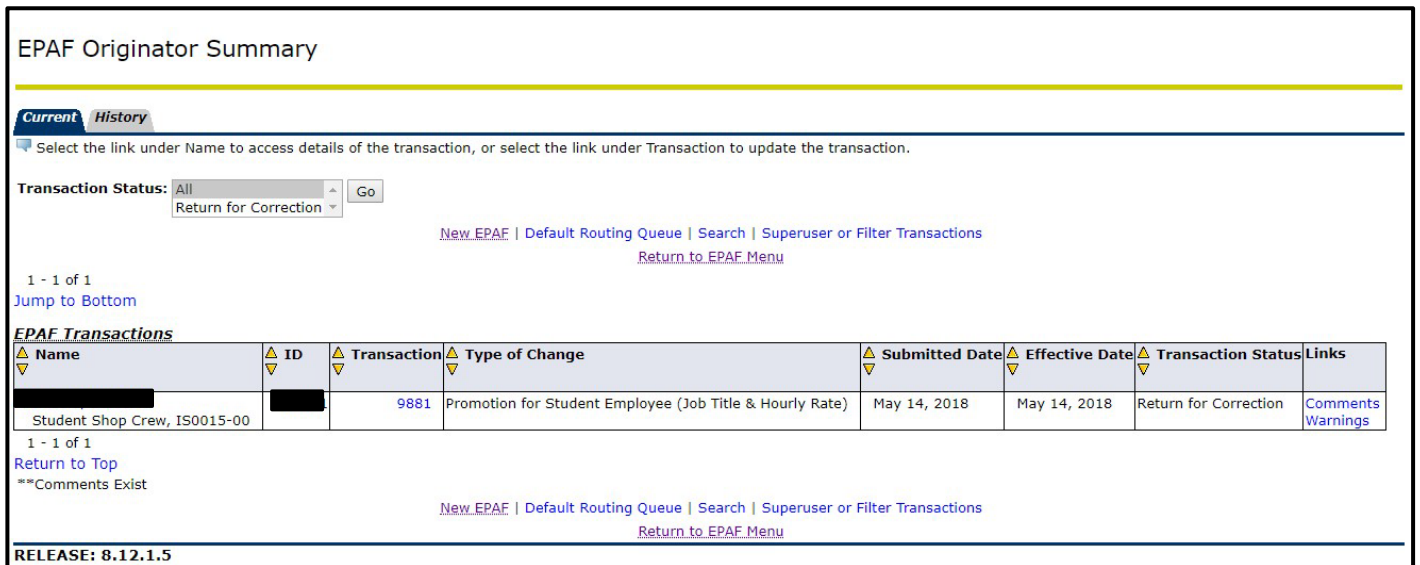
4) You will then be able to see for whom you created an EPAF, and the transaction number, type of EPAF, date you submitted the EPAF, date the EPAF will take effect, status of the EPAF, and if there are comments, warnings, errors, etc.
   a. If you see a Transaction Status of Completed, the form has been applied in Banner.

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EPAF Transactions

△ Name ▽	△ ID ▽	△ Transaction ▽	△ Type of Change ▽	△ Submitted Date ▽	△ Effective Date ▽	△ Transaction Status ▽	Links
				Oct 29, 2014	Oct 29, 2014	Completed	Warnings
				Oct 29, 2014	Oct 29, 2014	Completed	Warnings
				Oct 29, 2014	Oct 29, 2014	Completed	**Comments Warnings
				Oct 30, 2014	Aug 17, 2015	Completed	Warnings
				Oct 30, 2014	Aug 17, 2015	Approved	Comments Errors

☐ If you see a link with the word Errors, (see example above), you can click on the word and see an error description.

If you want detailed information, click on the employee's name, and you will get a detailed list of all actions taken, error and warning messages, date the EPAF was submitted, and where the EPAF is in the routing queue.

EPAF Transaction Status Chart

Status	Definition
Waiting	Transaction has been created, but not submitted. A waiting status transaction can be deleted on the Originator Summary Page.
Pending	Waiting for Approver to take action.
Return for Correction	Allows the Approver/Applier to return a transaction to the Originator for correction. Be sure to check for comments. **Originators will be emailed for notification of EPAF return.**
Approved	The transaction has been approved and is waiting to be applied
Complete	The transaction has been approved and applied to the Banner database. The process is complete. No further action is necessary.
Disapproved	The approver disapproved the transaction
Void	It is no longer a valid transaction. Only the originator may void the transaction.
In the Queue	The transaction is waiting action. Transactions must be approved/applied. To correct this you will need to enter the EPAF and click Submit