

Learning Objectives

- ▶ Define EPAF
- ▶ When should I complete an EPAF?
- ▶ General information needed to successfully submit all EPAFs
- ▶ Complete an EPAF (from beginning to end)
- ▶ Common Errors: Problems and their solutions
- ▶ Checking and interpreting EPAF statuses





What is EPAF?

EPAF is an acronym for Electronic Personnel Action Form

It is a digital tool used by organizations to manage and automate HR and payroll-related actions for employees. The EPAF system allows authorized users to submit, route, approve, and track personnel actions like:

- ▶ Hire/Rehire
- ▶ Job Transfer
- ▶ One-time/Recurrence Payment
- ▶ Terminations
- ▶ Distribution Change
- ▶ Job Title Change
- ▶ Salary Increase



What Can an EPAF Originator Do?

The Electronic Approvals Module uses Banner's Electronic Personnel Action Form (EPAF) to process a variety of transactions for employees.

As an EPAF Originator, you can:

- ▶ Create, Delete and void EPAF transactions.
- ▶ Route transactions.
- ▶ Track the EPAF and its status.
- ▶ Track job records



General Information Needed when creating EPAFs

- ▶ First and Last Name Or employee ID
- ▶ Query Date (Effective Date)
- ▶ Approval Category
- ▶ Position Number & Suffix
- ▶ Funding Information
- ▶ Title of the Employee
- ▶ Hourly Rate BW/Annual Salary SM

***Note:** If you don't know employees position number or funding information when starting an EPAF, contact:

HR Recruiting or HRIS office.

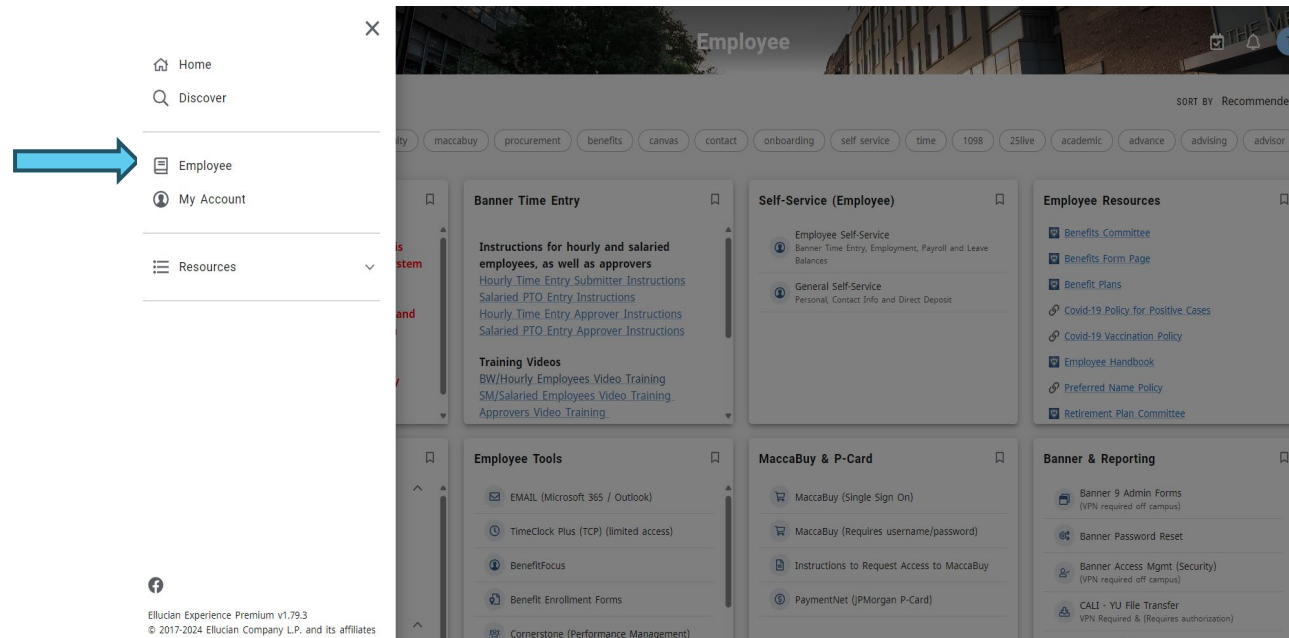
LET'S GET
STARTED



Step 1: Go to Yeshiva University Home Page:

[Home - Liferay \(yu.edu\)](https://yu.edu)

Then click on **‘Employee’** on the side bar



Step 2: Under the ‘Self Service Link’ section, click on ‘Employee Self Service’

The screenshot shows the Yeshiva University Employee Self-Service portal. At the top, there is a header with the Yeshiva University logo and the word "Employee". Below the header is a search bar labeled "Find cards" and a "SORT BY Recommended" dropdown. A row of category tags includes: employee, banner, time entry, faculty, maccabuy, procurement, benefits, canvas, contact, onboarding, self service, time, 1098, 25live, academic, advance, advising, and advisor. The main content area displays four cards:

- Banner Time Entry is Here!**: Contains red text stating that Banner Time Entry is now LIVE and the Kronos system is no longer active. It also mentions that entering and approving time should be done through Employee Self-Service and provides a link to the new Banner Time Entry section in InsideTrack!
- Banner Time Entry**: Contains instructions for hourly and salaried employees and approvers, with links to "Hourly Time Entry Submitter Instructions", "Salaried PTO Entry Instructions", "Hourly Time Entry Approver Instructions", and "Salaried PTO Entry Approver Instructions". It also includes a "Training Videos" section with links to "BW/Hourly Employees Video Training", "SM/Salaried Employees Video Training", and "Approvers Video Training". A blue arrow points from this card to the "Employee Self-Service" link in the next card.
- Self-Service (Employee)**: Contains two links: "Employee Self-Service" (Banner Time Entry, Employment, Payroll and Leave Balances) and "General Self-Service" (Personal, Contact Info and Direct Deposit).
- Employee Resources**: Contains a list of links: "Benefits Committee", "Benefits Form Page", "Benefit Plans", "Covid-19 Policy for Positive Cases", "Covid-19 Vaccination Policy", "Employee Handbook", "Preferred Name Policy", and "Retirement Plan Committee".

Step 3: Click on 'Electronic Personnel Action Forms (EPAF)' from the Employee Dashboard

The screenshot displays the Yeshiva University Employee Dashboard. At the top, the header includes the Yeshiva University logo and a settings gear icon. Below the header, the page is titled "Employee Dashboard". On the left, there is a placeholder for a profile picture and a "My Profile" button. To the right of the profile area, the "Leave Balances as of 07/21/2023" are shown: "Vacation Time in hours" with a value of 0.00 and "Sick Time in hours" with a value of 12.83. A link for "Full Leave Balance Information" is also present. The main content area is divided into two columns. The left column contains a list of links: "Pay Information", "Latest Pay Stub: 07/14/2023", "All Pay Stubs", "Direct Deposit Information", "Deductions History", "Earnings", "Taxes", "Job Summary", and "Employee Summary". The "Deductions History" link is highlighted with a blue arrow pointing to the right. The right column, titled "My Activities", contains a list of links: "Electronic Personnel Action Forms (EPAF)", "Effort Certification", and "Labor Redistribution". The "Electronic Personnel Action Forms (EPAF)" link is the first item in this list.

Step 4: Click on ‘New EPAF’

The screenshot displays the Yeshiva University website's 'Electronic Personnel Action Forms' (EPAF) section. The header includes the Yeshiva University logo and the text 'Yeshiva University'. Below the header, a breadcrumb trail shows 'Home' and 'Personnel Actions'. The main heading is 'Electronic Personnel Action Forms'. The content area contains five buttons with descriptions:

- 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. (A blue arrow points to this button.)
- 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.

Step 5: Enter the ‘Employee ID’ and ‘Query Date’ in the below search bars


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



First Name Last Name ☐ Is

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

ID * 

[Generate new ID](#)

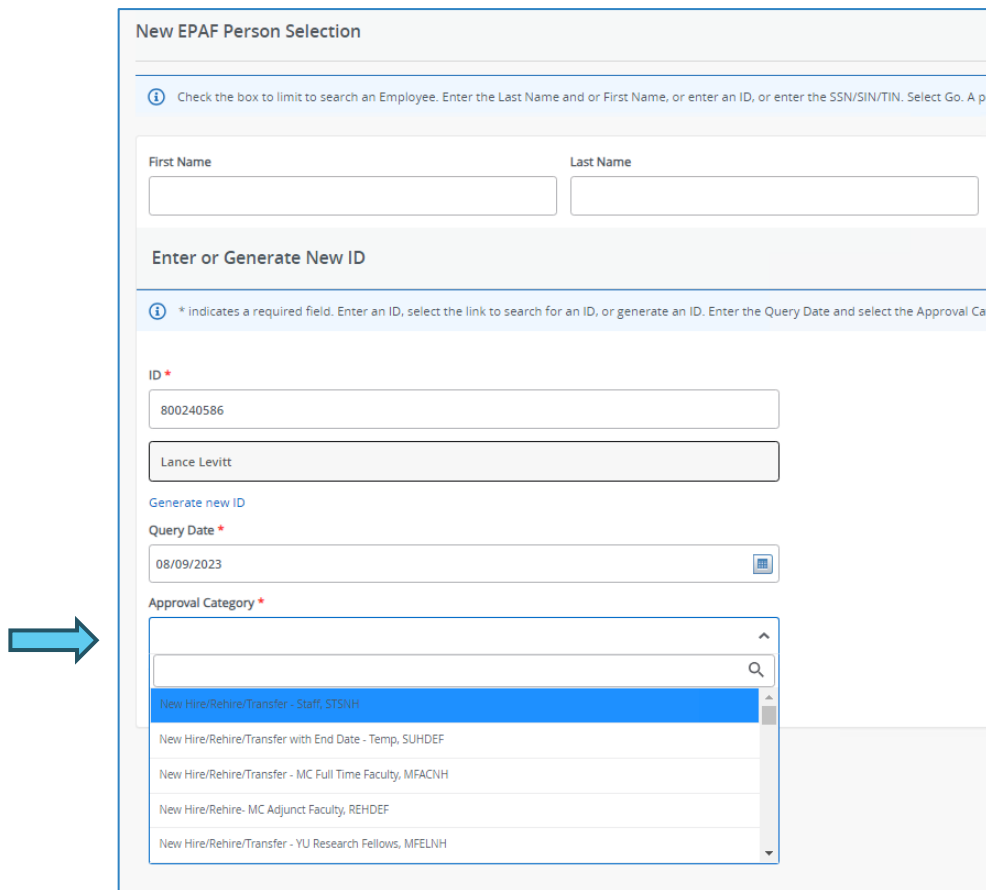
Query Date *  

Approval Category *

***Note:** It is very important to have a correct query date because this query date will be the EPAF effective date after the EPAF created and saved. It cannot be changed during the EPAF updating.

STEP 6: Select 'Approval Category' by clicking on arrow for drop down menu

For this example, we are going to select, 'New Hire/Rehire/Transfer - Staff, STSNH'



The screenshot shows the 'New EPAF Person Selection' form. A blue arrow points to the 'Approval Category' dropdown menu, which is open and showing a list of options. The first option, 'New Hire/Rehire/Transfer - Staff, STSNH', is highlighted in blue.

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 pe

First Name 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 Cat

ID *

800240586

Lance Levitt

Generate new ID

Query Date *

08/09/2023

Approval Category *

- New Hire/Rehire/Transfer - Staff, STSNH
- New Hire/Rehire/Transfer with End Date - Temp, SUHDEF
- New Hire/Rehire/Transfer - MC Full Time Faculty, MFACNH
- New Hire/Rehire- MC Adjunct Faculty, REHDEF
- New Hire/Rehire/Transfer - YU Research Fellows, MFELNH

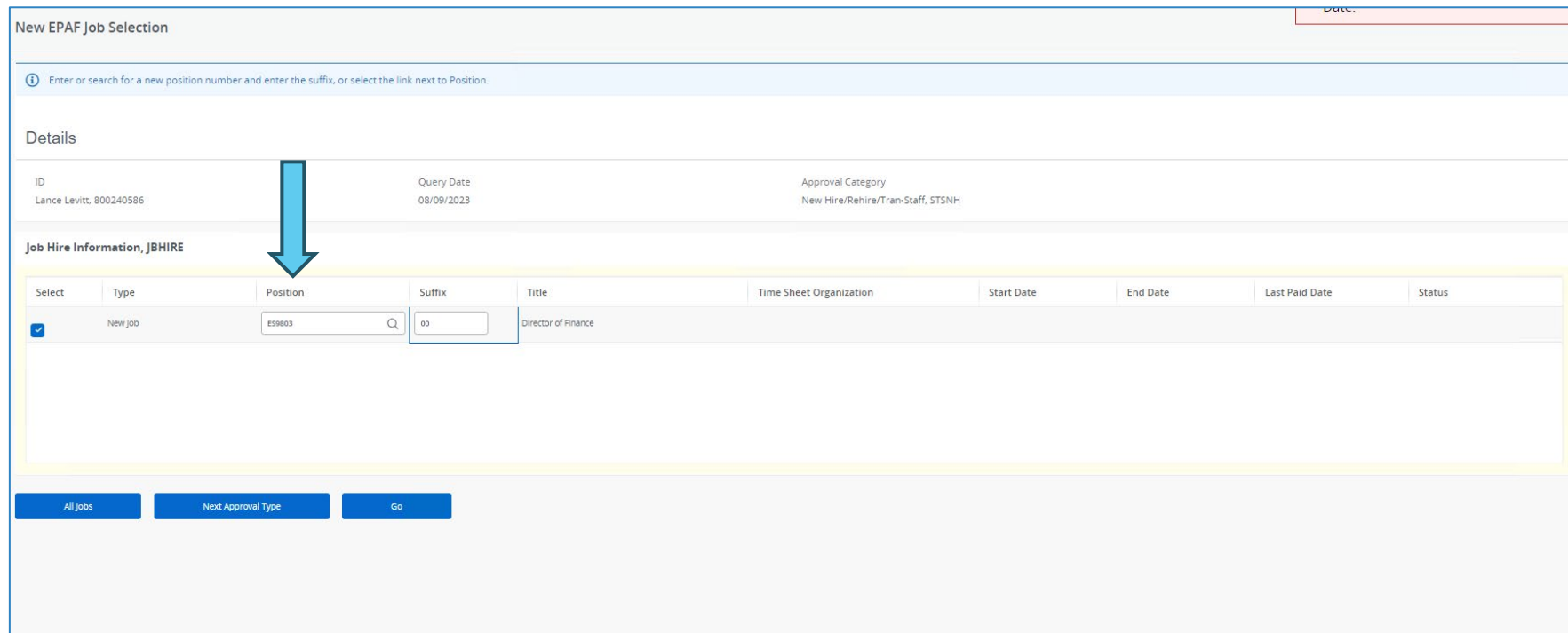


Approval Category Codes

<u>ACTION</u> What do you want to do?	<u>WHO</u> What type of employee?	<u>CODE</u>
New Hire/Rehire	Any Employees, No students	STSNH
Hire with End Date - Temp	Any Part-Time Employees	SUHDEF
Assign a Secondary Job to a Student with an ending date	Student	SJBSTM
New Hire/Rehire a Student	New Hire/Rehire-Manhattan Student	STMNH
Promotion, Off Cycle Increase, Job Hours Change, etc.	Employees, no Student	JBCHST
Employment Termination	All employees include Student	TERM
Recurrence or One-time Payment	Staff and Student	PAYSTF

Step 7: New EPAF

Next, enter the new job position and suffix number in the search bar below, then press go



The screenshot shows the 'New EPAF Job Selection' form. At the top, there is a header bar with the title 'New EPAF Job Selection'. Below the header, there is a light blue box with an information icon and the text: 'Enter or search for a new position number and enter the suffix, or select the link next to Position.' Below this is a 'Details' section with three columns: 'ID' (Lance Levitt, 800240586), 'Query Date' (08/09/2023), and 'Approval Category' (New Hire/Rehire/Tran-Staff, STSNH). Below the details is the 'Job Hire Information, JBHIRE' section, which is highlighted with a yellow border. A blue arrow points to the 'Position' input field in this section. The 'Position' field contains 'E59803' and has a magnifying glass icon. The 'Suffix' field contains '00'. The 'Title' field contains 'Director of Finance'. Below the input fields is a table with the following columns: 'Select', 'Type', 'Position', 'Suffix', 'Title', 'Time Sheet Organization', 'Start Date', 'End Date', 'Last Paid Date', and 'Status'. The table has one row with a checked checkbox in the 'Select' column, 'New job' in the 'Type' column, 'E59803' in the 'Position' column, '00' in the 'Suffix' column, and 'Director of Finance' in the 'Title' column. Below the table are three buttons: 'All Jobs', 'Next Approval Type', and 'Go'.

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
<input checked="" type="checkbox"/>	New job	E59803	00	Director of Finance					

***Note:** if position number and suffix are unknown, BUT you know employee class and name of budget organization then click the magnifying glass to search position number and suffix. Otherwise, contact your department budget authority.

Step 8: Once you open the below page, scroll to the bottom and click ‘Save’

Home » Personnel Actions » New Personnel Action

Details

Name and ID Lance Levitt, 800240586	Transaction	Transaction Status	Approval Category New Hire/Rehire/Transfer - Staff, STSNH
Query Date 08/09/2023			

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

Employment Information

Employee Status *

A

Old Value: Terminated

Employee Class Code *

E2

Home COAS *

Y

Distribution COA *

Y

Home Organization *

853565

Distribution Orgn *

853565

Location Code *

Not Selected

Campus Code *

RK, Resnick campus

Approval Level

15 - (ADMIN) Department Admin

45 - (HIRECR) HR Recruitment Services

62 - (URDOBT) Budget

98 - (PAYROL) Payroll Supervisor

User Name

Not Selected

Not Selected

Not Selected

Not Selected

Add Row

Comments

Add Comment

Remaining Characters : 4000

Save











***Note:** By saving first, you will avoid duplicate transactions.



STEP 9: Fill in Employee Information

- ▶ Employee Status: Enter status
- ▶ Employee Class Code: Fill in accordingly
- ▶ Home COAS: Enter 'Y'
- ▶ Home Organization: Fill in accordingly
- ▶ Distribution Orgn: Typically, is the same as Home Orgn
- ▶ Location Code: Select building from drop down
- ▶ Campus Code: Select campus from drop down
- ▶ District Code: Select code from drop down





Employment Information	
Employee Status *	<input type="text" value="A"/>
Employee Class Code *	<input type="text" value="M2"/> 
Home COAS *	<input type="text" value="Y"/> 
Distribution COA *	<input type="text" value="Y"/> 
Home Organization *	<input type="text" value="821207"/> 
Distribution Orgn *	<input type="text" value="821207"/> 
Location Code *	<input type="text" value="BELFHL, Belfer Hall"/> 
Campus Code *	<input type="text" value="1, Wilf"/> 
District Code *	<input type="text" value="YU, Yeshiva University"/> 

Step 9: Employee Information Continues..

- ▶ **Current Hire:** Enter Date
- ▶ **SSN First Name:** Name listed on SSN card
- ▶ **SSN Middle Name:** Name listed on SSN card
- ▶ **SSN Last Name:** Name listed on SSN card
- ▶ **Benefit Category:** Select from drop down
- ▶ **Leave Category Code:** Select from drop down

Current Hire Date
<input type="text" value="08/16/2023"/>
SSN First Name *
<input type="text" value="Test-first"/>
SSN Middle Name
<input type="text" value="Test-Last"/>
SSN Last Name *
<input type="text" value="Test-Last"/>
SSN Name Suffix
<input type="text"/>
Benefit Category
<input type="text" value="2Y, Exempt Staff Full Time"/>
Leave Category Code
<input type="text" value="15, Exempt Staff"/>

Step 10: Job Information

Job Begin Date	<input type="text" value="08/16/2023"/>	
Jobs Effective Date *	<input type="text" value="08/16/2023"/>	
Personnel Date *	<input type="text" value="08/16/2023"/>	
Job Status *	<input type="text" value="A"/>	
Contract Type *	<input type="text" value="P"/>	
Timesheet Orgn *	<input type="text" value="821207"/>	
Job Leave Category *	<input type="text" value="15, Exempt Staff"/>	
Title	<input type="text" value="Director of Operation"/>	
Step *	<input type="text" value="0"/>	

- ▶ **Job Begin Date:** For new hires or employees being assigned to a job NUMBER-suffix(code) for the first time, this is the same as the effective date. Once assigned to that employee, the begin date doesn't change.
- ▶ **Job Effective Date:** This “drives” the job record in BANNER. The effective date is the date the job record is recognized by Banner. Payroll
- ▶ **Personnel Date:** actual date that job take effect.
- ▶ **Timesheet Orgn:** Fill in accordingly
- ▶ **Job Leave Category:** Fill in accordingly
- ▶ **Title:** You can override the default title with the new title.
- ▶ **Step:** Enter step information. If they are a union employee, the step can be either 1 or 2, based on union eligibility date. No union employee will be step 0.

STEP 10: Job Information Continues..

- ▶ **Annual Salary:** Enter if paid by total amount over. Always for semimonthly, non-hourly biweekly.
- ▶ **Regular Rate:** Enter for biweekly hourly employees only
- ▶ **Hours per Pay:** Total hours per pay period
- ▶ **Factor/Pays:** Number of pay periods in a year or duration of job if amount is NOT prorated.
- ▶ **Job Change Reason:** Select job change reason from drop down

Annual Salary
85000
Regular Rate
Hours per Pay
75.83
Factor
24
Pays
24
Job Change Reason *
NH001, New Hire

STEP 11: Fill in Labor Distribution

The FOAPs auto populate from the position budget settings.

- ▶ If it does not auto populate, fill in all funding field codes: Fund, Organization, Account, Program (FOAP).
- ▶ If the Funding divides to two separate FOAPs, make sure the total percent of the two FOAPs must equal 100.

Job Labor Distribution, MS9647-00 Director of Testing position

Current

Effective Date
08/16/2023

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
No results found.											

New

Effective Date null
08/16/2023

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
Y		200000	824603	61000	60201					100		

+ Default from Index + Add Row

***Note:** In some cases, you may need to change the auto populated FOAP. You can make those changes accordingly.

STEP 12: Select Routing Queue

Use the drop downs to select the users needed for EPAF approval

- ▶ Approval Level automatically populates from EPAF approval category settings.
- ▶ If you need additional approver, you can click on ‘Add Row’. Only FYI action can be added by Originators.

Routing Queue

Approval Level	User Name	Required Action	Remove
15 - (ADMIN) Department Admin	RAPPELBA - Apfelbaum, Randy L.	Approve	
45 - (HRREC) HR Recruitment Services	KROSENTH - Rosenthal, Karin	Approve	
62 - (UBDGET) Budget	JAKRAMER - Kramer, Jacob	Approve	
98 - (PAYROL) Payroll Superuser	EVILLA - Villa, Fidel	Apply	

+ Add Row



STEP 12: Comment, Save, & Submit EPAF

- ▶ In the comments section below, be as detailed as possible. Make sure you hit save before submitting the EPAF (saving an EPAF does not mean your EPAF was submitted). In case there is a glitch in the system, you want to make sure your work does not get lost.
- ▶ After you click on “submit”, then your screen will say “the transaction has been successfully submitted”.
- ▶ If your screen does not say that, then you may have to fix some errors before you can submit EPAF.

Comments

Made By
Faye Wu

Date
08/09/2023 03:27 PM

Comment
Make the comments as detailed as possible.

Add Comment

Remaining Characters : 4000

Delete


Save

Submit

✓ The transaction has been successfully submitted.

STEP 13: Approve your EPAF if you select yourself as the “Admin Level” approver. Otherwise, you complete your EPAF.

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.	

STEP 14: As a Department Approver, you must review the EPAF. If there is information that is incorrect on EPAF, you must return back to EPAF originator.

- ▶ Click on the Name and it will show you a preview of the EPAF. Make sure everything is accurate.
- ▶ Next, go back to previous page and check off, 'Action', then click on 'Save'.

Approver Summary

Current In My Queue History

Select the link under Name to access details of the transaction

Transactions Queue Status: All

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Test-Last, Test-first Director of Admissions Admin., MS9898-00	800301063	176663	New Hire/Rehire/Transfer - Staff	08/11/2023	08/16/2023	Approve	<input type="checkbox"/>	View Details

Results found: 1

Select All Save

New EPAF · EPAF Proxy Records · Transaction Search · Superuser or Filter Transactions

Submitted Date	Effective Date	Required Action	Action	Links
08/11/2023	08/16/2023	Approve	<input checked="" type="checkbox"/>	View Details

1 transaction(s) processed successfully.

No transactions found in your queue.



YOU HAVE COMPLETED AN EPAF!



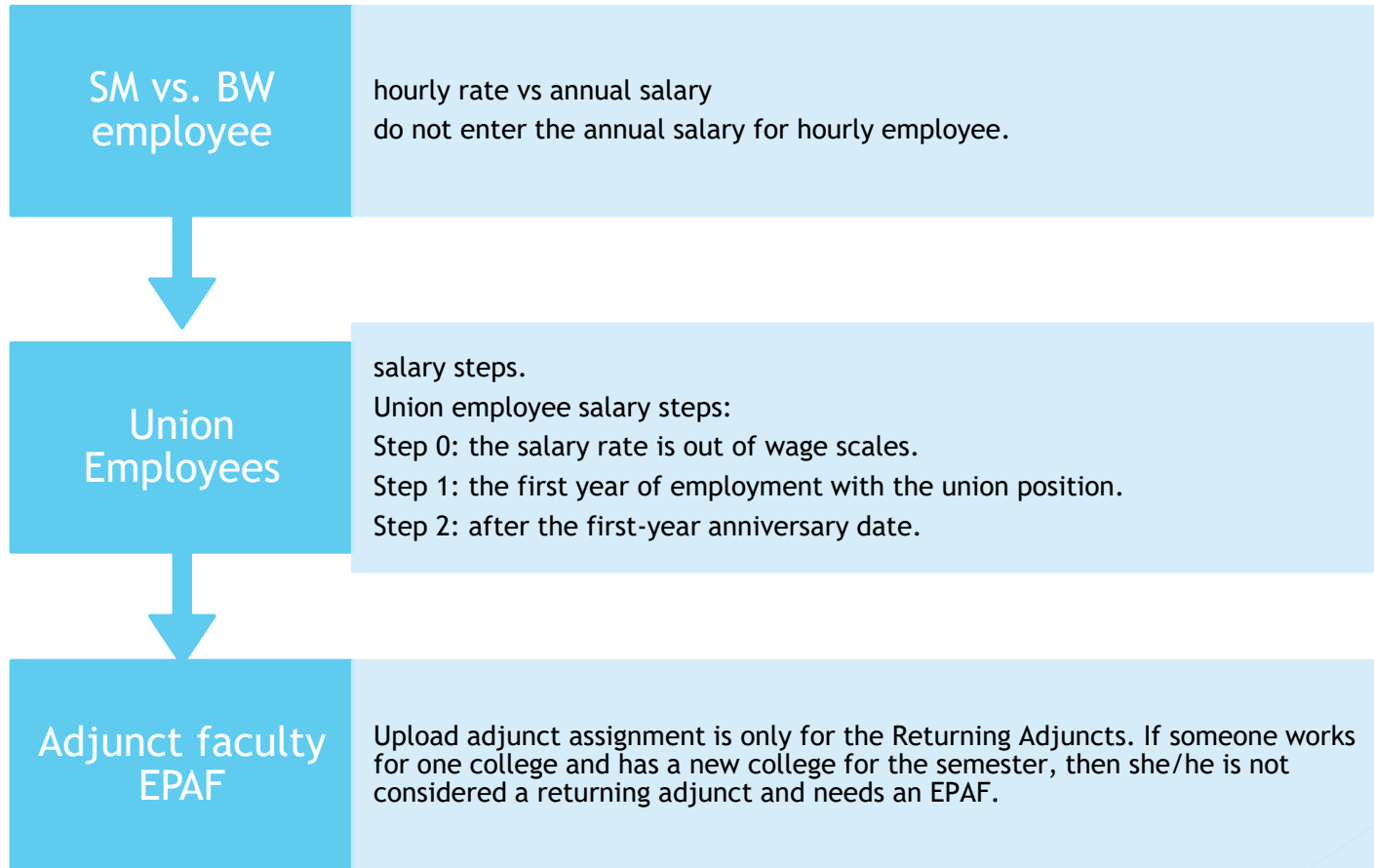
Be on the lookout for Common Errors:

Occasionally, you may come across an error message while creating an EPAF.

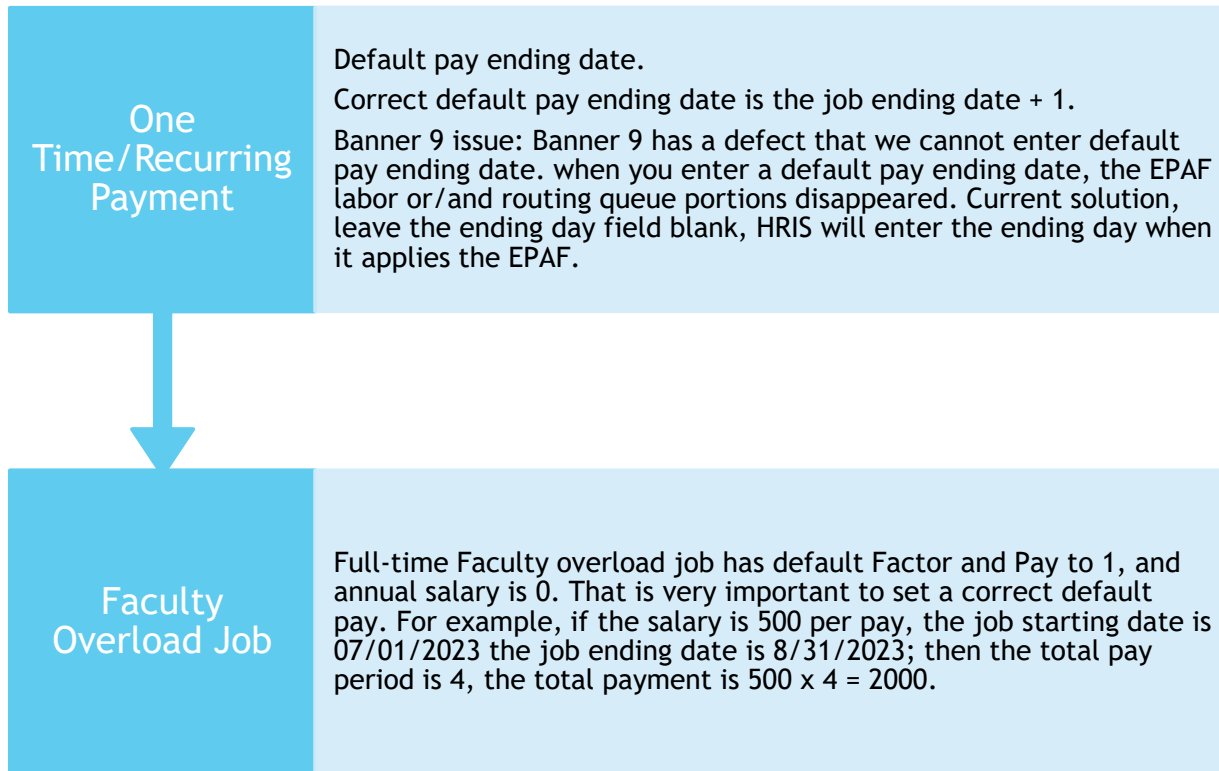
The below list showcases different error messages you may run into:

Invalid Index or ORGN	Most times, it is caused by the ORGN security if the Index or ORGN code is invalid in Finance, that means the FUND in the Index has ended for the FOAPs effective date.
Cannot save the EPAF	The error reasons are varying. It is possible to have two people holding onto the same transaction number due to a SYSTEM defect. If this happens, delete the current EPAF and redo it again from "New EPAF".
Cannot override index	This happens often. You need to clear the index and override the orgn code.
One-time/Recurring payment vs. Secondary job	One-time payment: Make sure to use the correct EPAF category, as well as making sure you are using the correct earning code (ADS vs. ADL).
Recurring Payment vs. Secondary job	If the payment is over 6 months or the total payment is over a certain amount, use a secondary job instead of a Recurring payment. If you are not sure, always ask HR recruiting team or HRIS. Living or moving expenses, most of the time, use one time/recurring pay.

Common Errors Continue..



Common Errors Continue ...



Common Errors Continue ...

Missing change
Home and
timesheet
ORGNs

When an employee transfers from one organization to another, updating only the Labor Distribution is not sufficient—the employee's home organization and timesheet organization must also be updated accordingly.



Missing change
job salary grade

When a faculty member's title changes—for example, from Assistant Professor to Associate Professor—be sure to update the job salary grade accordingly.

Salary grades are as follows:

INSTR: Instructor, Lecturer

ASST: Assistant Professor

ASSOC: Associate Professor

PROF: Professor



Transaction Statuses

W = Waiting

A = Approved

D = Disapproved

C = Complete

V = Void

P = Pending

T = Partially Complete

N = Canceled

R = Returned for Correction

U = Superuser Update



Thank you!