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:

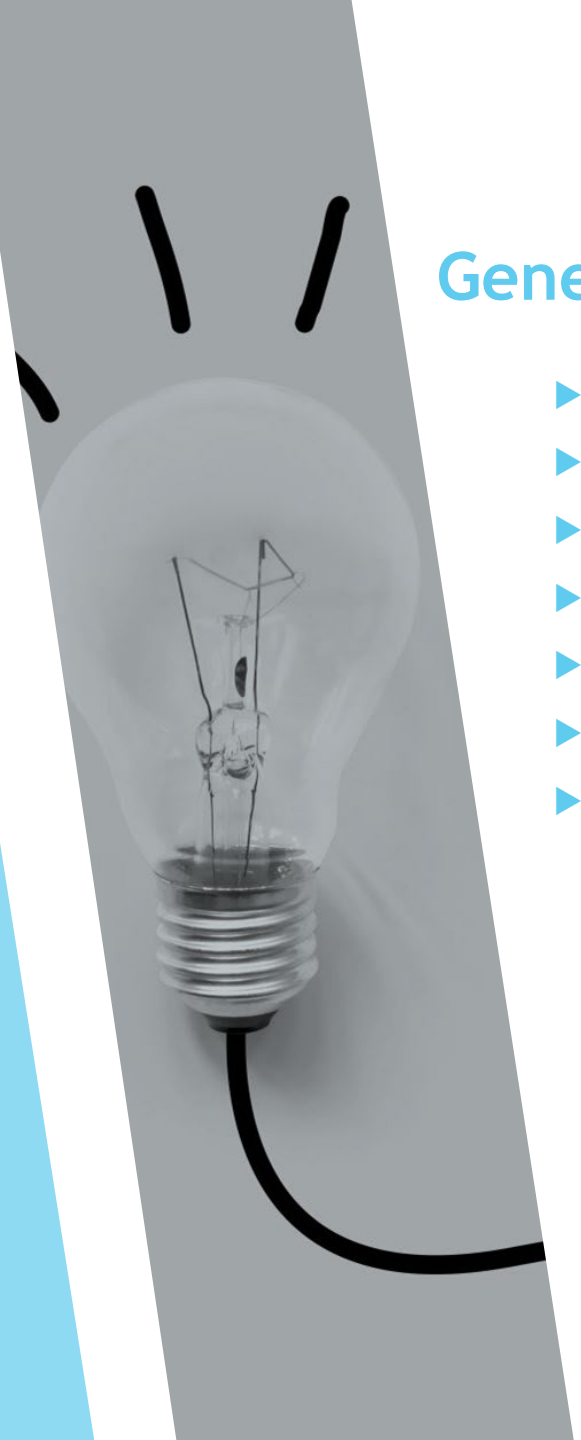
- Hire/Rehire
- Job Transfer
- One-time/Recurrence Payment
- Terminations
- Distribution Change
- Job Title Change
- Salary Increase

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:

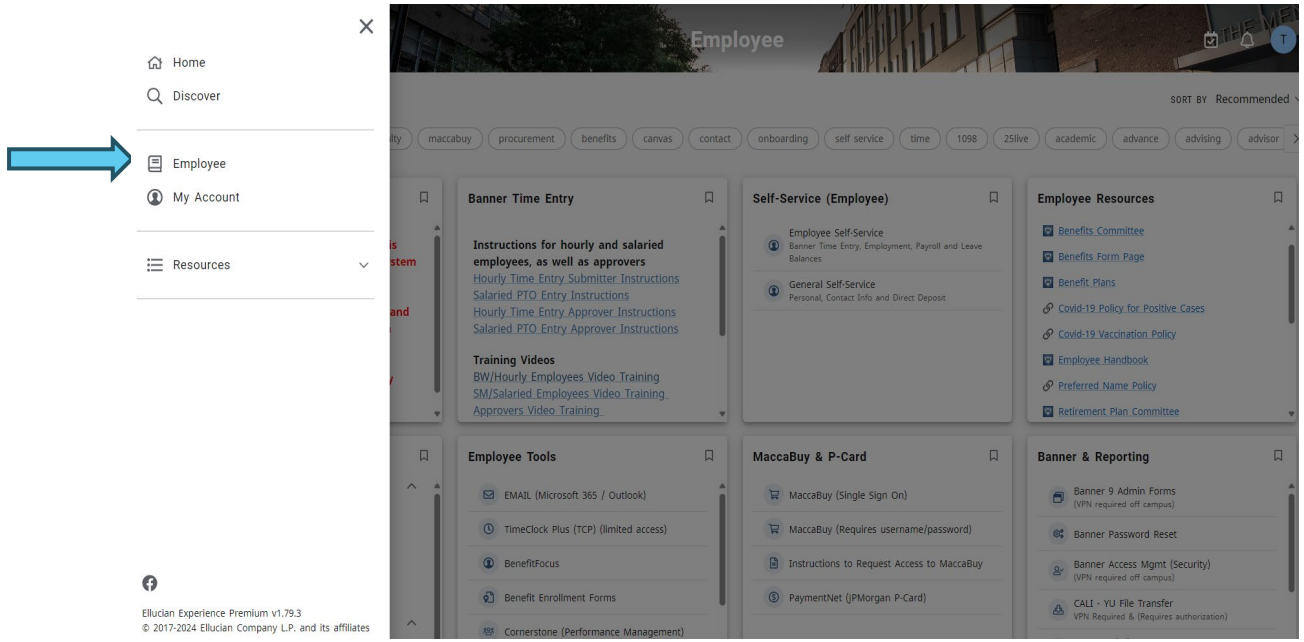
HR Recruiting or HRIS office.

LET'S GET
STARTED

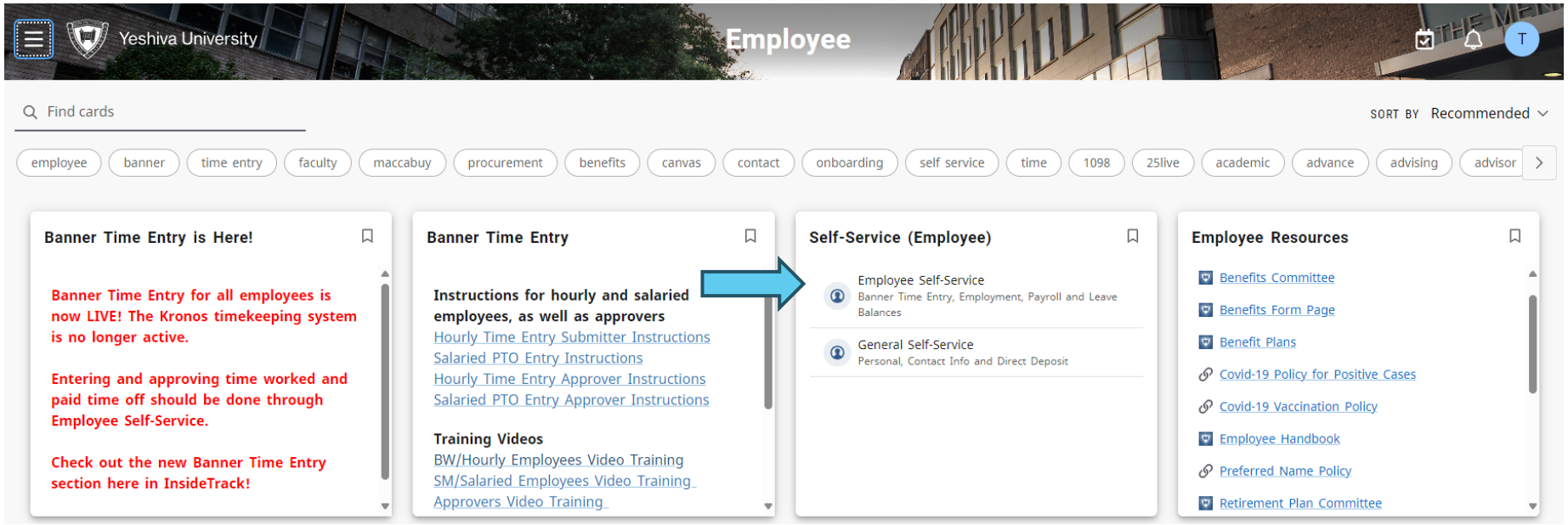
Step 1: Go to Yeshiva University Home Page:

Home - Liferay (yu.edu)

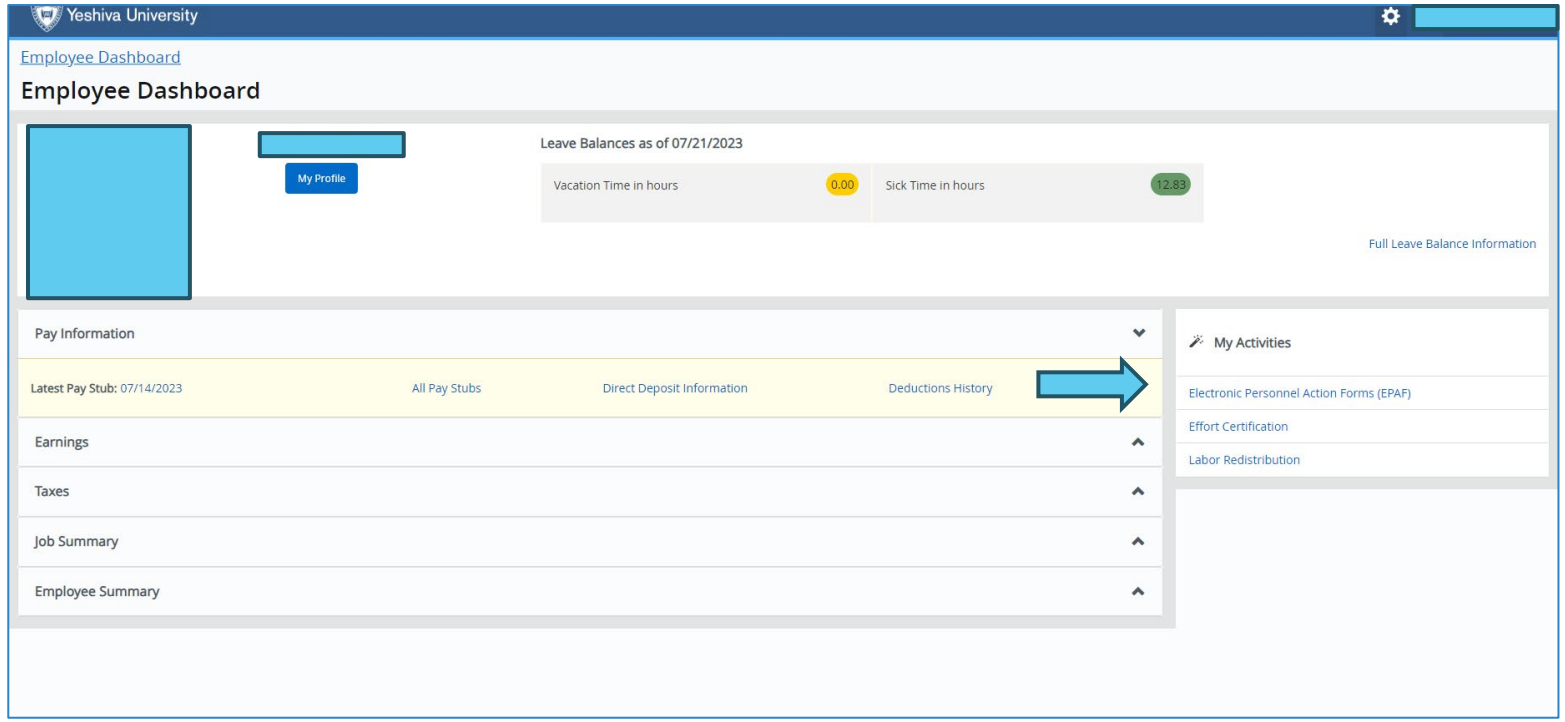
Then click on ‘Employee’ on the side bar



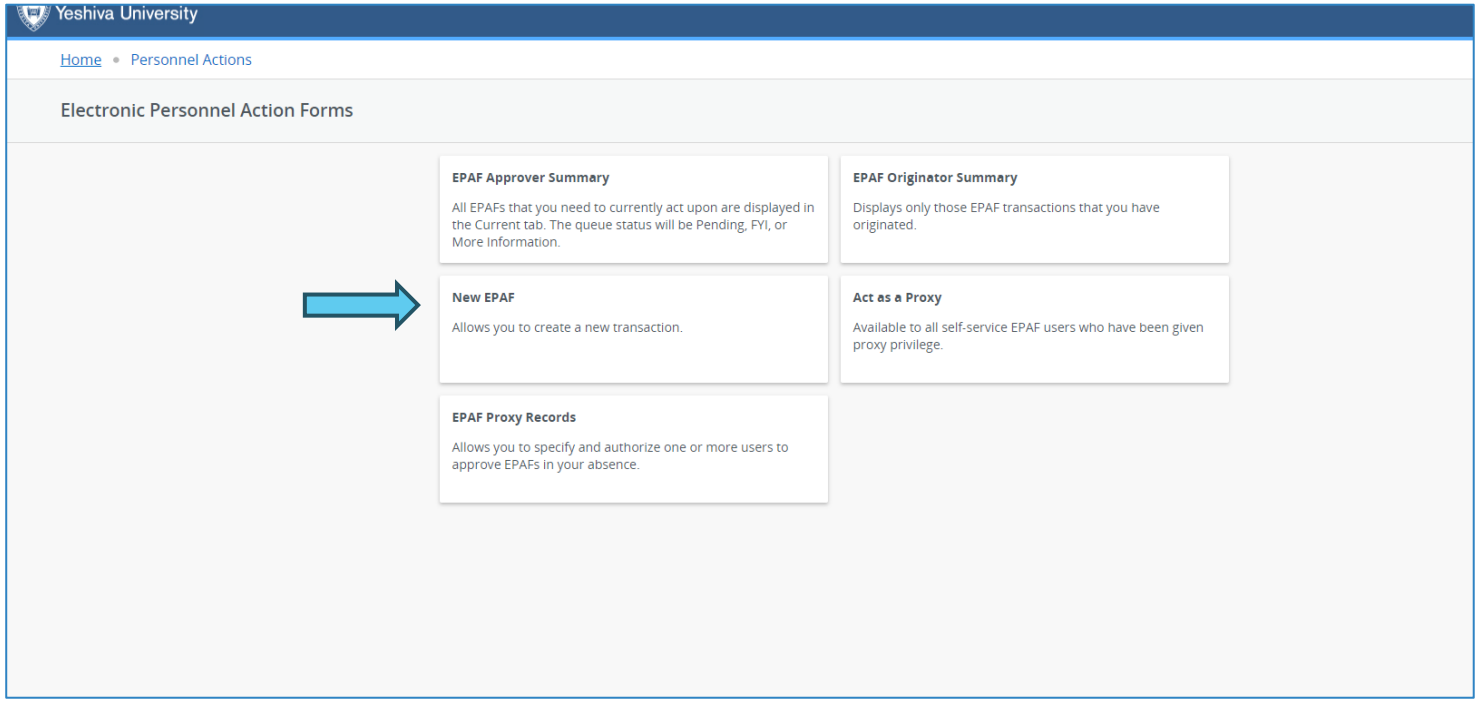
Step 2: Under the ‘Self Service Link’ section, click on ‘Employee Self Service’



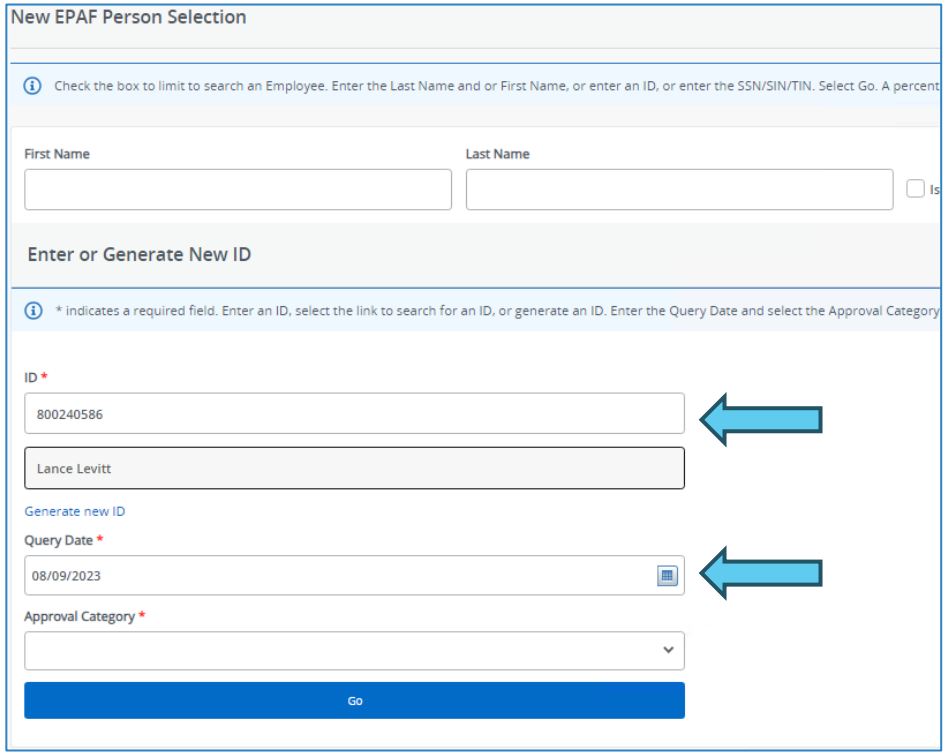
Step 3: Click on ‘Electronic Personnel Action Forms (EPAF)’ from the Employee Dashboard



Step 4: Click on ‘New EPAF’



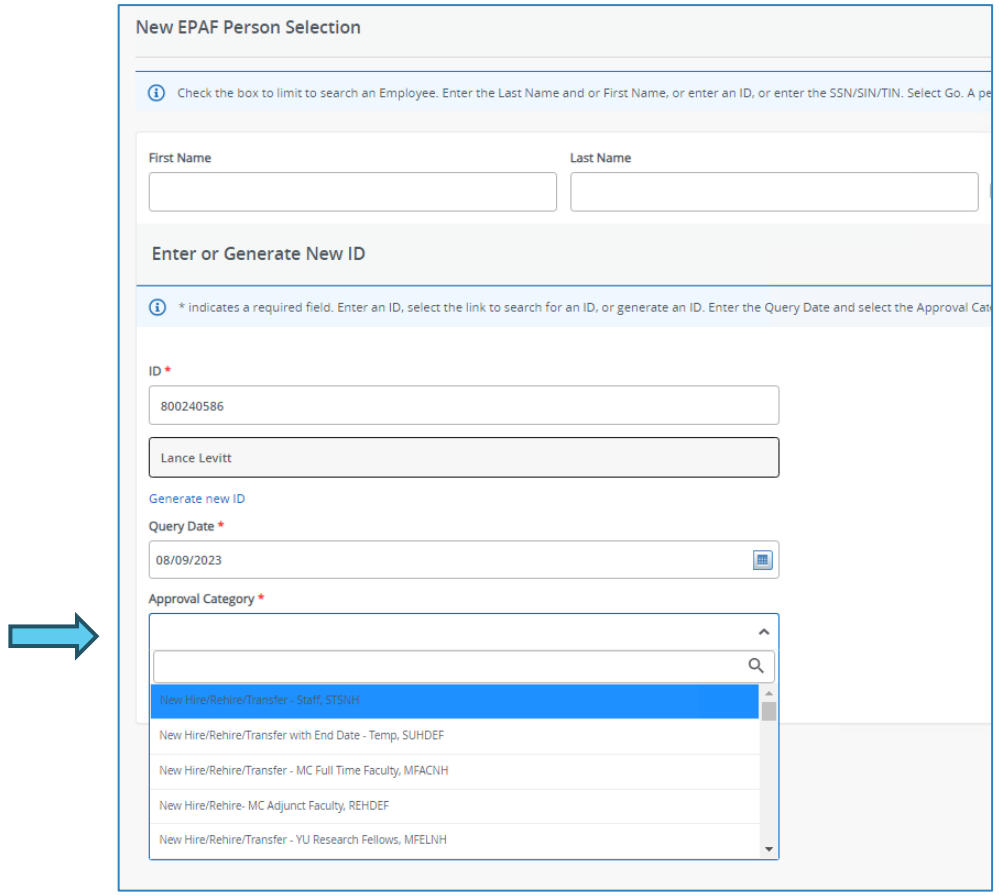
Step 5: Enter the ‘Employee ID’ and ‘Query Date’ in the below search bars



***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’

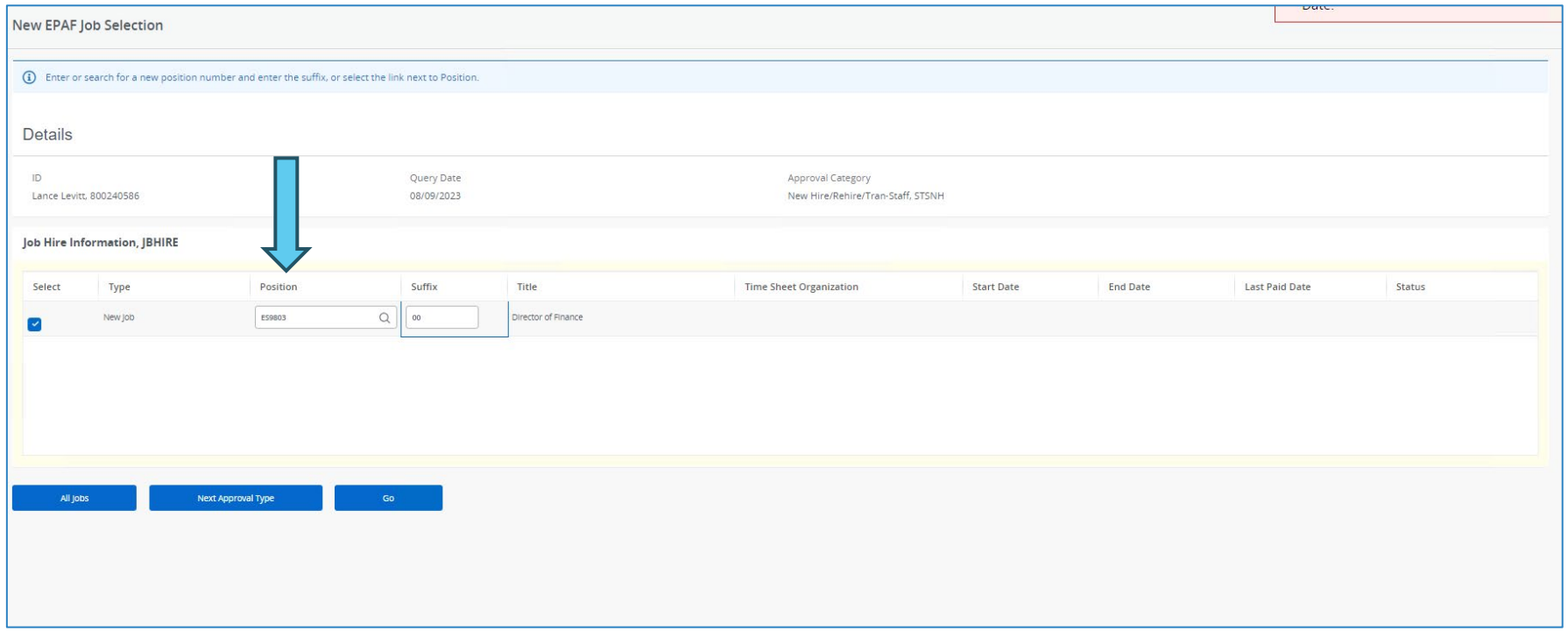


Approval Category Codes

ACTION What do you want to do?	WHO What type of employee?	CODE
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

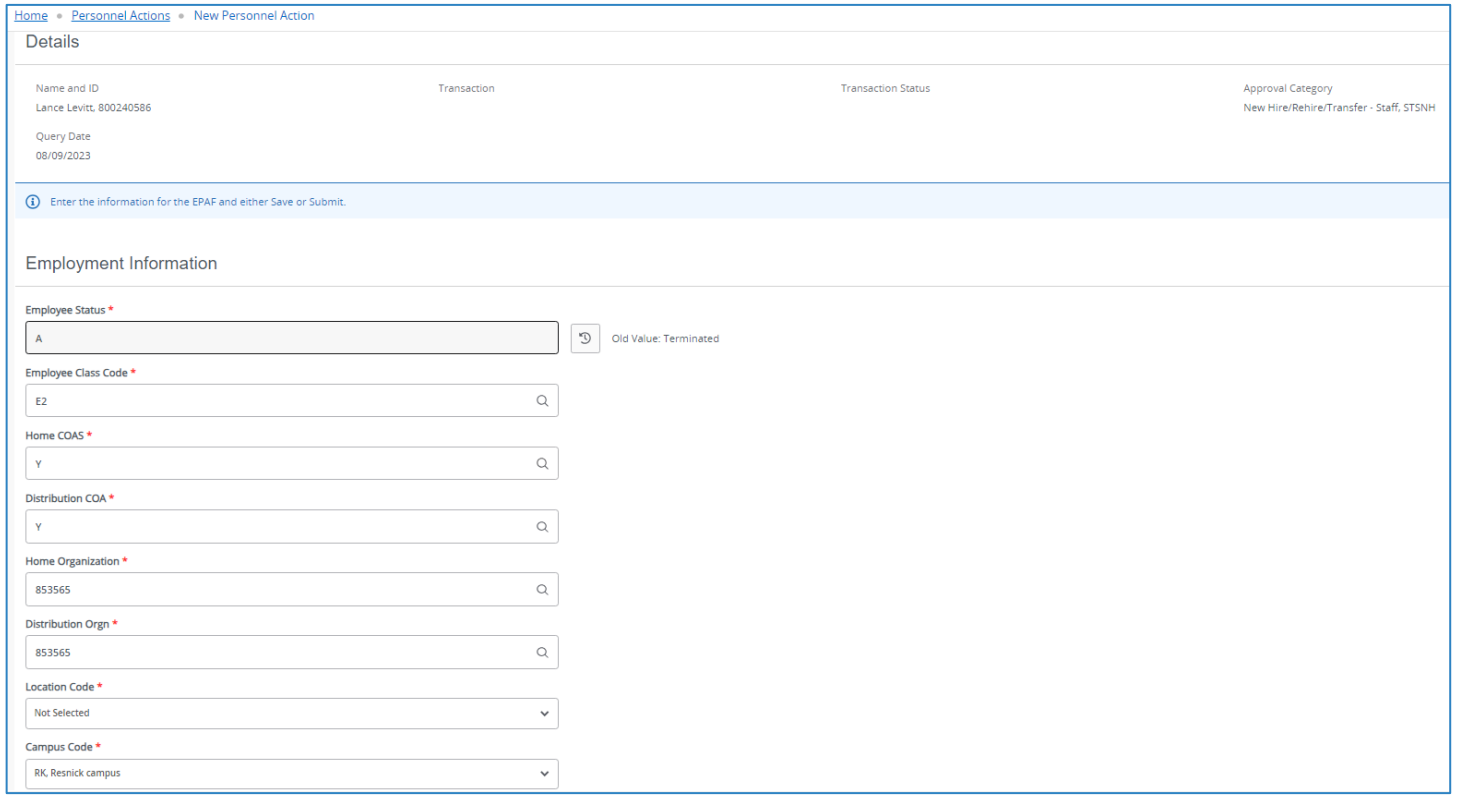
Step 7: New EPAF

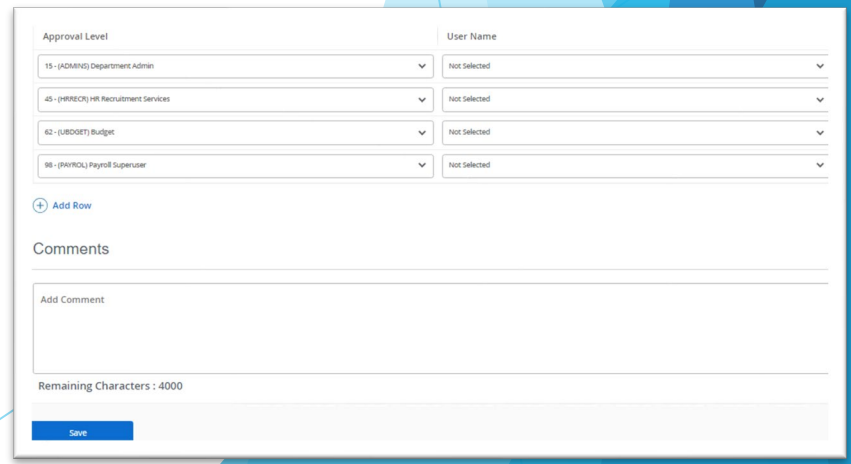
Next, enter the new job position and suffix number in the search bar below, then press go



***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'

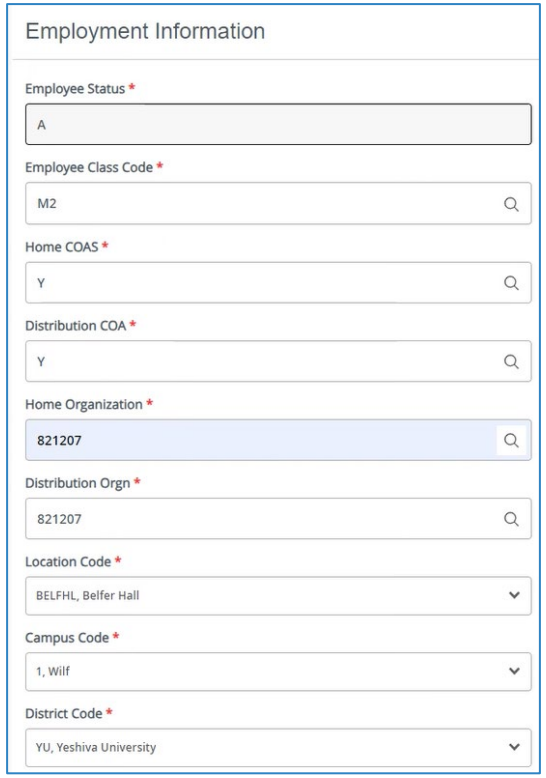




*__Note:__ By saving first, you will avoid duplicate transactions.

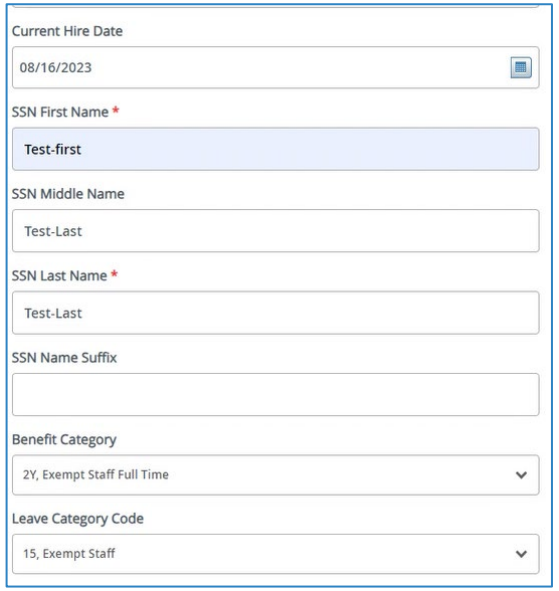
STEP 9: Fill in Employee Information

- **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

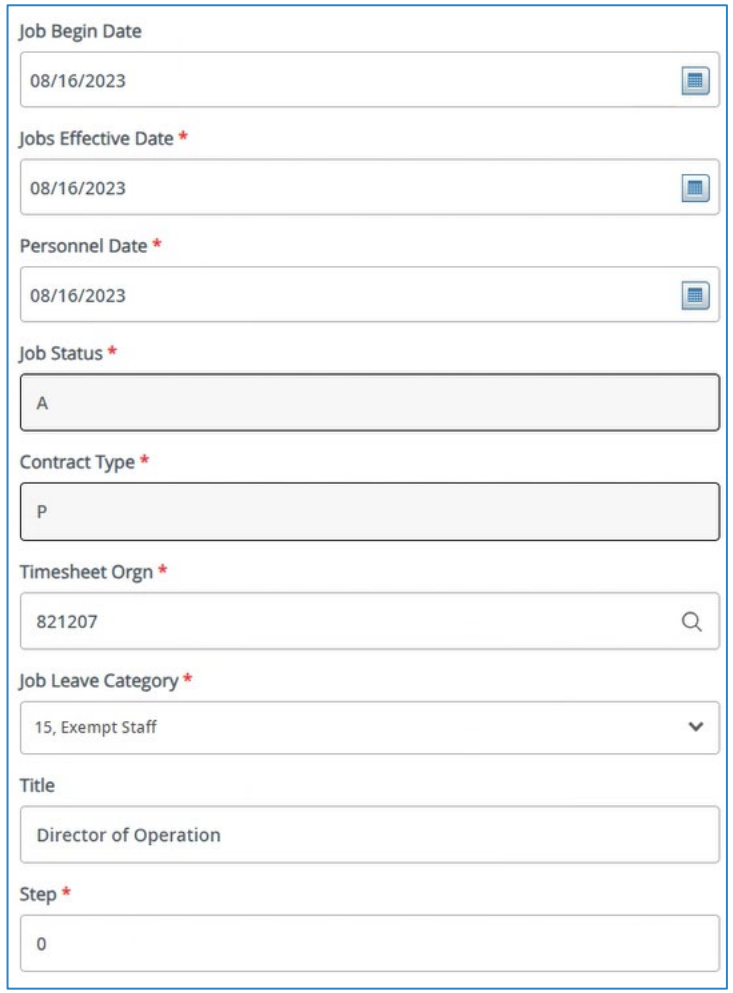


Step 9: Employee Information Continues..

- **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



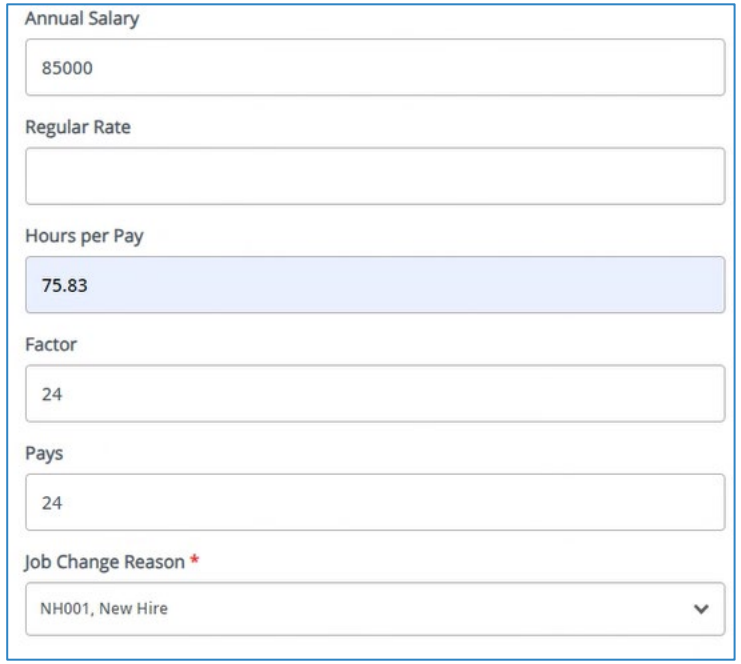
Step 10: Job Information



- **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..

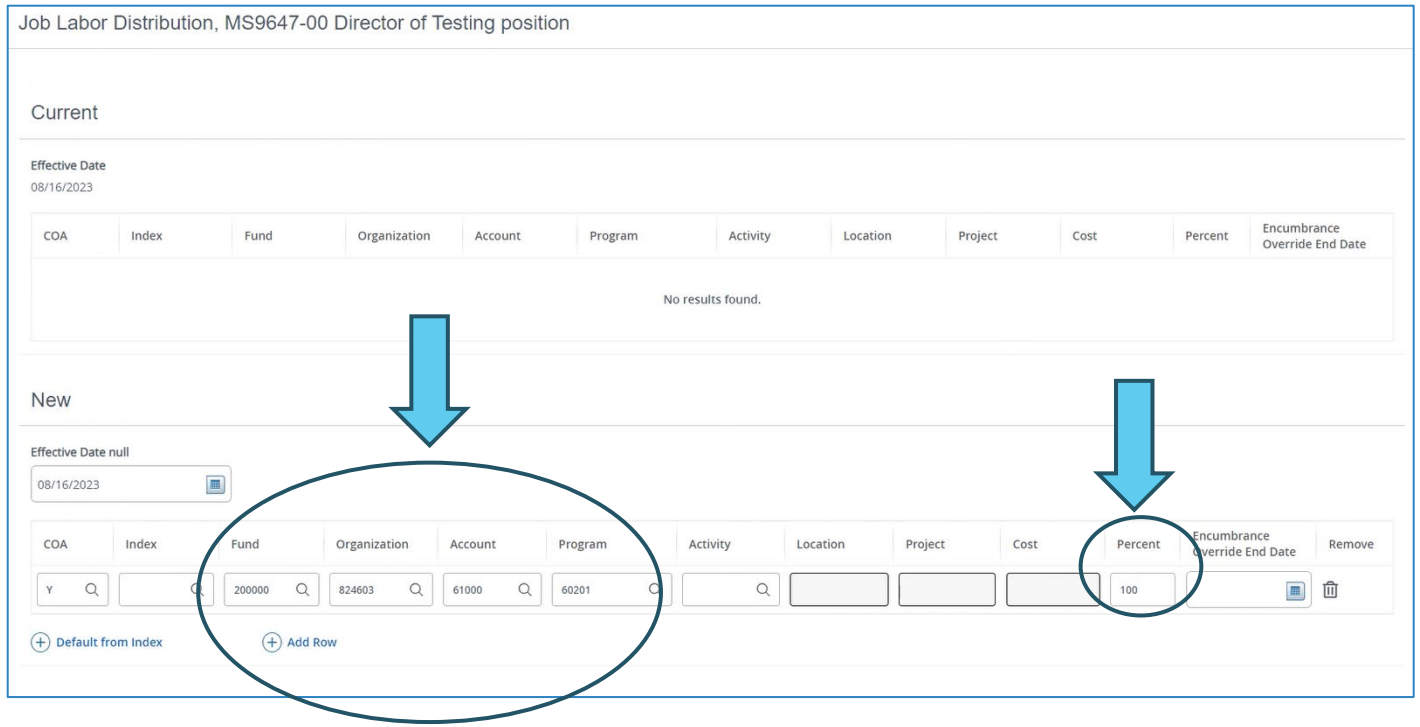
- **Annual Salary:** Enter if paid by total amount over. Always for semimonthly, non-hourly biweekly.
- **Regular Rate:** Enter for biweekly hourly employees only
- **Hours per Pay**: Total hours per pay period
- **Factor/Pays**: Number of pay periods in a year or duration of job if amount is NOT prorated.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



STEP 11: Fill in Labor Distribution

The FOAPs auto populates 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.

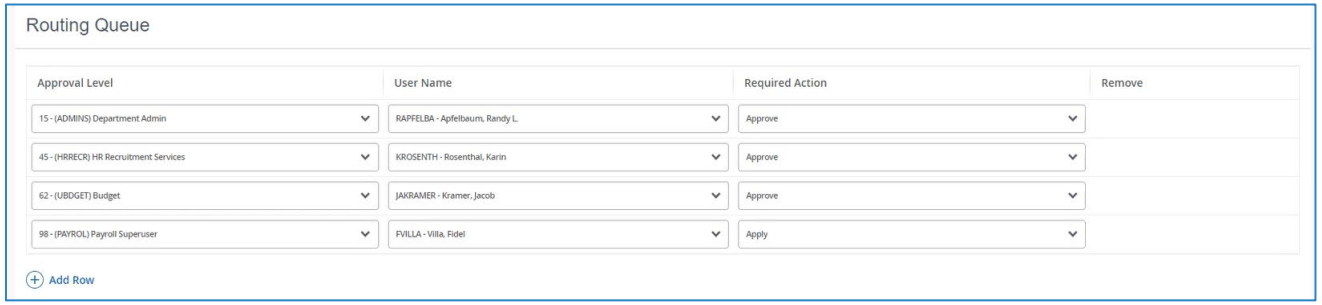


*Note: In some cases, you may need to change the auto populated FOAP. You can make those changes accordingly.

STEP 12: Select Routing Queue

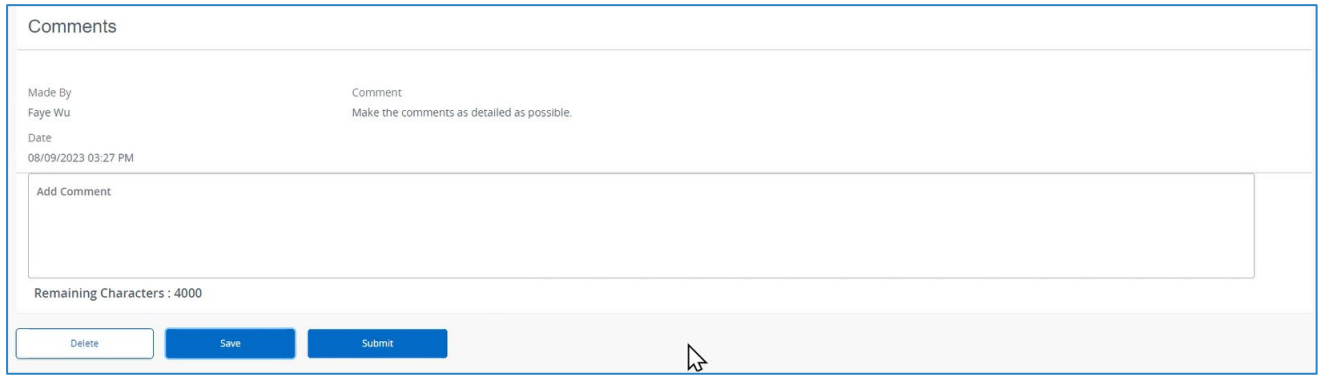
Use the drop downs to select the users needed for EPAF approval

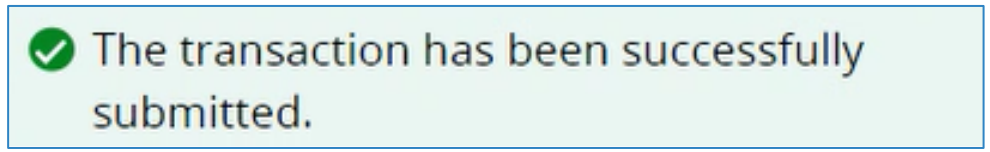
- Approval Level automatically populates from EPAF approval category settings.
- If you need additional approver, you can click on ‘Add Row’. Only FYI action can be added by Originators.



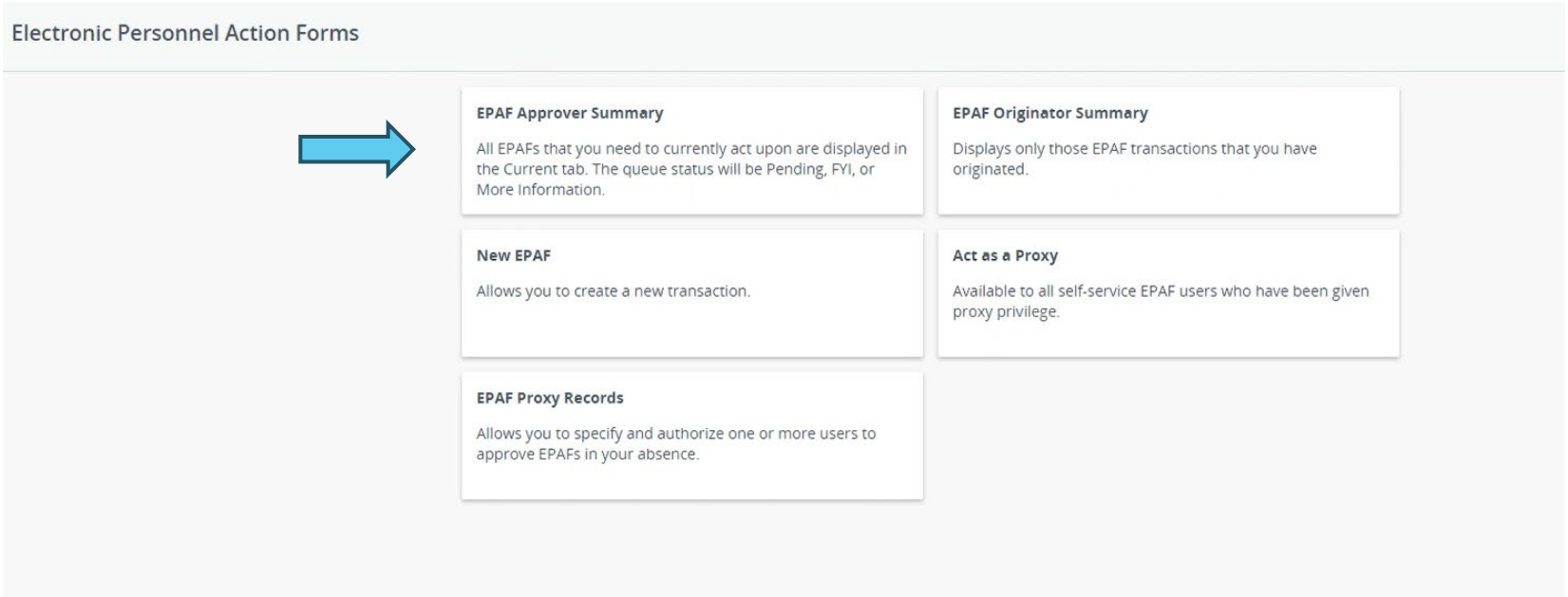
STEP 12: Comment, Save, & Submit EPAF

- 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.



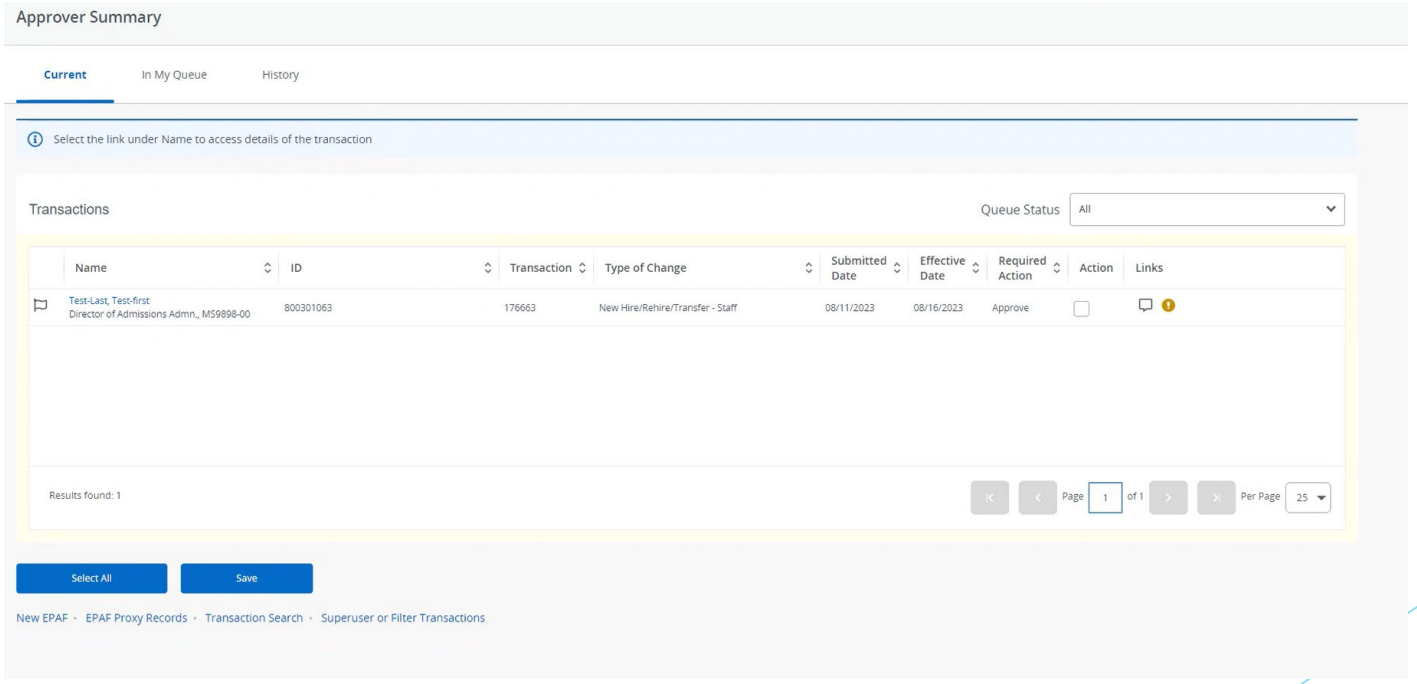


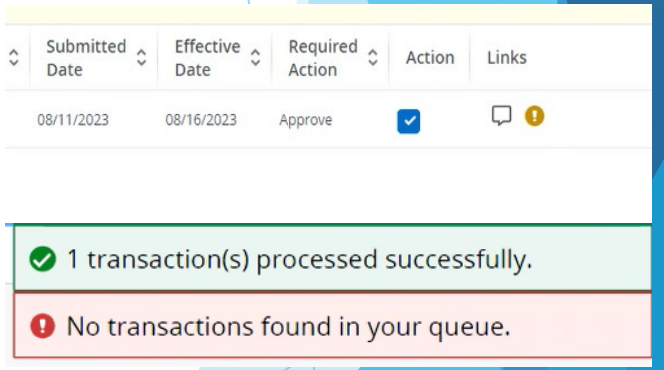
STEP 13: Approve your EPAF if you select yourself as the "Admin Level" approver. Otherwise, you complete your EPAF.



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'.





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..

SM vs. BW employee	hourly rate vs annual salary do not enter the annual salary for hourly employee.
Union Employees	salary steps. Union employee salary steps: Step 0: the salary rate is out of wage scales. Step 1: the first year of employment with the union position. Step 2: after the first-year anniversary date.
Adjunct faculty EPAF	Upload adjunct assignment is only for the Returning Adjuncts. If someone works for one college and has a new college for the semester, then she/he is not considered a returning adjunct and needs an EPAF.

Common Errors Continue …

One Time/Recurring Payment	Default pay ending date. Correct default pay ending date is the job ending date + 1. Banner 9 issue: Banner 9 has a defect that we cannot enter default pay ending date. when you enter a default pay ending date, the EPAF labor or/and routing queue portions disappeared. Current solution, leave the ending day field blank, HRIS will enter the ending day when it applies the EPAF.
Faculty Overload Job	Full-time Faculty overload job has default Factor and Pay to 1, and annual salary is 0. That is very important to set a correct default pay. For example, if the salary is 500 per pay, the job starting date is 07/01/2023 the job ending date is 8/31/2023; then the total pay period is 4, the total payment is 500 x 4 = 2000.

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!