Electronic Personnel Action Form for the Approver

Self Service: Employee
Last revised: January 12, 2010

myHelp
How-To Demos, Docs and Guides
for WSU Faculty and Staff
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### Get Connected

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<thead>
<tr>
<th>Section</th>
<th>Faculty/Staff Cube</th>
<th>Searchable knowledgebase to view how to demos, docs and guides.</th>
</tr>
</thead>
</table>

**Look for this icon in myWSU:**

<table>
<thead>
<tr>
<th>Applications Training</th>
<th>Training and Support</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assists faculty and staff with myWSU, Banner, Self Service and Reporting Services</strong></td>
<td></td>
</tr>
</tbody>
</table>

5800 training@wichita.edu

<table>
<thead>
<tr>
<th>Help Desk</th>
<th>Passwords, hardware and software support for students, faculty and staff</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HELP</strong></td>
<td>(4357) <a href="mailto:helpdesk@wichita.edu">helpdesk@wichita.edu</a></td>
</tr>
</tbody>
</table>
**Electronic Personnel Action Form**

### ePAF

#### Definition

Self Service *Electronic Personnel Action Form (ePAF)* is a series of online forms originated by the department to communicate an employment decision to ePAF approvers across campus, including Office of Human Resources (OHR) and Payroll.

#### Employment decision examples

An ePAF is required when employment decisions are made, including:

- Hire a student or graduate assistant
- Terminate an employee’s job assignment
- Make a change to an employee’s position
- Add a new position to a current or former employee.

ePAFs are divided into employee groups, Student assistant ePAFs were the first to Go-live in the fall of 2009.

#### Approvals and completion

*Electronic Personnel Action Forms are date driven* and must be

- completed by the originator
- approved by all the various approvers
- applied in an automatic nightly process.

The timely completion and approval of ePAFs are essential.

### Automatic email Notifications

Automatic emails are sent to the originator and approvers when an approval track has been completed.

### Email Corrections and Requests to OHR

#### Where to e-mail

The budget officer is asked to email requests to *epaf@wichita.edu*.

#### What to e-mail

*In the subject line:* ePAF request

*In the body of the e-mail* include needed information for OHR to complete the request.

#### Example:

To request a supervisor’s name to be added to the Department Supervisor drop down list, include this information in the body of the e-mail:

- Approval Category – Department Supervisor.
- Request – Add Brenda Johnson (a123z987) as a department supervisor.
- Budget officer contact information.
Accessing ePAFs

Logon to http://myWSU.wichita.edu using your myWSU ID and current password. There are two ways to access ePAFs.

Option 1:
Locate the Personnel Action Notices channel on the Faculty/Staff Resources tab.

Approvers:
- Only the headings will display if there are no ePAFs awaiting your approval.
- Details will display if there are ePAFs awaiting your action.

Initial set up
Select the Personnel Action Notices Preferences Edit button. Settings can be changed at any time.

- **Purpose** – All is the default and should not be changed.
- **Status** – Pending is the default, others can be selected. For example, Department Supervisors can check FYI. ePAF Originators may want to check Return For Correction.
- **Sort Options** – ePAFs are date driven, sorting by Date will keep the most current at the top of the list.
- **Number of Rows** – The default is 5 and can be changed.
- **Apply** to save setting changes.

Option 2:
- From the Faculty/Staff Resources tab, click Banner Self-Service to expand the folder.
- Select Employee and Electronic Personnel Action Forms.

Your role (originator or approver) will determine which menu options are listed.

In this example, all options are shown.
Terminology

**ePAF**

The *Electronic Personnel Action Form* is used for the electronic submission of an employee's new, terminated or revised job information from the various departments to Office of Human Resources and Payroll.

**Student Assistant ePAFs**

Used when hiring a student employee. A student must be flagged as an employee in Banner by OHR prior to creating the ePAF.

- New Hire
- Research New Hire
- Replaces OHR133
- Use the regular or research student *New Hire* ePAF if the student does not have an active position on the *Reporting Services Enrollment Verification Report*.
- If the student has an active position listed on this report, use the student assistant *Additional Job* ePAF.

**Termination**

To end a student’s active position within the organization.

- Replaces OHR134
- Additional Job
- Replaces OHR133
- Used to add a position to an active student employee.
- Change of Status
- Captures other changes to positions including funding FOAPAL, FTE or rate of pay.

**Approval Queue**

The approval queue contains a pre-defined sequence of approvers and actions that can be modified on the individual ePAFs.

**Approval Level**

The approval level represents the approval hierarchy structure. For example, Department Budget Officer.

**Transaction History**

*Transaction History* is created or updated after the ePAF is saved. The originator’s name is displayed under *User Name*. 

The approver can approve or return the ePAF to the originator for correction.
Add a Proxy

**Step 1**

2. Select ePAF Proxy Records.

3. Select the Approval Level from the drop down list.

**Step 2**
Select the proxy’s name from the drop down list.

Click in the description box and start typing the proxy’s name. The list will automatically adjust.

**Step 3**
Click Add and Save.

Remove a Proxy

Repeat steps 1 – 3, however, click the Remove checkbox instead of Add. Click Save.

Act as a Proxy

**Step 1**

2. Select Act as a Proxy.

3. Select the individual you want to Proxy For using the drop down box.

**Step 2** Optional
Submitted From Date and Submitted To Date.
Leave the dates blank to see all ePAFs that require approval or enter date parameters to refine the list.

**Step 3** Optional
Transactions per Page. 25 is the default, a different number of rows can be selected from the drop down list.

**Step 4**
Click Go.
The Approver’s name will stamp on the transaction, not the Proxy’s.
### Current, In My Queue and History Tabs

<table>
<thead>
<tr>
<th>Three tabs</th>
<th>Current</th>
<th>In My Queue</th>
<th>History</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>ePAFs that require your attention</td>
<td>All ePAFs that list you may approve</td>
<td>All ePAFs assigned to you</td>
</tr>
</tbody>
</table>

#### Current
- The **Current** tab displays ePAFs that are awaiting your approval.
- Use **Queue Status** to select specific or all types.
- Click on the employee’s name to select.
- The **Action Alert** (red flag) indicates the ePAF **Effective Date** is within 15 days of today’s date and action is needed.

#### In My Queue
- Displays all ePAFs for which you may **approve**.
- In this example, the ePAF has errors awaiting the originator's revision.

#### History
- Click **History** to review ePAFs you took action on.
- Click on the yellow arrows in the heading to change the sort.
# Approver’s Queue Status

<table>
<thead>
<tr>
<th>Queue Status and Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Shows all transactions in your queue.</td>
</tr>
<tr>
<td>Pending</td>
<td>Awaiting an action by the approvers after being saved and submitted by the originator.</td>
</tr>
<tr>
<td>Approved</td>
<td>Approver approved the ePAF.</td>
</tr>
<tr>
<td>Return for Correction</td>
<td>Approver returned the ePAF to the originator for corrections.</td>
</tr>
<tr>
<td>FYI</td>
<td>The ePAF will continue to flow through the approval process; however the FYI approver needs to Acknowledge the ePAF.</td>
</tr>
<tr>
<td>Acknowledge</td>
<td>The FYI approver must Acknowledge the ePAF to indicate it was reviewed.</td>
</tr>
<tr>
<td>More Information</td>
<td>An approver requires more information about the ePAF prior to approving it. This alerts the other approvers that some action is being taken, but the ePAF has not been approved.</td>
</tr>
<tr>
<td>In the Queue</td>
<td>The ePAF is on its way to the next approver but it needs attention at a lower level. The ePAF must be approved in the defined routing queue sequence.</td>
</tr>
<tr>
<td>Void</td>
<td>The originator or OHR superuser voided the transaction.</td>
</tr>
<tr>
<td>Overridden</td>
<td>System generated status. Indicates the OHR superuser approved the transaction prior to receiving all approvals.</td>
</tr>
<tr>
<td>Removed from the Queue</td>
<td>System generated status. The originator or OHR superuser voided or disapproved the transaction. This status will show on all remaining approver’s queues.</td>
</tr>
<tr>
<td>Applied</td>
<td>Used by OHR to update the employee’s job record in Banner. This is the last step in the approval process.</td>
</tr>
<tr>
<td>Disapproved</td>
<td>Approver denied the ePAF, it is returned to the originator’s History tab.</td>
</tr>
</tbody>
</table>
ePAF Preview

1. Summary Information
   - Your role - Approver
   - Employee, ePAF category and transaction info

2. Approver Options
   - Recommended Actions: Approve
     Return for Correction
     Acknowledge (if FYI)

3. Warning Messages
   - See page 11 for messages

4. Approval Types
   - Verify ePAF details
   - Organization code
   - Dates
   - Rate of pay
   - Hours per Pay (Period)

5. Account Distribution
   - Verify funding codes
   - Must total 100%

6. Routing Queue
   - Approver’s required action and status
   - Approver actions are date stamped

7. Comments
   - Proxy – enter your name when approving
   - Saved comments can be viewed but not updated
   - Are part of employee’s personnel record
   - Save. To return to the student’s ePAF, select ePAF Preview from the footer menu.

8. Transaction History
   - Originator’s action and date stamp
Approval Options

Recommended Actions

Approve
The approver confirms the information is correct. Click Approve to authorize the ePAF. The ePAF immediately becomes available for approval at the next level.

When acting as a Proxy, enter your name in Comments.

Acknowledge
FYI approvers must Acknowledge the ePAF after reviewing.

Return for Correction
Returns the ePAF to the originator to make corrections and resubmit for approval. It will return to the originator’s Current tab.

Enter explanations into Comments.

Comments
➢ Add Comment to enter a new comment
➢ Comment to jump to the view comments section.
➢ Comments become part of the employee’s personnel record. After saving, they cannot be deleted or changed.

Other Actions

More Information
Approvers use this option to indicate they have reviewed the ePAF but need additional information prior to approving it.

Disapprove
Use Disapprove to deny the ePAF. It will return to the originator’s History tab rather than Current.

Enter explanations into Comments.

Warning Messages

Warning messages deliver information to the originator and approvers and allow the ePAF to progress successfully. Typically, additional action is not required on the following warning messages.

Examples

Encumbrance has been set to 0 because method is Hours Input. All new ePAFs will receive this warning, additional action is not required.

Changes will not be made to any initialized time entry records. If labor distribution, rate of pay, work schedule, etc. is changed and their time record has been extracted, the ePAF changes will not be reflected on the current time record in Banner.

Future changes exist – starting on MM/DD/YYYY One or more ePAF dates are older than the dates on the employee’s current record in Banner. This message will appear on ePAFs funded by grants due to required termination dates. Additional action is not required.