

ePAF User Guide

ePAFs are electronic personnel action forms. They can be used through Banner Self-Service in place of a paper form for specific transactions.

Before creating an ePAF for the first time, it will be helpful to set up default routing, if possible. See below for instructions.

→ How to Create & Submit an ePAF for Employee Separations

***Resignation letters must be emailed to HR**

1. Log into PirateNet portal
2. Go to profile tab
3. Under Banner Self Service, choose employee
4. Select Electronic Electronic Personnel Action Form
5. Click on New EPAF
6. Enter CWID of employee or search by clicking on the magnifying glass.
7. Use drop down of approval category to select
 - Separation of employment(TERMEM) should be used when leaving university
 - Separation of job(TERMJ) should be used when only terminating job, employee not leaving university
8. Click Go
9. Select the job that should be terminated by clicking the radio button next to that job (under the word Select)
10. Click Go
11. Enter effective date (in MM/DD/YYYY format)
 - a. Status T (terminated) will default
 - b. Job Change Reason- select appropriate reason(note: separation reasons start with 05)
12. Confirm approval levels
 - a. 40 = Department Approver
 - b. 50 = Second Approver
 - c. 90 = HREPAF(human resources)
13. Click Save
14. Click Submit (Transaction Status will move to Pending)

→ How to Approve an ePAF (Approvers)

1. Log into PirateNet portal
2. Go to profile tab
3. Under Banner Self Service, choose employee
4. Select Electronic Electronic Personnel Action Form
5. Select ePAF Approver Summary
6. Click on Pending for queue status and click Go
7. To see more information about the ePAF, click on the employee's name
8. Review the ePAF information and select appropriate action
 - a. If information is complete, click Approve
 - b. If this ePAF should not be processed, click Disapprove
 - c. If information needs to be changed, click Return for Correction
 - d. If more information is needed, click More Information

→ How to Set Up Default Routing for ePAFs (All ePAF Users)

Routing for ePAFs lists who will receive the ePAF to approve, FYI, or apply the transaction. In many cases, ePAFs will go to the same users for approval, etc. Setting up a default routing will prevent a user from having to enter the next levels of approval for each ePAF. An originator can change routing on any individual ePAF.

1. Log into PirateNet portal
2. Go to profile tab
3. Under Banner Self Service, choose employee
4. Select Electronic Electronic Personnel Action Form
5. Click on ePAF Originator Summary
6. Click on Default Routing Queue
7. Select appropriate approval category (name of ePAF) from drop down list
8. Click on Go – the mandatory levels for this ePAF will appear
9. Select users for each approval level - Search for user name by using magnifying glass, or enter short name(ex: birdbig)
 - a. For example, termination ePAF select your department approver at level 40
 - b. For level 90 select "HREPAF"
10. (Optional) If adding another approval level, select Required Action from drop down list for each user
 - a. FYI – information is sent to user, but no action is required to proceed
 - b. Approve – required to approve before ePAF goes to next level of approval
 - c. Apply – final step in the process – should always be Human Resources

→ How to Set Up a Proxy for ePAFs

1. Log into PirateNet portal
2. Go to profile tab
3. Under Banner Self Service, choose employee
4. Select Electronic Personnel Action Form
5. Select ePAF Proxy Records
6. Select the appropriate Approval Level from the drop down list
 - a. Note: proxies must be set up for each approval level individually
7. Click Go
8. Select the name of your proxy from the drop down list
9. Check the Box under Add next to the name of the proxy
10. Click Save
11. Repeat the steps above for multiple approval levels or multiple proxies