

EPAF User Guide for Banner 9

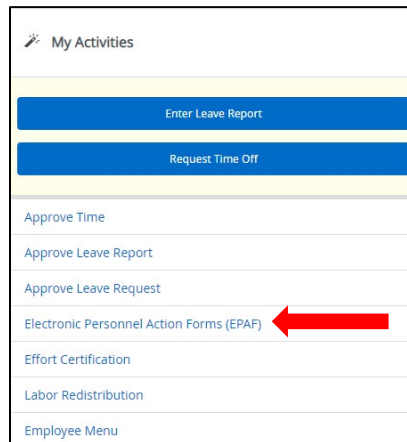
*EPAFs are Electronic Personnel Action Forms used through Banner Self-Service.
Before creating an EPAF for the first time, set up the default approval routing.*

Table of Contents

How to Access Electronic Personnel Action Forms (EPAF)	1
Setup Default Routing for EPAFs.....	1
Setup a Proxy for EPAFs	1
Submitting a Separation EPAF – Termination of Employment (Employee is leaving the University)	2
Submitting a Separation EPAF – Termination of Job (Employee is leaving current position, but remaining at Seton Hall) ..	3
Submitting a One-Time Earning Payment Form (ADEARN) EPAF	4
For Approvers Only – Navigating Approver Summary EPAF.....	6

How to Access Electronic Personnel Action Forms (EPAF)

1. Log onto **PirateNet**.
2. Click the **Banner Self Service (SSB)**, then **Employee Dashboard**.
3. Choose **Electronic Personnel Action Forms (EPAF)** and **New EPAF**.



Setup Default Routing for EPAFs

1. Select **Electronic Personnel Action Form**.
2. Click **EPAF Originator Summary**, then **Default Routing Queue**.
3. Select appropriate Approval Category (name of EPAF) from drop down list.
4. Click **Go** – the mandatory approval levels for the selected EPAF type will appear.
5. Select users for each approval level from the drop-down list.
6. Click **Save Changes**
7. If adding another approval level, select Required Action from drop down list for each user
 - a. **FYI** = Information is sent to user
 - b. **Approve** = Required
 - c. **Apply** = This is always HRIS (Human Resources)

Setup a Proxy for EPAFs

A proxy allows you to specify and authorize one or more users to approve EPAFs in your absence.

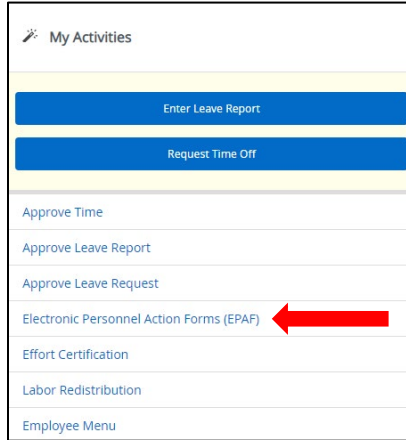
1. Select **Electronic Personnel Action Forms (EPAF)**.
2. Select **EPAF Proxy Records**.
3. Select the appropriate **Approval Level** from the drop-down list (**NOTE: Proxies must be set up for each approval level individually**).
4. Select **Add Proxy** and Search for Name.
5. Click **Submit**.

EPAF User Guide for Banner 9

Submitting a Separation EPAF – Termination of Employment (Employee is leaving the University)

NOTE: Resignation letters must be sent to HR via email

1. Log onto **PirateNet**.
2. Click the **Banner Self Service (SSB)**, then **Employee Dashboard**.
3. Choose **Electronic Personnel Action Forms (EPAF)** and **New EPAF**.



4. Enter **CWID** of Employee.

5. Select **Approval Category** of **Separation of Employment, TERMEM** (Employee is leaving the University).
6. Click **Go**.
7. Select the position that should be Terminated.

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
<input type="checkbox"/>	New Job								
<input checked="" type="checkbox"/>	Primary	A98413	00	Human Resources Generalist	141311, Human Resources Office	11/28/2022		01/31/2023	Active

8. Click **Go**.
9. Enter the Termination date in the **Job Effective Date** field and the Termination reason in the **Job Change Reason** field. *Reason will begin with "05XXX"*.
10. Enter the Termination date in **Termination Date** field and the Termination reason in the **Term Reason Code**.
11. Confirm approval levels are accurate in the **Routing Queue**.
 - a. These should be pre-populated because of [Default Routing](#). If you have not setup Default Routing, select names from the drop-down list.

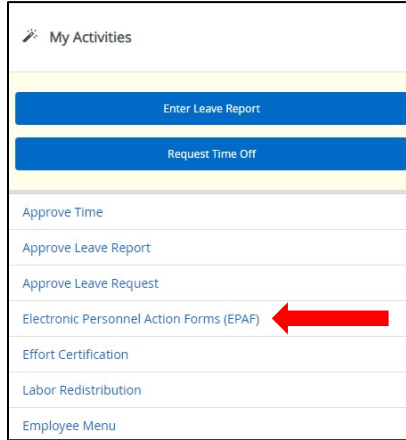
- b. **90 – HRIS** should always be **HREPAF** (To ensure this will be monitored, do not select specific HR Staff).
12. Add **Comments**, if necessary.
 13. Click **Save**, then **Submit**. If no Errors, status will move to **Pending**.

EPAF User Guide for Banner 9

Submitting a Separation EPAF – Termination of Job (Employee is leaving current position, but remaining at Seton Hall)

NOTE: Resignation letters must be sent to HR via email

1. Log onto **PirateNet**.
2. Click the **Banner Self Service (SSB)**, then **Employee Dashboard**.
3. Choose **Electronic Personnel Action Forms (EPAF)** and **New EPAF**.



4. Enter **CWID** of Employee.

The screenshot shows an input field for the employee ID. Below the field is a link that says 'Generate new ID'.

5. Select **Approval Category of Separation – job only, TERMJ** (Employee is leaving current position, but remaining at Seton Hall).
6. Click **Go**.
7. Select the position that should be Terminated.

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
<input type="checkbox"/>	New Job								
<input checked="" type="checkbox"/>	Primary	A98413	00	Human Resources Generalist	141311, Human Resources Office	11/28/2022		01/31/2023	Active

8. Click **Go**.
9. Enter the Termination date in the **Job Effective Date** field and the Termination reason in the **Job Change Reason** field. *Reason will begin with "05XXX"*.
10. Confirm approval levels are accurate in the **Routing Queue**.
 - a. These should be pre-populated because of [Default Routing](#). If you have not setup Default Routing, select names from the drop-down list.

The screenshot shows the 'Routing Queue' form with three dropdown menus for approval levels:

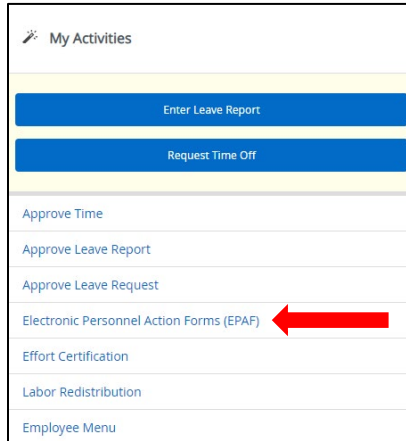
- 40 - (APPROV) Departmental Approver
- 50 - (VPAPPR) Second Approval
- 90 - (HRIS) HRIS

- b. **90 – HRIS** should always be **HREPAF** (To ensure this will be monitored, do not select specific HR Staff).
11. Add **Comments**, if necessary.
 12. Click **Save**, then **Submit**. If no Errors, status will move to **Pending**.

EPAF User Guide for Banner 9

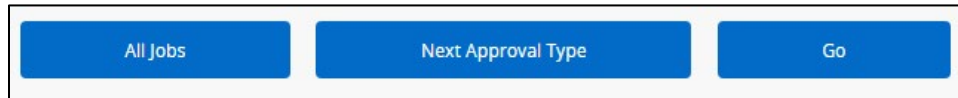
Submitting a One-Time Earning Payment Form (ADEARN) EPAF

1. Log onto **PirateNet**.
2. Click the **Banner Self Service (SSB)**, then **Employee Dashboard**.
3. Choose **Electronic Personnel Action Forms (EPAF)** and **New EPAF**.



4. Enter **CWID of Employee**

5. Enter the **Query Date** – MM/01/YYYY (**NOTE: This must be the first of the month in which the payment is to be made. Failure to use the first of the month may result in incorrect payment**).
6. Select **Approval Category of One-Time Earning Payment, ADEARN**.
7. Click **Go**.
8. Click **All Jobs** to view previous suffixes and enter the next number in the sequence.



9. In **New Job** field enter **Position (ADEARN)** and **Suffix (one number above highest suffix)**.

- a. **NOTE:** To ensure proper payment, when submitting more than one ADEARN at a time, please remember to use different suffixes for each assignment.
 - i. **Ex:** If the last ADEARN that was used was ADEARN-03 and you have 2 more to submit you will use ADEARN-04 and ADEARN-05

10. Click **Go**.
11. Under **New** enter Index, then click **Default from Index** (an Error message will appear as a Reminder for the Account Code) and **Account**, scroll down to **New** once more and enter **Account Code**.

EPAF User Guide for Banner 9

12. Click **Go**.
13. Under **New Value** click **Add Row** and enter **Effective Date** as the first of the month in which a payment should occur and make the following additional entries:

New Value						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="1"/>	<input type="text" value=""/>
+ Add Row						

- a. **Earnings** = STS
 - b. **Hours or Units per Pay** = 1
 - c. **Special Rate** = Dollar amount Employee should be paid
14. Under **End the One Time Earning** enter the last day of the month in which the payment is scheduled.

End One Time Earning,

Jobs Effective Date *

15. Confirm approval levels are accurate in the **Routing Queue**.
 - a. These should be pre-populated because of [Default Routing](#). If you have not setup Default Routing, select names from the drop-down list.

Routing Queue

Approval Level

40 - (APPROV) Departmental Approver ▼

50 - (VPAPPR) Second Approval ▼

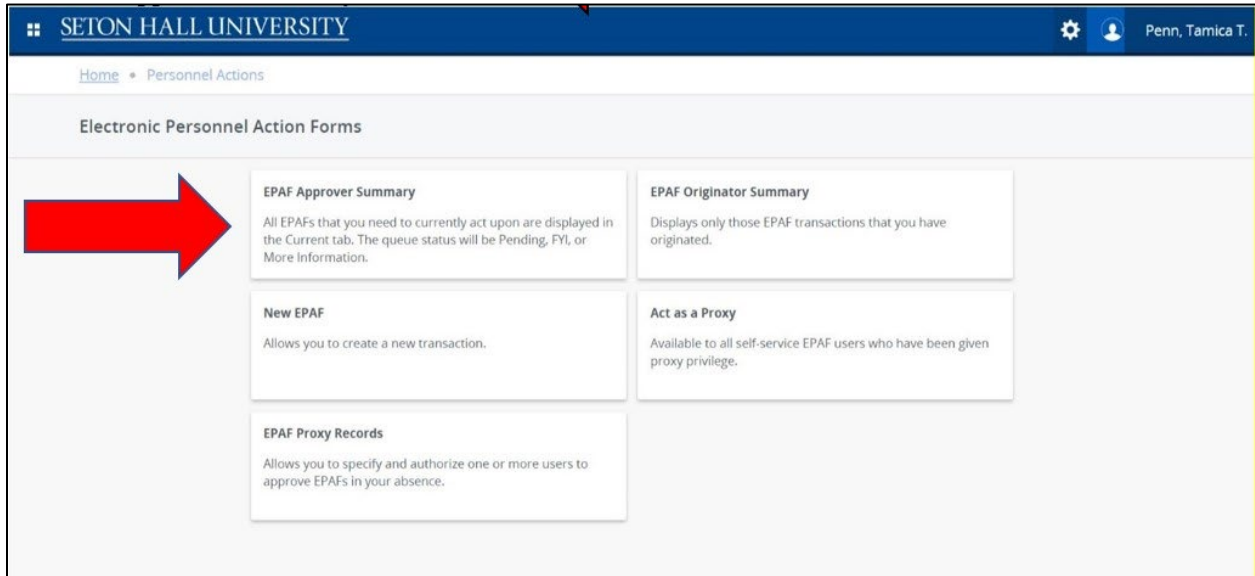
90 - (HRIS) HRIS ▼

- b. **90 – HRIS** should always be **HREPAF** (To ensure this will be monitored, do not select specific HR Staff).
16. Add **Comments** by entering the rationale for the stipend payment. **Comments are required to avoid processing delays.**
 17. Click **Save**, then Choose **Submit**. *If no Errors, status will move to pending.*

EPAF User Guide for Banner 9

For Approvers Only – Navigating Approver Summary EPAF

1. Log onto **PirateNet**.
2. Click the **Banner Self Service (SSB)**, then **Employee Dashboard**.
3. Choose **Electronic Personnel Action Forms (EPAF)**
4. Click on **EPAF Approver Summary**



5. Approve the ePAF, as appropriate

