

PROCESSING EPAFs THROUGH BANNER SELF-SERVICE

HOW TO PROCESS A SEPARATION EPAF

When processing a Separation EPAF please ensure you have the supporting documents ready to be sent to Human Resources.


Separation EPAF should only be used when the employee is **leaving the University entirely**.



Please note: Supporting documents must be submitted to Human Resources. (Ex: resignation letter, retirement letter, layoff memo, etc.)

Steps	Instructions	Comments
1	Go to the EPAF Menu and select “New EPAF” link > Complete the “New EPAF Person Selection” page then > Complete the “New EPAF Job Selection” page.	(See page 15-19 for instructions.)
2	You are now on the “Electronic Personnel Action Form” – Review the top section to ensure you have identified the person you want to process, the correct Approval Category and the Query Date is accurate based on the EPAF Payroll Calendar.	Note: If any of the information is not correct you must exit the page and start over again.

Electronic Personnel Action Form

 Enter the information for the EPAF and Click Save; then click Submit to **Commit** the transaction.

Name and ID:	Catrina D Fowler, A00112963	Job and Suffix:	983026-00, USER SUPPORT SPEC II
Transaction:		Query Date:	Jul 23, 2008
Transaction Status:		Last Paid Date:	Jan 05, 2008
Approval Category:	Employee Separation, SEPAR		

Steps	Instructions	Comments
3	The Jobs Effective Date will already be defaulted in from the Query Date	
4	Enter the Personnel Date.	This date is the actual date for the event. For a Separation, it is the last day of work and/or last day paid.
5	Job Status and Job Change Reason is a default. No input needed.	
6	Enter the Termination Date.	This date is the same as the Personnel Date.
7	Select the Term Reason Code.	Select the code which reflects the reason why the employee is leaving the University.

End Current Job Record

[Click here for EPAF Payroll Calendar](#)

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	07/15/2007	<input type="text" value="06/22/2008"/>
Personnel Date: MM/DD/YYYY	07/15/2007	<input type="text" value="06/18/2008"/>
Job Status: (Not Overrideable)	Active	<input type="text" value="T"/>
Job Change Reason: (Not Overrideable) 9		<input type="text" value="SP"/>

End Employment Record

[Click here for EPAF Payroll Calendar](#)

Item	Current Value	New Value
Termination Date: MM/DD/YYYY		<input type="text" value="06/18/2008"/>
Term Reason Code:		<input type="text" value="58, RESIGNATION"/>
Employee Status: (Not Overrideable) Active		<input type="text" value="T"/>

Steps	Instructions	Comments
8	In the Routing Queue section, the mandatory Approval Levels appears in this section. Type in the appropriate Banner IDs for each level in the User Name column.	If the Originator completed the Default Routing Queue then the user names will appear in this section.
9	Originator may include additional levels if necessary. Use the drop down menu to select the approval levels and required actions.	

Routing Queue

Approval Level	User Name	Required Action
20 - (DEPTAP) Department Approvers	<input type="text" value="EPAFTR12"/> Ava M. EPAFTR12	<input type="text" value="Approve"/>
25 - (HRADM1) HR Data Administration	<input type="text" value="RAMOSJ"/> Jessie G Ramos	<input type="text" value="Approve"/>
50 - (BUDGET) Budget	<input type="text" value="MARTINM1"/> Miriam E Martinez	<input type="text" value="FYI"/>
70 - (PAYROL) Payroll	<input type="text" value="LANES"/> Sharie A Lane	<input type="text" value="Approve"/>
99 - (APPLY) Appliers	<input type="text" value="RAMOSJ"/> Jessie G Ramos	<input type="text" value="Apply"/>
Not Selected	<input type="text"/> <input type="text"/>	<input type="text" value="Not Selected"/>
Not Selected	<input type="text"/> <input type="text"/>	<input type="text" value="Not Selected"/>
Not Selected	<input type="text"/> <input type="text"/>	<input type="text" value="Not Selected"/>
Not Selected	<input type="text"/> <input type="text"/>	<input type="text" value="Not Selected"/>

Steps	Instructions	Comments
10	Add a statement or a note in the Comments section to communicate information concerning the employee to all Approvers in the queue.	Comments, example: Resignation letter has been sent to HR.
11	After you have entered your comments, click on the SAVE button to save all your entries.	

Comment


Employee's resignation letter has been submitted to HR.

[Approval Types](#) | [Routing Queue](#) | [Transaction History](#)

Steps	Instructions	Comments
12	Once you click SAVE , you will receive a message indicating your changes have been save successfully.	
13	Then click on the SUBMIT button to send the transaction to be approved by the Users in the routing queue. You will receive a message indicating you have submitted the transaction successfully.	You will receive a workflow email

Electronic Personnel Action Form

Your change was saved successfully.


 Enter the information for the EPAF and Click Save; then click Submit to **Commit** the transaction.

Name and ID: Virna S , A00276 8 **Job and Suffix:** 998 8 -00, STAFF NURSE
Transaction: 18284 **Query Date:** Jun 22, 2008
Transaction Status: Waiting **Last Paid Date:** Dec 29, 2007
Approval Category: Employee Separation, SEPAR

[Approval Types](#) | [Comments](#) | [Routing Queue](#) | [Transaction History](#)

Electronic Personnel Action Form

The transaction has been successfully submitted.

 Enter the information for the EPAF and Click Save; then click Submit to **Commit** the transaction.