

OVERVIEW OF ELECTRONIC PERSONNEL ACTION FORM (EPAF)

The Electronic Personnel Action Form function of Banner allows for paperless processing of personnel actions. EPAF's are simple, concise, and allow many values or data elements to default into the NOAEPAF form without manual data entry. The NOAEPAF form enable users to process personnel actions rapidly, through an electronic approval queue, and provides an audit trail of all approval/disapproval history. Coupled with SCT Workflow - a tool that allows instant communication and enhanced responsiveness to actions via email - both tools leverage our institutions existing technology.

Self Service EPAF provides a web-based front-end for processing personnel transactions via UMDNJ Self Service portal. This will eliminate the need to understand how to navigate through Banner.

Functionalities of EPAF:

- a) Proxy - a function that allows users to assign approval authority to a representative within a department/unit in cases of scheduled absences. A proxy can assume full responsibility for approving or disapproving EPAF transactions.
- b) Comments - a function that allows users to enter annotations that will assist the various approvers in the queue to make informed decisions relating to a particular transaction.
- c) Email Notification - users will receive confirmation email messages of transactions awaiting approval or which have been entered into the system. These email notifications include comprehensive information pertaining to the transaction such as: employee ID, effective date, position number, home and finance organization information, separation reason, etc.
- d) Transaction Number - personnel transactions that are originated in EPAF and submitted for approval generate a unique sequence of numbers for the transaction. This number allows for easy tracking and search capabilities.

Self Service EPAF will allow you to perform the following functions:

- ✓ Enter and submit electronic transactions
- ✓ Select your approval action
- ✓ Track the transaction through the process
- ✓ Add comments to a transaction

Advantages of Self Service EPAF:

- ✓ Provides a web-based front-end for processing personnel transactions via UMDNJ portal
- ✓ More user-friendly environment
- ✓ Transactions are processed in a timely manner
- ✓ Workflow emails assist with communication

Types of EPAF Users:

- ✓ **Originators** – can create and void EPAF transactions, but cannot approve an EPAF
- ✓ **Approvers** – can approve or acknowledge EPAF transactions and identify a proxy when they are not available to perform an action

Approval Categories

The Banner Human Resources System has been set up to process electronic personnel action forms (EPAF) for changes that department’s initiate and approve for staff employees. The following table depicts the category codes, describes what action each code is used for, and provides contact information for each category.

These will be used to process EPAF actions:

Approval Category	Description	Purpose
ORGCOD	Organizational Code Change	Make corrections or changes to an existing organizational code. The home org, timesheet org, distribution org or cashier code.
SEPAR	Employee and Job Separation	End a person's job and employee record that is separating from the University.
MERHBI	Merit Hourly Increase	Increase an employee's hourly rate based on the merit process.
MERSBI	Merit Salary Increase	Increase an employee's salary based on the merit process.
MERSLS	Merit Salary and Lump Sum	Increase an employee's salary and give a lump sum bonus based on the merit process.
MERHLS	Merit Hourly Lump Sum	Increase an employee's hourly rate and give a lump sum bonus based on the merit process.
MERLMP	Merit Lump Sum	To give an employee a lump sum bonus based on merit process.
LMPSUM	Lump Sum Payment	To give an employee a lump sum NOT based on the merit process.
SALADJ	Salary Adjustment - Salaried	Increase an employee’s salary due to equity adjustment or due to initial incorrect salary or salary increase (not merit base).
SALADH	Salary Adjustment - Hourly	Increase an employee’s hourly due to equity adjustment or due to initial incorrect salary (not merit base).

Approval Levels

An EPAF is originated in the department by the person who is authorized to enter and submit changes for employee status, jobs, etc. Once an EPAF is originated, it must be saved and submitted to an approval routing queue. There are **mandatory approver levels** that the EPAF is routed through before the change can be applied to the employee's record.

Approval

Those identified as approvers in the queue, must approve a transaction before it moves to the next person/level in the queue. (See chart below)

FYI

Individuals who do not need to approve the EPAF but receive notification for informational purposes after the EPAF is approved. An FYI person does not stop an EPAF from processing. As an FYI person you have the option to *acknowledge* the EPAF.

Applier

The Information system specialist in the Human Resources Information Systems office applies the EPAF to Banner once the transaction is approved and/or acknowledge by the individuals in the routing queue.

The chart below shows the mandatory levels for each EPAF category and the action required for each level.

Approval Category	Description	20 DEPTAP	25 HRADM N	50 BUDGET	70 PAYROL L	90 HRADM N	99 APPLIE R
ORGCOD	Organizational Code Change	Approval		FYI		Approval	Apply
SEPAR	Employee and Job Separation	Approval	Approval	FYI	Approval		Apply
MERHBI	Merit Hourly Increase	Approval		* Approval	FYI	Approval	Apply
MERSLS	Merit Salary and Lump Sum	Approval		* Approval	FYI	Approval	Apply
MERHLS	Merit Hourly Lump Sum	Approval		Approval	FYI	Approval	Apply
MERLMP	Merit Lump Sum	Approval		* Approval	FYI	Approval	Apply
LMPSUM	Lump Sum Payment	Approval		*Approval	FYI	Approval	Apply
SALADJ	Salary Adjustment - Salaried	Approval		* Approval	FYI	Approval	Apply
SALADH	Salary Adjustment - Hourly	Approval		* Approval	FYI	Approval	Apply

*Several approval levels have been established for increases that require split funding. (Level 21 = DEPAP1, levels 51 to 55 = BUD01 to BUD05.)

**Use the same HR person from HRADMN levels 25 and 90 as the APPLIER for level 99.