Banner 7

Human Resources

EPAF General Instructions

UNC Charlotte Financial Services

I - Introduction

EPAF Defined

An **Electronic Personnel Action Form** - **EPAF,** is an online form originated by a department to communicate an employment decision about an employee to the Human Resources and Payroll Department.

All EPAFs require approval. Each EPAF is assigned an "Approval Category" that determines the required levels of approval. Finally, the EPAF is approved by the Human Resources Department, and the EPAF is applied to the employee's job record. If there are any problems with the EPAF, a designated Approver can select Return for Correction and require the originator to correct or recreate the EPAF.

The EPAF must be completed, approved, and applied in a timely manner so the employees' job record can be updated. Timely completion of an EPAF is essential to help the Payroll Department pay an employee accurately and on time. A complete EPAF Submission Schedule can be found on the Payroll Calendar.
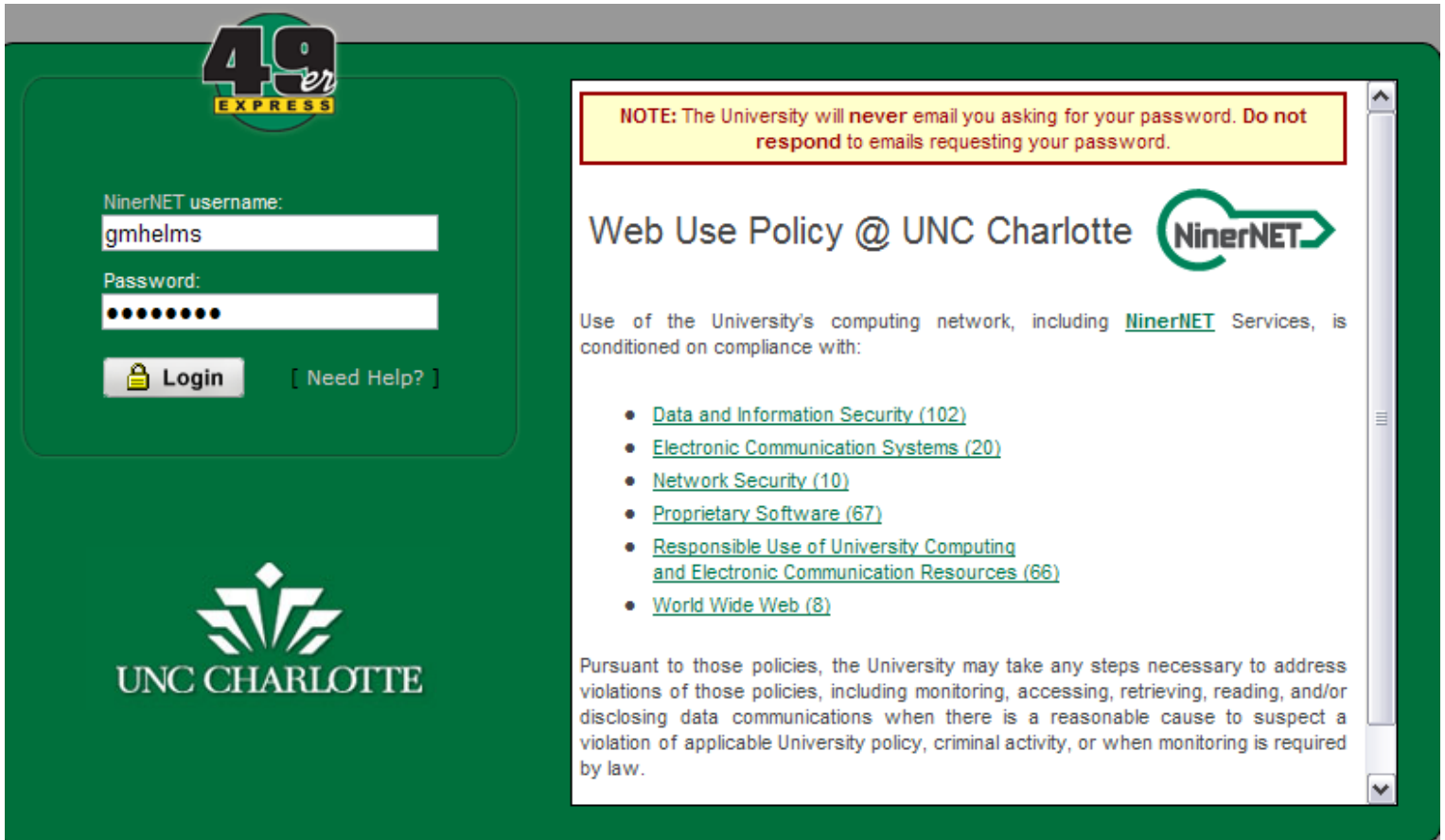
Currently UNC Charlotte uses the following EPAFS:

- Hire Part Time Faculty – E50PTF
- Hire Continuing Ed Part Time Employee – E50CE
- Special Pay for Full Time Employee – E45SP
- Student New Hire – S70N
- Student Reappointment – S70R
- Student Miscellaneous Pay – S72M

Click on each EPAF above to find instructions related to that EPAF.
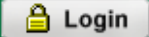
II - Logging In

- Log in to 49er Express using a NinerNet id and password.

- Select Banner Self Service from the Employee Home tab.

Employee Home	Help Center		June 30, 2009

Employment & Benefits ⊠

Banner Self Service **(Below: Direct Links)**

- o Pay Stub
- o Direct Deposit
- o Current and Past Jobs
- o Leave Balances and History
- o Tax Info
- o View Addresses and Phones

HR Homepage
Jobs Database (Hiring Managers)
Job Postings
Benefits Information
State Health Plan
NC Flex
State Employees Credit Union
HR Employee Learning & Development

- o New Staff Orientation Online Learning Modules
- o HR Employee Training Registration

eProcurement Marketplace ⊠

Enterprise Rental Car
Use this link for Enterprise Rental Car Reservations.
Contact: Travel Info
Fax: 704-687-6514
For guidance see the Travel Procedure Manual.

Staples
Use this link for office supply orders.
Contact: Larry Barfield
704-687-2394

Wallace Printing
Contact: Wallace Printing office 828-466-3300
UNC Charlotte Office: 704-687-7332
For more information on printing: Wallace Printing office.

RICOH Ricoh
Use this link for copying and reprographics orders.
Contact: Jo Prophit
704-687-7341

Calendar ⊠

Academic Calendar

Personal Announcements ⊠

There are no announcements

Movies and Activities ⊠

- Movies.com
- Campus Movies

Weather Bug ⊠

Your Weather for:
Charlotte, NC 28223
University of N Carolina at Charlotte

75°F   4 mph

- When Banner Self Service opens, select the **Employee tab.**

Personal Information	Student Services / Student Accounts	Financial Aid	**Employee**	Finance

RETURN TO MENU   SITE MAP   HELP   EXIT

Employee Information

Benefits and Deductions
View your retirement plans, Health insurance information, NC Flex information, and miscellaneous deductions.

Pay Information
View your Direct Deposit Payment details; View your Earnings and Deductions History; View your Pay Stubs; Establish or change Direct Deposit Enrollment.

Tax Information
View W-4, NC-4 and Year Earnings and W-2 information.

Current and Past Jobs as of July 1, 2005

Time Off Current Balances and History

Time Sheet
Web Time Entry (WTE) (WTE Training Materials)
Web Time Entry is now fully implemented for student and non-student hourly employees.
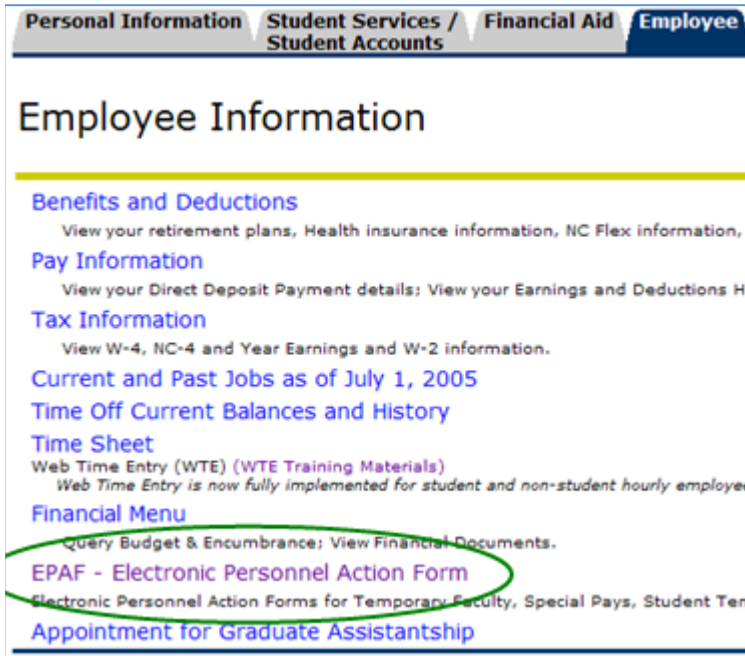
Financial Menu
Query Budget & Encumbrance; View Financial Documents.

EPAF - Electronic Personnel Action Form
Electronic Personnel Action Forms for Temporary Faculty, Special Pays, Student Temp Wage, Student Miscellaneous Pay

Appointment for Graduate Assistantship

- Select **EPAF (Electronic Personnel Action Form)**
- EPAF Menu

III – EPAF Originator Summary

The **EPAF Originator Summary** stores EPAFs that the Originator has created, voided, saved, or submitted. It also contains EPAFs that have been Returned for Correction and require the Originator's attention.

- To access the EPAF Originator Summary - Log into **49er Express**, select the **Employee Tab**.

- Select **EPAF (Electronic Personnel Action Form)**   •   Select **EPAF Originator Summary**
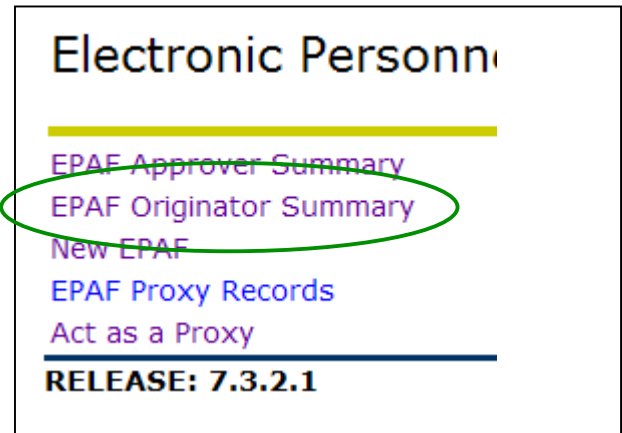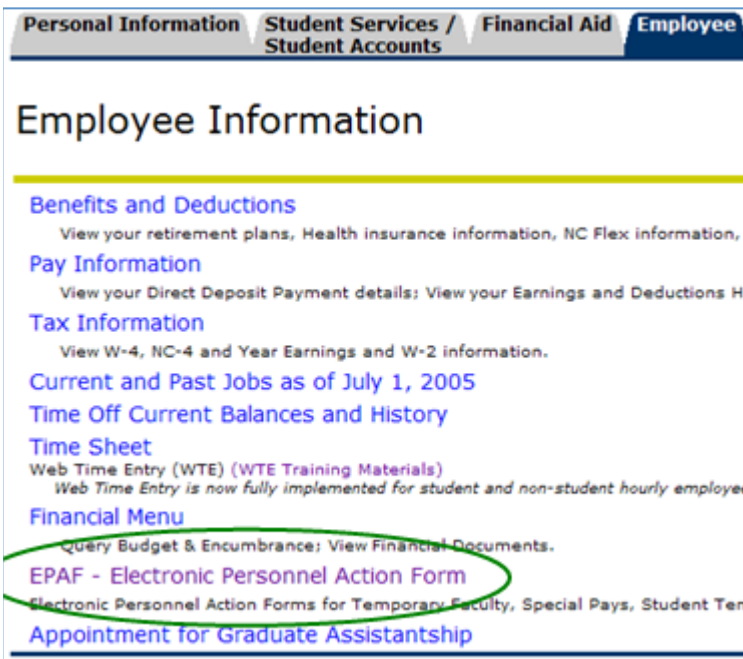
- Within the EPAF Originator Summary, there are two tabs: **Current** and **History**.

Current Tab

- The Current tab is similar to an "inbox" for the EPAF Originator Summary. Two types of EPAFs appear in the Current tab:

Current	History						
EPAF Transactions							
Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
EPA Temporary - Instructional, E50325-00	800:	9037	New Hire Part Time Faculty		Aug 24, 2009	Waiting	Comments Errors
EPA Temporary - Instructional, E50305-00	800·	9056	Hire Part Time Faculty	Jun 30, 2009	Sep 01, 2009	Return for Correction	**Comments

- o **Waiting** - If an EPAF has been created and saved (but not submitted), it remains with the Waiting status and can be found in the EPAF Originator Summary.
  - o **Returned for Correction** - If an EPAF contains an error or incorrect data, instead of approving it, an Approver will return it for correction. To view a returned EPAF, click on the employee's name.
- Usually, the Approver will note the reason for the return under the Comments of the EPAF. The EPAF Originator has two options: Void or Update.

Void   Update | Add Comment

- Clicking **Void** will permanently inactivate the EPAF.
- Click **Update** to make any changes to the EPAF.
- Only the Originator can make changes to the EPAF. If the Originator makes changes, they must save and submit the EPAF to send it through the Approval Queue. The EPAF must be re-approved on all levels.

History Tab

- All EPAFs created by the Originator are stored in the History tab. To check the status of an EPAF, in the EPAF Originator Summary, click the History tab, and notice the Transaction Status of the EPAF.

1 - 6 of 6
EPAF Transactions

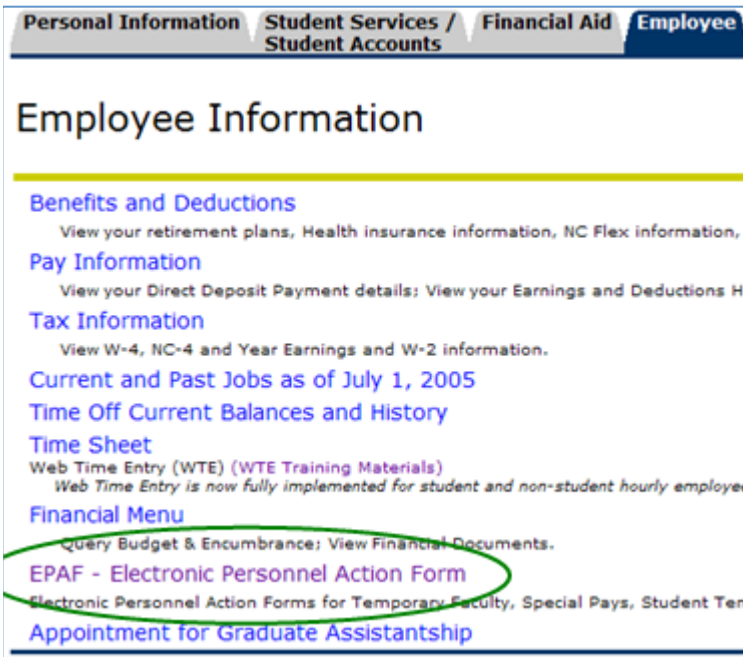| Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
EPA Temporary -Instructional, E50320-89	800	9006	New Hire Part Time Faculty	Jun 01, 2009	Sep 01, 2009	Cancelled	Comments
EPA Temporary -Instructional, E50320-89	800	8998	New Hire Part Time Faculty	May 29, 2009	Jun 01, 2009	Completed	
EPA Temporary -Instructional, E50325-89	800	9031	New Hire Part Time Faculty	Jun 09, 2009	Sep 01, 2009	Pending	**Comments
Temporary Wage Students, S81015-00	8001	9036	Student Wage New Hire (Hourly)	Jun 12, 2009	Sep 01, 2009	Approved	**Comments

- Possible transaction statuses include:
  o Pending - The EPAF is pending approval.
  o Complete - The EPAF has been completed and applied to the employee's job file.
  o Returned - The EPAF has been returned for correction.
  o Voided - The EPAF has been voided but its history remains available.
  o Overridden - The EPAF has been overridden and approved by a Super User at the Payroll level.
  o Removed from Queue - The EPAF has been returned to the Originator for correction thus is removed from the Approval Queue.

- The Originator can only modify an EPAF if it has not been viewed or approved at a higher level in the approval queue. Click on the EPAF, and if the option Return for Correction exists, then the Originator may return it to him or herself, make a change, then resubmit.

IV – Approving EPAFS

The **EPAF Approver Summary** contains EPAFs that have the Approver listed in the Approval Queue. To access the EPAF Originator Summary - Log into 49er Express, select the Employee Tab.

- To access the EPAF Approver Summary- Log into **49er Express**, select the **Employee Tab**,

- Select **EPAF (Electronic Personnel Action Form)**
- Select **EPAF Approver Summary**

- Within the EPAF Originator Summary, there are three tabs: **Current**, **In My Queue**, and **History**.

Current Tab

The Current tab is similar to an "inbox" for the EPAF Approver Summary. EPAFs that require the Approver's attention appear here.

Current	In My Queue	History						
△▽ Name	△▽ ID	△▽ Transaction	△▽ Type of Change	△▽ Submitted Date	△▽ Effective Date	△▽ Required Action	Action	Links
EPA Temporary - Instructional, E50310-00	800......	9033	Continuing Education - Reappoint Part Time Faculty	Jun 15, 2009	Sep 01, 2009	Approve	☐	**Comments Warnings
EPA Temporary - Instructional, E50325-00	800	9053	Hire Part Time Faculty	Jun 25, 2009	Sep 01, 2009	FYI	☐	**Comments

- An EPAF can be approved by two ways.
    o Check the "Action" box next to each EPAF to be approved. Click Save.
- To view an EPAF, click on the employee's name. Review the EPAF. The Approver then has two options:
    o **Approve** - Click Approve to approve the EPAF. Approving an EPAF confirms the information is correct and authorized. The EPAF immediately becomes available for approval at the next level.
    o **Return for Correction** - Click this button to return the EPAF to the Originator for correction. The originator may correct and resubmit the EPAF or it can be voided.

- Approvers who return EPAFs must add a Comment to the EPAF indicating the reason for return.

  [Approve]   [Return for Correction]   Add Comment

- An Approver can **Add Comments** to the EPAF regardless of the required action or transaction status.

- If the Required Action of an EPAF is Acknowledge or FYI, the Approver only has one option. However, the Approver can add a comment to the EPAF.

  [Acknowledge]   Add Comment

- To approve a group of EPAFs click the box under **Action** or press [Select All] in the Current tab. After selecting the EPAFs to receive the Required Action, click **Save**.

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
EPA Temporary - Instructional, E50310-00	800	9033	Continuing Education - Reappoint Part Time Faculty	Jun 15, 2009	Sep 01, 2009	Approve	☐	**Comments Warnings
EPA Temporary - Instructional, E50325-00	800	9053	Hire Part Time Faculty	Jun 25, 2009	Sep 01, 2009	FYI	☐	**Comments

In My Queue Tab

The **In My Queue** tab shows EPAFs that are pending in the queue of the Approver. However, these EPAFs may not have been approved yet at a lower level. Or the EPAFs may be 'voided.'

History Tab

The **History** tab shows EPAFs that have been approved or acknowledged by the Approver.

Search

Click on *Search* to find EPAFs by UNC Charlotte ID #, Employee Name, EPAF Transaction Number, and more. The search function will search the Current, In My Queue, and History tabs.

New EPAF | Update Proxies | Search | Proxy or Superuser or Filter Transactions

Proxy or Superuser or Filter Transactions

Click on *Proxy or Superuser or Filter Transactions* to find EPAFs for a certain date range or to act as a proxy.

New EPAF | Update Proxies | Search | Proxy or Superuser or Filter Transactions

Proxy For:	Self
Act as a Superuser:	☐
Submitted From Date: MM/DD/YYYY	
Submitted To Date: MM/DD/YYYY	
Transactions Per Page:	25
Go	

- To act as a Proxy, select the approvers name form the **Proxy For:** dropdown and press **Go**. Please note – a person cannot act as a proxy until they have been added by another approver.

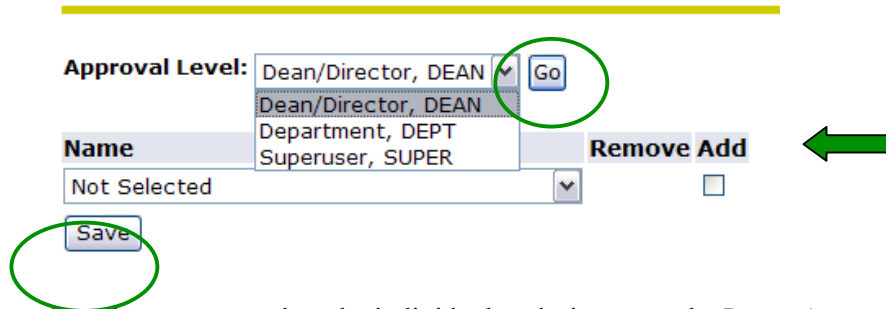- To search for an EPAF by date range, enter the beginning and end date and press **Go**.

V - Designate a Proxy Approver

- To designate a proxy - Log into **49er Express**, select the **Employee Tab**,

- Select **EPAF (Electronic Personnel Action Form)**   • Select **EPAF Proxy Records**
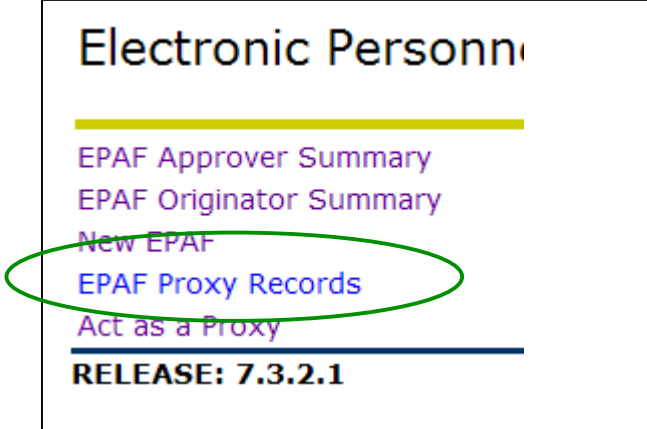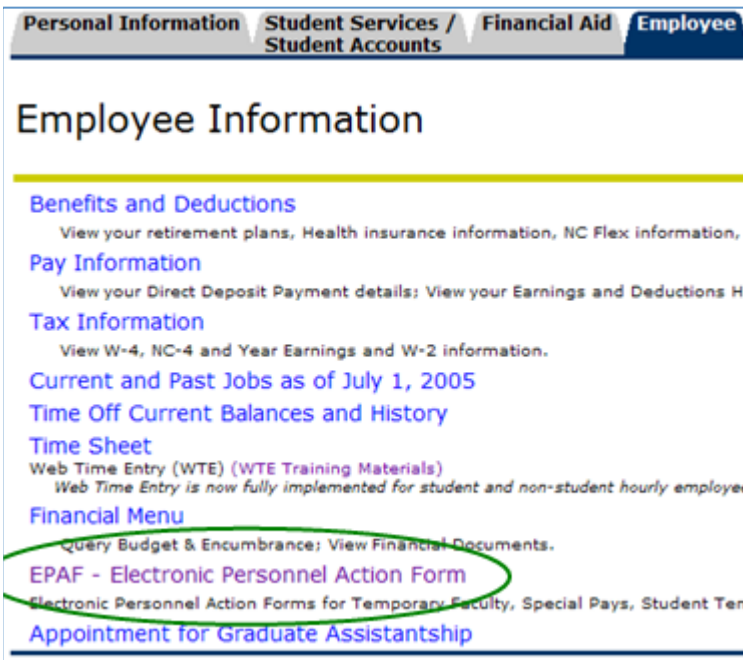
- Select the **Approval Level** for which you wish to designate a Proxy Approver from the drop down menu. Click **Go**.
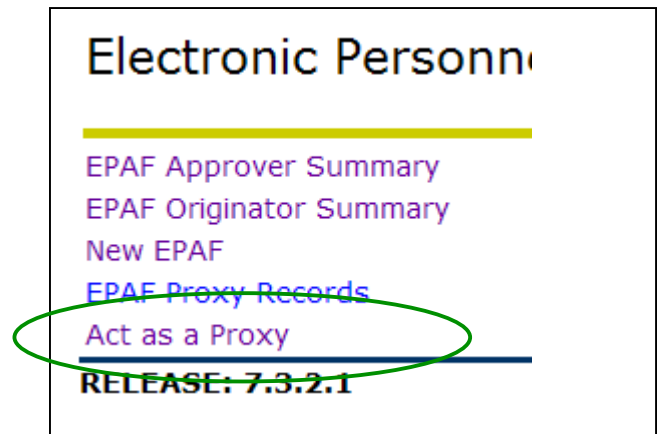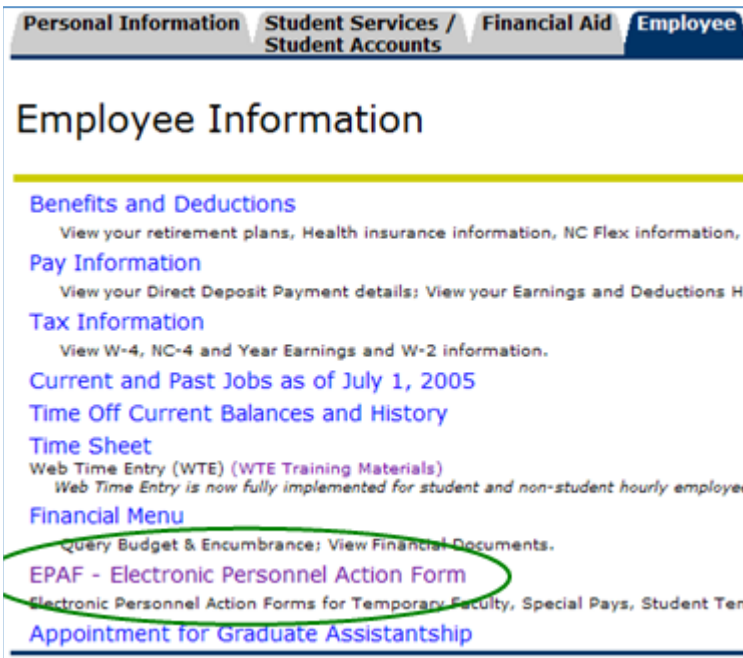

- From the **Name** drop down menu, select the individual to designate as the Proxy Approver.
- Click **Add** next to the individual's name, then click **Save**.
- To remove a Proxy Approver, click **Remove** next to the individual's name and click **Save**.
- A Proxy must have security access at the designated approval level.

VI - Act as a Proxy Approver

- To act as a proxy - Log into **49er Express**, select the **Employee Tab**.

- Select **EPAF (Electronic Personnel Action Form)**
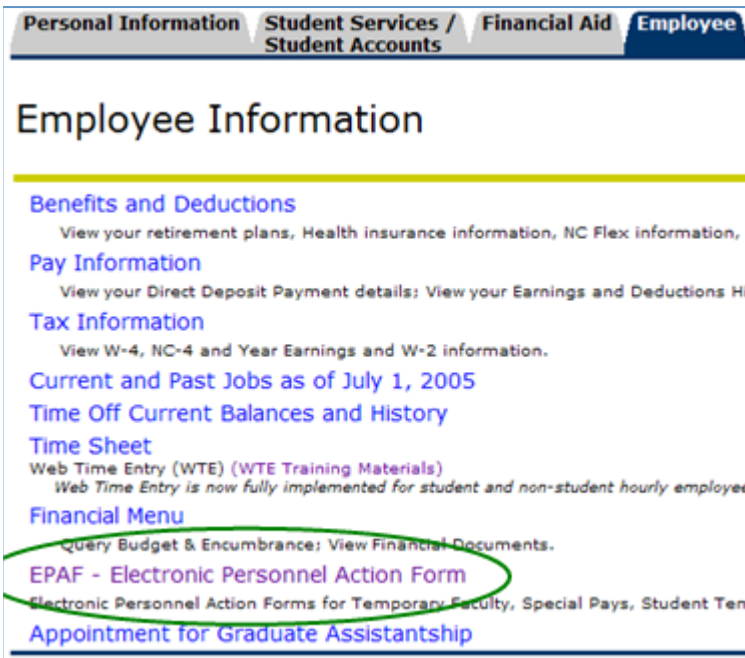- Select **EPAF Act as a Proxy**

- Select the individual you wish to **Proxy For** with the drop down menu.

- **Submitted From Date** and **Submitted To Date**: Leave blank if you want to see all EPAFs that require this individual's approval or input submission date parameters.

- Click **Go**.

- A Proxy will have access to approve, acknowledge, or return EPAFs at the approval level for which they have been designated by the EPAF Approver.

VII - Set up a Default Routing Queue

- A Default Routing Queue allows the user to customize the routing queue for every Approval Category, or type of EPAF, that they create.   This should be done before the first EPAF is created.

- To act as a proxy - Log into **49er Express**, select the **Employee Tab**.

- Select **EPAF (Electronic Personnel Action Form)**

- Select **EPAF Originator Summary**

- Select **Default Routing Queue**

- Select the **Approval Category** from the dropdown list. Press **Go**.

- Use the magnifying glass search function to fill in the open data fields for each required approval level.

Approval Category: Hire Part Time Faculty, E50PTF [Go]

Approval Queue

Approval Level		User Name		Required Action
1 - (PAYROL) Payroll		BLMUSSEL	Brenda L Musselman	FYI
45 - (DEPT) Department		GMHELMS	Gale M Helms	Approve
50 - (DEAN) Dean/Director		VLHILL	Virginia L Hill	FYI
60 - (AA) Academic Affairs		HFTENCH	Dawn F Tench	Approve
65 - (FUND) Fund Approval		JCHARPER	Jessica Harper Miller	Approve
90 - (HR) Human Resources		TLHUX	Tracy L Hux	Apply

- Press [Save and Add New Rows] when complete.