UNIVERSITY OF HARTFORD

ePAF Approver Reference Manual

Introduction

Banner HR, the University of Hartford's Human Resources Information System (HRIS), allows designated end users to electronically process standard personnel actions such as hiring or making personnel changes via an electronic Personnel Action Form (ePAF). The ePAF allows an originator to input all actions into an online form, which will then be sent automatically to the next designated approver in the routing queue until it is ultimately applied electronically to the appropriate BANNER screen(s).

The ePAF system provides an end user with the ability to check the status of ePAFs at any time, locating exactly where the ePAF is in the approval routing queue. This paperless process also allows for the intuitive workflow system to notify users of pending actions as well as creates an opportunity to achieve greater institutional efficiencies as well as reduces our carbon footprint.

Prior to beginning your use of ePAFs, you should become familiar with employee class codes, your department/college home organization number(s), position number(s) as well as the funding source (grant or restricted funded or non-grant or restricted funded) for the personnel actions in which you will be approving an ePAF. Your unit's reporting line, as well as the funding source for each personnel action, will dictate which ePAF the originator will use. An ePAF Quick Reference Guide, which outlines all ePAF options available to the originator and a brief summary of their use, as well as other important reference materials are available as appendices on HRD's website at **http://www.hartford.edu/hrd/ePAF.aspx**.

Note: *The University of Hartford has chosen to use the Self Service Center as its ePAF processing forum. Since the Internet-native Banner (INB) is also available, users may receive a notice upon log-in that indicates that there are transactions to be reviewed and "Do you want to go there now?" ALWAYS CLICK* ***NO*** *to this question.*

Approver (and/or Proxy) Responsibilities

Each ePAF has an established default approval routing queue. It is incumbent upon you as an approver (and/or a proxy) to understand your role and responsibilities as it relates to ePAF processing. As an authorized ePAF approver, you are expected to demonstrate a full awareness of the importance of maintaining prudent fiscal operations in an effort to ensure the effective management of departmental financial resources as well as compliance with other applicable University policies.

The mandatory approval routing queue levels have been assigned with the minimum approval levels needed from an institution-wide audit perspective. While several other University departments will have reviewed and approved the ePAF prior to you receiving it in your queue, in your role as an approver (and/or proxy), you are ensuring that the personnel data and other information contained in the ePAF is accurate and that you approve of the action being taken. Your approval will be electronically date and time stamped on the ePAF and will be deemed as your electronic signature as a part of the University's signatory authority for audit purposes.

Logging In and Getting Started

To access ePAFs, you must be able to log onto the Self Service Center (SSC) using your University ID number and secure PIN. SSC can be found by navigating to **http://www.hartford.edu/selfserve/default.aspx**. The ePAF menu is found on the Employee tab.

1. Enter your User ID and PIN/password for SSC Click Login.
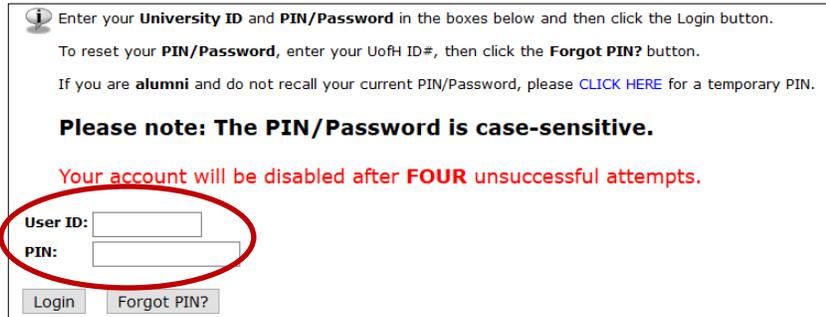
2. Select the Employee tab

3. Select the **EPAFS** link from the menu.
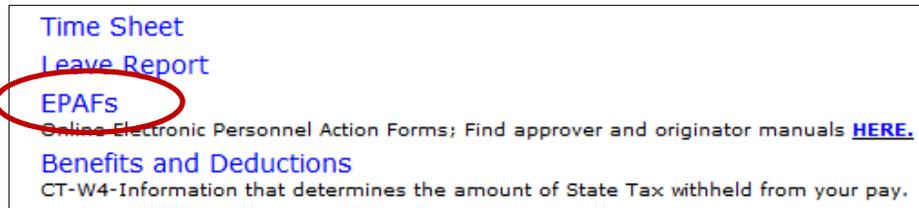
Viewing EPAF Transactions

This electronic process will provide you with the ability within the SSC to view ePAFs submitted by originators in your department/college. Your ePAF menu options will vary depending on your user roles and access levels.

1. Select the **EPAF Approver Summary** link.
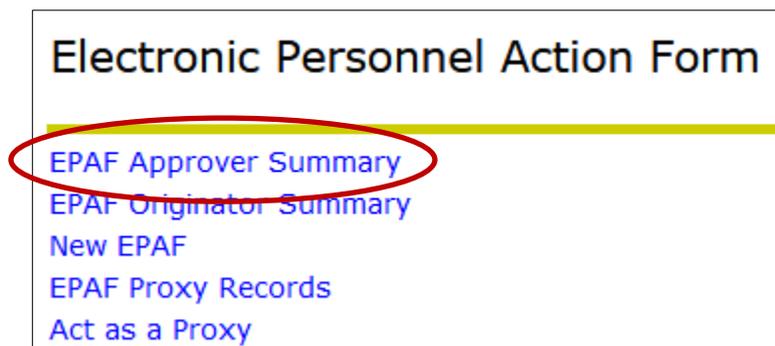
2. The **Current** tab will show transactions that need your immediate attention. In the **Queue Status** field, select **Pending** and then click **Go** to review transactions that are pending your approval.

3. Click on the employee's name to review the ePAF. You may review comments made by the ePAF originator or other approvers by clinking on the **Comments** link.

Note: Only the originator of an ePAF can make a change to that ePAF. If an error is detected at any level in the default routing queue, the ePAF must be returned to the originator for correction.

ASSIGN A PROXY SO IN YOUR ABSENSE (SICK OR VACATION) EPAFS CONTINUE TO BE APPROVED. Instructions for adding and removing a proxy can be found by going to www.hartford.edu/hrd, select ePAF link on the left, and scroll to Approver Manuals section.

EPAF Approver Actions

Please be reminded of your responsibilities as a designated ePAF approver/proxy. It is incumbent upon you to review the information in the "New Value" column and consider any comments submitted with the ePAF as this may be important information for you to consider before approving this personnel transaction.

1. The approver summary will display the transactions pending approval for the selected date range. Click on the transaction you wish to review, the name of the employee is a link.

EPAF Transactions

	Name	ID	Transaction
▶	LoBello, Anthony G. Temp Staff Student, 524600-00		1862
▶	Tripoli, Alicia L. Temp Staff Student, 524600-00		1865

1 - 2 of 2

2.
Based on the information provided, select the appropriate ePAF Action:

a. **Approve** – Choose this action if you approve and agree to sign off on the values entered in the *New Values* column of the ePAF detail. This action allows the ePAF to move on to the next approver in the default routing queue or allows the ePAF to be applied to the Banner System.

b. **Disapprove** – Choose this action if you do not approve of the ePAF and do not wish to have any further action taken on the transaction. This action may also be chosen if there are errors on the ePAF that cannot be corrected by the originator (e.g. incorrect position number). Please include a comment explaining the reason for disapproval prior to disapproving it, click EPAF Preview after entering comments.

c. **Return for Correction** – Choose this action if there is an error that needs to be corrected by the originator before the ePAF is applied to the system. Please include a comment explaining what needs to be corrected prior to returning it, then click EPAF Preview to return to the ePAF. Once the correction(s) have been made and the ePAF has been resubmitted by the originator, the transaction will return to your approval queue.

d. **Add Comment** – Enter information for why an EPAF would be Disapproved or Returned for Correction. Please keep in mind comments become part of the permanent record for the employee. If you need to add comments, enter them first and click SAVE. Click EPAF Preview to complete action required (Disapprove or Return for Correction).

Once the appropriate action has been taken, a message will be displayed at the top of the ePAF stating that the transaction has been successfully completed.

EPAF Preview

✔ You are acting as an Approver.
✔ Transaction successfully completed.

Name and ID:	Shawn C Alderson,
Transaction:	1641
Transaction Status:	Pending
Approval Category:	H - Hourly Staff/Non-WorkStudy NEW Nongrant

Checking the Status of the ePAF

The ePAF process will provide you with the ability, within the SSC, to determine where any ePAF is located in the approval routing queue.

On the SSC main page, click the **Employee** tab, then choose **EPAF**, and finally click **EPAF Approver Summary**.

There are two tabs – current and history – which electronically store ePAFs that have been originated.

- The **Current** tab will display ePAFs that you have not yet reviewed and/or approved. You are encouraged to check your Current tab regularly to ensure that all pending ePAFs are submitted in a timely manner.

- The **History** tab will display ePAFs that you have approved as well as the status of that ePAF. There are several transaction status options in this tab – Completed, Approved, Pending, Returned for Correction, Void and Rejected. You are encouraged to check your History tab regularly to determine what action, if any, is necessary to complete the ePAF process. The system will store all submitted EPAFs in this History tab for twenty-four (24) months.

To check status, click on the name of the ePAF you have a question on and scroll to the Routing Queue section of the ePAF. In the example below, the ePAF has been approved at the first and second level of HRD approvals, and is pending at the Department Supervisor. This means the Department approval still needs to happen before the ePAF can be applied. Once applied the ePAF is complete. Queue Status of FYI means that Approval level simply needs knowledge of the ePAF but does not have anything to review/approve and does not stop the ePAF from proceeding through the process.

Routing Queue				
Approval Level	**Name**	**Required Action**	**Queue Status**	**Action Date**
Human Resources Development, 10	Tina J Berrien, BERRIEN	Approve	Approved	11/09/2018 03:43:21 PM
Budget Approval, 20	William Donald Nowitzke, NOWITZKE	FYI	FYI	11/09/2018 03:43:23 PM
Human Resources Final Review, 45	Denise K Limberger, LIMBERGER	Approve	Approved	11/09/2018 03:44:58 PM
Department Head/Chair, 50	Cesarina Thompson, CTHOMPSON	Approve	Pending	
EPAF Applier, 98	Tina J Berrien, BERRIEN	Apply	In the Queue	

EPAF Status Definitions

Transaction Status	Definition		Queue Status	Definition
Waiting	The transaction has been initiated, but not submitted.		Pending	The transaction is pending in the approvers queue.
Pending	The transaction has been submitted by the initiator and is pending review by an approver.		FYI	A person in the approval queue who receives the EPAF action for information purposes only.
Approved	The transaction has been approved by an approver(s).		Approved	The transaction has been approved by the current approver.
Disapproved	The transaction has been disapproved by an approver.		Disapproved	The transaction has been disapproved by the current approver.
Complete	The transaction has been submitted and approved by all approvers in the routing queue.		In the queue	The transaction is back in the routing queue waiting for the next approval level.
Void	Transaction has been voided.		Void	The transaction was voided.
Partially Completed	The transaction requires some fields to be fixed – only part of the transaction can be applied.		More information	An approver has requested additional information before the EPAF can proceed.
Cancelled.	The transaction was cancelled.		Acknowledge	An FYI approver has reviewed the EPAF and acknowledged receipt.
			Return for Correction	The EPAF was returned to the originator for correction.
			Overridden	A superuser has overridden one or more approval levels.
			Removed from queue	The transaction was removed from the approval queue (superuser)
			All	Includes all queue statuses
			Applied	All approvals in the routing queue are complete and HRIS or payroll has applied the changes to the system.