



Northeast Ohio

M E D I C A L U N I V E R S I T Y

Electronic Personnel Action (EPAF) Training Document

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Overview:

The EPAF process is an automated procedure to process certain job and labor distribution changes. Security roles are put in place to ensure responsibility. It also allows for approval workflows and real time status searches. This document outlines how to submit an EPAF, how to approve an EPAF, and how to set up a proxy.

Please know that the EPAF system only processes changes or new requests for future dates. Changes for monthly employees must be **approved** prior to the 10th of each month (holiday times may differ.) Changes to bi-weekly employees must be **approved** prior to the end of the pay period for which the changes occur.

Please review the [Payroll Calendars](#).

If the payroll-EPAF change date has passed you must complete a labor redistribution form and obtain all required signatures by the deadline.

Example: The current date is 9/9/2021. You should only process an EPAF with a labor date of 9/1/2021 and forward. After the cutoff date, you must process the Redistribution Form. Nothing prior to this date can be processed through an EPAF. If you have percentage changes for both past and future dates, you will do the EPAF for the future date(s) and a Labor Redistribution form for the prior dates.

Example 2: The current date is 9/9/2021. Your request is for August 1 – August 31. You only process the labor redistribution and not use the EPAF system.

Example 3: The current date is 9/9/2021. You wish to process a change for a biweekly employee beginning September 6. You would use the EPAF system as the pay period for this pay ends September 19.

The EPAF process is not for pay changes, terminations, or change in positions. Please continue to contact Chrissy LoCascio for processing. clocascio@neomed.edu.

If the position has an end date listed and it needs to be removed before the ePAF is started, please contact Lisa Oswald so that she can remove the end date. If she is not notified, the position will not be extended.

There are a couple of different types of EPAF categories currently available. This list will grow over time, so please pay attention to the approval category when first creating your personnel action. Again, please only use this process for changes with a future date.

- 1. Labor Distribution:** Choose this only for updating the future distribution of salary expense related to a position.
- 2. 100 % Grant Funded Labor Distribution:** Choose this only for updating the distribution of salary expense related to a position. *(Grant funds only. Therefore, only the owner of the Grant and Grants Accounting will have to approve.)*
- 3. Adding an End Date:** Choose this EPAF when you need to add an end date to a job where the funding is ending. *This is not to terminate an employee or for when someone is changing position.*

Unfortunately, for the Labor Distributions, Grants accounting must be listed even if there are no grants on the EPAF. If this is the case, and no grants are listed, please select Lisa Oswald and she will approve. If there is a grant listed, please select one of the Grants employees below.

When selecting the Grant Accountant, please use the following list per department:

Jeffrey McCann: Family & Community Medicine, Integrative Medical Sciences, College of Pharmacy

Maureen Brown: Anatomy & Neurobiology, Psychiatry

Bianka Hernandez: All other departments. (Example: like Public Safety, Office of Research and Sponsored Programs, Office of VP for Oper & Finance, etc.)

All levels of approval are still required.

EXAMPLE:

APPROVALS	
TITLE	SIGNATURE via EPAF
Financial Manager/PI Signature	Approve
Grants Accounting (if applicable, if not choose Lisa O.)	Approve
Vice President/Dean (of applicable Division)	Approve
Sr. Vice President Operations and Finance	Approve
HR	Apply

Note: If you have any questions or issues using these instructions, please contact Lisa Oswald at loswald@neomed.edu or 330.325.6731.

Logging into SSB


From the NEOMED Faculty/Staff home page, select the Applications Menu

FACULTY & STAFF RESOURCES

Designed to provide NEOMED faculty and staff with quick, easy access to your most-used tools, resources and links.

<p>CANVAS <i>(i.e., project and course sites, course syllabi and schedules)</i></p> <p>LOGIN +</p>	<p>NEOMED INTRANET <i>(i.e. internal forms, documents, tools)</i></p> <p>LOGIN +</p>	<p>MICROSOFT 365 <i>(i.e. email, calendar, groups)</i></p> <p>LOGIN +</p>	<p>APPLICATIONS MENU <i>(links to Banner Self-Service and other applications)</i></p> <p>LOGIN +</p>
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Log in with your full email address (xxxx@neomed.edu) and password. Make sure the Employees tab across the top is selected. Then, choose the Employee Self Service Dashboard.



Employee Self Service Dashboard
Includes Timesheets, Payroll and Leave Balances

Starting a new Personnel Action

Employee Dashboard

LoCascio, Christina M. [My Profile](#)

Leave Balances as of 04/01/2021

Vacation Pay in hours	179.96	Sick Pay in hours	202.59	Winter Break in hours	0.00
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[Full Leave Balance Information](#)

Pay Information

Latest Pay Stub: [02/26/2021](#) [All Pay Stubs](#) [Direct Deposit Information](#) [Deductions History](#)

Earnings

Benefits

Taxes

Job Summary

My Activities

[Enter Time](#)

[Approve Time](#)

[Approve Leave Report](#)

[Approve Leave Request](#)

[Electronic Personnel Action Forms \(EPAF\)](#)

[Effort Certification](#)

- After selecting Electronic Personnel Action Forms (EPAF) from the navigation area, you will be taken to a new page.
- Select New EPAF link

New EPAF

Allows you to create a new transaction.

- Put in the employee's name or ID and search. Click on the ID of the employee you wish to modify
 - You should keep the Query Date as the current date.
- Select the approval category: Example: Labor distribution.
- Select Go
- Select job you want (Primary position only)
- Select Go
- Enter in the effective date

- Enter in the index and click **DEFAULT FROM INDEX**

Effective Date
05/01/2021

COA Index
c 10010

Default from Index

- If you are not sure of the account code, you can look above and enter the account code from there

Effective Date
07/01/2020

COA	Index	Fund	Organization	Account	Program	Activity	Location
C	11920	10000	11920	613700	5000		

New

Effective Date
05/01/2021

COA	Index	Fund	Organization	Account	Program	Activity	Location	Pr
c	10010	10000	10010		5000			

- Go down to the routing queue and select the usernames who should approve for each level.
- Additional rows can be added if necessary

Routing Queue

Approval Level	User Name	Required Action
20 - (DEPT) Financial Manager/PI		Approve
40 - (VP) Vice President		Approve
99 - (HR) HR level		Apply

- Save. You may save an EPAF to return to at a later date. These will show under the Originator Summary link in the Personnel Actions Page.
- When all changes are complete then select **SUBMIT!**
 - Note – every time you make a change you must save before moving forward

Adding an end date:

Employee Dashboard

LoCascio, Christina M. [My Profile](#)

Leave Balances as of 04/01/2021

Vacation Pay in hours	179.96	Sick Pay in hours	202.59	Winter Break in hours	0.00
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[Full Leave Balance Information](#)

Pay Information

Latest Pay Stub: [02/26/2021](#) [All Pay Stubs](#) [Direct Deposit Information](#) [Deductions History](#)

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[Approve Leave Request](#)

[Electronic Personnel Action Forms \(EPAF\)](#)

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- After selecting Electronic Personnel Action Forms (EPAF) from the navigation area, you will be taken to a new page.
- Select New EPAF link

New EPAF

Allows you to create a new transaction.

- Put in the employee's name or ID and search. Click on the ID of the employee you wish to modify
 - You should keep the Query Date as the current date.
- Select the approval category: Example: Adding an End Date_PAF
- Select Go
- Select job you want (Primary position)
- Select Go
- Enter in the effective date
- Select the appropriate job change reason. **Example:** 011, Grant Ending
- The Job Status will be **T** for adding the end date.
- Go down to the routing queue and select the usernames who should approve for each level.
- Additional rows can be added if necessary.

Jobs Effective Date *

05/31/2022



Remove



Old Value: 10/25/2021

Job Change Reason *

011, Grant Ending



Old Value: 031, Hire

Job Status *

T



Old Value: Active

Routing Queue

Approval Level	User Name	Required Action
20 - (DEPT) Financial Manager/PI	CLOCASCIO - LoCascio, Christina M.	Approve
35 - (GRANTS) Grants Accounting	Not Selected	FYI
40 - (BUDGET) Budget	Not Selected	FYI

- Save. You may save an EPAF to return to at a later date. These will show under the Originator Summary link in the Personnel Actions Page.
- When all changes are complete then select **SUBMIT!**
 - Note – every time you make a change you must save before moving forward

Personnel Action Tracking:

You may see the status of any Personnel Action you have submitted. After choosing the Dashboard Navigation of Electronic Personnel Action Forms (EPAF), choose EPAF Originator Summary link. The history tab will show all actions. Clicking on the name hyperlink will show you a review of the form.

[Home](#) • [Personnel Actions](#) • [EPAF Originator Summary](#)

EPAF Originator Summary

Current **History**

i Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

Transactions

Transaction Status

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Status	Links
T... Assista A18138-00	@00	1673	Grant Funded Labor Distribution	10/11/2021	11/01/2021	Pending	

The routing queue participants and any action taken will also be displayed:

A Notification will be sent on a daily basis to all approvers requiring action(s) to be taken.


Approval Level	Name	Required Action	Status	Date
Grants, 10		FYI	FYI	10/11/2021 01:41 PM
Financial Manager/PI, 20		Approve	Pending	
Vice President, 40		FYI	In the Queue	
HR level, 50		Apply	In the Queue	

How to set up an approver proxy in Banner self service:

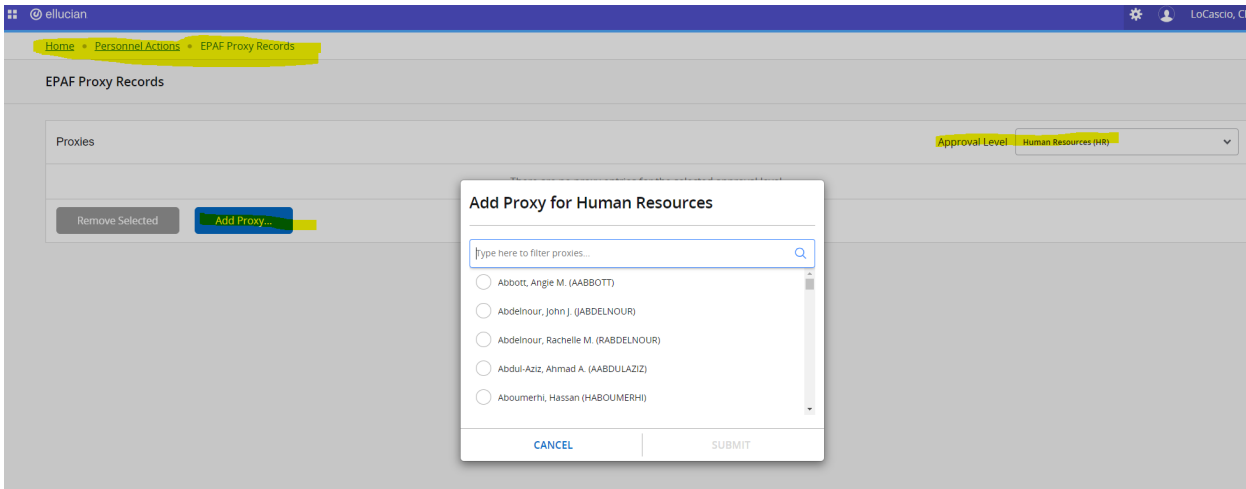
From the Personnel Actions tab, choose the Proxy Record link:

EPAF Proxy Records

Allows you to specify and authorize one or more users to approve EPAFs in your absence.

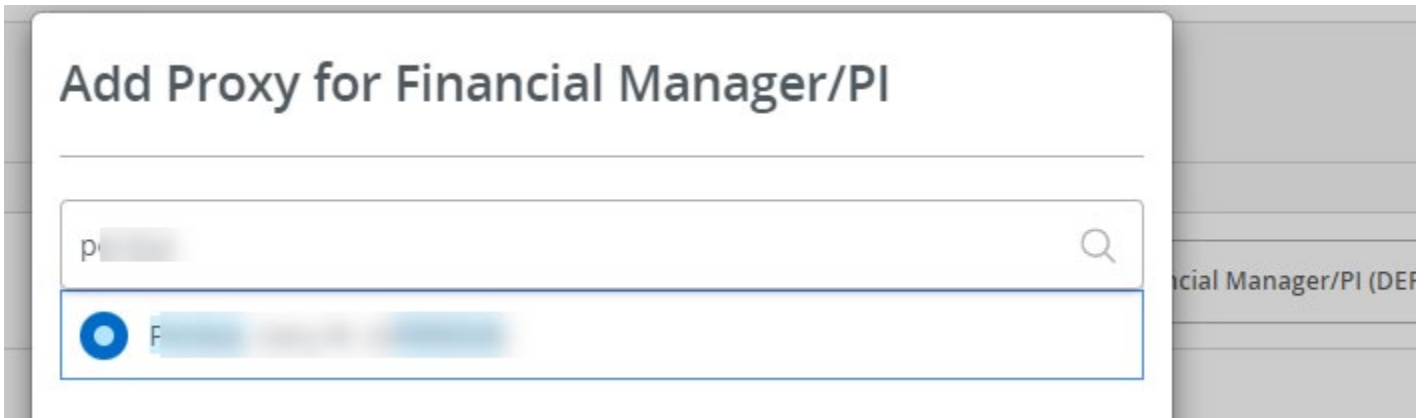


Choose the level(s) you are assigned from the drop-down menu.



The screenshot shows the Banner self service interface. The breadcrumb navigation is Home > Personnel Actions > EPAF Proxy Records. The main heading is EPAF Proxy Records. There is a 'Proxies' section with a table. To the right, there is an 'Approval Level' dropdown menu set to 'Human Resources (HR)'. Below the table, there are 'Remove Selected' and 'Add Proxy...' buttons. A modal window titled 'Add Proxy for Human Resources' is open, showing a search bar with the text 'Type here to filter proxies...' and a list of proxy users with radio buttons for selection. The list includes: Abbott, Angie M. (AABBOTT), Abdelnour, John J. (ABDELNOUR), Abdelnour, Rachelle M. (RABDELNOUR), Abdul-Aziz, Ahmad A. (AABDULA2IZ), and Aboumerhi, Hassan (HABOUMERHI). At the bottom of the modal, there are 'CANCEL' and 'SUBMIT' buttons.

You can scroll through the alphabetical list, or type a portion of the proxy name to search:



The screenshot shows a modal window titled 'Add Proxy for Financial Manager/PI'. It features a search bar with the text 'P' and a magnifying glass icon. Below the search bar, a dropdown list is visible, showing a search result for 'F' with a blue radio button selected. The background is blurred, showing the text 'Financial Manager/PI (DEF'.

How to approve an EPAF:

All EPAFs that you need to act on are displayed in your Current Tab. You will also receive a daily email notification of any new or outstanding actions.

In the Employee Dashboard, click on Electronic Action Forms



Click EPAF Approver Summary

Electronic Personnel Action Forms

EPAF Approver Summary

All EPAFs that you need to currently act upon are displayed in the Current tab. The queue status will be Pending, FYI, or More Information.

EPAF Originator Summary

Displays only those EPAF transactions that you have originated.

New EPAF

Allows you to create a new transaction.

Act as a Proxy

Available to all self-service EPAF users who have been give proxy privilege.

EPAF Proxy Records

Allows you to specify and authorize one or more users to approve EPAFs in your absence.

Here you will see the summary of all EPAFs awaiting your decision. If you are expecting the transaction, you can simply click the Action checkbox, then select the Save icon. It will then go to the next approver.

[Home](#) • [Personnel Actions](#) • [Approver Summary](#)

Transactions		Queue Status						
Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Research Associate, A18268-00	@000...	1617	PAF Date Extension	09/22/2021	09/22/2021	Approve	<input type="checkbox"/>	
Research Associate, A18091-00	@000...	1615	PAF Date Extension	09/22/2021	09/22/2021	Approve	<input type="checkbox"/>	
Research Technician, A18016-00	@000...	1577	PAF Date Extension	09/21/2021	09/16/2021	Approve	<input type="checkbox"/>	

Clicking on the Links icon will take you directly to any comments previously entered.

Alternatively, you can click on each person's name to view the EPAF. The original form will be displayed, along with the routing queue participants and status. At the bottom of the page are the actions that can be applied. Approve the EPAF.

[Home](#) • [Personnel Actions](#) • [Approver Summary](#) • [EPAF Preview](#)

EPAF Preview

Previous Transaction
Next Transaction

Details

Name and ID	Transaction	Transaction Status	Approval Category
Research Associate, @000...	1617	Pending	PAF Date Extension, PAFEXT
Job and Suffix	Query Date	Last Paid Date	
A18268-00, Research Associate	09/22/2021	06/30/2021	

PAF Date Extension, A18268-00, Research Associate, Last Paid Date: 06/30/2021

Current

Effective Date: 07/01/2021

Percent	COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Encumbrance
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Add Comment

Approve

Disapprove

Return for Correction

Once all approvals have been made, or an action is Disapproved a notification will be sent to the submitter to finalize all communications.