Electronic Personnel Action Form (EPAF)-Frequently Asked Questions

What is an EPAF?
An EPAF (Electronic Personnel Action Form) is a set of on-line data entry forms used to initiate and collect appropriate approvals on job actions for John Carroll University employees.

When Should I complete an EPAF?
An EPAF is necessary to effect **ALL** job actions in Banner (new hires, title changes, terminations, department transfers, salary changes, etc.)

What information do I need before I can create an EPAF?
The following is the information you need for each kind of EPAF:

New Hire Full Time-Valid Position Number, hire date and salary.
New Hire Part Time – Valid Position Number, hire date and hourly rate
Termination-Termination date and reason
Promotion with a Salary Increase – New Position Number, effective date of the change and new salary
Change in Salary-Effective date and new salary
Title Change-Effective date and new title
Department Transfer-New position number, effective date of the change and new salary

Where do I get a valid position number?
You can get a valid position number from Candace Pluhar ext. 4976 or cpluhar@jcu.edu.

Where can I find the EPAF link?
Log into Banner Self-Service.   Select Employee Service and then select Electronic Personnel Action Forms.

What if the EPAF link does not appear on my Banner Self-Service Menu?
Contact Lori Sprague at ext. 4962 or lsprague@jcu.edu and you will get setup to see the link.

Why is entering comments so important when I submit an EPAF?
Comments provide information for everyone involved in the EPAF and create a history of why and how this job change occurred.

Where can I find documentation on how to do the different EPAF's.
You can find documentation on how to submit each different kind of EPAF by accessing our EPAF website here.

I put the employee's name in the ID data box but, for some reason, it's not working. What did I do wrong?

Remove the person's name in the ID data box. If you know the person's Banner ID enter it in the ID data box. If you do not know the person's Banner ID search for their name by clicking on the magnify glass to the right of the ID box

What date should I put in the Query Date field on the first screen?

The query date field must be equal to or less than the Jobs Effective Date. (i.e. if you are hiring a person to start on April 8th then the query date must be April 8th or earlier.

My supervisor went into the Approver Queue to approve my EPAF and she can't see it?

Check your Originator Summary and be sure your EPAF has a Transaction Status of "Pending". If the EPAF has a Transaction Status of "Waiting", you may not have submitted it. Click on the name of the employee, select "Update", Save and then Submit. Then the EPAF should be visible in the Approver Queue

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EPAF Error Messages and Warnings

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While creating a transaction in EPAF, Originators could encounter error messages and/or warnings that occur during the save and submit operations. The following provides you with an explanation of the messages and the action to be taken (if any) when error and warning messages appear.

ERROR MESSAGES

If an error message is received, the transaction CANNOT be completed (submitted) as is. The originator must make the necessary corrections as identified below. Once the error has been corrected, the originator should be able to SAVE and SUBMIT the transaction successfully.

WARNING MESSAGES

If a Warning message is received, the transaction CAN be completed (submitted) as is.

Most common error messages and warnings:

Message Received	Action to be Taken
ERROR: New Job Labor Distribution Date should be >= query effective date	Return to the New EPAF screen where query date is requested. If you don't enter a query date, it will pre-fill with today's date, causing a start date error if the effective date of the action is before today's date. NOTE: If there are two actions within the same EPAF (i.e. Promotion where you are terminating one position and assigning a new position) then the Query Date should be the earlier of the two job effective dates, in this example it should be the date that the first job is

	terminated.
ERROR: Effective Date must be greater than Last Paid Date of….	Change the effective date to the first day of the next pay period. In the Comments field, note the actual start date.
ERROR: ID is not defined as an employee	Return to the New EPAF screen. Check to make sure you selected the correct Banner ID. If the correct ID was selected call Human Resources to have them make the person an employee in the Banner system.
ERROR: First Labor Dist Effective Date Must Equal Jobs Begin Date.	Change the Labor distribution effective date to match the effective date. This could also be an incorrect query date, see first error message listed in this table.
ERROR: Base Job record must equal the first Jobs Detail Effective Date.	This means that a Position/Suffix already exists. (i.e. a returning employee who is being assigned the same position number). DELETE or VOID the transaction. Return to the New EPAF screen and create a new transaction under the correct Position Number but with a new suffix. (i.e. if the last time the employee held the position they had a suffix of 00 then make the suffix 01, it must be different than one that has already been assigned to them).
WARNING: Annual Salary is outside the Table/Grade range.	No action necessary.
WARNING: Rate for this job is outside the Table/Grade range.	No action necessary.