Learn how to process an Employee’s Separation from Start to Finish
Electronic Personnel Action Form (EPAF)

- An EPAF is an Electronic Personnel Action Form; an online form, originated by a department to submit data changes to an employee’s Banner record.

- *The Separation From Employment Process* combines EPAF and Workflow functionality which allows you to:
  - Create transactions
  - Delete transactions that have not been submitted
  - Approve transactions
  - Track items through the approval process
  - Add comments to a transaction
  - Search transactions
  - Provide audit trail
What is the purpose of the EPAF System?

- The *Separation From Employment* EPAF system was designed to initiate the process of ending an employee’s employment with the University. The EPAF will terminate the Banner Job Record (NBAJOBS) and enter a Last Work Date on the Banner Employee Record (PEAEMPL).

- The EPAF termination information will be routed to the selected department approver via workflow. After the department approves the termination, (and if needed attaches the resignation letter), HR Labor Relations must approve the termination. After, HR approves the termination, University wide system email notifications are sent.
EPAF Rules of Separation

- The Termination date must be greater than the Employee’s Last Paid Date.
- Employees with a predetermined end date should not be processed through the EPAF. (Adjunct, Post Docs, Graduate Students) Please contact HR/Labor Relations: Felisha Brown 7-2298 or fmbrown@temple.edu.
- Do not use the Separation EPAF for Promotions or Transfers.
- If you need to update your list of Originators or Approvers contact Felisha Brown at fmbrown@temple.edu.
How to Access EPAFs...

- From bottom of www.temple.edu, click on TU Portal
- Log into TU Portal
- Go to Banner Tab
- Find the EPAF Channel, click on Electronic Personnel Action Form
- The EPAF Menu will be displayed
How to access the EPAF

- Alternative, if you do not see EPAF Channel
  - From bottom of www.temple.edu, click on TU Portal
  - Log into TU Portal
  - Under TU Applications, click on Self-Service Banner
  - Click on Employee
  - Click on Electronic Personnel Action Form
  - The EPAF Menu will be displayed
Electronic Personnel Action Form

Electronic Personnel Action Form

- EPAF Approver Summary
- EPAF Originator Summary
- New EPAF

RELEASE: 8.5
How to Setup Your EPAF Approval Queue….

Before you create an EPAF, it is recommended to set up your default Approval Queue (also called the ‘Routing Queue’). This is a list of your department manager(s) who will be approving your EPAFs. Once this is set up, you won’t have to indicate who approves your EPAFs each time you create a new EPAF, since it will automatically appear as your default routing queue. If needed, you may override any of these defaults on the individual EPAF.
Click on the link **EPAF Originator Summary**
Click on link Default Routing Queue
Click the down arrow next to the Approval Category and select the category for which you want to establish default routing. Then, click “Go”.

EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: Human Resources Exp Distrib Change, HREDCF

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Selected</td>
<td></td>
<td>Not Selected</td>
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<tr>
<td>Not Selected</td>
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<tr>
<td>Not Selected</td>
<td></td>
<td>Not Selected</td>
</tr>
</tbody>
</table>

Save and Add New Rows

EPAF Originator Summary

Return to EPAF Menu
4. Screen will refresh and the mandatory approval levels will default in.

![Approval Queue](image)

- **Approval Queue**
  - **Approval Level**
  - **User Name**
  - **Required Action**

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 - (HR2) HR EDCF Approvers</td>
<td></td>
<td>Approve</td>
</tr>
<tr>
<td>99 - (APPLY) EPAF Apply Appworx</td>
<td></td>
<td>Apply</td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
<td>Not Selected</td>
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<tr>
<td>Not Selected</td>
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<td>Not Selected</td>
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<td>Not Selected</td>
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</tbody>
</table>

- Mandatory Levels defaulted from Electronic Approval Category Form (NTRACAT).

- **Save and Add New Rows**

- **EPAF Originator Summary**
A. In the ‘30’ Approval Levels row, under User Name

- Click the magnifying lens
- Click on the name of the Approver you want
- Click on “Select”
B. In the ‘99 – (APPLY) EPAF Apply Appworx’ row, under User Name
   • Click the magnifying lens
   • Click on Banworx Appworx
   • Click on “Select”

C. Do not change the Required Action.

D. Do not add any rows.

5. Click on “Save and Add New Rows”.

6. The message, “Your change was saved successfully” appears.
7. To exit out of the EPAF Default Routing Queue, click on the “Return to EPAF Menu” at the bottom of the page.
Please note: You must repeat set up for “Default Routing” for every EPAF Approval Category (i.e. Separation From Employment, Expense Distribution Changes, etc.) you are authorized to originate.
How to Create A New EPAF...

1. Click on New EPAF
   The EPAF form will open.
Important Tip – It is very helpful if you already have the TUID of the employee that is terminating. However, if you do not have it, you can search Banner for the TUID by clicking on the magnifying glass.
• **Query Date** = this date will default to today’s date. You MUST update it to reflect the date you want the termination to be effective.
  
  • Must be greater than the employee’s Last Paid Date.

• **Approval Category** = select the appropriate Approval Category from list.

• Click “Go”.
New EPAF Person Selection

Enter a TUid or select the magnifying glass to search for a TUid by name. Enter the Query Date and select the Approval Category. Select Go.

* - Indicates a required field.

ID: *

Query Date: 01/23/2013

Termination Date

Approval Category: * Finance/HR Separation from Employment, FTERM

Go

EPAF Approver Summary | EPAF Originator Summary

Return to EPAF Menu
How to select the Position/Job to be Terminated…

- Confirm the correct employee is being processed.
- Select the job/position that you wish to change status to **Terminated**.
  - You can **only** update one job at a time.
  - Each job (position/suffix) will need a separate transaction created.
- Click “**Go**”.

New EPAF Job Selection

Select the job to process and then select Go.

<table>
<thead>
<tr>
<th>ID:</th>
<th>Laurie</th>
</tr>
</thead>
<tbody>
<tr>
<td>QUERY DATE:</td>
<td>Jan 01, 2013</td>
</tr>
<tr>
<td>APPROVAL CATEGORY:</td>
<td>HR Exp Distrib Change, HREDCC</td>
</tr>
</tbody>
</table>

Expense Distribution Change, LABOR1

<table>
<thead>
<tr>
<th>SEARCH</th>
<th>TYPE</th>
<th>POSITION</th>
<th>SUFFIX</th>
<th>TITLE</th>
<th>TIME SHEET ORGANIZATION</th>
<th>START DATE</th>
<th>END DATE</th>
<th>LAST PAID DATE</th>
<th>STATUS</th>
<th>SELECT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Primary</td>
<td>005809</td>
<td>00</td>
<td>Lead Software Developer</td>
<td>77130, Application Support Services</td>
<td>Jul 01, 2009</td>
<td>Jan 31, 2013</td>
<td></td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>

New EPAF

Return to EPAF Menu
In the “**Current Value**” column – the current Banner values will default into the form if you have HR Security (eclass/org) access.
• Verify the Last Work date and Jobs Effective Date is the Termination Date.
  • If incorrect, click in the field and correct it.
How to fill out the Routing Queue..

- This step will determine who will approve and apply the EPAF transaction. If you set up your Default Routing Queue (see page 4) these values will be pre-populated for you. All approval levels listed on the EPAF must have a User Name and Required Action.
- Select the magnifying lens to select your department approver from the list.
  - The Approval Level 99 ‘EPAF APPLY’ User Name must equal BANWORX.
  - Do not add any other Approval Levels
  - Do not change the Required Action
- Click “Save and add New Rows”.
<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 - (HR2) HR EDCF Approvers</td>
<td>NOGAMI</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>99 - (APPLY) EPAF Apply Appworx</td>
<td>BANWORX</td>
<td>Apply</td>
<td></td>
</tr>
<tr>
<td>Not Selected</td>
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</tr>
<tr>
<td><strong>Save and Add New Rows</strong></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
If you need to update (add or delete) to your list of Originators or Approvers contact Felisha Brown at fmbrown@temple.edu.
How to enter Comments…

- Comments can be entered at any point for EPAFs during the Electronic Approvals process, provided you have been defined in the approval queue. As an originator you can enter comments for an EPAF until you submit the EPAF to the approval queue. Once you submit the EPAF to the approval queue, you can then enter additional comments only from the EPAF preview page or the EPAF Originator Summary Page.
In the *Optional* Comment Section, as appropriate enter comments for the approver.

- Your department approver and HR Labor Relations will see comments entered.
- Do *not* copy the resignation letter into this section. The resignation letter should be attached by the approver in the workflow task.
15. Click on “Save” at the bottom or the top of the form. Return to the top of the form (if not already there). You should see the message – “Your change was saved successfully.”

16. Click on “Submit”. If error occurs, fix the errors, Save and Submit again. Go to page 17, for help with trouble shooting errors. Once all errors are corrected, the status changes from Waiting to Pending.
17. This is the final step to the initiation of the EPAF. When you answer these final questions and click “Submit for Approval”, the EPAF will go to your Approver in the form of a Workflow task.

18. To enter another EPAF transaction; click on “New EPAF”.

```markdown
# EPAF - Additional Questions

<table>
<thead>
<tr>
<th>TRANSACTION:</th>
<th>50591 - Comp Sys Separation from Emp. (CSTERM)</th>
</tr>
</thead>
<tbody>
<tr>
<td>NAME AND TUID:</td>
<td>Laurie</td>
</tr>
<tr>
<td>PCN AND TITLE:</td>
<td>0005869-00, HRS Lead Software Developer</td>
</tr>
<tr>
<td>CLASS CODE:</td>
<td>02, Admin T26 and above</td>
</tr>
<tr>
<td>UNRESTRICTED ACCESS:</td>
<td>No</td>
</tr>
<tr>
<td>DEPARTMENT:</td>
<td>77130, Application Support Services</td>
</tr>
<tr>
<td>SUPERVISOR:</td>
<td></td>
</tr>
<tr>
<td>EFFECTIVE DATE:</td>
<td>22-JAN-13</td>
</tr>
<tr>
<td>LAST WORK DATE:</td>
<td>01-FEB-2013</td>
</tr>
<tr>
<td>LAST PAID DATE:</td>
<td>29-JUN-12</td>
</tr>
<tr>
<td>PAYROLL ID:</td>
<td>M1</td>
</tr>
<tr>
<td>SUBMITTED BY:</td>
<td>BERNARDI, 22-JAN-13</td>
</tr>
<tr>
<td>NEXT APPROVER:</td>
<td></td>
</tr>
</tbody>
</table>

Please indicate the termination reason:

- [ ] TU2 - Voluntary Resignation

What day did employee give notice? [ ] (mm/dd/yyyy)

Is the employee part of a bargaining unit that is eligible for separation payment? [ ] No

Is re-employment recommended within the university? [ ] No

Is re-employment recommended within the department? [ ] No

[Submit Approval]
YOUR EPAF IS COMPLETE

If you have any questions please feel free to contact:
Felisha Brown 215-926-2298 or
Deirdre Culbreath-Walton 215-926-2296