

# Approver Guide to ePAF

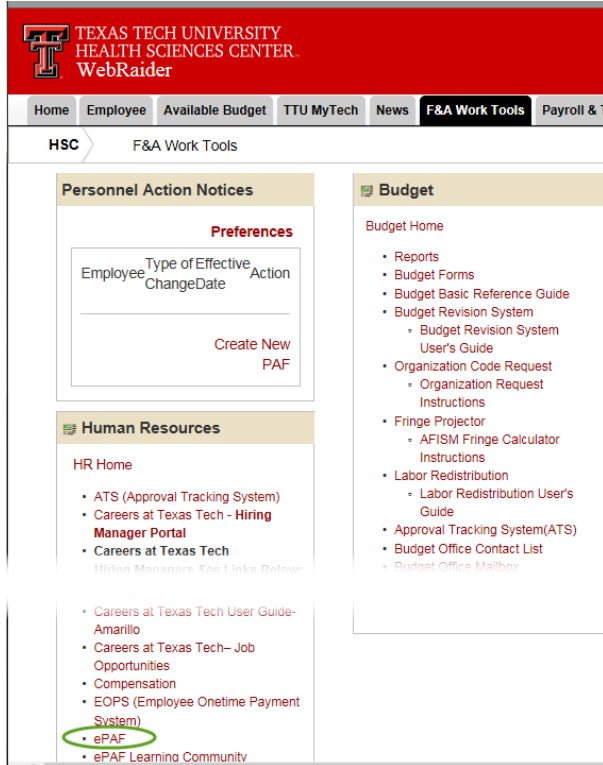


Table of Contents:

Logging into Self Service Banner (SSB) .....	3
Accessing the Electronic Personnel Action Forms Menu .....	4
Monitoring the Approver Summary .....	5
Searching for a PAF.....	7
Viewing PAF details .....	8
Responding to a PAF.....	10
Adding a Comment to a PAF.....	11
Approving a PAF.....	12
Returning a PAF for Correction.....	13
Disapproving a PAF.....	14
Setting Up a Proxy.....	15
Acting As a Proxy.....	17

## Logging into Self Service Banner (SSB)

1. Visit <http://webraider.ttuhscc.edu> .
2. Log in using your eRaider username and password.
3. Click on the F & A Work Tools Tab
4. Under the Human Resources area, select the ePAF link



- a. This will take you to the *Electronic Personnel Action Form* menu



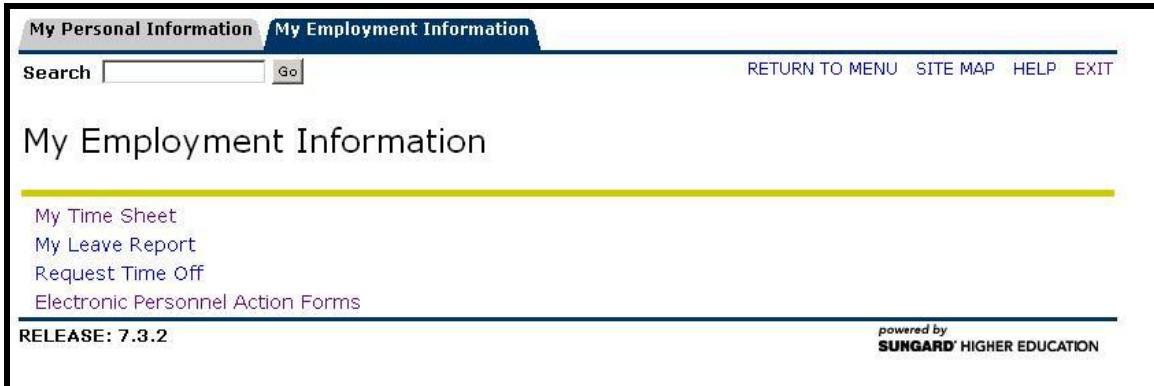
OR

5. Under the Personnel Action Notices area, if an ePAF is listed you may select it from the list
  - a. This will take you directly to the ePAF

## Accessing the Electronic Personnel Action Forms Menu

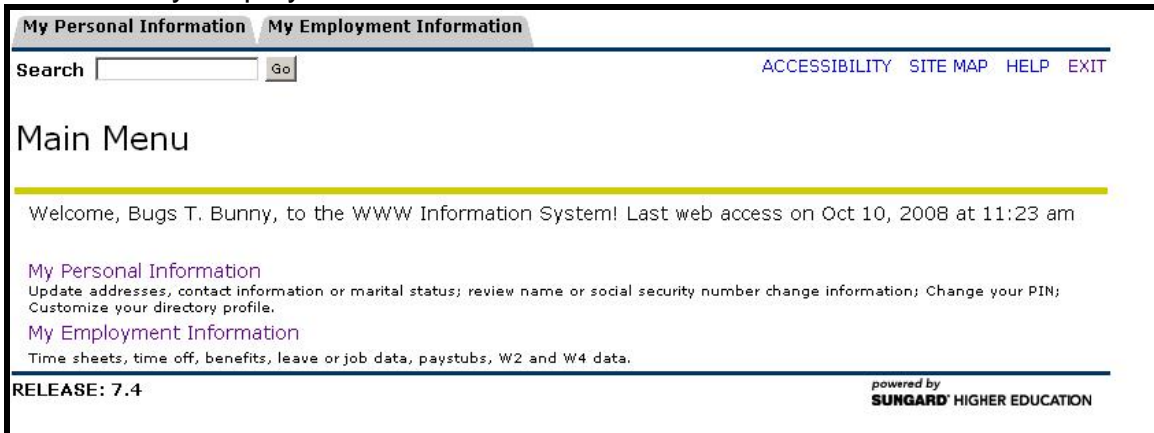
If you are already in Self-Service Banner, you can access ePAF without going back out to the WebRaider portal.

1. Select the *Electronic Personnel Action Forms* link.



The screenshot shows the 'My Employment Information' menu. At the top, there are two tabs: 'My Personal Information' and 'My Employment Information', with the latter being selected. Below the tabs is a search bar with a 'Go' button and navigation links: 'RETURN TO MENU', 'SITE MAP', 'HELP', and 'EXIT'. The main heading is 'My Employment Information'. Below this, there is a list of links: 'My Time Sheet', 'My Leave Report', 'Request Time Off', and 'Electronic Personnel Action Forms'. At the bottom left, it says 'RELEASE: 7.3.2' and at the bottom right, it says 'powered by SUNGARD HIGHER EDUCATION'.

2. If you do not see the Electronic Personnel Action Forms (ePAF) link, click on My Employment Information tab to locate the link.

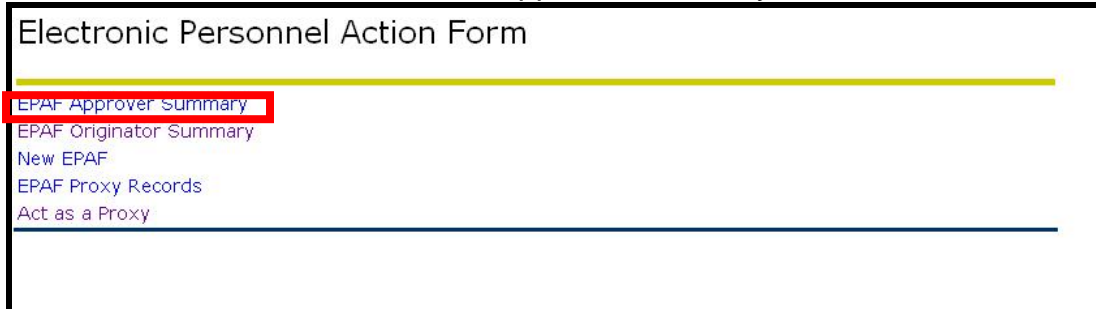


The screenshot shows the 'Main Menu' page. At the top, there are two tabs: 'My Personal Information' and 'My Employment Information', with the latter being selected. Below the tabs is a search bar with a 'Go' button and navigation links: 'ACCESSIBILITY', 'SITE MAP', 'HELP', and 'EXIT'. The main heading is 'Main Menu'. Below this, there is a welcome message: 'Welcome, Bugs T. Bunny, to the WWW Information System! Last web access on Oct 10, 2008 at 11:23 am'. Below the welcome message, there are two sections: 'My Personal Information' with sub-links 'Update addresses, contact information or marital status; review name or social security number change information; Change your PIN; Customize your directory profile.' and 'My Employment Information' with sub-links 'Time sheets, time off, benefits, leave or job data, paystubs, W2 and W4 data.' At the bottom left, it says 'RELEASE: 7.4' and at the bottom right, it says 'powered by SUNGARD HIGHER EDUCATION'.

3. If the link is still NOT available, then you likely are not setup as an ePAF approver.
4. If you should be set up, have your organizational manager use the TEAM App at <http://team.texastech.edu> to specify your setup.
5. For additional assistance, contact your [HR security coordinator](#).

## Monitoring the Approver Summary

1. From the ePAF menu, click Approver Summary.



2. In order to see the *Approver Summary* link, someone has to save an ePAF with you set as an Approver in the routing queue.
3. ePAFs listed under the *Current* tab are ePAFs that are currently pending your approval.

EPAF Approver Summary Your current Institution is TTU

**Current** In My Queue History

Select the link under Name to access details of the transaction.

Queue Status:

[New EPAF](#) | [Update Proxies](#) | [Search](#) | [Proxy or Superuser](#) or [Filter Transactions](#)

1 - 22 of 22

**EPAF Transactions**

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action
Calderon, Theresa A. Admin Business Assistant,	R00519256	446	TTUHSC Terminate Employee	Oct 09, 2008	Oct 09, 2008	Approve

- ePAFs listed under the *In My Queue* tab are ePAFs that have you set as an Approver in the routing queue, but that have not yet arrived at your approval level.

Current **In My Queue** History

Select the link under Name to access details of the transaction.

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

1 - 3 of 3

**EPAF Transactions**

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Links
Man, Army G. Managing Director, ZH9944-00	GENERATED	396	TTUHSC New Hire Exempt		Oct 07, 2008	<a href="#">Comments</a>
Rabbit, Roger R. Managing Director, ZH9953-00	GENERATED	388	TTUHSC New Hire Exempt		Oct 07, 2008	<a href="#">Comments</a>

- View the PAF details by clicking on the name associated with the PAF transaction to determine where the PAF is in the routing queue.

**Routing Queue**

Approval Level	Name	Required Action	Queue Status	Action Date
Department HSC, 20	Bugs Tyler Bunny, HR_TRAIN200	Approve	In the Queue	
HSC Regional HR Office, 73	Ronnie Jim Dunn, HR_TRAIN192	Approve	In the Queue	
Compensation HSC, 75	Ricardo H Martinez, HR_TRAIN196	Approve	In the Queue	
Budget HSC, 80	Amelia Prieto, HR_TRAIN199	Approve	In the Queue	
HR HSC Approval, 95	Claire Ann Surratt, HR_TRAIN197	Approve	In the Queue	
HSC Human Resources Apply, 99	Janet Lee Coquelin, HR_TRAIN198	Apply	In the Queue	

**Transaction History**

Action	Date	User Name
Created:	Oct 07, 2008	Tweety Lane Pie

- PAFs under the History tab document the PAFs that are now historical to you.

Current **In My Queue** **History**

Select the link under Name to access details of the transaction.

Queue Status:

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

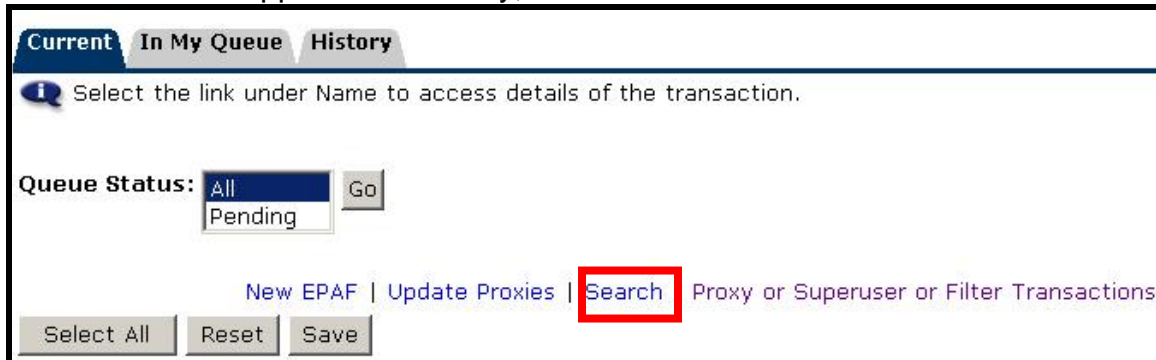
1 - 25 of 37 Next

**EPAF Transactions**

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Links
Bonfamme, Adelaide F. Managing Director, ZH9955-00	R03935842	426	TTUHSC New Hire Exempt	Oct 08, 2008	Nov 01, 2008	<a href="#">Comments</a>

## Searching for a PAF

1. Every saved and submitted PAF is automatically assigned a transaction number. When searching for a PAF, search using the transaction number.
2. From the Approver Summary, click the *Search* link.



The screenshot shows a web interface with three tabs: 'Current', 'In My Queue', and 'History'. Below the tabs is an information icon and the text: 'Select the link under Name to access details of the transaction.' Below that is a 'Queue Status:' section with a dropdown menu showing 'All' and 'Pending', and a 'Go' button. At the bottom, there are several links: 'New EPAF', 'Update Proxies', 'Search' (highlighted with a red box), and 'Proxy or Superuser or Filter Transactions'. At the very bottom, there are three buttons: 'Select All', 'Reset', and 'Save'.

3. Enter the transaction number to uniquely complete the search.

## Viewing PAF details

1. Click on the name associated with the PAF or the PAF transaction number to see the individual PAF.

<a href="#">DeVil, Cruella A.</a> Managing Director, ZH9943-00	R03935837	390	TTUHSC New Hire Exempt	Oct 07, 2008	Oct 07, 2008	Approve
<a href="#">Doom, Judge M.</a> Managing Director, ZH9954-00	R03935834	392	TTUHSC New Hire Exempt	Oct 07, 2008	Oct 07, 2008	Approve
<a href="#">Fflam, Ffewddur F.</a> Managing Director, ZH9943-00	R03935844	449	TTUHSC New Hire Exempt	Oct 09, 2008	Nov 01, 2008	Approve
<a href="#">Gabble, Amelia S.</a> Managing Director, ZH9940-00	R03935846	452	TTUHSC New Hire Exempt	Oct 09, 2008	Nov 01, 2008	Approve
<a href="#">Georges, Hautecourt H.</a> Managing Director, ZH9957-00	R03935845	451	TTUHSC New Hire Exempt	Oct 10, 2008	Oct 15, 2008	Approve
<a href="#">Goophers, Goofer W.</a>	R03935801	438	TTUHSC Pay Class Exempt	Oct 08, 2008	Oct 08, 2008	Approve

2. Scroll down the PAF using the scroll bar to view PAF details or use the PAF sections to hyperlink to such as labor distribution or routing queue.

General Person Data		
Enter Changes	Current Value	New Value
ID:	R03935837	R03935837
First Name:	Cruella	Cruella
Middle Name:	Ann	Ann
Last Name:	DeVil	DeVil
SSN/SIN/TIN:		998876879
Name Prefix:		
Name Suffix:		
Sex:		Female
Birth Date:		02/10/1963
Citizenship:		Y, US Citizen
Ethnicity:		MX, Mexican American
Veteran File Number:		
Veteran Category:		
Active Duty Sep Date:		
Address From Date:		10/07/2008
Address Type:		WK, Texas Tech Work
Address Sequence No.:		
Address Line 1:		2301 N Big Spring
Address Line 2:		
Address Line 3:		
City:		Midland
State:		TX, Texas



- Verify details such as employee class, full-time or part-time, benefits eligible or not, salary, job title, hire date, etc. based on criteria appropriate to the situation or details of the grant or process that you are monitoring.

**Employee Record**

Enter Changes	Current Value	New Value
Employee Status:		Active
Employee Class Code:		E1, FT Exempt Staff
Leave Category Code:		HE, HSC Leave Eligible Exempt
Benefit Category:		FT, Full Time Benefits Eligible
FT/PT Status:		Full Time
Home COAS:		H
Home Organization:		545501
Distribution COA:		H
Distribution Orgn:		545501
Current Hire Date:		10/07/2008
Location Code:		H47071, WIC Clin Ozona Flr 1

**New Job Exempt**

Enter Changes	Current Value	New Value
Job Begin Date:		10/07/2008
Contract Type:		Primary
Jobs Effective Date:		10/07/2008
Personnel Date:		10/07/2008
Step:		0
Annual Salary:		40000
Job Status:		Active
Title:		Managing Director Salary
FTE:		1
Job Change Reason:		NEWHI
Premium Pay Code:		LONG
Supervisor ID:		R00899526

- Verify the FOAP source and percentage, and ensure the routing queue involves the appropriate levels depending on the situation, for instance are there additional approval levels that this PAF should have gone through?

**Create or Change Default Earnings**

Current

Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift End Date
07-OCT-2008	HLD, Hazard or Longevity Eligible		1.00		1

**Create or Change FOAPAL**

New

Effective Date: 10/07/2008

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
H	181999	201345	612509	30				100.00	

**Routing Queue**

Approval Level	Name	Required Action	Queue Status	Action Date
Department HSC, 20	Bugs Tyler Bunny, HR_TRAIN200	Approve	Pending	
HSC Regional HR Office, 73	Ronnie Jim Dunn, HR_TRAIN192	Approve	In the Queue	
Compensation HSC, 75	Ricardo H Martinez, HR_TRAIN196	Approve	In the Queue	
Budget HSC, 80	Amelia Prieto, HR_TRAIN199	Approve	In the Queue	
HR HSC Approval, 95	Claire Ann Surratt, HR_TRAIN197	Approve	In the Queue	
HSC Human Resources Apply, 99	Janet Lee Coquelin, HR_TRAIN198	Apply	In the Queue	

**Transaction History**

Action	Date	User Name
Created:	Oct 07, 2008	Pepe' Le Pew
Submitted:	Oct 07, 2008	Pepe' Le Pew

## Responding to a PAF

1. You have three options when responding to a PAF:
  - **Approve** – if all details, funding, routing, etc. are accurate for your approval level, then you can approve the PAF at your level
  - **Return for Correction** – if there are any details that need to be changed such as using a different course of funding, adding additional routing levels of approval, etc., then you should return the PAF for correction after adding a comment regarding the specific reasons for the return. *Note:* this will send the PAF immediately back to its Originator. They will only know this if they log into the ePAF system and check the status of their PAF. It may be helpful to contact the Originator to further address details and to alert them of the return. After the Originator makes the corrections and resubmits the PAF, the PAF will still need to go through all of the routing on the PAF.
  - **Disapprove** – if you do not agree with the details of the PAF and have strong reason to end the PAF, reason beyond returning it for correction, then you can disapprove of the PAF, which will end that PAF transaction number. If the Originator continues the original intent for the PAF that was ended, they will need to begin a new PAF transaction to follow that pursuit.
  - Or, you can click the More Info button to mark the PAF status as waiting on information, while you await a decision.
2. If you do not respond to a PAF nor does a proxy of yours, it will remain in your queue unless the Originator returns it to themselves for correction or an ePAF coordinator intervenes.

## Adding a Comment to a PAF

1. You can add a comment to PAF regardless of how you respond to a PAF or even before choosing a response. For instance, if you have a question to the Originator, you can pose that question for a response before returning a PAF for correction in case returning the PAF might not be necessary.
2. Click the Add Comment link.



3. Add the comment as appropriately.

Comments Your current Institution is TTU

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 Enter a comment.

**Name and ID:** Judge Michael Doom, R03935834  
**Transaction:** 392  
**Job and Suffix:** ZH9954-00, Managing Director  
**Approval Category:** TTUHSC New Hire Exempt, HNHE

*Enter Comment*

The employee's funding should come from the 101039 Texas Grant fund instead.

4. Click Save and verify comment saved.


**Name and ID:** Judge Michael Doom, R03935834  
**Transaction:** 392  
**Job and Suffix:** ZH9954-00, Managing Director  
**Approval Category:** TTUHSC New Hire Exempt, HNHE

*Previous Comments*

**Date:** Oct 10, 2008 05:18:41 PM  
**Made by:** Bugs Tyler Bunny, HR\_TRAIN200  
**Comments:** The employee's funding should come from the 101039 Texas Grant fund instead.

5. Contact the Originator or source to address the question further or respond to the PAF as needed.

## Approving a PAF

1. If you have determined that the PAF information and approval at your level is acceptable, then click the  button within that PAF's details.
2. Verify that your response completed successfully and add a comment as needed or desired.

**EPAF Preview** Your current Institution is TTU

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You are acting as an Approver.

Transaction successfully completed.

**Name and ID:** Ffewddur Flem Filam, R03935844 **Job and Suffix:** ZH9943-00, Managing Director

**Transaction:** 449 **Query Date:** Nov 01, 2008

**Transaction Status:** Pending **Last Paid Date:**

**Approval Category:** TTUHSC New Hire Exempt, HNHE

 Previous   Next 

[Add Comment](#)

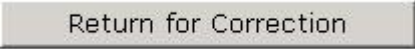
3. Verify the routing queue has moved to the next level.

<i>Routing Queue</i>				
Approval Level	Name	Required Action	Queue Status	Action Date
Department HSC, 20	Bugs Tyler Bunny, HR_TRAIN200	Approve	Approved	Oct 10, 2008 05:21:27 PM
HSC Regional HR Office, 73	Ronnie Jim Dunn, HR_TRAIN192	Approve	Pending	
Compensation HSC, 75	Ricardo H Martinez, HR_TRAIN196	Approve	In the Queue	
Budget HSC, 80	Amelia Prieto, HR_TRAIN199	Approve	In the Queue	
HR HSC Approval, 95	Claire Ann Surratt, HR_TRAIN197	Approve	In the Queue	
HSC Human Resources Apply, 99	Janet Lee Coquelin, HR_TRAIN198	Apply	In the Queue	

## Returning a PAF for Correction

1. If you have determined that the PAF information and approval at your level is not acceptable and further discussion with the Originator or another source would not be necessary, then you need to add comment detailing the reason to return the PAF for correction.

<b>Name and ID:</b>	Judge Michael Doom, R03935834
<b>Transaction:</b>	392
<b>Job and Suffix:</b>	ZH9954-00, Managing Director
<b>Approval Category:</b>	TTUHSC New Hire Exempt, HNHE
<b>Previous Comments</b>	
<b>Date:</b>	Oct 10, 2008 05:18:41 PM
<b>Made by:</b>	Bugs Tyler Bunny, HR_TRAIN200
<b>Comments:</b>	The employee's funding should come from the 101039 Texas Grant fund instead.

2. Then, you can click the  button.
3. Verify that the action was completed and that the *Transaction Status* changed to Return for Correction.


<b>EPAF Preview</b>	
<input checked="" type="checkbox"/> You are acting as an Approver.	
<input checked="" type="checkbox"/> Transaction successfully completed.	
<b>Name and ID:</b>	Judge Michael Doom, R03935834
<b>Transaction:</b>	392
<b>Transaction Status:</b>	Return for Correction
<b>Approval Category:</b>	TTUHSC New Hire Exempt, HNHE
<b>Job and Suffix:</b>	ZH9954-00, Managing Director
<b>Query Date:</b>	Oct 07, 2008
<b>Last Paid Date:</b>	
<input type="button" value="Previous"/> <input type="button" value="Next"/>	
<a href="#">Add Comment</a>	

4. Verify the routing of the PAF.

<i>Routing Queue</i>				
Approval Level	Name	Required Action	Queue Status	Action Date
Department HSC, 20	Bugs Tyler Bunny, HR_TRAIN200	Approve	Return for Correction	Oct 10, 2008 05:19:27 PM
HSC Regional HR Office, 73	Ronnie Jim Dunn, HR_TRAIN192	Approve	Removed from Queue	Oct 10, 2008 05:19:27 PM
Compensation HSC, 75	Ricardo H Martinez, HR_TRAIN196	Approve	Removed from Queue	Oct 10, 2008 05:19:27 PM
Budget HSC, 80	Amelia Prieto, HR_TRAIN199	Approve	Removed from Queue	Oct 10, 2008 05:19:27 PM
HR HSC Approval, 95	Claire Ann Surratt, HR_TRAIN197	Approve	Removed from Queue	Oct 10, 2008 05:19:27 PM
HSC Human Resources Apply, 99	Janet Lee Coquelin, HR_TRAIN198	Apply	Removed from Queue	Oct 10, 2008 05:19:27 PM

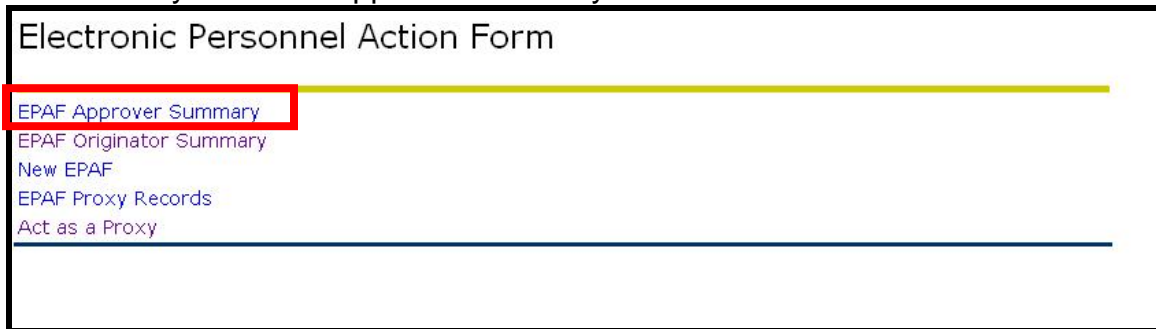
5. Contact the Originator as needed.

## Disapproving an ePAF

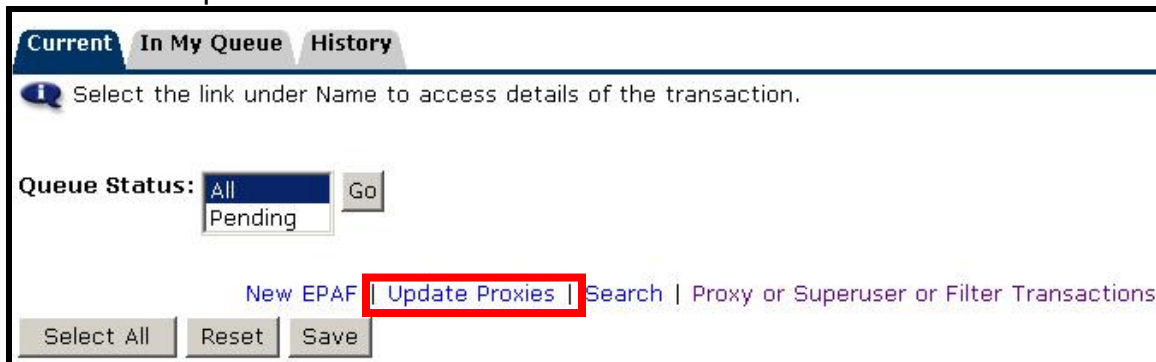
1. If you have determined that the ePAF information and approval at your level is NOT acceptable, further discussion with the Originator or another source would not be necessary, and the PAF should be eliminated on the spot regardless of the need to change any of its details, then you can disapprove the PAF.
2. Enter a detailed comment regarding your decision and its reasoning.
3. Perhaps contact the Originator prior to disapproving the PAF to further explain and ensure that ending the PAF is the best approach.
4. Then if you have explored all other avenues and still determined to end the PAF transaction number completely, the select the  button.

## Setting Up a Proxy

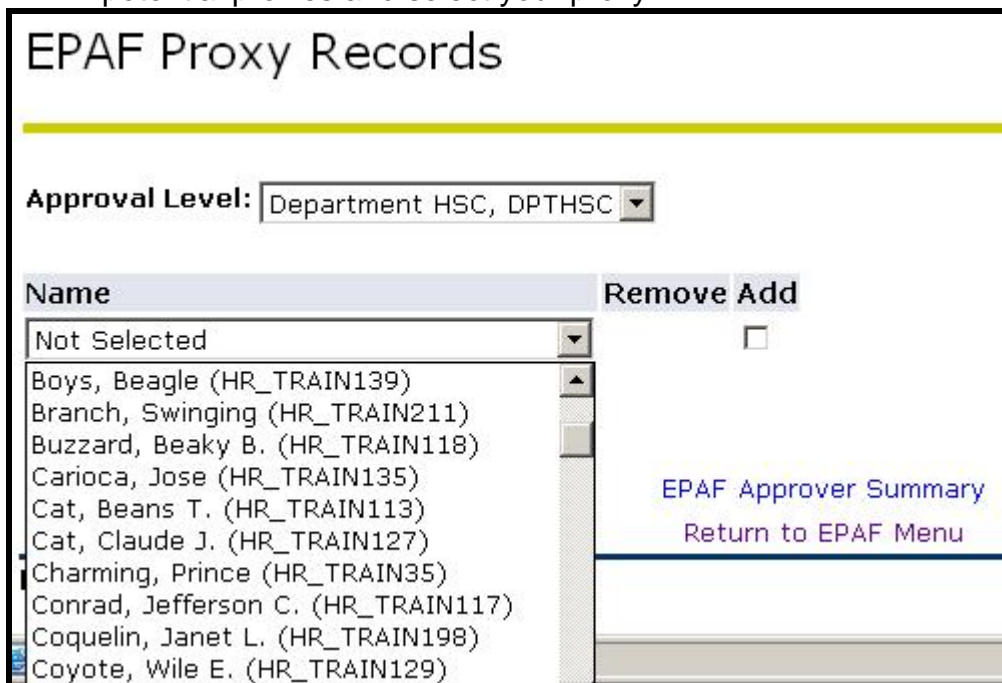
1. Visit your ePAF Approver Summary.



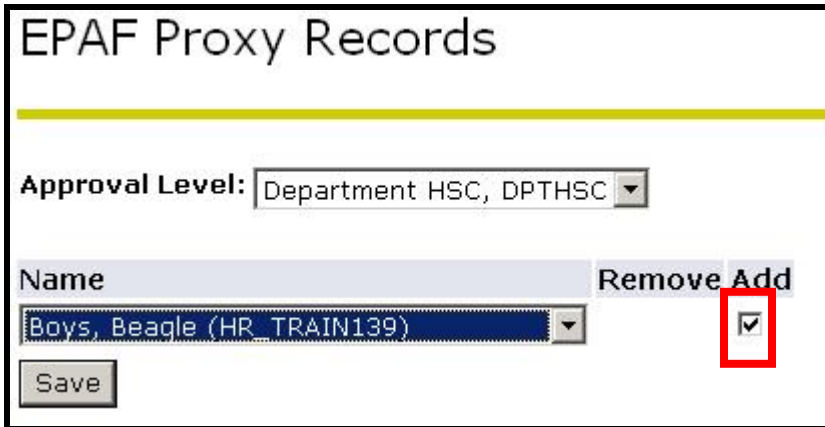
2. Click Update Proxies.



3. Select the appropriate Approval Level and click the drop-down box of potential proxies and select your proxy.

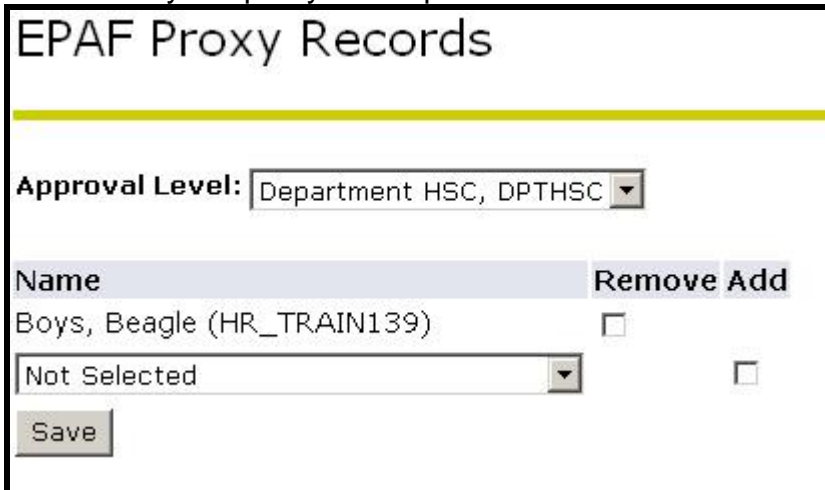


4. Check the *Add* box and *Save*.



The screenshot shows the 'EPAF Proxy Records' form. At the top, there is a yellow horizontal line. Below it, the 'Approval Level' is set to 'Department HSC, DPTHSC'. The 'Name' field contains 'Boys, Beagle (HR\_TRAIN139)'. To the right of the name field are two buttons: 'Remove' and 'Add'. The 'Add' button has a checked checkbox next to it, which is highlighted with a red square. A 'Save' button is located at the bottom left of the form.

5. Verify the proxy is setup.



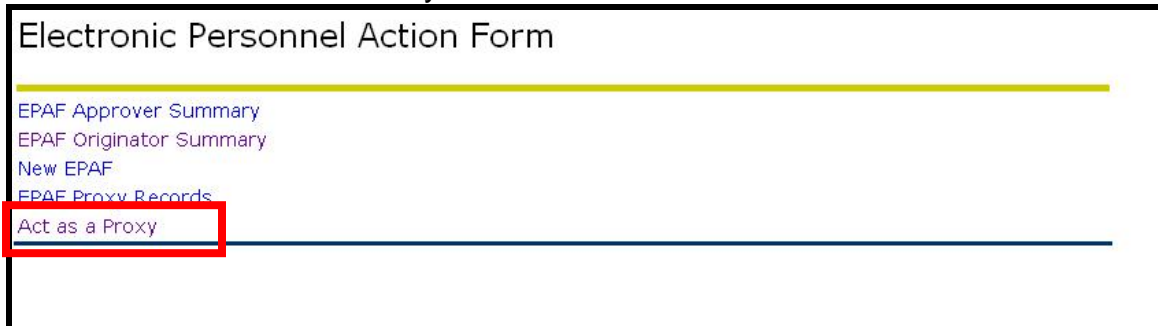
The screenshot shows the 'EPAF Proxy Records' form. At the top, there is a yellow horizontal line. Below it, the 'Approval Level' is set to 'Department HSC, DPTHSC'. The 'Name' field contains 'Boys, Beagle (HR\_TRAIN139)'. To the right of the name field are two buttons: 'Remove' and 'Add'. The 'Add' button has an unchecked checkbox next to it. Below the name field, there is a dropdown menu showing 'Not Selected' and another unchecked checkbox. A 'Save' button is located at the bottom left of the form.

6. Remove as needed in the future by selecting the *Remove* box and clicking *Save*.



## Acting As a Proxy

1. Click the Act as a Proxy from the ePAF menu.



Electronic Personnel Action Form

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[EPAF Approver Summary](#)  
[EPAF Originator Summary](#)  
[New EPAF](#)  
[EPAF Proxy Records](#)  
**[Act as a Proxy](#)**

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2. Click the drop-down arrow on the Proxy For field and select the person to proxy for.



Proxy or Superuser or Filter Transactions

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 Act as a proxy or a superuser and enter the following criteria to filter transactions.

**Proxy For:**

**Act as a Superuser:**

**Submitted From Date:** MM/DD/YYYY

**Submitted To Date:** MM/DD/YYYY

**Transactions Per Page:**

[Return to EPAF Menu](#)

3. Click Go to see the Approver's Summary and view details and respond accordingly in the approver's absence.