



**Teachers College**  
COLUMBIA UNIVERSITY

# **Intro to ePAF System Training**

# What We'll Cover Today

- [What is an ePAF?](#)
- [How to Access ePAFs](#)
- [New ePAF](#)
- [ePAF Originator](#)
- [ePAF Approver](#)
- [Act as a Proxy](#)
- [Demo](#)
- [Defaulted Values, Common Errors and System Defects](#)
- [Other Items](#)
- [EPAF Transaction Glossary](#)



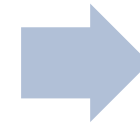
# What is an ePAF?

# What is an ePAF?

Electronic Personnel Action  
Form



Data entry forms used to  
initiate employee  
transactions



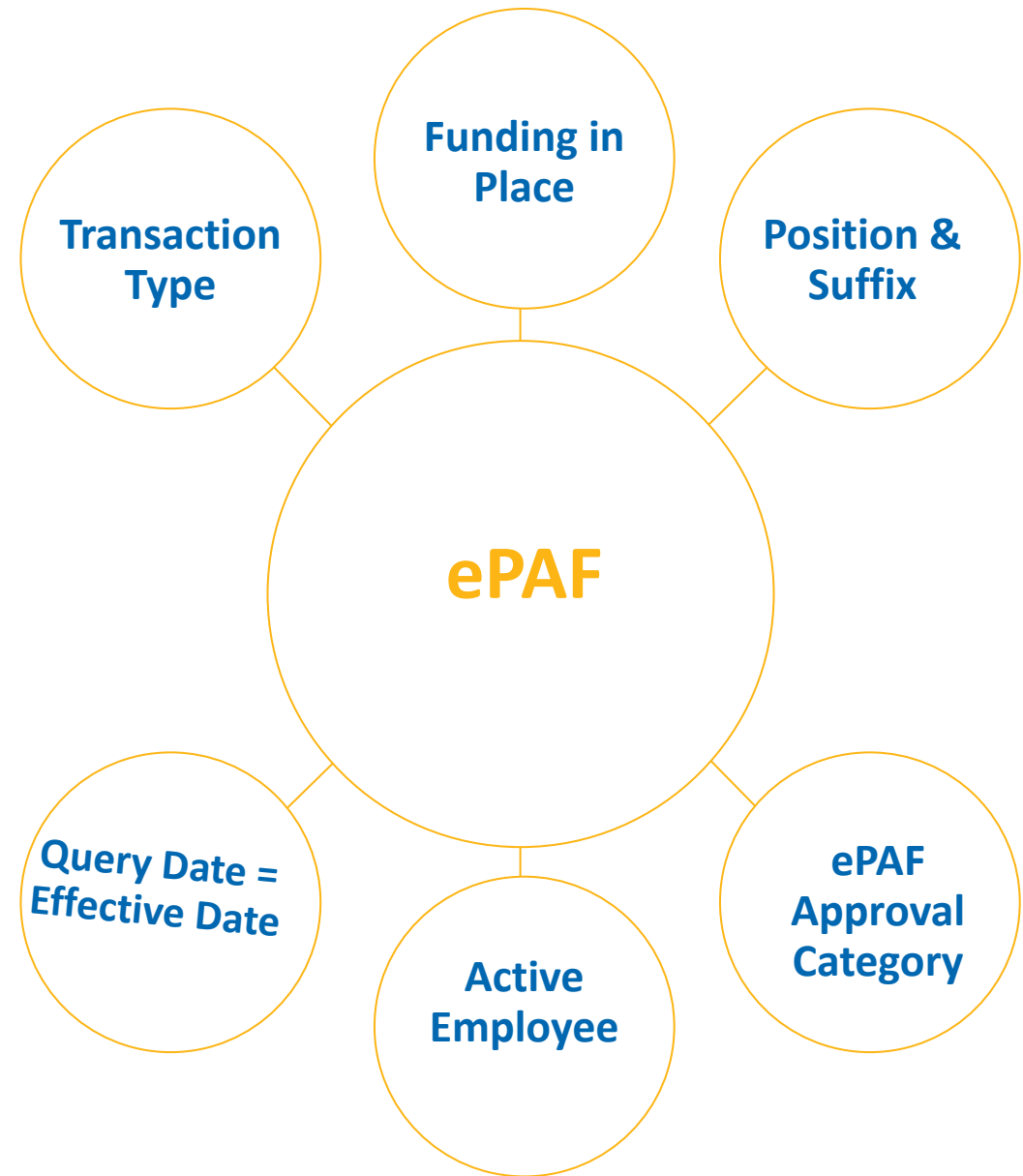
These transaction types  
include:

- Reappointments
- Terminations and Transfers
- Additional Jobs/Compensation
- Adjustments to Active Jobs

# Main Components of an ePAF

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Elements that must be in order prior to moving transactions through the ePAF system.



# Available ePAF Approval Categories

Approval Category \*

Reappt - Sem Based, Conversion Community Teachers, ADDJ11

Reappt - Sem Based, BRK5

Reappt - Sem Based, PT Instructional, PTIAPP

Reappt - Sem Based, Conversion PT Instructional, ADDJ10

Reappt - Sem Based, Community Teacher, CMMUTY

Reappt - Sem Based, Conversion Community Teachers, ADDJ11

- Ordered by transaction type:
  - Reappointments
  - Terminations/ Transfers
  - Additional Job or Compensation
  - Adjustments to Active Jobs

# How to Determine Which ePAF to Use

- [Detailed Chart of ePAFs](#)

Transaction Type	ePAF Approval Category	Availability	Personnel Transactions	Scope
Reappointments - Semester Based	<a href="#">Reappt - Sem Based, PT Instructional</a>	Semester	Reappointment	PT Instructional staff paid from accounts 6122/6129, 6132/6139 or 6152/6159.
	Reappt - Sem Based, Conversion PT Instructional <ul style="list-style-type: none"> <li>• <a href="#">Reappt - Sem Based, Conversion PT Instructors</a></li> <li>• <a href="#">Reappt - Sem Based, Conversion Adjunct Professor</a></li> <li>• <a href="#">Reappt - Sem Based, Conversion Fee Based Instructors</a></li> </ul>	Semester	Reappointment and conversion to designated pooled position number	PT Instructional staff paid from accounts 6122/6129, 6132/6139 or 6152/6159.
	<a href="#">Reappt - Sem Based, Community Teacher</a>	Semester	Reappointment	Part Time instructional staff paid from account 6142 or 6149.
	<a href="#">Reappt - Sem Based, Conversion Comm. Teachers</a>	Semester	Reappointment and conversion to designated pooled position number	Part Time instructional staff paid from account 6142 or 6149.
	<a href="#">Reappt - Sem Based, BA/TA</a>	Semester	Reappointment	Student employees paid from account 5422 or 5429.

# ePAF User Guides

- Always available on the HR Website

[TCHR Website](#) > Employee Resources > Managers’s Toolkit > HR Systems’ Guides  
Always Available on the HR Website

COLUMBIA UNIVERSITY

## Reappt – Year Round (Salaried)

This ePAF is used to reappoint the following employee groups: Full Time Faculty & Instructional Staff, Full Time Professionals & Exempt Part Time Professionals. The employee must have an active employment record AND must be returning to the same appointment that is (or will be) terminated by the begin date of the new reappointment.

What you need to do	What you will see
<p><b>STEP 1: Provide the ePAF parameters:</b></p> <ol style="list-style-type: none"> <li>Enter the TCID of the employee in the ID field ('T' in TCID in caps).</li> <li>Enter the Query Date. <u>The Query Date should equal the appointment effective date.</u></li> <li>Select Reappt – Year Round (Salaried) in the approval category.</li> <li>Click Go.</li> </ol>	

## HR Systems Guides (SSB9)

### EPAFS

#### General Information and Tools

- Intro to SSB9 ePAFs - Originator & Approver Training
- Conversion and Reappointment ePAF Training
- Detailed Listing of ePAFs - SSB9
- Position Guidance for Additional Compensation or Job
- Pooled Positions Crosswalk
- Determining a Position Number for a Supplemental Compensation for FT Employee
- Additional Job or Compensation ePAF - Common Issues Guide

### How To:

#### Additional Compensation or Job

- Additional Compensation or Job - Salaried - SSB9
- Additional Job - Hourly - SSB9
- Additional Job - CWS - SSB9
- Additional Job - Salaried Student - SSB9
- Reinstate Job or Compensation - Salaried - SSB9





# How to Access ePAFs

# Log into the TC Portal

The screenshot shows the TC Portal dashboard. At the top, it says "Hello Hannah!" and includes a "Go to Employee Information" button, "TIME, LEAVE, & PAY" button, and "MY BENEFITS" button. Below this is the "Applications" section with icons for Gmail, Zoom, Google Drive, Banner Admin PROD, Google Calendar, Banner Admin PPRD, Banner Admin TEST1, and a "MORE APPLICATIONS" button. The "Resources" section is highlighted with a red box and contains four "EMPLOYEE RESOURCES" items: "Electronic Personnel Action Forms (EPAF)", "Employee Class & Account Chart", "Human Resources Forms", and "Human Resources Website". Below these is a "Customize/Add to My Resources" button and an "ALL RESOURCES >" link with a red arrow pointing to it. To the right is the "Knowledge Articles" section with categories like "PAYROLL", "PURCHASING", and "TECHNOLOGY", and a search bar for "Knowledge Base Articles".

Log into the new TC Portal, head to the **Resource** section and click **All Resources**

# Log into the TC Portal

The screenshot displays the 'EMPLOYEE PORTAL' interface. On the left, the 'My Resources' section lists bookmarked items such as 'POLICIES/COMPLIANCE TC Policy Library' and 'EMPLOYEE RESOURCES Employee Class & Account Chart'. The main 'Resources' section, titled 'ALL RESOURCES', includes a search bar and a row of category buttons: Academics, Campus, Employee Resources, Faculty Resources, Jobs/Career, Library, and Policies/Compliance. A red arrow points to the 'Employee Resources' button. Below the buttons, a grid of resource cards is visible, including 'ACADEMICS Academic Calendar', 'TECHNOLOGY Accessibility First - TC's Digital Accessibility Website', and 'EMPLOYEE RESOURCES Budget & Planning Office Website'.

You will be taken to an **All Resource** page where you can find all resources available to you. Find and click the **Employee Resource** button.

# Log into the new TC Portal

The screenshot displays the 'EMPLOYEE PORTAL' interface. On the left, under 'My Resources', there is a 'MY BOOKMARKED RESOURCES' section with a list of items including 'POLICIES/COMPLIANCE TC Policy Library', 'EMPLOYEE RESOURCES Employee Class & Account Chart', 'EMPLOYEE RESOURCES Electronic Personnel Action Forms (EPAF)', 'EMPLOYEE RESOURCES Human Resources Forms', 'EMPLOYEE RESOURCES Human Resources Website', 'EMPLOYEE RESOURCES Recruitment Dashboard', and 'EMPLOYEE RESOURCES Performance Management'. The main area is titled 'Resources' and 'ALL RESOURCES', with a search bar and filter buttons for 'Academics', 'Campus', 'Employee Resources', 'Faculty Resources', 'Jobs/Career', 'Library', 'Policies/Compliance', 'Publications', 'Reports', 'Research', 'TC Resources', and 'Technology'. A grid of resource cards is shown, with a red arrow pointing to the 'EMPLOYEE RESOURCES Electronic Personnel Action Forms (EPAF)' card, which is also enclosed in a red rectangular box.

You will be presented with all the resources categorized as **Employee Resources**. From there, you can find and click the **Electronic Personnel Action Form (EPAF)** link.

\*If you wish, you can click the icon next to the title and save this to your bookmarks.

# ePAF Home Screen

[Home](#) • [Personnel Actions](#)

## 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.

### **New EPAF**

Allows you to create a new transaction.

### **EPAF Proxy Records**

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

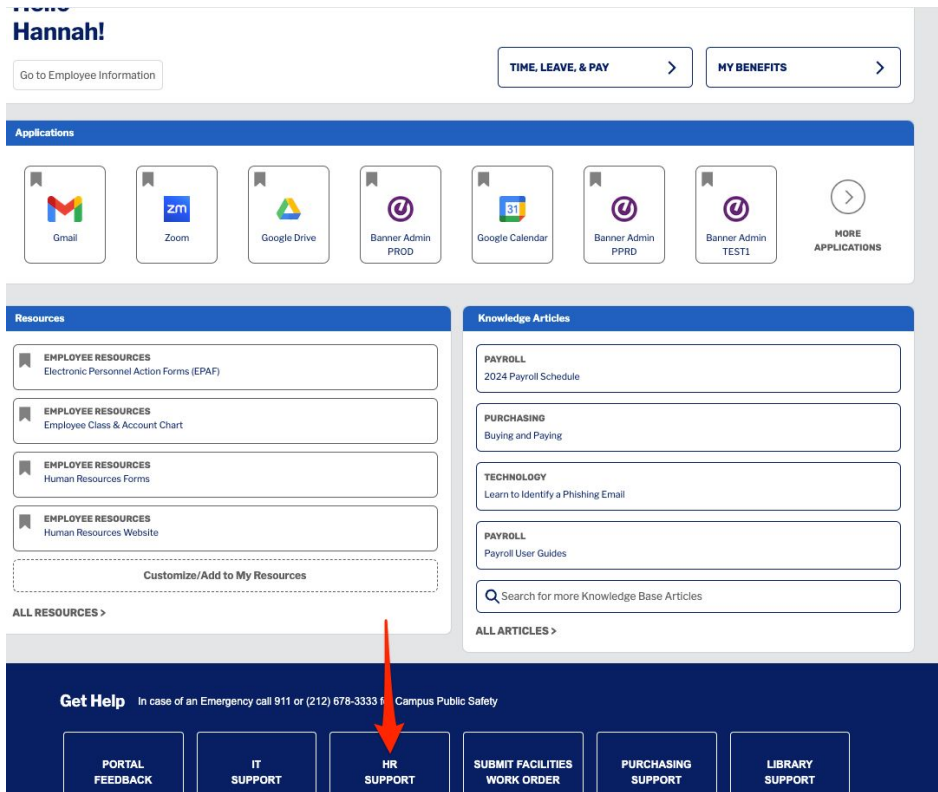
### **EPAF Originator Summary**

Displays only those EPAF transactions that you have originated.

### **Act as a Proxy**

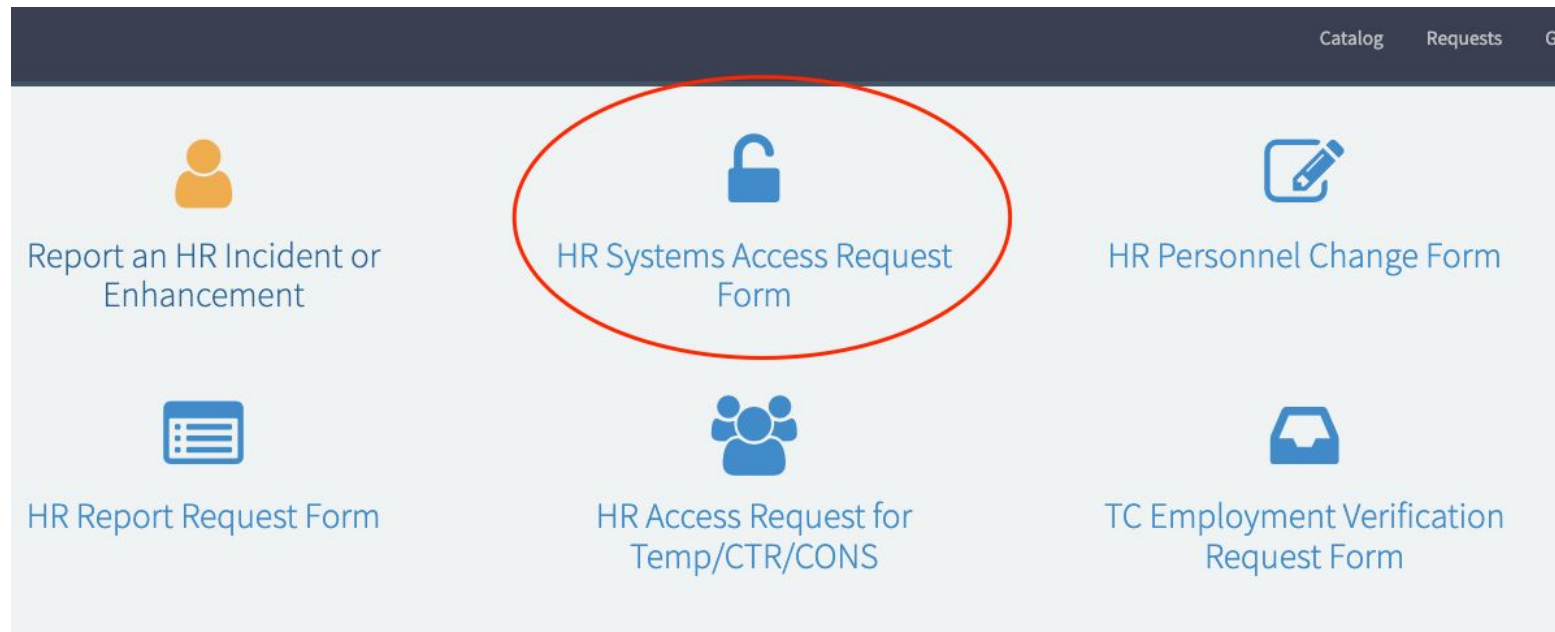
Available to all self-service EPAF users who have been given proxy privilege.

# HR Systems Access Request Form



If you don't have the ePAF link, please have your supervisor submit the [HR Systems Access Request Form](#).

This can be found by going to the home page of the [TC portal](#). Click the [HR Support](#) link. Then click and submit the [HR Systems Access Request form](#).





# New ePAF

# New ePAF

Where you go as an Originator to create a new employee transaction

[Home](#) • [Personnel Actions](#)


## 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 given proxy privilege.

**EPAF Proxy Records**

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



# New ePAF Person Selection Screen

**New ePAF Person Selection**

*i* Check the box to limit to search an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

First Name	Last Name	<input type="checkbox"/> Is an employee	or	<input type="text" value="SSN/SIN/TIN"/>	<b>→</b>	Search
<input type="text"/>	<input type="text"/>					

**If needed, employee search functionality via First & Last Name**

**Enter or Generate New ID**

*i* \* indicates a required field. Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

ID \*

**← Input employee's TCID**

Employee name will populate once TCID is entered

Query Date \*

**← Input the effective date of the transaction**

Approval Category \*

**← Select the ePAF approval category**

Go **← Clicking Go will lock in your ePAF approval category selection**

# New ePAF Job Selection Screen

New EPAF Job Selection

Enter or search for a new position number and enter the suffix, or select the link next to Position.

**Details**

ID: Klay Thompson, T00061052      Query Date: 03/01/2023      Approval Category: Salary Update, MODJB4

**Begin Appointment, J00005**

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
<input checked="" type="checkbox"/>	New Job	<input type="text"/>	<input type="text"/>						
<input type="checkbox"/>	Primary	201255	00			01/10/2022	06/30/2025	02/28/2023	Active

**All Jobs**      Next Approval Type      Go

- A. **Position/Suffix** - Where you manually input a position number if granting someone a brand new job
- B. **End Date** - Displays the job end date; important for reappointments
- C. **Status** - Displays the status of the job; important to select an active job for any epafs that make adjustments to an active job
- D. **All Jobs** - by clicking you will see a listing of all jobs the employee has held at the College; this is important to review especially for reappointments




# ePAF Originator

# ePAF Originator Summary

Where you go to see all ePAFs that you have originated

[Home](#) • [Personnel Actions](#)

## Electronic Personnel Action Forms

<b>EPAF Approver Summary</b> 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.	<b>EPAF Originator Summary</b> Displays only those EPAF transactions that you have originated. 
<b>New EPAF</b> Allows you to create a new transaction.	<b>Act as a Proxy</b> Available to all self-service EPAF users who have been given proxy privilege.
<b>EPAF Proxy Records</b> Allows you to specify and authorize one or more users to approve EPAFs in your absence.	

# ePAF Originator Summary

### Current

ePAFs sitting with you for action

### History

ePAFs that you have originated and successfully submitted and are no longer sitting with you for action

EPAF Originator Summary

Current History

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

Transactions Transaction Status All

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Status	Links
Amanda	T00021894	143959	Reappt - Year Round (Hourly)		01/18/2023	Waiting	🗨️ ⚠️
	T00021894	143851	Reappt - Sem Based, PT Instructional		01/16/2022	Waiting	🗨️
			Reappt - Sem Based, PT				🗨️

### Transaction Status

Ability to filter different statuses by clicking drop down menu

### Employee Name

By clicking name, you'll be taken to the ePAF details

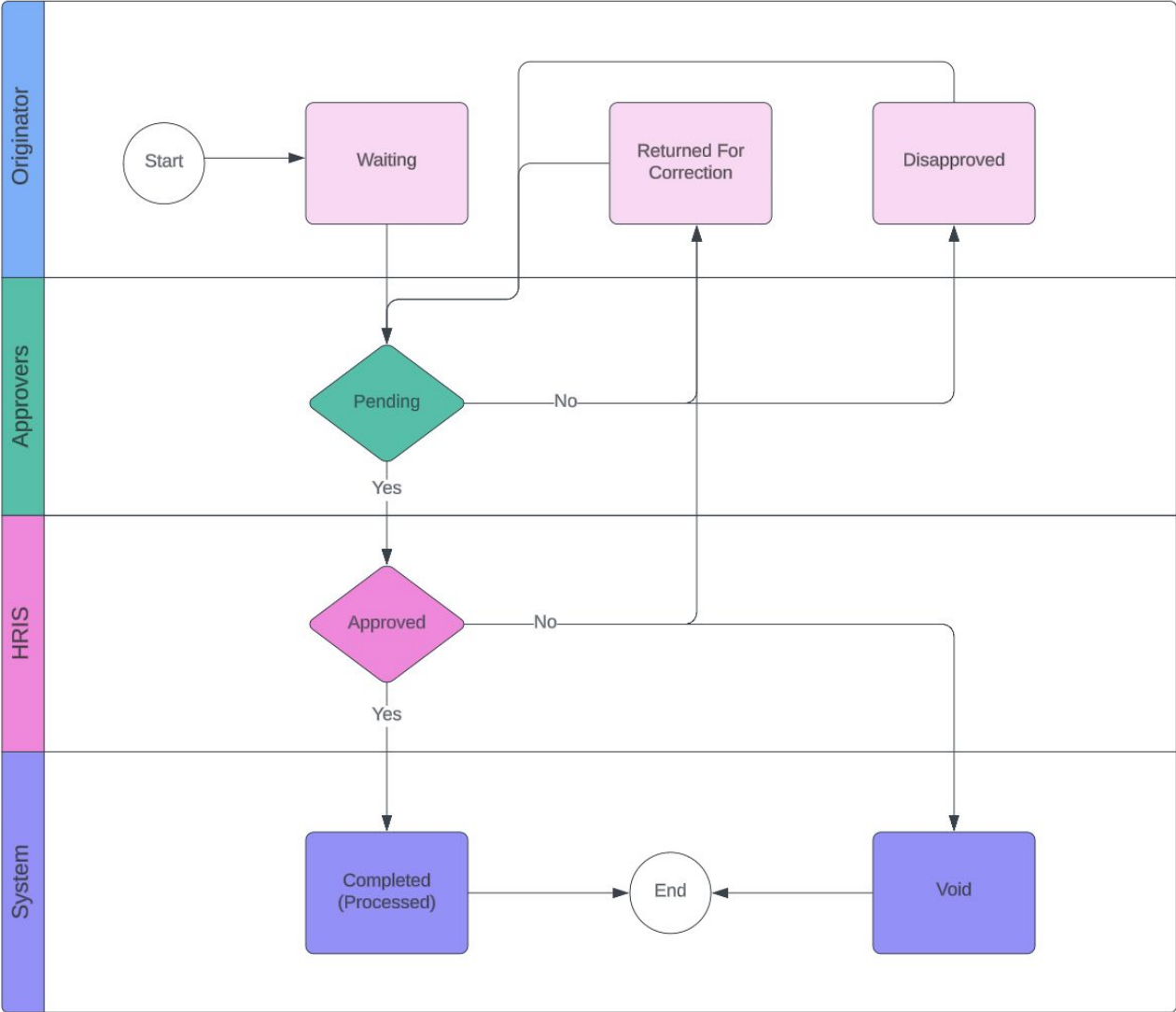
### Status

ePAF Transaction status (see next slide)

# ePAF Transaction Status Key

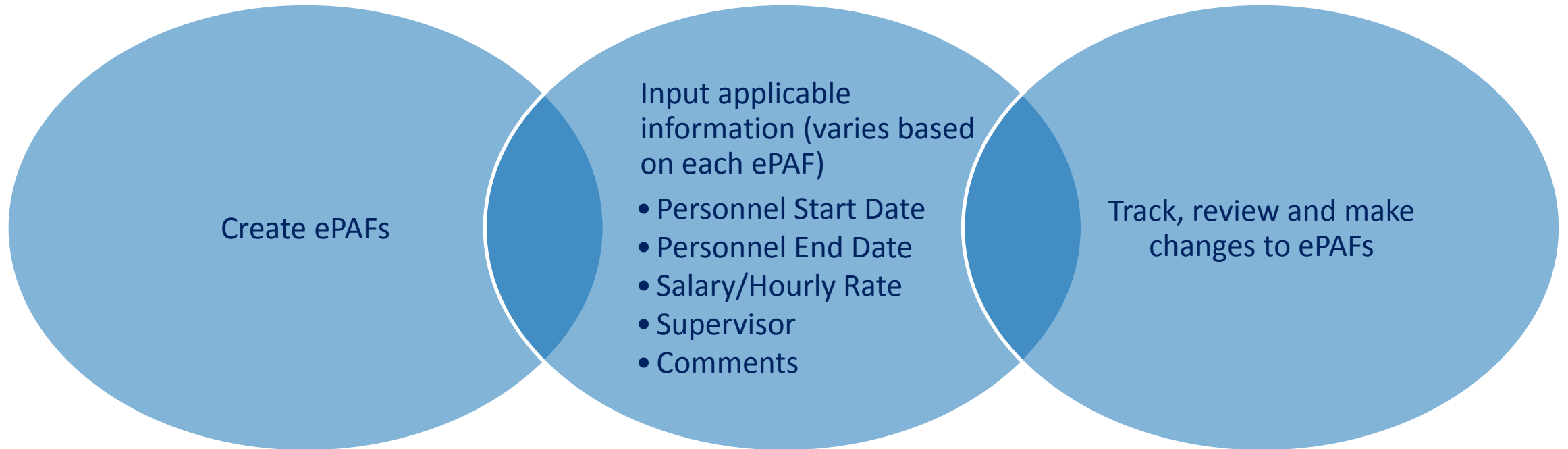
Transaction Status	What It Means	Action Needed
<b>Waiting</b>	Indicates that the transaction is in the process of being created	ePAF Originator needs to review and submit
<b>Return for Correction</b>	Indicates that the transaction has been returned to the Originator for update/correction	ePAF Originator needs to review, update and submit
<b>Disapproved</b>	Indicates that the transactions has been disapproved by an Approver	ePAF Originator can chose to return it to themselves for correction, update, save and submit again
<b>Pending</b>	Indicates that the transaction requires action by the approver(s)	Approver needs to review and approved
<b>Approved</b>	Indicates that the transaction has been approved by all parties	HRIS needs to review and process
<b>Complete</b>	Indicates that the transaction has been applied to Banner; no further action needed	No Action
<b>Void</b>	Indicates that the transaction has been voided by an originator or superuser and is no longer a valid transaction; no action can be taken on this ePAF	No Action

# ePAF Transaction Flow Chart



# Your Role as an ePAF Originator

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# ePAF Approver

# ePAF Approver Summary

[Home](#) • [Personnel Actions](#)

### Electronic Personnel Action Forms

<b>EPAF Approver Summary</b> 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.	<b>EPAF Originator Summary</b> Displays only those EPAF transactions that you have originated.
<b>New EPAF</b> Allows you to create a new transaction.	<b>Act as a Proxy</b> Available to all self-service EPAF users who have been given proxy privilege.
<b>EPAF Proxy Records</b> Allows you to specify and authorize one or more users to approve EPAFs in your absence.	



Where you go to see all the ePAFs you need to OR have approved.

# ePAF Approver Summary

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



## Approver Summary

- Current**
- In My Queue
- History

Select the link under Name to access details of the transaction

### Transactions

Queue Status: All

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
<a href="#">Rassi, Cody</a>	T00067163	143796	Hourly Rate Update	11/17/2022	11/17/2022	Approve	<input type="checkbox"/>	 

### Current

ePAFs sitting with you for action

### In My Queue

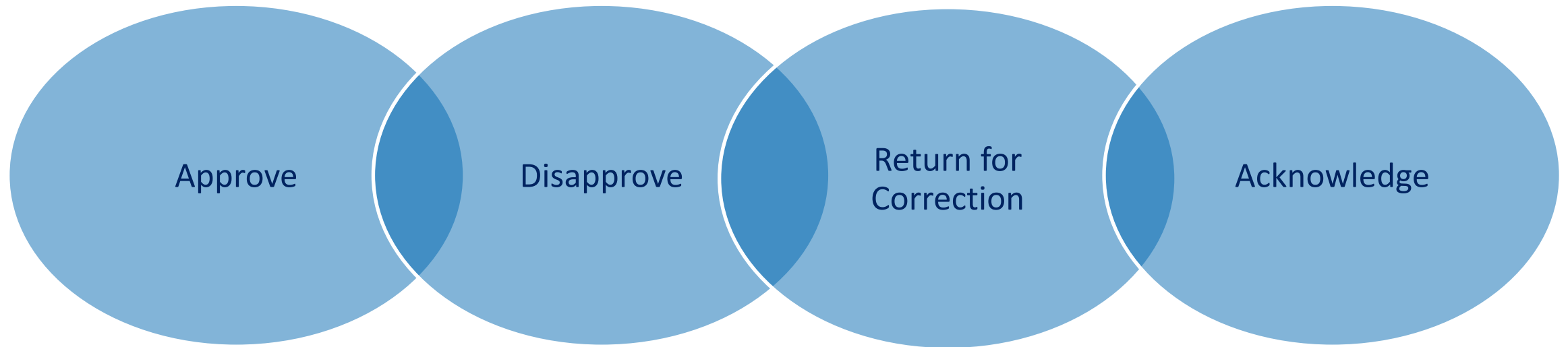
ePAFs that will eventually come to you once the previous levels have approved

### History

ePAFs that you have approved and are no longer sitting with you for action

# Your Role as an ePAF Approver

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# How to Approve an ePAF (Method 1)

1. Click the Current tab
2. Click the employee name to take you to the ePAF for review
3. Review the ePAF.
4. Scroll to the bottom. Click one of the action buttons, and/or Add a comment.

Home • Personnel Actions • Approver Summary

### Approver Summary

**Current** 1 In My Queue History

Select the link under Name to access details of the transaction

#### Transactions

Name	ID	Transaction
Rassi, Cody	T00067163	143796

### EPAF Preview 3

Previous Transaction Next Transaction

#### Details

Name and ID	Transaction	Transaction Status	Approval Category
[REDACTED]	144365	Pending	Reinstate Job or Compensation - Salaried, AD096

Job and Suffix	Query Date	Last Paid Date
SP0700-00, Full Time Professional Staff	01/01/2023	02/28/2023

#### Errors and Warning Messages

Begin Appointment, SP0700-00, Full Time Professional Staff, Last Paid Date: 02/28/2023

Salary	7500
Job Status	Active
Effective Date	03/01/2023
Personnel Date	03/01/2023
Job Change Reason	

# How to Approve an ePAF (Method 1)

Action	Date	User Name
Created	03/21/2023	Johanna J Masbad
Submitted	03/21/2023	Johanna J Masbad

Buttons: Add Comment, Approve, Disapprove, Return for Correction, More Info

## Add Comment

Adds comment to ePAF where all users can see

## Approve

Approves the ePAF and moves to the next approval level

## Disapprove

Returns ePAF to Originator; They can return it to themselves, update and re-submit if they wish; Please add comment

## Return for Correction

Returns ePAF to Originator; They can update and re-submit if they wish; Please add comment

## More Info

Removes it from your main queue, but still sitting with you for action; Common use if you need to wait for outside information before approving

# How to Approve an ePAF (Method 2)

Home • Personnel Actions • Approver Summary

## Approver Summary

**Current** <sup>1</sup> In My Queue History

Select the link under Name to access details of the transaction

Transactions Queue Status: All

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
<a href="#">Rassi, Cody</a> <sup>2</sup>	T00067163	143796	Hourly Rate Update	11/17/2022	11/17/2022	Approve	<input type="checkbox"/> <sup>3</sup>	

Results found: 1

Page 1 of 1 Per Page 25

Select All Save <sup>4</sup>

1. Click the Current tab
2. Click the employee name to take you to the ePAF for review
3. From the ePAF Approver Summary home screen, click the box in the Action column
4. Click Save




# Act as a Proxy



# Act as a Proxy

[Home](#) • [Personnel Actions](#)

## Electronic Personnel Action Forms

<b>EPAF Approver Summary</b> 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.	<b>EPAF Originator Summary</b> Displays only those EPAF transactions that you have originated.
<b>New EPAF</b> Allows you to create a new transaction.	<b>Act as a Proxy</b> Available to all self-service EPAF users who have been given proxy privilege. 
<b>EPAF Proxy Records</b> Allows you to specify and authorize one or more users to approve EPAFs in your absence.	

Where you go to approve an ePAF as a proxy approver

\*\*must be requested in advance by supervisor submitting [HR Systems Access Request Form](#)

# Act as a Proxy

Proxy or Superuser or Filter Transactions

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

**Proxy For**  
Self

Act as a Superuser

**Submitted From Date**  
MM/dd/yyyy

**Submitted To Date**  
MM/dd/yyyy

**Transactions Per Page**  
25

Go

Approver Summary

Proxy or Superuser or Filter Transactions

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

**Proxy For**

Self

Search

McGhee, Ryan C.

Transactions Per Page

25

Go

Approver Summary

# Act as a Proxy

You'll be taken to the ePAF Approver Summary screen of the person you're proxy approving for as indicated by the "Filtering On" in the upper right corner

Home • Personnel Actions • Approver Summary

Approver Summary

Current In My Queue History

Select the link under Name to access details of the transaction

Transactions Queue Status All

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
<a href="#">Black, John B.</a>	[redacted]	144070	[redacted]	02/01/2023	02/01/2023	Approve	<input type="checkbox"/>	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

Carballo Montalvo, Laura I

# Act as a Proxy

**Routing Queue**

Approval Level	Name	Required Action	Status
Budget/Grant, 24	Ryan Clarke McGhee, MCGHEE1	Approve	Pending
HRIS Apply, 90	Brendan Thomas Stone, STONE1	Apply	In the Queue

**Comments**

Date	Made By	Comments
02/01/2023 10:24 AM	Saeedullah Jan	TEST: Reappt - Summer B, FT Faculty FAAPP2 <a href="#">more</a>

**Transaction History**

Action	Date	By
Created	02/01/2023	Saeedullah Jan
Submitted	02/01/2023	Saeedullah Jan

**Approver Action Buttons**

[Add Comment](#) [Approve](#) [Disapprove](#) [Return for Correction](#) [More Info](#)

Approver Proxy has access to same actions as actual approver

**Routing Queue**

Approval Level	Name	Required Action	Status	Date
Budget/Grant, 24	Johanna J Masbad, MASBAD1 For Ryan Clarke McGhee, MCGHEE1	Approve	Approved	03/21/2023 04:16 PM
HRIS Apply, 90	Brendan Thomas Stone, STONE1	Apply	Pending	

Proxy approver name captured in routing queue section



**Now a Demo!**

# Step 1: Select an Employee & ePAF Approval Category

First Name  Last Name   Is an em


**Enter or Generate New ID**

*i* \* indicates a required field. Enter an ID, select the link to search for an ID, or generate an ID

ID \*

Query Date \*

Approval Category \*



# Step 2: Select Job

**New EPAF Job Selection**

*i* Enter or search for a new position number and enter the suffix, or select the link next to Position.

**Details**

ID	Query Date	Approval Category
Klay Thompson, T00061052	03/01/2023	Salary Update, MODJB4

**Begin Appointment, J00005**

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
<input type="checkbox"/>	New Job	<input type="text"/>	<input type="text"/>						
<input checked="" type="checkbox"/>	Primary	201255	00			01/10/2022	06/30/2025	02/28/2023	Active

**All Jobs**   **Next Approval Type**   **Go**

# Step 3: Input Fields on ePAF

Fields to input will depend on the specific ePAF transaction selected; all mandatory fields marked by \*

Electronic Personnel Action Form the Job records.

**Details**

Name and ID	Transaction	Transaction Status	Approval Category
Klay Thompson, T00061052			Salary Update / Promotion, MODJB4

Query Date  
03/01/2023

*i* Enter the information for the EPAF and either Save or Submit.

**Begin Appointment** [redacted] 02/28/2023

Effective Date \*

Personnel Date \*

Salary \*

Supervisor TC ID/UNI



# Step 4: Save ePAF

Once all fields are filled, click Save at the bottom of the ePAF

**Comments**

ssb9 test

Remaining Characters : 3991

[Save](#)

[New EPAF](#) • [EPAF Originator Summary](#)

**Electronic Personnel Action Form**

**Enter the information for the EPAF and either Save or Submit**

**Details**

Name and ID Klay Thompson, T00061052	Transaction 144368	Transaction Status Waiting
Query Date 03/01/2023		

**\* Indicates a required field.**

When you have saved your EPAF, the transaction status will be populated from a blank field to "Waiting"

# Step 5: Submit the ePAF

Made By  
Johanna J Masbad

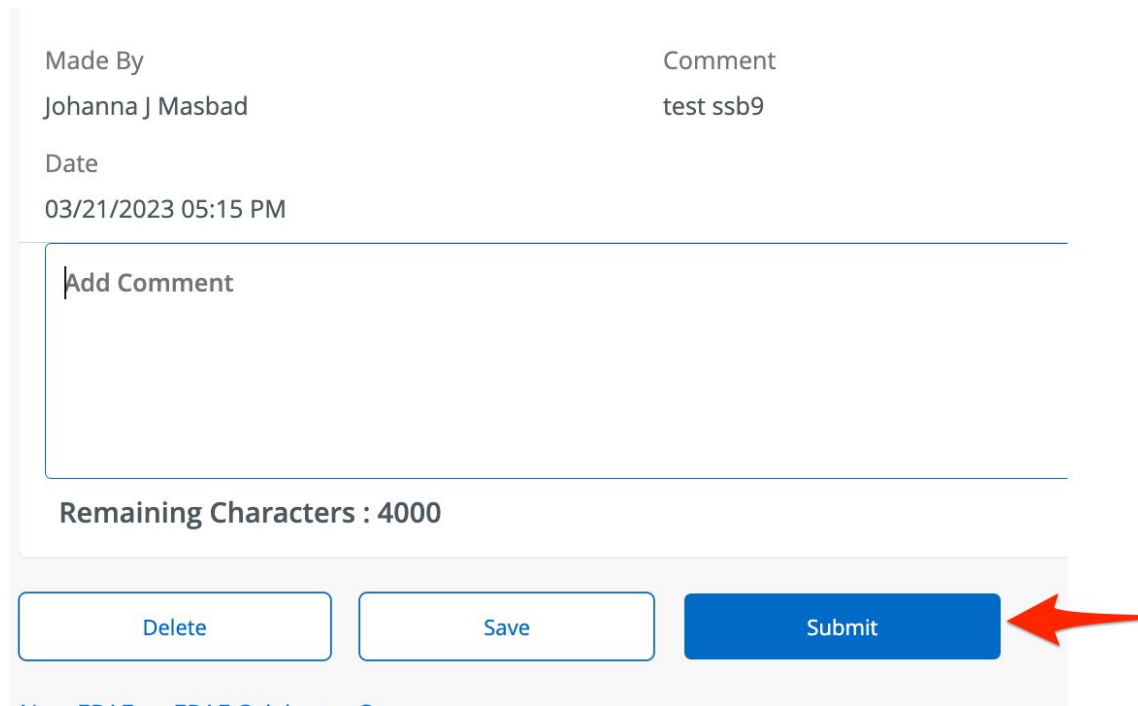
Comment  
test ssb9

Date  
03/21/2023 05:15 PM

Add Comment

Remaining Characters : 4000

Delete Save **Submit**



After **Updating** or **Saving** the EPAF, you can choose to **Submit** or **Delete** the EPAF from one of the icons listed under the Index.

The EPAF will not be submitted until you **Submit** the EPAF. If the **Transaction Status** still shows '*Waiting*' the EPAF has not been submitted.

Remember to only press **Submit** or **Delete** once.

# Successfully Saved ePAF

Once all fields are filled, click Save at the bottom of the ePAF

When you have saved your EPAF, the transaction status will be populated from a blank field to “Waiting” and you will not see any error messages.

**Comments**

ssb9 test

Remaining Characters : 3991

[Save](#)

[New EPAF](#) • [EPAF Originator Summary](#)

**Electronic Personnel Action Form**

Enter the information for the EPAF and either Save or Submit

**Details**

Name and ID Klay Thompson, T00061052	Transaction 144368	Transaction Status Waiting
Query Date 03/01/2023		

\* Indicates a required field.

# NOT Successfully Saved ePAF

CHERS COLLEGE  
UMBIA UNIVERSITY

Home • Personnel Actions • New Personnel Action

Electronic Personnel Action Form

Details

Name and ID	Transaction	Transaction Status	Approval Category
[REDACTED]	[REDACTED]	[REDACTED]	Reappt - Sem Based, PT Instructional, PTIAPP

Query Date  
01/16/2023

Enter the information for the EPAF and either Save or Submit.

- Labor Distribution Change - Account code is required.
- Begin Appointment - Invalid value for Salary. Value entered must be numeric.
- Error(s) occurred.

Hannah Masbad 3

- Any errors will be identified upon saving the ePAF.
- Any errors will show in the top left corner with a text description of the error(s).
- The **Transaction Status** will remain at BLANK until a successful save.
- Review and fix the error as needed. Click **Save** to save the changes.
- A list of common EPAF errors can be found at the end of this guide.


# Successfully Saved ePAF

The screenshot shows the Teachers College ePAF system interface. At the top, the header includes 'TEACHERS COLLEGE COLUMBIA UNIVERSITY' and a user profile for 'Hannah Masbad'. A navigation breadcrumb trail reads: Home • Personnel Actions • ePAF Originator Summary • Update Personnel Action. A green notification box at the top right states: 'The transaction has been successfully submitted.' Below this, the main content area is titled 'Electronic Personnel Action Form' and contains an instruction: 'Enter the information for the ePAF and either Save or Submit'. A table with the following data is displayed:

Details			
Name and ID	Transaction	Transaction Status	Approval Category
Klay Thompson, T00061052	144370	Pending	Salary Update / Promotion, MODJB4
Query Date	03/01/2023		

A red arrow points from the breadcrumb trail to the notification box, and a red circle highlights the 'Pending' status in the table. A footer note indicates: '\* Indicates a required field.'

- When you have successfully submitted your ePAF, you will see a green check mark at the top with the statement “**Your transaction has been successfully submitted.**”
- You can confirm that your ePAF was successfully submitted by reviewing the
- **Transaction Status.** It should be in a **‘Pending’** status.
- A list of common ePAF errors can be found at the end of this guide.

The background features a white line-art illustration of a city skyline on a dark blue background. A prominent, tall, Gothic-style tower with a spire is the central focus. To its left and right are various other buildings, including a smaller tower with a clock face and several multi-story buildings with arched windows and doorways. The overall style is architectural and detailed.

# Defaulted Values, Common Errors and System Defects

# Defaulted Values: Salary/Hourly Rate

Begin Appointment, A00044-00 Adj/PTVisiting Prof/PTLe,

Salary \*

0

Job Status

A

Effective Date \*

01/16/2023

Personnel Date \*

01/16/2023

Job Change Reason

Any ePAFs with a **Salary** or **Hourly Rate** have been defaulted to “0”

The ePAF will NOT error out, but be sure to update this to the correct amount - otherwise your employee will not get paid.



# Error: Invalid Value for Salary. Value entered must be numeric.

The screenshot shows the LUMBIA UNIVERSITY personnel action form. The breadcrumb trail is "Home • Personnel Actions • New Personnel Action". The form title is "Begin Appointment, C00010-00 Course Assistant - Fall/, Last Paid Date: 12/15/2022". The "Salary" field contains "\$4500" and is circled in red. The "Job Status" field contains "A". The "Hours per Pav" field is empty. An error message box on the right side of the form reads: "Begin Appointment - Invalid value for Salary. Value entered must be numeric." and "Error(s) occurred." A red arrow points from the error message to the "Begin Appointment" text in the form title.

If you receive an error that says “**Invalid value for Salary. Value entered must be numeric.**,” this means you have put a “\$” (dollar sign) in the salary section on the EPAF. You cannot put a “\$” sign in the Salary or Hourly Rate field.

Be sure to remove the “\$” sign and then, after reviewing, click submit.



# Defaulted Values: End Appointment End Date = 01/01/1900

End Appointment, D00001-00 Doctoral Research Fellow, Last Paid Date: 02/28/2023

Job Status

T

Effective Date \*

Due to a known defect, do not use the datepicker tool. Type the date into the field.

01/01/1900

Personnel Date \*

Due to a known defect, do not use the datepicker tool. Type the date into the field.

01/01/1900

Job Change Reason

EAP

Some ePAFs will have 01/01/1900 defaulted into the date field. Update this field to the end date of the appointment/transaction.

# Date Input: Manual Entry

End Appointment, D00001-00 Doctoral Research Fellow, Last Paid Date: 02/28

Job Status

T

Effective Date \*

Due to a known defect, do not use the datepicker tool. Type the date into the field.

01/01/1900

c

a

Person **Manually type in date**

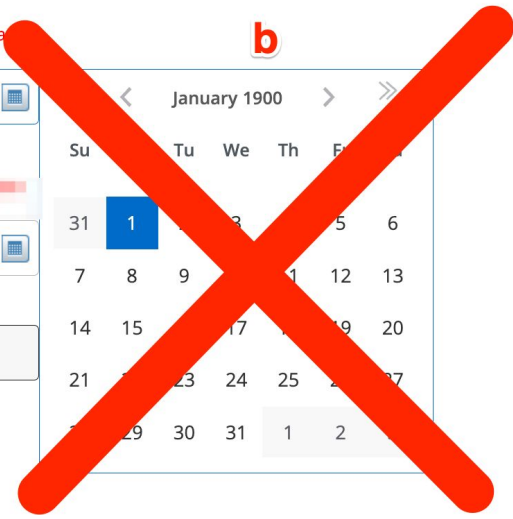
**d** in MM/DD/YYYY

01/01/1900

Job Change Reason

EAP

Routing Queue



- Click datepicker. Calendar will appear. Do not select date.
- Close the calendar by click the datepicker icon again. Calendar will disappear.
- Click into date field and cursor will appear.
- Manually type in date in format MM/DD/YYYY



# Error: Incorrect Date Inputs

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

End Appointment, OTP000-00 One Time Payment, Last Paid Date: 09/15/2019

Job Status

T

Effective Date \*

01/01/1900

Personnel Date \*

01/01/1900

Job Change Reason

EAP

- \*WARNING\*** The future dated Job record will be deleted before ending Job.
- \*ERROR\*** Date cannot be prior to the Base Job Begin Date of 01-SEP-2019.
- \*ERROR\*** Eff Date must be greater than Last Paid Date of 15-SEP-2019.
- \*ERROR\*** End Date must be later than Begin Date.
- \*ERROR\*** Job Effective Date is not within a defined fiscal year.
- \*ERROR\*** Job Effective Date cannot be prior to Job Begin Date; 01-SEP-2019 .

Be sure manually enter the date on the end appointment. **(Do not use datepicker as it will override the dates in the begin appointment section.)**

# Funding Allocation: Default From Index

When updating the funding information, you should only update two fields **Index** and **Account**.

**Step 1.** Manually enter the Index field only

**Step 2.** Click Default from Index

**Step 3.** The Fund, Organization and Program fields will automatically populate

COA	Index	Fund	Organization	Account	Program	Act
1	133100	500000	500000	6462	6000	

+ Default from Index   ←   + Add Row

COA	Index	Fund	Organization	Account	Program
1	133100	1	133100		720

+ Default from Index   + Add Row



# Error: Account Code is required

## Step 4. Enter Account Code

Teachers College  
COLUMBIA UNIVERSITY

Hannah Masbad 2

Personnel Actions • New Personnel Action

Effective Date: 11/16/2023

4

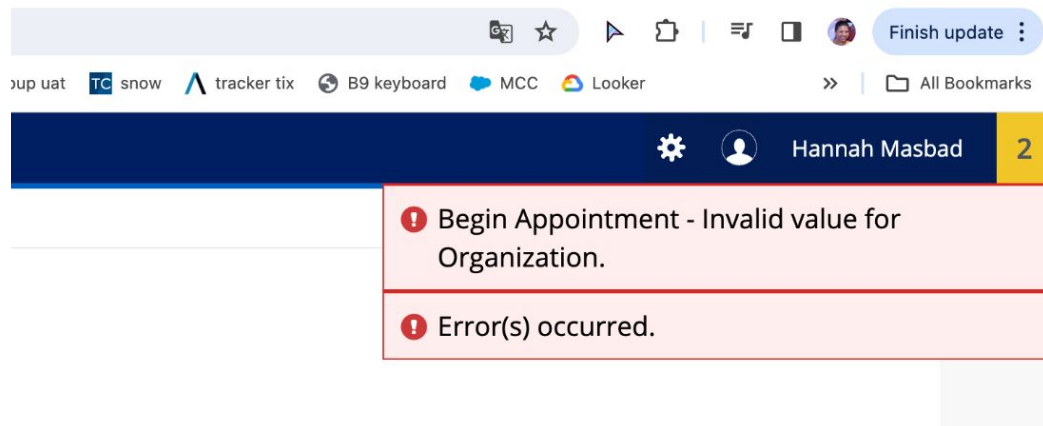
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1	133100	1	133100		720					100		

Funding Allocation - Account code is required.

Error(s) occurred.

# Timesheet Orgn Field Defect

**Defect:** The Timesheet Orgn field causes error (shown below)



A screenshot of a form with the following fields:

- Timesheet COA \*: Input field containing '1'.
- Timesheet Orgn: Input field with a search icon. A blue arrow points to this field.
- Due to defect, please leave the Timesheet Orgn field blank. (Red text)
- Job Change Reason \*: Dropdown menu showing 'SUP, Supplemental'.
- Supervisor TC ID/UNI \*: Input field.
- Factor \*: Input field.

**Resolution:** Leave field Null



# Other Items

# Tracking Submitted ePAFs

EPAF Originator Summary

Current **History**

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

Transactions Transaction Status: All

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Status	Links
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Completed	[Redacted]
[Redacted]	T00021894	143874	Reappt - Sem Based, PT Instructional	12/06/2022	01/16/2023	<b>Pending</b>	[Redacted] [!]
[Redacted]	[Redacted]	143893	Reappt - Sem Based, PT Instructional	12/08/2022	01/16/2023	Pending	[Redacted] [!]
[Redacted]	[Redacted]	144153	Reappt - Year Round (Salaried)	02/16/2023	02/01/2023	Pending	[Redacted] [!]

As an EPAF originator, you can track, review the status of, and make changes to your EPAF by returning to the **EPAF Originator Summary** screen and clicking on the **History** tab.

From the **History** tab, an EPAF originator can click on the name of the employee and see where the EPAF is in the **Routing Queue** and any **comments** associated with the EPAF.



# Tracking Submitted ePAFs

Routing Queue			
Approval Level	Name	Required Action	Status
Department or OSP for Grad., 5	Judy [REDACTED]	Approve	Pending
Budget/Grant, 24	Ryan [REDACTED]	Approve	In the Queue
Vice Provost's Office, 29	Patricia [REDACTED]	Approve	In the Queue
HRIS Apply, 90	Brendar [REDACTED]	Apply	In the Queue

Comments		
Date	Made By	Comments
12/08/2022 10:43 AM	Johanna J Masbad	PROGRAM = Training Program; <a href="#">more</a>
12/08/2022 10:41 AM	Johanna J Masbad	PROGRAM = EPAF TRAINING PROGRAM; COURSE = COURSE TEST; <a href="#">more</a>

Transaction History		
Action	Date	User Name
Created	12/08/2022	Johanna J Masbad
Submitted	12/08/2022	Johanna J Masbad

**Monitoring Routing Queue.** If an approver has a status of “Pending” this means that the ePAF is currently sitting with them for approval.

“In the Queue” means that the ePAF will go to this person, once the previous levels approve.

# ePAFs Returned for Correction

Home • Personnel Actions

## Electronic Personnel Action Forms

<b>EPAF Approver Summary</b> 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.	<b>EPAF Originator Summary</b> ← Displays only those EPAF transactions that you have originated.
<b>New EPAF</b> Allows you to create a new transaction.	<b>Act as a Proxy</b> Available to all self-service EPAF users who have been given proxy privilege.
<b>EPAF Proxy Records</b> Allows you to specify and authorize one or more users to approve EPAFs in your absence.	

If an approver needs you to make a change on the EPAF, they will return the EPAF for correction. If you receive an email notification that indicates that you have an EPAF in your queue, the EPAF has been returned to you.

From the **EPAFS (Electronic Personnel Action Forms)** home screen, navigate to the **EPAF Originator Summary** tile

# ePAFs Returned for Correction

EPAF Originator Summary

**Current** History

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

Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status
[Redacted]	T00021894	[Redacted]	Reappt - Year Round (Hourly)	[Redacted]	01/18/2023	All
[Redacted]	T00021894	[Redacted]	Reappt - Sem Based, PT Instructional	[Redacted]	01/16/2022	Return for Correction
[Redacted]	T41235706	[Redacted]	Reappt - Sem Based, PT Instructional	[Redacted]	01/16/2023	Waiting

Transaction Status dropdown menu:

- All
- Return for Correction
- Waiting

In your **Current** tab, you can filter by **Transaction Status**. Click the drop down arrow and select **Return for Correction**. EPAFs that have been returned to you for correction will now populate the listing

Click the employee's name to be taken to the ePAF.

# ePAFs Returned for Correction

Routing Queue				
Approval Level	Name	Required Action	Status	Date
Department Level Approval, 5	Johanna J Masbad, MASBAD1	Approve	Return for Correction	03/21/2023 05:56 PM
Vice President/Vice Provost, 9	Johanna J Masbad, MASBAD1 For Henry Perkowski, PERKOWS	Approve	Removed from Queue	03/21/2023 05:56 PM
Budget/Grant, 24	Johanna J Masbad, MASBAD1 For Ryan Clarke McGhee, MCGHEE1	Approve	Removed from Queue	03/21/2023 05:56 PM
Human Resources Associate, 30	Johanna J Masbad, MASBAD1 For Svetla Eneva, ENEVA	Approve	Removed from Queue	03/21/2023 05:56 PM
HRIS Apply, 90	Johanna J Masbad, MASBAD1 For Brendan Thomas Stone, STONE1	Apply	Removed from Queue	03/21/2023 05:56 PM

Comments		
Date	Made By	Comments
03/21/2023 05:55 PM	Johanna J Masbad	Please submit a budget transfer for \$5000. <a href="#">more</a>
03/21/2023 03:05 PM	Johanna J Masbad	final test ssb9 <a href="#">more</a>

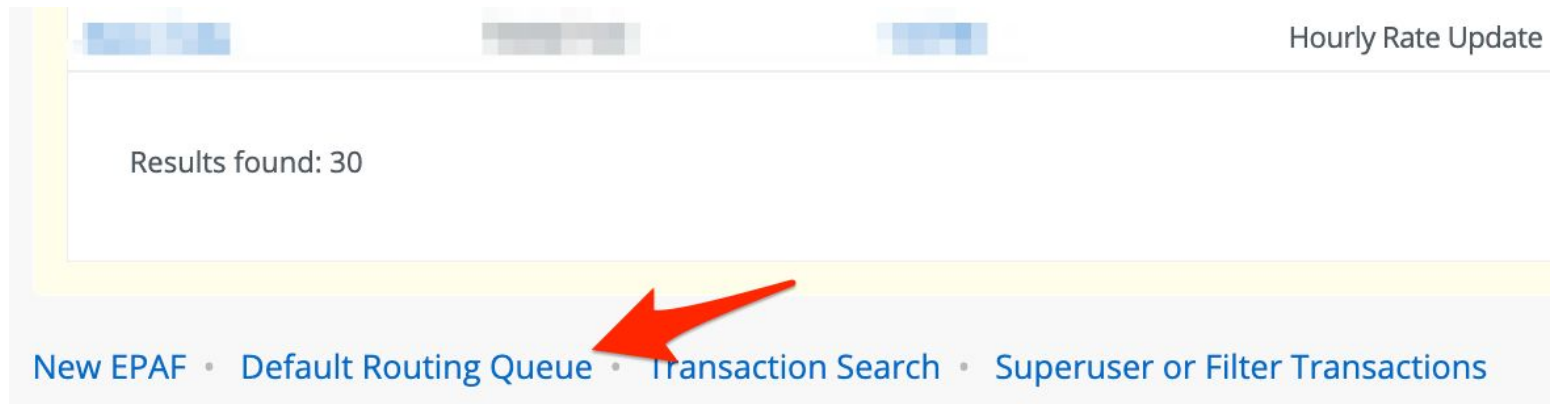
  

Transaction History		
Action	Date	User Name
Created	03/21/2023	Johanna J Masbad
Submitted	03/21/2023	Johanna J Masbad

Update   Add Comment   Void

- Scroll down to the comments section to review the reason why the ePAF was returned.
- Click **Void** to delete the EPAF and remove it from your queue. No further action can be taken on the transaction.
- Click on **Update** to make changes. You'll be able to make any adjustments necessary on the ePAF fields. Click Save and then click **submit** to send the ePAF back to the routing queue

# Establishing Default Routing Queues



Default Routing Queues allow you to automatically populate approvers in your Routing Queue. You must create a default routing queue for **each** EPAF (i.e. setting up a default routing queue for Course Assistant EPAFs does not automatically set up a routing queue for Course Assistant EPAFs).

To establish Default Routing Queues, click on **EPAF Originator Summary** from your EPAF Menu.

# Establishing Default Routing Queues

EPAF Default Routing Queue

*i* Select an Approval Category and Go. Once the page refreshes, select the Approval Level,

Approval Category

Approval Category

Additional Job or Compensation - Salaried, ADDJB1

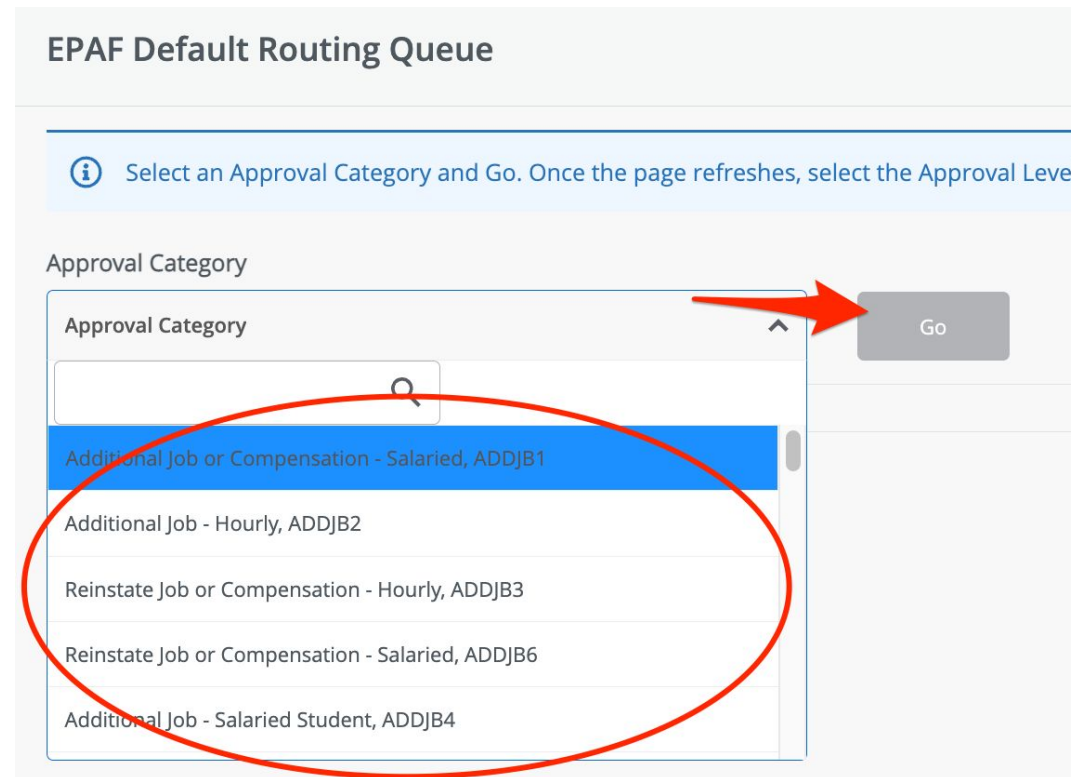
Additional Job - Hourly, ADDJB2

Reinstate Job or Compensation - Hourly, ADDJB3

Reinstate Job or Compensation - Salaried, ADDJB6

Additional Job - Salaried Student, ADDJB4

Go



Select the EPAF you wish to establish **Default Routing Queues** for from the drop down (remember, you must set up default routing queues for each EPAF). Then click **GO**.

# Establishing Default Routing Queues

EPAF Default Routing Queue

*i* Select an Approval Category and Go. Once the page refreshes, select the Approval Level,

Approval Category

Approval Category

Additional Job or Compensation - Salaried, ADDJB1

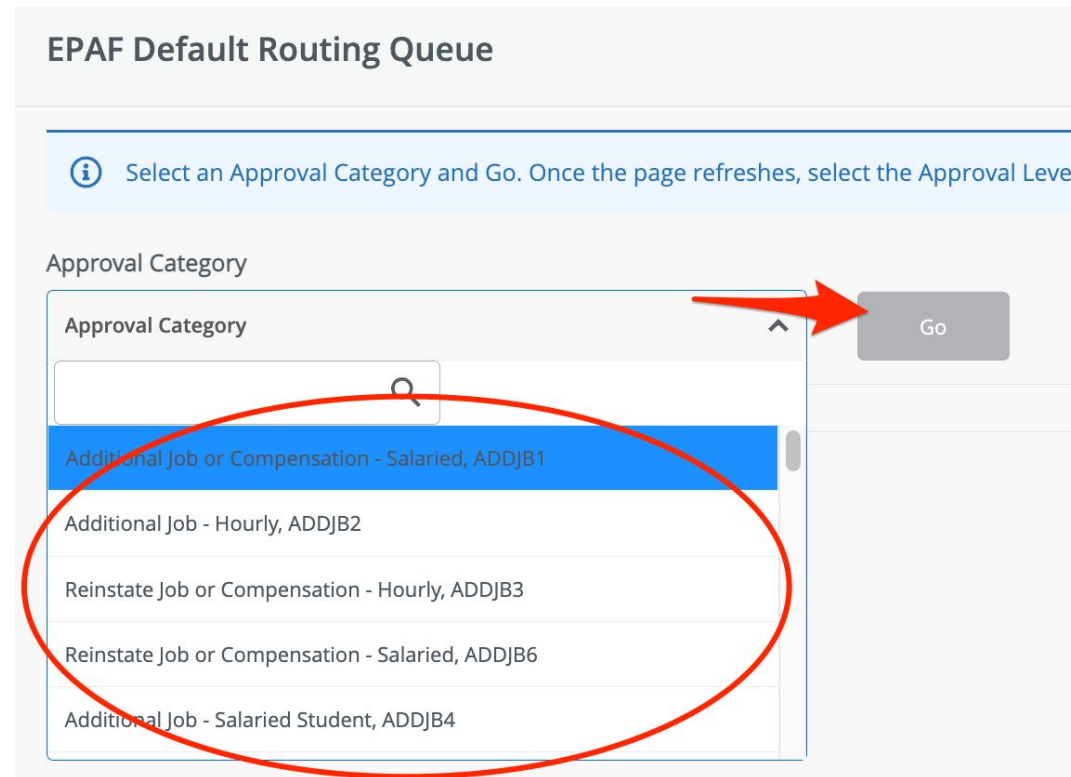
Additional Job - Hourly, ADDJB2

Reinstate Job or Compensation - Hourly, ADDJB3

Reinstate Job or Compensation - Salaried, ADDJB6

Additional Job - Salaried Student, ADDJB4

Go



Select the EPAF you wish to establish **Default Routing Queues** for from the drop down (remember, you must set up default routing queues for each EPAF). Then click **GO**.

# Establishing Default Routing Queues

Click on the drop down menu to select the user for each Approval Level. Please note that user names can be updated when creating new ePAFs. Click **Save Changes**.

You can establish the default routing queues for another EPAF by clicking on the **Approval Category** and clicking Go. You'll be presented with the mandatory approval levels for that ePAF. Select the user name from each level. Click **Save Changes**.

EPAF Default Routing Queue

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

Approval Category: Additional Job or Compensation - Salaried, ADDJB1

Approval Queue

Approval Level	User Name	Required Action	Remove
5 - (DEPART) Department Level Approval	[Redacted]	Approve	<input type="checkbox"/>
9 - (VP/VPR) Vice President/Vice Provost	[Redacted]	Approve	<input type="checkbox"/>
24 - (CONTR) Budget/Grant	[Redacted]	Approve	<input type="checkbox"/>
30 - (HRASSC) Human Resources Associate	[Redacted]	Approve	<input type="checkbox"/>
90 - (HRIS) HRIS Apply	[Redacted]	Apply	<input type="checkbox"/>

**DO NOT adjust required action or remove any levels**





# ePAF Transaction Glossary

# ePAF Transaction Glossary

Transaction Status and Queue Status Guide		
Status	Status Type	Definition
Approved	Transaction Status / Queue Status	Indicates that the transaction has been approved by all parties and ready to be applied to Banner
Complete	Transaction Status	Indicates that the transaction has been applied to Banner
Disapproved	Transaction Status / Queue Status	Indicates that the transaction has been disapproved by an approver
Pending	Transaction Status	Indicates that the transaction requires action by the approver(s)
Removed From Queue	Queue Status	Indicates that the transaction no longer needs your action
Return for Correction	Transaction Status / Queue Status	Indicates that the transaction has been returned to the Originator for update/correction
Void	Transaction Status	Indicates that the transaction has been voided by an originator or superuser and is no longer a valid transaction
Waiting	Transaction Status	Indicates that the transaction is in the process of being created
Action Buttons Guide		
Action Buttons/Links	User Type	Function
Approve	Approver(s)	The transaction will progress to the next level of approval in the transaction queue
Comment	Originator / Approver(s)	Available on all transactions for users as a free text field to share additional information
Disapprove	Approver(s)	The transaction will be removed from all levels of approvals and no further action will be possible
Return for Correction	Approver(s)	The transaction will be returned to the Originator for update/correction
Update	Originator	Available on transactions that have been returned for correction and the originator can make changes and submit for approval
Void	Originator	The transaction will be removed from all levels of approvals and no further action will be possible
Summary Page Guide		
Summary Page Tabs	User Type	Definition
Current	Originator / Approver(s)	Transactions that require your action
In My Queue	Approver(s)	Transactions that will require your action after predecessor levels have been approved
History	Originator / Approver(s)	Transactions that you have already taken action on
Miscellaneous		
Field Name		Usage
Personnel Date (Begin Appointment)		Actual Start Date of appointment
Personnel Date (End Appointment)		Actual End Date of appointment



# The End

# Help

Contact: [HRISTeam@tc.edu](mailto:HRISTeam@tc.edu) or your HR Rep 😊

\*\* By emailing [HRISTeam@tc.edu](mailto:HRISTeam@tc.edu) a ServiceNow ticket will automatically be created. You will receive a follow up email saying that a case has been created along with a case number.

Please correspond with us by replying to the email with the CASE NUMBER.

Case **Created** | HR0018683 | Additional [REDACTED]



**TC Information Technology**

to me, map2312 ▾

This email is to confirm that we have received your request for assistance and have opened HR incident

Here is a short description of your request: Additional ACAT codes to add to epaf reports

[View the status of your incidents](#)

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From: Johanna Masbad

[REDACTED]

[REDACTED]

[REDACTED]