

# EPAF GLOSSARY

TERM	DEFINITION
<b>Annual Salary</b>	For a graduate assistant, this is the amount he/she will be paid for the assistantship, regardless of funding. The assistantship is usually the academic year, and summers are handled separately. Check with your dean's office if you have questions.
<b>Applier</b>	A person in Human Resources who applies an approved EPAF transaction to Banner.
<b>Approver</b>	An Approver is a person in the Routing Queue required to approve the EPAF. This person reviews it to ensure that the information about the employee, the job, and/or the funding is correct. If it is not correct or if there are questions, he/she may "disapprove" it, return it for "correction" or return it for "more information." If it is correct, he/she approves it, and the EPAF continues to the next person in the Routing Queue, either a higher level Approver or an Applier.
<b>Approval Category</b>	The type of EPAF the Originator will select to complete the appropriate personnel action. The Originator will specify a person, a position number and an "approval category" (type of EPAF).  Descriptions of available EPAFs and their business functions are available.
<b>Approval Levels</b>	The signature hierarchy in an organization. For example, an approval level may be "Department Chair" or "Dean's Office." People in that office authorized to sign off on an EPAF would belong to that approval level.
<b>Approval Queue</b>	See Routing Queue.
<b>Base Job Begin Date</b>	This is the very first date a person worked in a given position number. If a student returns year after year to the same position number, the base job begin date will never change.  If there is a value for this field in "current values" for an EPAF, an Originator should always copy and paste that date into the "new values" field.
<b>Contract Type</b>	Primary: A person's main job. For a student, a semi-monthly job should always be primary.  Overload: A second job held by a person.  Note: If you are trying to hire a semi-monthly student and a primary job already exists, confirm with the student whether or not the hourly job is valid. Change the semi-monthly job contract type to "overload" and include a comment so that HR knows whether or not the hourly job should be ended and can correct the contract type for both jobs in Banner after the transaction is applied.
<b>Effective Date</b>	The date an action takes effect in Banner. This is usually a payroll date (10 <sup>th</sup> or 25 <sup>th</sup> for semi-monthly). If it is not a payroll date, Banner will pro-rate based on the number of days in that pay period.
<b>EPAF (Electronic Personnel Action Form)</b>	An electronic means to initiate a personnel action. It replaces paper forms such as the PAF and the Student Employment Form.
<b>EPAF Approver Summary</b>	A summary page that is available to all EPAF Approvers and has three tabs: <ul style="list-style-type: none"> <li>• The <b>Current</b> tab displays EPAF transactions that are currently awaiting action by the Approver.</li> <li>• The <b>In my Queue</b> tab displays EPAF transactions that will require action by the Approver in the future.</li> <li>• The <b>History</b> tab displays EPAF transactions that the Approver has previously taken action on within the past 24 months and no longer require action.</li> </ul>

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<b>EPAF Originator Summary</b>	<p>A summary page that is available to all EPAF Originators and has two tabs:</p> <ul style="list-style-type: none"> <li>• The <b>Current</b> tab displays EPAF transactions that require action by the Originator with transaction statuses of Waiting (not yet submitted) or Return for Correction. (What about more information?)</li> <li>• The <b>History</b> tab displays EPAF transactions that have already been submitted by the Originator within the past 24 months and no longer require action.</li> </ul>
<b>Factor/Pays</b>	<p>The number of pay periods over which a person is being paid. For graduate students, this would generally be the number of pay periods during the academic year. Summer assignments are usually handled separately.</p> <p>Annual Pay / Number of Pays is the amount of money the employee will receive per pay period. The employee will receive this amount from the time the job starts until the job is terminated.</p>
<b>FYI</b>	<p>An action that can be designated for a person in the Routing Queue. An FYI allows the person to acknowledge a transaction (rather than approve) and does not delay the approval process.</p>
<b>Hours Per Pay</b>	<p>This number is needed by Human Resources in order to ensure compliance with the Affordable Care Act requirements.</p> <p>Hours per Pay = (Hours per Week * 52)/24</p>
<b>Originator</b>	<p>The person who creates an EPAF in Banner Self Service and submits it for approval.</p>
<b>Personnel Date</b>	<p>The true date that an action took effect (e.g., the true start date, termination date, or pay change date, etc.). Personnel date is equal to effective date in most cases.</p>
<b>Proxy</b>	<p>A designee who acts on behalf of an Approver or Applier.</p>
<b>Queue Status:</b>	<p>The current routing status of the EPAF with regard to the individual defined in the approval queue. The Queue statuses are as follows:</p> <ul style="list-style-type: none"> <li>• <b>In the Queue</b> – the transaction is on its way to you, but it requires an action prior to reaching your level.</li> <li>• <b>Pending</b> – the transaction is ready for action by the Approver.</li> <li>• <b>Approved</b> – the transaction has been approved by the Approver.</li> <li>• <b>FYI</b> – the transaction is for information only. You can acknowledge the transaction, but no action on your part is required for the transaction to continue moving through the approval queue.</li> <li>• <b>Acknowledge</b> – the person listed as FYI has viewed the EPAF transaction.</li> <li>• <b>Applied</b> – the transaction has been applied to Banner by Student Financial Aid or Human Resources.</li> <li>• <b>Disapproved</b> – the transaction has been disapproved by the Approver.</li> <li>• <b>Return for Correction</b> – the transaction has been returned to the Originator for correction.</li> <li>• <b>More Information</b> – a person in the approval queue with a required action of <i>Approve</i> needs more information before approving the transaction.</li> <li>• <b>Removed from Queue</b> – this system-generated status will appear for all approvers remaining in the queue for a transaction which was voided or disapproved and never reached them.</li> <li>• <b>Void</b> – the transaction has been voided by the Originator.</li> </ul>

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<b>Query Date</b>	The date entered by the Originator on the New EPAF Person Selection page. This date defaults into the date fields in the body of the EPAF and also appears as the Transaction Effective Date on the Approver Summary.
<b>Routing Queue</b>	A defined sequence of Approval Levels, also referred to as an Approval Queue. Each EPAF has mandatory Approval Levels defined for it, which require at least one Approver and one Applier to take action. This is the basis of the routing queue. An originator can add additional approval levels to the routing queue as appropriate, for actions of “approval” and “fyi.”
<b>Superuser</b>	Someone with the ability to take action (e.g., return an EPAF to the Originator) on any transaction at any time during the approval process. Your Human Resources contact can act as a Superuser.
<b>Transaction Number</b>	A unique number for a transaction, assigned by Banner.
<b>Transaction Status</b>	<p>The current status of the EPAF itself. This status is the more relevant status for an originator. It is displayed in the Originator Summary and at the top of each EPAF transaction. The transaction statuses are:</p> <ul style="list-style-type: none"> <li>• <b>Waiting</b> – the transaction is in the process of being created by the Originator and has not yet been submitted for approval. The EPAF will not appear on the Approver Summary while in waiting status.</li> <li>• <b>Pending</b> – the transaction requires action by the Approver(s).</li> <li>• <b>Approved</b> – the transaction has been approved by the Approver(s) defined in the approval queue. It has not yet been applied by the Applier.</li> <li>• <b>Complete</b> – the transaction has been applied to Banner by Human Resources (student semi-monthly) or Financial Aid (student hourly).</li> <li>• <b>Return for Correction</b> – the Approver returned the EPAF to the Originator for correction. The Originator will need to update the EPAF and submit it for approval again.</li> <li>• <b>Disapproved</b> – the transaction has been disapproved by the Approver.</li> <li>• <b>Canceled</b> – the originator has asked Human Resources or Financial Aid to remove a transaction from Banner once it has been applied. The originator will need to update the transaction status for that transaction to Cancelled and add a comment so it will reflect that it is not in Banner.</li> <li>• <b>Partially Completed</b> – A portion of the EPAF transaction been applied to database by Human Resources and the remaining portion (employee information) will be applied at a later date. This status will be evident when an EPAF has been applied long before the effective date and the employee portion (e.g., home org, etc.) shouldn't reflect the change until the effective date arrives.</li> <li>• <b>Void</b> – the Originator has voided the EPAF transaction.</li> </ul>