EPAF
(Electronic Personnel Action Form)

ORIGINATOR MANUAL
The electronic personnel action form (EPAF) function of Gulflime allows the University to process paperless personnel actions (Approval Categories). EPAF’s are simple, concise, and allow many values or data elements to default into the document without manual data entry. The forms enable the University to achieve our goal to process personnel actions rapidly, through an electronic approval process, providing an audit trail of all approval/disapproval history.

Departments will use the EPAF process to provide the data elements necessary to process the following EPAF Approval Categories:

- All Summer Faculty Appointments
- All Overload Appointments
- All Labor Distribution Changes
- All OPS Hourly Job Terminations
- All OPS Hourly Pay Changes
- All New OPS Jobs - Fixed Amounts **
- All Adjunct Faculty Appointments **
- All Graduate Teaching Appointments **

** These EPAF transactions can only be completed for a rehired employee who has previously completed their payroll sign-on with Human Resources and received a paycheck within the last three (3) years.

The completed EPAF is then submitted through a pre-determined approval queue (routing). If approved, the EPAF will be applied to the Banner database by Human Resources.

Some efficiencies that will be realized from using EPAFs are:

- An EPAF is never lost in campus mail or in somebody’s “inbox”.
- An EPAF is created online and applied to the Banner system online so the information is keyed only once, lessening the chance for data entry errors.
- An EPAF is routed online so there is never any question regarding the location of the EPAF.
- An EPAF is available for viewing via Gulflime so various people can view it simultaneously.
- Once the EPAF has been submitted, you can see who has approved it, disapproved it, made remarks about it or returned it for correction.
Gulfline - Logon Procedures

To Logon to Gulfline, type **gulfline.fgcu.edu** in your Browser’s address line and click “Go”.

Enter your UIN and PIN
Click on ‘Logon’
Gulfline Menus

Click on ‘Employee’

Click on ‘Electronic Personnel Action Forms’
Gulfline Menus

Click on ‘New EPAF’
New EPAF Person Selection

ID - Enter employee’s University ID number (UIN), if known. Skip to page 9.

If you do not know employee’s UIN, click the ‘Search’ button at the far right of the ID field. Do not click the ‘Generate ID’ button.

The following Person Search query screen will display:
Check the ‘Employee’ box.

Enter the last name and/or first name or SSN if known.

Click the ‘Go’ button.

NOTE: With the use of wildcards, you can also execute a query using only a partial field value as a search criteria. Use the symbol ‘%’ to represent any number of unspecified characters. Use the symbol ‘_’ to represent one occurrence of an unspecified character. You can use both wildcards in the same search string.

**EXAMPLES**

<table>
<thead>
<tr>
<th>To get these results</th>
<th>Enter this criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>All entries that contain ma</td>
<td>%ma%</td>
</tr>
<tr>
<td>All entries that begin with ma</td>
<td>ma%</td>
</tr>
<tr>
<td>All entries that end with ma</td>
<td>%ma</td>
</tr>
<tr>
<td>All entries that have m as the second character</td>
<td>_m%</td>
</tr>
</tbody>
</table>
New EPAF Person Selection

When you find your match, click on the employee’s UIN number.
Query Date - Enter effective date of EPAF. Date format is MM/DD/YYYY

Note: When entering a change to an employee’s existing job, the Query Date must be greater than the employee’s Last Paid Date (last day of the pay period in which the employee’s most recent paycheck occurred.) The Last Paid Date can be found on the next screen, under the ‘Existing Jobs’ section. If you entered a date prior to the Last Paid Date in the Query Date field, click your browser’s back button to return to this screen and correct the Query Date.

Warning: At this point in the EPAF process, the system will not prevent you from entering an incorrect Query Date. The system only validates that the date is entered in the correct format, MM/DD/YYYY. However, if the Query Date is an incorrect date, the EPAF will error out upon attempting to submit.

Select the appropriate ‘Approval Category’ from the drop down menu.

Click the ‘Go’ button.
New EPAF Job Selection

Position - Enter or select the appropriate position number based on the Approval Category selected. **Note: Position number must be entered in All Caps when alpha or alpha/numeric. (Refer to Appendix B for position numbers.)**

If the Approval Category is updating an existing job, click on the ‘Select’ button for appropriate position number and title under ‘Existing Jobs’. Skip to page 12.

Otherwise to create a new job, click the ‘All Jobs’ button.
A list of all the employee’s prior and current jobs will display. Determine the last suffix assigned to the position you are currently creating, as per the position number information provided in Appendix B.

**Suffix** - Enter the next sequential suffix number.
(e.g. Professor Plum has a position ADJ997 with suffix 00 and 01 and position ADJ999 with suffix 00, 01, 02, 03, 04 – for ADJ 997 he must be assigned suffix 02, but for ADJ999, he must be assigned suffix 05).

Click the ‘Select’ button.
Click on ‘Next Approval Type’ if available and continue to next step. Otherwise click ‘Go’ and skip to page 13.

Again, click the ‘Select’ button for the appropriate job and click on ‘Next Approval Type’ if available. Repeat until ‘Next Approval Type’ button is no longer available, and then click ‘Go’.
Electronic Personnel Action Form

Prior to continuing:

- if you receive a notification message that reads “A duplicate transaction, XXXXX, for this person exists for this approval category at Waiting status” contact HR to verify the next available suffix.
- verify that the appropriate position and suffix numbers are assigned to each approval category type as listed on the applicable recipe sheet in Appendix A.
EPAF Data Entry and Submission

Each Approval Category has associated Approval Types which are the steps required to complete the EPAF. Please refer to Appendix A for the EPAF Category Information Sheets and Recipe Cards.

Once you have completed entering the EPAF data, click the ‘Save’ button. (Note that the EPAF has been assigned a unique Transaction Number which can be used for tracking purposes.)

Warning messages are informational only and do not prevent you from submitting the EPAF transaction. If you receive an error message, please refer to Appendix D.

Then, click the ‘Submit’ button.

You will receive the message ‘The transaction has been successfully submitted’. Submitting the EPAF sends it on its way to be viewed and approved by the people listed in the Routing Queue.
Troubleshooting EPAF Processing Errors

If you experience a problem or error message while processing an EPAF action:

- Check the ‘Error and Warning Messages’ section on the top of the EPAF page. Messages about the status of data entry and submission are provided and may help you determine what needs to be done to clear the error. **NOTE: System error checking is built into the functioning of Banner and will STOP YOU from continuing with the EPAF process. Data entry errors that you make WILL NOT stop the EPAF submittal process. Examples of data entry errors are wrong position numbers, suffixes, rates of pay, index and account codes. EPAFs with these errors are returned to you for correction during the Approval process. Errors not caught and corrected are applied to Banner and paid with the wrong information. Refer to Appendix D for common error messages and solutions.**

- Check that *all required data has been entered* in the EPAF fields. Verify that the information entered is typed correctly. **Review all dates for the correct format MM/DD/YYYY. Amounts should not contain ‘$’ or ‘,’**

- Check *dates entered* in fields to ensure they are appropriate for each field.

- Check that you have *completed all of the necessary information fields* – all approval types; approval routing queue.

To make correction to a field, click on the field and overwrite the information.

‘Save’ your changes and ‘Submit’.

If the above suggestions do not solve your issue/error and you are unable to successfully submit the transaction, call the appropriate Human Resources representative below:

- Barbara Cloxton – 590-1407
- Sandy Zablackas – 590-1416
Creating Your Default Routing Queues

Click on the ‘Default Routing Queue’ link.

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Creating Your Default Routing Queues

Mandatory routing queues (approval levels) are defined for each EPAF Approval Category by Human Resources and are outlined in the EPAF Category Information Sheets in Appendix A. Each college may select additional approvers in their routing queues for all or some of the EPAF Approval Categories.

Select an Approval Category from the drop down menu and click the ‘Go’ button.
Creating Your Default Routing Queues

All mandatory approval levels will default. For each level, define the default user by clicking on the ‘Search’ button, highlighting the appropriate user, and clicking on the ‘Select’ button. If the user name is known, it can be typed in the User Name field.
Creating Your Default Routing Queues

To add additional departmental approval levels, select Department Approver Level 2 from the drop down menu. Select ‘Approve’ from the Required Action drop down menu.

You may define the default user by clicking on the ‘Search’ button, highlighting the appropriate user, and clicking on the ‘Select’ button. If the user name is known, it can be typed in the User Name field.

Repeat for additional approval levels, as needed.

Click the ‘Save’ button.
EPAF Originator Manual

To review your EPAFs statuses, from the EPAF Main Menu, click on the ‘EPAF Originator Summary’ link.

The ‘Current’ tab will display. This page displays EPAFs in a ‘Waiting’ status. These are EPAFs you have initiated and saved but have not yet submitted to the routing queue.
EPAF Originator Summary

Click on the ‘History’ tab to view the status of EPAFs submitted to the routing queue.

You can select to view only EPAFs in certain statuses by selecting from the ‘Transaction Status’ drop down menu.

<table>
<thead>
<tr>
<th>Transaction Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Includes all transaction statuses</td>
</tr>
<tr>
<td>Cancelled</td>
<td>The transaction was cancelled after it was at ‘Completed’ status.</td>
</tr>
<tr>
<td>Completed</td>
<td>The transaction has been submitted and approved by all approvers in the routing queue and has been applied to the Banner database.</td>
</tr>
<tr>
<td>Disapproved</td>
<td>The transaction has been disapproved by an approver in the queue.</td>
</tr>
<tr>
<td>Pending</td>
<td>The transaction has been submitted by the initiator and is pending action by an approver in the queue.</td>
</tr>
<tr>
<td>Voided</td>
<td>The transaction has been voided. Only the Originator and an HR/Superuser has privileges to VOID a transaction.</td>
</tr>
</tbody>
</table>

To view the EPAF details, click on the person’s name.
EPAF Originator Summary

Scrolling down to the ’Routing Queue’ will show you the ‘Queue Status’ for each Approval Level.

<table>
<thead>
<tr>
<th>Queue Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>The transaction is in the approver’s “inbox” and pending their approval or other appropriate action.</td>
</tr>
<tr>
<td>FYI</td>
<td>The transaction is in approver’s queue for information purposes only.</td>
</tr>
<tr>
<td>Approved</td>
<td>The transaction has been approved by the approver.</td>
</tr>
<tr>
<td>Disapproved</td>
<td>The transaction has been disapproved by the approver.</td>
</tr>
<tr>
<td>In the queue</td>
<td>The transaction is in the routing queue waiting for the next approval level.</td>
</tr>
<tr>
<td>More information</td>
<td>An approver has requested additional information before the EPAF can proceed.</td>
</tr>
<tr>
<td>Acknowledged</td>
<td>An FYI approver has reviewed the EPAF and acknowledged receipt.</td>
</tr>
<tr>
<td>Return for Correction</td>
<td>The EPAF was returned to the originator for correction.</td>
</tr>
<tr>
<td>Overridden</td>
<td>A superuser has overridden one or more approval levels.</td>
</tr>
<tr>
<td>Removed from queue</td>
<td>The transaction was removed from an approver’s queue.</td>
</tr>
<tr>
<td>Applied</td>
<td>All approvals in the routing queue are complete and the approver has applied the changes to the Banner database.</td>
</tr>
</tbody>
</table>