EPAF Guide: Initiating A New Job Change EPAF

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**What is Job Change EPAF (Electronic Personnel Authorization Form) in Banner?**

- Changing the **salary amount** (increase or decrease) for an existing position **and/or** changing the **title of the existing position** – Staff and Faculty
- Starting with a **payroll period in the future and going forward** – NOT retroactive
- **NOT for employee class change** – cannot change Exempt to Non-Exempt, 9 months to 12 months, etc.

**How does it work?**

- An Originator completes/fills out the online EPAF form in Banner Self-Service providing all relevant information
- After submission, the EPAF is digitally work flowed through Banner Self-Service for review and approval
- Once the EPAF is approved, it will arrive in Payroll to be applied in Banner

**What to have ready before originating / starting to fill out a Job Change EPAF**

- Know the first date of the next or new Payroll Period that the Job Change EPAF should take effect

**If also changing the FOAP as part of the salary change:**

- Make sure to check there is **budget available** on the FOAP(s) you are increasing the salary on
- If it is a Grant/3-Fund FOAP, in addition to checking the available budget, also ensure that the **award is active for the period of the salary increase**
- **Reach out to the RAS team** before you originate a Grant Labor Distribution EPAF should you have any questions
**Step 1:** First, log into **MyIIT Portal** and from the **Work** page, click on the **Employee Dashboard** icon.

**Step 2:** You will be routed to a new page and halfway down the page under **My Activities**, you should see **Electronic Personnel Action Forms (EPAF)**, click on it. If you do not see this option and need to start a new EPAF, please contact **OTS Support Desk** ([supportdesk@iit.edu](mailto:supportdesk@iit.edu)) to gain access.
To pull up the individual whose labor distribution you want to change, you can search for them by first and last name, A#/CWID or SSN#, or if you know their A#/CWID, you type it directly into the ID field to locate the individual.

Step 3: A new window will open and you will want to select the **New EPAF** option.

On the new page, you can search for or enter the information of the individual whose salary and/or title you want to change.
Step 4: If you choose to search for the individual, once you hit **Search**, a list of potential matches will appear in a pop up window. Double click the **ID** of the person you want and the ID* field will populate with the A# and name of the individual you selected.
You can also type in the A# of the individual you need directly into the ID* field to pull up the individual.

**Step 5:** Now you can select your **Query Date** and **Approval Category** (the specific EPAF), then hit the **Go** button to move onto the next steps.

The **Query Date** should be the **First Day or Start Date of a future pay period**, bi-weekly or monthly (first day of the month). The payroll calendars can be located on the Payroll website ([https://web.iit.edu/payroll/calendars](https://web.iit.edu/payroll/calendars)).

Select **Non-Grant, JCHNG** if you are:
- Increasing/changing the salary / position / title on a non-grant FOAP
- Moving from one non-grant FOAP to another non-grant FOAP
- Splitting between more than one non-grant FOAPs
- Moving from a grant-FOAP to a non-grant FOAP.

Select **Grant(3-fund), JCHGGR** if you are:
- Increasing/changing the salary /position / title on a grant FOAP
- Moving from a grant/3-fund FOAP to another grant/3-fund FOAP
- Moving from a non-grant FOAP to a grant/3-fund FOAP
- Splitting between more than one FOAPs that includes a grant/3-fund FOAPs
Step 6: On the Details screen that shows up next, please make sure you select the line that says Primary under Type, as you are working with an existing position when you change an individual’s salary amount and their title.

Then hit Go.
Step 7a: On this next screen you will be able to see and change the individual’s current salary level, current position name, and provide the job change reason. The job effective date will be defaulted over from the Query Date from a previous screen and will not be changeable.

If you are a Budget Manager / current timesheet approver for the impacted individual, you will be able to see the actual current salary level.
Step 7b: Type the new salary amount and/or job description in the corresponding boxes and make sure to select the relevant Job Change Reason from the drop down / search list.

<table>
<thead>
<tr>
<th>Job Change, 101015-00 Accounts Payable Specialist, Last Paid Date: 09/18/2021</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Annual Salary</strong></td>
</tr>
<tr>
<td>Type in New Salary Amount</td>
</tr>
<tr>
<td>Old Value: Current Salary Amount</td>
</tr>
<tr>
<td><strong>Title</strong></td>
</tr>
<tr>
<td>Sr. Accounts Payable Specialist Type in New Title Name</td>
</tr>
<tr>
<td>Old Value: Accounts Payable Specialist</td>
</tr>
<tr>
<td><strong>Jobs Effective Date</strong></td>
</tr>
<tr>
<td>11/14/2021</td>
</tr>
<tr>
<td>Old Value: 06/01/2021</td>
</tr>
<tr>
<td><strong>Job Change Reason</strong></td>
</tr>
<tr>
<td>PROMO, Promotion</td>
</tr>
<tr>
<td>Old Value: FIROL, Fiscal Year Roll</td>
</tr>
</tbody>
</table>

- Please be aware if the box outline turns red, it means your new title name is too long and must be shortened or else it will create an error.

- Please select/ search for the relevant job change reason, including promotion, pay increase, job title change, etc.
Step 8: Scrolling down to the next section, and you can change the FOAP associated with the position if as part of salary and/or title change the FOAP is also changing. Otherwise, please leave blank.

Effective Date: This will be defaulted from the Query Date you entered on a previous page, so please make sure you enter in the correct first pay period date in Query Date.

If you are changing the FOAP, you can enter the new FOAP in this section, or if you need to add another FOAP/split FOAP, just click on the Add Row button and you will get another FOAP line. Please make sure to enter all components of the FOAP including 1 for COA (chart of account) and that the percentage splits add up to 100.
Step 9a: Scroll down and you can select the specific approver for each step of the predetermined Approval Routing Queue.

A User Name must be selected from the drop down list for each step of the approval flow, they are also searchable within the list. You are responsible to know and select the correct 1st Level Approvers (Budget Manager) and 2nd Level Approvers (Deans / VPs) for the new Job Change EPAF. If you do not see your approver’s name in the drop down please contact George Lara.

**DO NOT CHANGE** anything in the Approval Level or Required Action columns and associated fields. These are pre-set for each type of EPAF and will result in errors if you change them yourself.

Most central offices will only have one selection.
Step 9b: If you have selected the Grant/3-Fund Job Change EPAF, you will see a different Approval Routing Queue, with the PI Approvers and Grants and Contract Accounting office added as additional approval steps.

Similarly, a **User Name must be selected** from the drop down list **for each step of the approval flow** and **DO NOT CHANGE** anything in the **Approval Level** or **Required Action** columns and associated fields.

### Routing Queue - Grant/3-Fund EPAF

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 - (BDMANG) 1st Level Approvers</td>
<td>SRUTKOWSKJE - Rudkowski, Snow</td>
<td>FYI</td>
<td></td>
</tr>
<tr>
<td>35 - (PIAPP) PI Approvers</td>
<td>BSTEPHES - Stephens, Brent R.</td>
<td>Approve</td>
<td></td>
</tr>
<tr>
<td>40 - (BUDGET) Budget Office</td>
<td>BUDGET_BATCH - Banner Nonperson Acct, Budget Dept Approvals</td>
<td>FYI</td>
<td></td>
</tr>
<tr>
<td>40 - (GCA) Grants and Contract Accounting</td>
<td>GCA_BATCH - Banner Nonperson Acct, Grants Dept Approvals</td>
<td>Approve</td>
<td></td>
</tr>
<tr>
<td>40 - (RAS) Research Admin Services</td>
<td>RAS_BATCH - Banner Nonperson Acct, RAS Dept Approvals</td>
<td>FYI</td>
<td></td>
</tr>
<tr>
<td>50 - (HR) Human Resources</td>
<td>HR_BATCH - Banner Nonperson Acct, HR Batch Acct</td>
<td>Approve</td>
<td></td>
</tr>
<tr>
<td>99 - (PAYROL) Payroll</td>
<td>PAYROLL_BATCH - Banner Nonperson Acct, Payroll Batch Acct</td>
<td>Apply</td>
<td></td>
</tr>
</tbody>
</table>
Step 9c: If you are doing a split FOAP Job Change EPAF that needs approvals by more than one Budget Manager or PI Approver, you can add additional approvers by clicking on the Add Row button. Please note you can only add additional approvers if the Approval Level is already in the defaulted routing queue lineup, for example, you cannot add a CFO Office Approver to the Job Change EPAFs because it was never build into the workflow queue.

Please also make sure you select the SAME Required Action from the drop down list that correspond to the specific approval level, in most cases that should be Approve / FYI.

Note that EPAF approvals are sequential not concurrent, so if you have 2 budget manager or PI approvers, the one appearing first in EPAF approval queue will need to approve first before the 2nd individual can approve.
Step 10: Scroll down and you will be able to **input the specific required information** in the **Comments** section.

Then scroll down to the bottom of the page and hit the **Save** button. **Once you Save**, you’ll see additional options appear:

- **Delete** – if you no longer need to make this change or if you selected the wrong EPAF
- **Save** – if you made additional updates but are not ready yet to Submit
- **Submit** – you are ready to submit your EPAF for approvals through to HR application in Banner

Please note that you **MUST SAVE first** before you have the option to **SUBMIT**.

If you submitted **successfully**, you’ll get a green notification at the top of the page. Otherwise, red **error message(s)** will point out to you what you need to fix before re-**Save** and re-**Submit**.

**Description / reason for the salary increase and / or title change.**
Checking the Real Time Status of Your EPAFs

Once you have Saved or Submitted your EPAF, you can check the real time status of them and where they are sitting in the approval process by going back to the Electronic Personnel Action Forms homepage and clicking on EPAF Originator Summary.

Under the Current tab you will find the EPAFs that you have saved but not yet submitted.

Under the History tab, you will find all the EPAFs that you have submitted that are approved or going through the approval process.

Click on the Transaction # to view more details of your EPAF and options for next steps.
Your EPAF will be rejected/returned for correction if:

• You do not have enough money / budget on the FOAP / Grant or if you do not have an Advanced Expenditure Authorization (AEA) on file to cover the salary increase

• The Grant has expired already

• Not enough information provided in the Comments section which must include the description or reason for the salary change and/or title change
Checking the Real Time Status of Your EPAFs

At the bottom of the details page, you can **Delete** or **Void** an EPAF that’s no longer needed or **Update** it then **Save/Submit** for approval.
Checking the Real Time Status of Your EPAFs

For EPAFs you have already submitted, you can track the step-by-step status of approval / application.