



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 workflowed 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 half way 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) to gain access.

The screenshot shows the MyIIT Portal interface. On the left, a sidebar menu includes options like Work (highlighted with a pink box), Welcome, Academics, Student Life, Library, Athletics, and Banner Finance. The main content area features the Employee Dashboard (with a yellow circle labeled '1' over the 'click here' button) and Time Reporting/Approval sections. On the right, a red header bar shows the user's name, Rutkowske, Snow. Below it, the 'My Activities' section is expanded, showing 'Enter Time' (blue box), 'Approve Time' (yellow box labeled '2'), 'Electronic Personnel Action Forms (EPAF)' (pink box), 'Effort Certification', and 'Labor Redistribution'.

MyIIT Portal

Work (highlighted)

Welcome

Academics

Student Life

Library

Athletics

Banner Finance

Employee Dashboard

Employee Dashboard **click here** (yellow circle labeled '1')

Community Support

CONCERNED ABOUT AN IIT STUDENT, FACULTY OR STAFF MEMBER?

The Community Support Team assists members of the IIT community when they are concerned about, or troubled by, the behavior of a student, faculty member, or staff member. The

Latest Pay Stub: 03/12/2021

All Pay Stubs

Direct Deposit Information

Deductions History

Benefits

Taxes

Job Summary

Time Reporting

Submit Timesheet

Time Approval

Approve Timesheet

Update Approval Proxies

Timesheet Reports

Grant Effort Certification Reporting

My Activities

Enter Time

Approve Time

Electronic Personnel Action Forms (EPAF) (pink box, yellow circle labeled '2')

Effort Certification

Labor Redistribution

Rutkowske, Snow

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.

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.**

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

 Is an employee or

ID

SSN/SIN/TIN

Search

A

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 *

Generate new ID

Query Date *

 03/18/2021

Approval Category *

To pull up the individual whose labor distribution you want to change, **A** you can search for them by first and last name, A#/CWID or SSN#, or **B** if you know their A#/CWID, you type it directly into the ID field to locate the individual.

Go

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.

New EPAF Person Selection

(i) Check the box to limit to search an Employee. Enter the Last Name and

First Name	Last Name
elena	Mancari

Enter or Generate New ID

(i) * indicates a required field. Enter an ID, select the link to search for an

ID *
A20004944

Elena Mancari

Generate new ID

Query Date *

03/24/2021

Approval Category *

Go

Person Search Result

ID	Last Name	First Name	Middle Name	Birth Date	Name Type
A20004944	Mancari	Elena		12/29	Legacy ID converted to Banner INST
A20017449	Mancari	Anthony		04/19	
A20066132	Mancari	Yvonne	Nadine	10/19	
A20067005	Mancari	Leonardo		08/03	
A20147568	Mancari	Bruno		04/04	
A20211992	Mancari	Anthony	R.	10/04	
A20435959	Mancari	Michael	J	09/24	

Results found: 7

Page of 1 Per Page

Search

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.

* 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 Pay Period.

Pay Period #	First Day of Pay Period (Start Date)	Last Day of Pay Period (End Date)	Submission Deadline Employees - 10 a.m. Approvers - 4 p.m.	Pay Date
1	12/27/2020	1/9/2021	1/11/2021	1/15/2021
2	1/10/2021	1/23/2021	1/25/2021	1/29/2021
3	1/24/2021	2/6/2021	2/8/2021	2/12/2021
4	2/7/2021	2/20/2021	2/22/2021	2/26/2021

ID *
A20004944

Elena Mancari

Generate new ID

Query Date *
11/14/2021

Approval Category *

- Labor Distribution Change - Non-Grant, ELABOR
- Labor Distribution Change - Grant (3-fund), ELBRGR
- Job Supervisor Change, SUPCHG
- Job Change - Non-Grant, JCHNG**
- Job Change - Grant, JCHGGR

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>).

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**.

Details

ID
Elena Mancari, A20004944

Query Date
03/24/2021

Approval Category
EPAF for Labor Dist - Non Grnt, ELABOR

Create or change FOAPAL, LABOR

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
<input type="checkbox"/>	New Job		<input type="button" value="Q"/>						
<input checked="" type="checkbox"/>	Primary	101015	00	Accounts Payable Specialist	6505, Procurement Services	06/01/2007	03/20/2021		Active

All Jobs **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.

Home • [Personnel Actions](#) • New Personnel Action

Details

 Defaulting values for Labor Distribution from the Job records.

Name and ID
Elena Mancari, A20004944

Transaction

Transaction Status

Approval Category

Job Change - Non-Grant, JCHNG

Job and Suffix
101015-00, Accounts Payable Specialist

Query Date

Last Paid Date

11/14/2021

09/18/2021

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

Job Change, 101015-00 Accounts Payable Specialist, Last Paid Date: 09/18/2021

Annual Salary

Current Salary Amount



If you are a Budget Manager / current timesheet approver for the impacted individual, you will be able to see the actual current salary level.

Title

Accounts Payable Specialist

Jobs Effective Date *

11/14/2021



Old Value: 06/01/2021

Job Change Reason

PROMO, Promotion



Old Value: FYROL, Fiscal Year Roll

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.

Job Change, 101015-00 Accounts Payable Specialist, Last Paid Date: 09/18/2021

Annual Salary

Type in New Salary Amount



Old Value: Current Salary Amount

Title

Sr. Accounts Payable Specialist

Type in New Title Name



Old Value: Accounts Payable Specialist

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.

Jobs Effective Date *

11/14/2021



Old Value: 06/01/2021

Job Change Reason

PROMO, Promotion



Old Value: FYROL, Fiscal Year Roll

Please select/ search for the relevant job change reason, including promotion, pay increase, job title change, etc.

Not Selected

Remove

ADJTB, Begin Adjunct Assignment

ADJTE, End Adjunct Assignment

CONRE, Contract Renewal Pay Reduction

Account

Program

Activity

Location

Project

Cost

Percent

Encumbrance
Override End
Date

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.

Home • Personnel Actions • New Personnel Action

Current

Effective Date
06/30/2019

Defaulting values for Labor Distribution from the Job records.

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		100000	6505	6220	3100					100	

New

Effective Date MM/DD/YYYY
11/14/2021

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**.

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		10000C	6505	6220	3100					100		

Default from Index Add Row

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 Manaer) 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**.

Routing Queue - Non-Grant EPAF

Approval Level	User Name	Required Action	Remove
30 - (BDMANG) 1st Level Approvers	<input checked="" type="checkbox"/> MBORCHERS - Borchers, Mary Ellen	<input type="button" value="▼"/>	<input checked="" type="checkbox"/> Approve
37 - (2NDLVL) 2nd Level Approval	<input checked="" type="checkbox"/> SRUTKOWSKE - Rutkowske, Snow	<input type="button" value="▼"/>	<input checked="" type="checkbox"/> FYI
38 - (PROVOS) Provost Approval	<input checked="" type="checkbox"/> GROW - Grow, Patricia	<input type="button" value="▼"/>	<input checked="" type="checkbox"/> FYI
40 - (BUDGET) Budget Office	<input checked="" type="checkbox"/> BUDGET_BATCH - Banner Nonperson Acct, Budget Dept Approv	<input type="button" value="▼"/>	<input checked="" type="checkbox"/> Approve
90 - (HR) Human Resources	<input checked="" type="checkbox"/> HR_BATCH - Banner Nonperson Acct, HR Batch Acct	<input type="button" value="▼"/>	<input checked="" type="checkbox"/> Approve
99 - (PAYROL) Payroll	<input checked="" type="checkbox"/> PAYROLL_BATCH - Banner Nonperson Acct, Payroll Ba	<input type="button" value="▼"/>	<input checked="" type="checkbox"/> Approve

 **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



Most central offices will only have one selection.

Approval Level	User Name	Required Action	Remove
30 - (BDMANG) 1st Level Approvers	<input checked="" type="checkbox"/> SRUTKOWSKE - Rutkowske, Snow	FYI	<input checked="" type="checkbox"/>
35 - (PIAPPR) PI Approvers	<input checked="" type="checkbox"/> BSTEPHE5 - Stephens, Brent R.	Approve	<input checked="" type="checkbox"/>
40 - (BUDGET) Budget Office	<input checked="" type="checkbox"/>  BUDGET_BATCH - Banner Nonperson Acct, Budget Dept Approvals	FYI	<input checked="" type="checkbox"/>
40 - (GCA) Grants and Contract Accounting	<input checked="" type="checkbox"/>  GCA_BATCH - Banner Nonperson Acct, Grants Dept Approvals	Approve	<input checked="" type="checkbox"/>
40 - (RAS) Research Admin Services	<input checked="" type="checkbox"/>  RAS_BATCH - Banner Nonperson Acct, RAS Dept Approvals	FYI	<input checked="" type="checkbox"/>
90 - (HR) Human Resources	<input checked="" type="checkbox"/>  HR_BATCH - Banner Nonperson Acct, HR Batch Acct	Approve	<input checked="" type="checkbox"/>
99 - (PAYROL) Payroll	<input checked="" type="checkbox"/>  PAYROLL_BATCH - Banner Nonperson Acct, Payroll Batch Acct	Apply	<input checked="" type="checkbox"/>

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**.

Routing Queue

Approval Level	User Name	Required Action
30 - (BDMANG) 1st Level Approvers	Not Selected	Approve
35 - (PIAPPR) PI Approvers	Not Selected	Approve
40 - (GCA) Grants and Contract Accounting	Not Selected	Approve

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.

Add Row

The screenshot shows the 'Routing Queue' section of a software application. It displays a table with three rows of approval levels: '30 - (BDMANG) 1st Level Approvers', '35 - (PIAPPR) PI Approvers', and '40 - (GCA) Grants and Contract Accounting'. Each row has a dropdown for 'User Name' (set to 'Not Selected') and a dropdown for 'Required Action' (set to 'Approve'). A red box highlights the 'Add Row' button. A green box highlights the first row. Two blue circles highlight the 'Approve' dropdown in the second and third rows. Below the table, there are three search dropdowns. The left one shows 'Not Selected' with a red line under '30 - (BDMANG) 1st Level Approvers'. The middle one shows 'Not Selected'. The right one shows 'Not Selected' with a blue box around 'Approve'. A green checkmark is placed next to '30 - (BDMANG) 1st Level Approvers' in the left dropdown, and a blue box highlights 'Approve' in the right dropdown's list.

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**.

The screenshot shows a web-based form for submitting comments. On the left, there's a 'Comments' section with a text area containing the message: 'Description / reason for the salary increase and / or title change.' Below this is a 'Save' button, which is highlighted with a red border. To the right, there's a success message in a green box: 'The transaction has been successfully submitted.' Further down, an error message is displayed in a red box: 'Create or change FOAPAL - The Fund code 100000 is invalid. Please change. The Organization code 6504 is invalid. Please change. The Account code 6215 is invalid. Please change. The Program code 3100 is invalid. Please change.' Below the error message is another red box stating 'Error(s) occurred.'

Comments

Add Comment

Remaining Characters : 4000

Save

Comments

Add Comment

Description / reason for the salary increase and / or title change.

Remaining Characters : 4000

Delete Save **Submit**

Success Message: The transaction has been successfully submitted.

Error Message: Create or change FOAPAL - The Fund code 100000 is invalid. Please change. The Organization code 6504 is invalid. Please change. The Account code 6215 is invalid. Please change. The Program code 3100 is invalid. Please change.

Error(s) occurred.

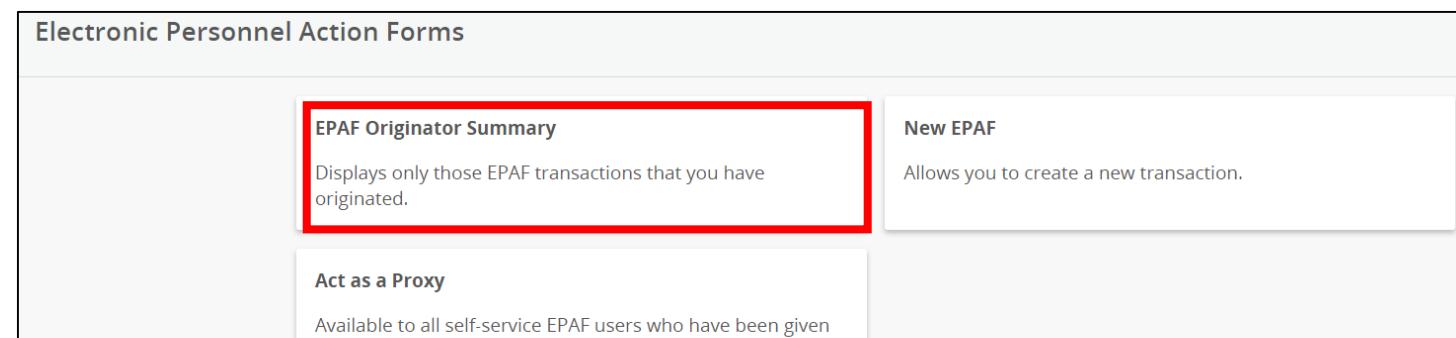
Checking the Real Time Status of Your EPAFs

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.



This screenshot shows the 'EPAF Originator Summary' page. At the top, there are tabs for 'Current' (which is selected) and 'History'. A note below the tabs says: 'Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.' The main area is titled 'Transactions' and includes a table header with columns: Name, ID, Transaction, Type of Change, Submitted Date, Effective Date, Status, and Links. A dropdown menu for 'Transaction Status' is set to 'All'. Below the header, a single transaction is listed:

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Status	Links
Mancari, Elena Accounts Payable Specialist, 101015-00	A20004944	23822	Labor Distribution Change - Non-Grant	03/24/2021		Waiting	

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.

Name and ID Elena Mancari, A20004944	Transaction 23822	Transaction Status Waiting	Approval Category Labor Distribution Change - Non-Grant, ELABOR
Job and Suffix 101015-00, Accounts Payable Specialist	Query Date 03/24/2021	Last Paid Date 03/20/2021	

Create or change FOAPAL, 101015-00, Accounts Payable Specialist, Last Paid Date: 03/20/2021

Current
Effective Date: 06/30/2019

Percent	COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Encumbrance Override End Date
100	1		100000	6505	6220	3100					

New
Effective Date: 04/04/2021

Percent	COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Encumbrance Override End Date
75	1		100000	6505	6220	3100					
25	1		100000	6508	6220	3100					

Routing Queue

Approval Level	Name	Required Action	Status	Date
1st Level Approvers, 30	Adrienne J. Wassell, AWASSELL	Approve	In the Queue	
Budget Office, 40	Mary Ellen Borchers, MBORCHERS	Approve	In the Queue	
2nd Level Approval, 50	Snow Rutkowske, SRUTKOWSKE	FYI	In the Queue	
Human Resources, 90	HR Batch Acct Banner Nonperson Acct, HR_BATCH	Approve	In the Queue	
Payroll, 99	Payroll Batch Acct Banner Nonperson Acct, PAYROLL_BATCH	Apply	In the Queue	

Transaction History

Action	Date	User Name
Created	03/24/2021	Snow Rutkowske

Delete **Update** **Add Comment** **Void**

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.

Create or change FOAPAL, 137517-00, HR Business Partner, Last Paid Date: 03/20/2021											
Current											
Effective Date: 03/17/2021											
Percent	COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Encumbrance Override End Date
100	1		381778	205A	6215	3100					
New											
Effective Date: 03/17/2021											
Percent	COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Encumbrance Override End Date
100	1		381778	205A	6215	3100					
Routing Queue											
Approval Level				Name				Required Action		Status	Date
1st Level Approvers, 30				Susan L Parpart, PARPART				Approve		Approved	03/17/2021 02:39 PM
Grants and Contract Accounting, 40				Benito L Bozzetti, BOZZETTI				Approve		Approved	03/17/2021 02:41 PM
Budget Office, 40				Snow Rutkowske, SRUTKOWSKE				Approve		Approved	03/17/2021 02:43 PM
Human Resources, 90				HR Batch Acct Banner Nonperson Acct, HR_BATCH				FYI		FYI	03/17/2021 02:43 PM
Payroll, 99				Adrienne J. Wassell, AWASSELL For Payroll Batch Acct Banner Nonperson Acct, PAYROLL_BATCH				Apply		Applied	03/17/2021 02:45 PM
Transaction History											
Action			Date			User Name			Status		
Created			03/17/2021			Melanieta Anggraeni			Pending		
Submitted			03/17/2021			Melanieta Anggraeni			In the Queue		
									In the Queue		
									In the Queue		