

EPAF Guide: Initiating a New Supervisor Change EPAF

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George Lara (elara7@iit.edu)

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

- ❖ Changing the Supervisor / Manager that a given individual reports to, for example because of a reorganization, changing departments, etc.
- ❖ Change the timesheet approver for a given individual for a period of time, for example, when the permanent manager goes on a period of leave

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 HR to be applied in Banner

What to have ready before originating / starting to fill out a Supervisor Change EPAF?

- ❖ The new supervisor's A#/CDIW#
- ❖ Who should be approving the timesheet for the individual if not the same as the new permanent supervisor

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 displays the MyIIT Portal interface. On the left is a navigation menu with categories: Work, Welcome, Academics, Student Life, Library, Athletics, and Banner Finance. The 'Work' category is highlighted with a pink box. The main content area is divided into several sections: 'Employee Dashboard' (with a pink box and a yellow circle containing the number '1' pointing to a 'click here' link), 'Time Reporting' (with a 'Submit Timesheet' link), 'Time Approval' (with 'Approve Timesheet', 'Update Approval Proxies', and 'Timesheet Reports' links), and 'Community Support' (with a heading 'CONCERNED ABOUT AN IIT STUDENT, FACULTY OR STAFF MEMBER?' and a paragraph of text). Below these sections are links for 'Latest Pay Stub: 03/12/2021', 'All Pay Stubs', 'Direct Deposit Information', and 'Deductions History'. At the bottom left, there are expandable sections for 'Benefits', 'Taxes', and 'Job Summary'. On the right side, a red header bar shows a user profile for 'Rutkowske, Snow' with a gear icon. Below this is a 'Personal Day in hours' section with green bars. Further down is a 'Full Leave Balance Information' link. At the bottom right, the 'My Activities' section is visible, containing a blue 'Enter Time' button and a list of activities: 'Approve Time', 'Electronic Personnel Action Forms (EPAF)' (highlighted with a pink box and a yellow circle containing the number '2'), 'Effort Certification', and 'Labor Redistribution'.

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 Labor Distribution you want to change.**

New EPAF Person Selection

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

ID

SSN/SIN/TIN

Is an employee or

A

Enter or Generate New ID

* 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 *

Approval Category *

B

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.

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 [X]

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

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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 Approval Category. Select Go.*

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

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 **Job Supervisor Change, SUPCHG**, then hit **Go**.

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.

Then hit **Go**.

Please note, if the supervisor change is part of a promotion/title change, the Job Change EPAF must be completed, approved, and applied first, before you can put through a separate Supervisor Change EPAF to change the supervisor/manager.

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="text"/>	<input type="text"/>						
<input checked="" type="checkbox"/>	Primary	101015	00	Accounts Payable Specialist	6505, Procurement Services	06/01/2007		03/20/2021	Active

All Jobs

Go

Step 7: On the next page, you will see the **Current** supervisor assigned to the individual and also be able to change the supervisor going forward. The Effective Date will be defaulted based on the Query Date you inputted in a previous screen.

Please double check the A#/CWID# of the new supervisor as their name will not be displayed on the screen!!

Details

Name and ID Elena Mancari, A20004944	Transaction	Transaction Status	Approval Category Job Supervisor Change, SUPCHG
Job and Suffix 101015-00, Accounts Payable Specialist	Query Date 11/14/2021	Last Paid Date 09/18/2021	

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

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

Jobs Effective Date *

11/14/2021  Remove  Old Value: 06/01/2021

Supervisor ID *

A20435330 **Type in the New Supervisor's A#** 

 **The existing supervisor's A# will be showing in the box; type in the A# of the relevant New Supervisor to make the change.**

Job Change Reason *

SUPVR  Old Value: FYROL

Step 8: 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** Budget Manager/1st Level Approvers for the new FOAP.

If you do not see your approver's name in the drop down please contact **George Lara**.

Routing Queue

Approval Level	User Name	Required Action	Remove
30 - (BDMANG) 1st Level Approvers 	SRUTKOWSKE - Rutkowske, Snow 	Approve 	
37 - (2NDLVL) 2nd Level Approval 	PARPART - Parpart, Susan L. 	FYI 	
90 - (HR) Human Resources 	HR_BATCH - Banner Nonperson Acct, HR Batch Acct 	Apply 	

 Add Row

 **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.

User Name

AWASSELL - Wassell, Adrienne J. 

Not Selected 

JALEXIS - Alexis, Jeremy P.

BOZZETTI - Bozzetti, Benito L.

BUTTERFIELD - Butterfield, Tara L.

CCASPER1 - Casper, Carrie S.

MCOLWELL - Colwell, Marc 

Step 9: 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 displays the EPAF system interface. At the top right, a green notification box states: "The transaction has been successfully submitted." Below this, the main interface is divided into two sections. The left section shows a "Comments" header, an "Add Comment" text area, and a "Save" button highlighted with a red box. The right section shows a "Comments" header, a "MUST INCLUDE:" section with a bulleted list of requirements, and buttons for "Delete", "Save", and "Submit", with the "Submit" button highlighted with a red box. The bulleted list includes: "The name of the existing supervisor", "The name of the desired new supervisor", and "If this is a supervisor and timesheet approver change or just a timesheet approver change".

Comments

✓ The transaction has been successfully submitted.

Add Comment

Remaining Characters : 40

Save

Comments

MUST INCLUDE:

- The name of the existing supervisor
- The name of the desired new supervisor
- If this is a supervisor and timesheet approver change or just a timesheet approver change

Remaining Characters : 4000

Delete Save Submit

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.

Electronic Personnel Action Forms

- EPAF Originator Summary**
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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
Mancari, Elena Accounts Payable Specialist, 101015-00	A20004944	23822	Labor Distribution Change - Non-Grant		03/24/2021	Waiting	

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
Created	03/17/2021	Melanieta Anggraeni
Submitted	03/17/2021	Melanieta Anggraeni

Status

Approved

Status

Approved

Approved

Acknowledged

Status

Pending

In the Queue

In the Queue

In the Queue