Approver Guide to ePAF
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Acting as a Proxy
Logging into Self Service Banner (SSB)

2. Log in using your eRaider username and password.
3. Click on the F & A Tab.
4. Under the Human Resources area, select the ePAF link.
Adding the F & A Tab

1. If you do not already have the F&A tab on webraider.ttuhsc.edu, then you need to add it.
2. Click the Layout Setup link.
3. Click the Fragments button.
4. Click Subscribe on the same line as the F&A tab is listed.
5. Click the red x in the box near the tab areas to specify where to place the F&A tab.
6. Now, click the F&A tab to see the various links available.
Accessing the Electronic Personnel Action Forms Menu

1. Select the *Electronic Personnel Action Forms* link.

2. If you do not see the Electronic Personnel Action Forms (ePAF) link, click on My Employment Information tab to locate the link.

3. If the link is still NOT available, then you likely are not setup as an ePAF approver.

4. If you should be setup, have your organizational manager use the TEAM App at [http://team.texastech.edu](http://team.texastech.edu) to specify your setup.

5. For additional assistance, contact your HR security coordinator.
Monitoring the Approver Summary

1. From the ePAF menu, click Approver Summary.

2. In order to see the Approver Summary link, someone has to save an ePAF with you set as an Approver in the routing queue.

3. ePAFs listed under the Current tab are ePAFs that are currently pending your approval.

4. ePAFs listed under the In My Queue tab are ePAFs that have you set as an Approver in the routing queue, but that have not yet arrived at your approval level.
5. View the PAF details by clicking on the name associated with the PAF transaction to determine where the PAF is in the routing queue.

6. PAFs under the History tab document the PAFs that are now historical to you.
Searching for a PAF

1. Every saved and submitted PAF is automatically assigned a transaction number. When searching for a PAF, search using the transaction number.

2. From the Approver Summary, click the Search link.

3. Enter the transaction number to uniquely complete the search.
Viewing PAF details

1. Click on the name associated with the PAF or the PAF transaction number to see the individual PAF.

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Amount</th>
<th>PAF Status</th>
<th>Date</th>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demm, Judge M.</td>
<td>R03935934</td>
<td>352 Int</td>
<td>TTUHSC New Hire Exempt</td>
<td>Oct 07, 2008</td>
<td>Oct 07, 2008</td>
<td>Approve</td>
</tr>
<tr>
<td>Flam, Fawndur F.</td>
<td>R03935944</td>
<td>449 Int</td>
<td>TTUHSC New Hire Exempt</td>
<td>Oct 09, 2008</td>
<td>Nov 01, 2008</td>
<td>Approve</td>
</tr>
<tr>
<td>Gabla, Amalia S.</td>
<td>R03935945</td>
<td>452 Int</td>
<td>TTUHSC New Hire Exempt</td>
<td>Oct 09, 2008</td>
<td>Nov 01, 2008</td>
<td>Approve</td>
</tr>
</tbody>
</table>

2. Scroll down the PAF using the scroll bar to view PAF details or use the PAF sections to hyperlink to such as labor distribution or routing queue.

3. Verify details such as employee class, full-time or part-time, benefits eligible or not, salary, job title, hire date, etc. based on criteria appropriate to the situation or details of the grant or process that you are monitoring.
4. Verify the FOAP source and percentage, and ensure the routing queue involves the appropriate levels depending on the situation, for instance are there additional approval levels that this PAF should have gone through?
### Create or Change Default Earnings

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Earnings</th>
<th>Hours or Units Per Pay</th>
<th>Deemed Hours</th>
<th>Special Rate</th>
<th>Shift End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>07-OCT-2008</td>
<td>HLD, Hazard or Longevity Eligible</td>
<td>1.00</td>
<td></td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

### Create or Change FOAPAL

**New**

**Effective Date:** 10/07/2008

<table>
<thead>
<tr>
<th>COA Index Fund</th>
<th>Organization Account Program Activity Location Project Cost Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>H</td>
<td>181999 201345 612599 30 100.00</td>
</tr>
</tbody>
</table>

#### Routing Queue

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>Name</th>
<th>Required Action</th>
<th>Queue Status</th>
<th>Action Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>HSC Regional HR Office, 73</td>
<td>Ronnie Jim Dunn, HR_TRAIN192</td>
<td>Approve</td>
<td>In the Queue</td>
<td></td>
</tr>
<tr>
<td>Compensation HSC, 75</td>
<td>Ricardo H Martinez, HR_TRAIN196</td>
<td>Approve</td>
<td>In the Queue</td>
<td></td>
</tr>
<tr>
<td>Budget HSC, 80</td>
<td>Amelia Prieto, HR_TRAIN199</td>
<td>Approve</td>
<td>In the Queue</td>
<td></td>
</tr>
<tr>
<td>HR HSC Approval, 95</td>
<td>Claire Ann Surratt, HR_TRAIN197</td>
<td>Approve</td>
<td>In the Queue</td>
<td></td>
</tr>
<tr>
<td>HSC Human Resources Apply, 99</td>
<td>Janet Lee Coquillon, HR_TRAIN198</td>
<td>Apply</td>
<td>In the Queue</td>
<td></td>
</tr>
</tbody>
</table>

#### Transaction History

<table>
<thead>
<tr>
<th>Action</th>
<th>Date</th>
<th>User Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created</td>
<td>Oct 07, 2008</td>
<td>Pepe Le Pew</td>
</tr>
<tr>
<td>Submitted</td>
<td>Oct 07, 2008</td>
<td>Pepe Le Pew</td>
</tr>
</tbody>
</table>
Responding to a PAF

1. You have three options when responding to a PAF:
   - **Approve** – if all details, funding, routing, etc. are accurate for your approval level, then you can approve the PAF at your level.
   - **Return for Correction** – if there are any details that need to be changed such as using a different course of funding, adding additional routing levels of approval, etc., then you should return the PAF for correction after adding a comment regarding the specific reasons for the return. Note: this will send the PAF immediately back to its Originator. They will only know this if they log into the ePAF system and check the status of their PAF. It may be helpful to contact the Originator to further address details and to alert them of the return. After the Originator makes the corrections and resubmits the PAF, the PAF will still need to go through all of the routing on the PAF.
   - **Disapprove** – if you do not agree with the details of the PAF and have strong reason to end the PAF, reason beyond returning it for correction, then you can disapprove of the PAF, which will end that PAF transaction number. If the Originator continues the original intent for the PAF that was ended, they will need to begin a new PAF transaction to follow that pursuit.

2. If you do not respond to a PAF nor does a proxy of yours, it will remain in your queue unless the Originator returns it to themselves for correction or an ePAF coordinator intervenes.
Adding a Comment to a PAF

1. You can add a comment to PAF regardless of how you respond to a PAF or even before choosing a response. For instance, if you have a question to the Originator, you can pose that question for a response before returning a PAF for correction in case returning the PAF might not be necessary.

2. Click the Add Comment link.

3. Add the comment as appropriately.

4. Click Save and verify comment saved.

5. Contact the Originator or source to address the question further or respond to the PAF as needed.
Approving a PAF

1. If you have determined that the PAF information and approval at your level is acceptable, then click the Approve button within that PAF’s details.
2. Verify that your response completed successfully and add a comment as needed or desired.

3. Verify the routing queue has moved to the next level.

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>Name</th>
<th>Required Action</th>
<th>Queue Status</th>
<th>Action Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department HSC, 20</td>
<td>Bugs Tyler Bunn, HR_TRAIN200</td>
<td>Approve</td>
<td>Approved</td>
<td>Oct 10, 2008 05:21:27 PM</td>
</tr>
<tr>
<td>HSC Regional HR Office, 73</td>
<td>Ronnie Jim Dunn, HR_TRAIN192</td>
<td>Approve</td>
<td>Pending</td>
<td>In the Queue</td>
</tr>
<tr>
<td>Compensation HSC, 75</td>
<td>Ricardo H Martinez, HR_TRAIN196</td>
<td>Approve</td>
<td>In the Queue</td>
<td></td>
</tr>
<tr>
<td>Budget HSC, 80</td>
<td>Amelia Prieto, HR_TRAIN199</td>
<td>Approve</td>
<td>In the Queue</td>
<td></td>
</tr>
<tr>
<td>HR HSC Approval, 95</td>
<td>Claire Ann Barnett, HR_TRAIN197</td>
<td>Approve</td>
<td>In the Queue</td>
<td></td>
</tr>
<tr>
<td>HSC Human Resources Apply, 69</td>
<td>Janet Lee Coquelin, HR_TRAIN199</td>
<td>Apply</td>
<td>In the Queue</td>
<td></td>
</tr>
</tbody>
</table>
Returning a PAF for Correction

1. If you have determined that the PAF information and approval at your level is not acceptable and further discussion with the Originator or another source would not be necessary, then you need to add comment detailing the reason to return the PAF for correction.

| Name and ID: | Judge Michael Doom, R039355834 |
| Transaction: | 392 |
| Job and Suffix: | ZH9554-00, Managing Director |
| Approval Category: | TTUHSC New Hire Exempt, HNHE |

**Previous Comments**

- **Date:** Oct 10, 2008 05:18:41 PM
- **Made by:** Bugs Tyler Bunny, HR_TRAIN200
- **Comments:** The employee's funding should come from the 101039 Texas Grant fund instead.

2. Then, you can click the **Return for Correction** button.

3. Verify that the action was completed and that the *Transaction Status* changed to Return for Correction.

**EPAF Preview**

- You are acting as an Approver.
- Transaction successfully completed.

- **Name and ID:** Judge Michael Doom, R039355834
- **Transaction:** 392
- **Job and Suffix:** ZH9554-00, Managing Director
- **Query Date:** Oct 07, 2008
- **Last Paid Date:**
- **Transaction Status:** Return for Correction
- **Approval Category:** TTUHSC New Hire Exempt, HNHE
- **Add Comment**

4. Verify the routing of the PAF.

<table>
<thead>
<tr>
<th>Routeing Queue</th>
<th>Name</th>
<th>Required Action</th>
<th>Queue Status</th>
<th>Action Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department HSC, 20</td>
<td>Bugs Tyler Bunny, HR_TRAIN209</td>
<td>Approve</td>
<td>Return for Correction</td>
<td>Oct 10, 2008 05:19:27 PM</td>
</tr>
<tr>
<td>HSC Regional HR Office, 73</td>
<td>Ronnie Jim Dunn, HRTRAIN192</td>
<td>Approve</td>
<td>Removed from Queue</td>
<td>Oct 10, 2008 05:19:27 PM</td>
</tr>
<tr>
<td>Compensation HSC, 75</td>
<td>Ricardo H Martinez, HR_TRAIN196</td>
<td>Approve</td>
<td>Removed from Queue</td>
<td>Oct 10, 2008 05:19:27 PM</td>
</tr>
<tr>
<td>Budget HSC, 90</td>
<td>Amelia Prite, HR_TRAIN199</td>
<td>Approve</td>
<td>Removed from Queue</td>
<td>Oct 10, 2008 05:19:27 PM</td>
</tr>
<tr>
<td>HR HSC Approval, 90</td>
<td>Clara Ann Suratt, HR_TRAIN197</td>
<td>Approve</td>
<td>Removed from Queue</td>
<td>Oct 10, 2008 05:19:27 PM</td>
</tr>
<tr>
<td>HSC Human Resources Applly, Janet Lee Coquelin, 99</td>
<td></td>
<td>Approve</td>
<td>Removed from Queue</td>
<td>Oct 10, 2008 05:19:27 PM</td>
</tr>
</tbody>
</table>

5. Contact the Originator as needed.
Disapproving a PAF

1. If you have determined that the PAF information and approval at your level is NOT acceptable, further discussion with the Originator or another source would not be necessary, and the PAF should be eliminated on the spot regardless of the need to change any of its details, then you can disapprove the PAF.

2. Enter a detailed comment regarding your decision and its reasoning.

3. Perhaps contact the Originator prior to disapproving the PAF to further explain and ensure that ending the PAF is the best approach.

4. Then if you have explored all other avenues and still determined to end the PAF transaction number completely, the select the disapprove button.
Setting Up a Proxy

1. Visit your Approver Summary.

Electronic Personnel Action Form

2. Click Update Proxies.

3. Select the appropriate Approval Level and click the drop-down box of potential proxies and select your proxy.

4. Check the Add box and Save.
5. Verify the proxy is set up.

6. Remove as needed in the future by selecting the *Remove* box and clicking *Save*.
Acting As a Proxy

1. Click the Act as a Proxy from the ePAF menu.

Electronic Personnel Action Form

2. Click the drop-down arrow on the Proxy For field and select the person to proxy for.

Proxy or Superuser or Filter Transactions

Act as a proxy or a superuser and enter the following criteria to filter transactions.

Proxy For: 
Act as a Superuser: Self
Submitted From Date: MM/DD/YYYY
Submitted To Date: MM/DD/YYYY
Transactions Per Page: 25

3. Click Go to see the Approver's Summary and view details and respond accordingly in the approver's absence.