

# How Do I Change an Employee/Supervisor Relationship using EPAF (Electronic Personnel Action Form)

1. Log onto [SharkLink](#) with your system credentials:
2. Click on the link **Webstar**;











MY SITES ▾ Bernard Erdmann [Sign Out](#)

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My NSU  
My NSU / Home

Good Morning Bernard | N# ..... [View Profile](#)

You will need to change your password in... **43 DAYS** [View My Profile](#) [Change Password](#)



3. From the WebSTAR page, select the button Employee.

Personal Information

Employee

Finance

View or update your address(es), phone number(s), e-mail address(es), & emergency contact information; View name change & social security number change information; Change your PIN; Change your Security Question and Answer.

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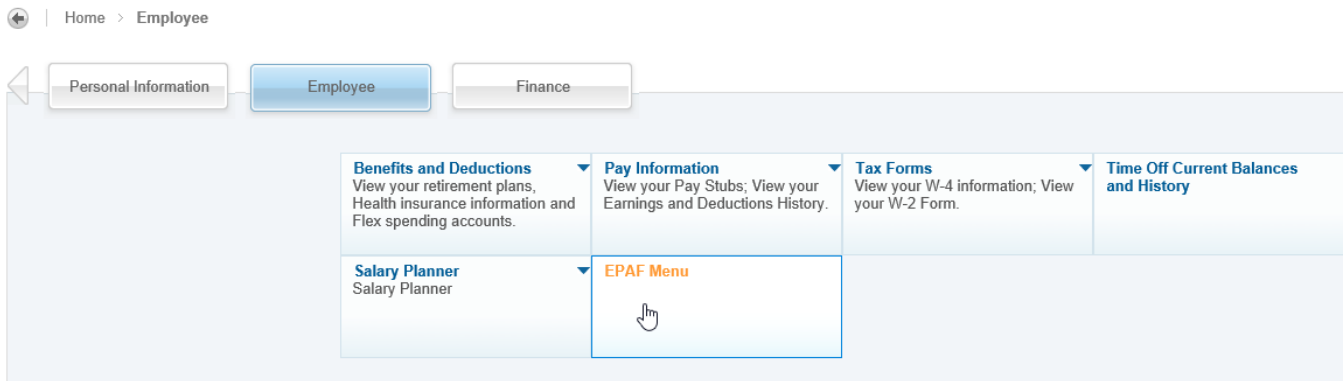
View your benefits information; Enroll in Benefits; View your leave history or balances, pay stubs, or W-2 forms; View your W-4 information.

*Note: This information is available back to January 1, 1999, the date the Banner Human Resources module was implemented. In some cases, you may see start/effective dates prior to January 1, 1999; however, these dates were used for conversion purposes only and do not necessarily reflect when a particular benefit was available to you.*

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# How Do I Change an Employee/Supervisor Relationship using EPAF (Electronic Personnel Action Form)

4. From the Employee page, select the button EPAF Menu:



The page **Employee Personnel Action Form** page is displayed.

**NOTE: Steps 4 through 11 are for setting up Default Approvers routing (the individuals in HR Compensation and HR Shared Services who should approve change requests). This setup is optional and can be completed or modified later. If you wish to omit this setup, proceed to Step 12.**

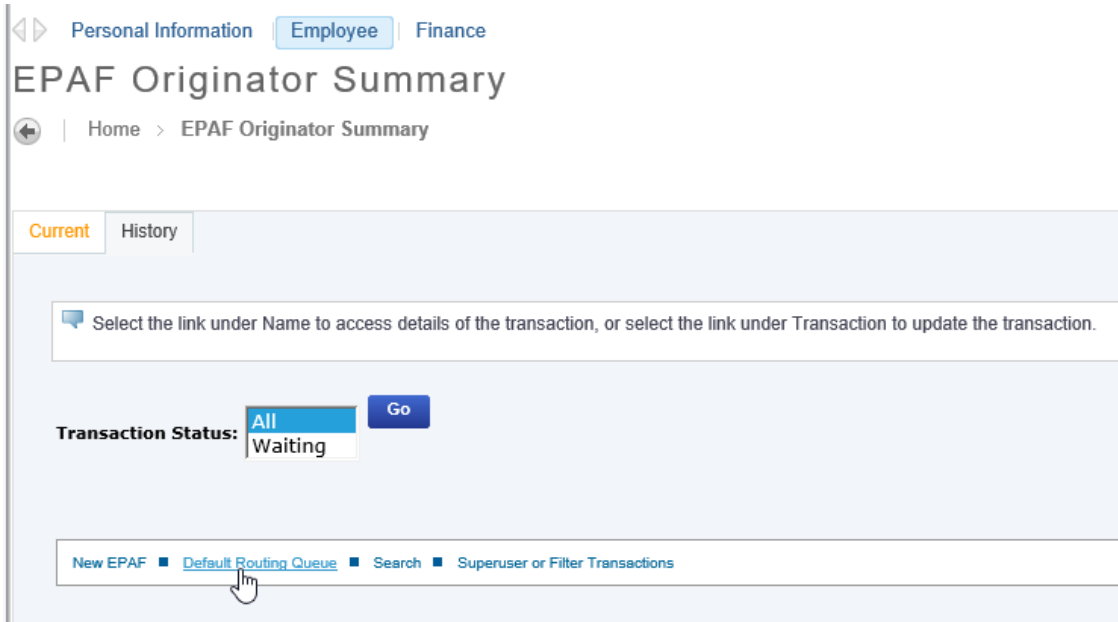
5. Click on the link **EPAF Originator Summary**



The page **EPAF Originator Summary** is displayed.

# How Do I Change an Employee/Supervisor Relationship using EPAF (Electronic Personnel Action Form)

6. Click on the link **Default Routing Queue**:



The page **EPAF Default Routing Queue** is displayed.

7. In the dropdown box **Approval Category**, select the option **Supervisor Change EPAF, SUPVRC**, then click the option button **GO**:

# How Do I Change an Employee/Supervisor Relationship using EPAF (Electronic Personnel Action Form)

Personal Information | Employee | Finance

## EPAF Default Routing Queue

Home > EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: **Not Selected**   
 Supervisor Change EPAF, SUPVRC

Approval Queue

Approval Level	User Name	Required Action
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

[EPAF Originator Summary](#)

[Return to EPAF Menu](#)

8. The page displays the required approval levels for Supervisor Changes. On the **Approval Level** row titled **HR Compensation**, click the search icon to open the popup box:

Personal Information | Employee | Finance

## EPAF Default Routing Queue

Home > EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: **Supervisor Change EPAF, SUPVRC**

Approval Queue

Approval Level	User Name	Required Action
90 - (HRCOMP) HR Compensation	<input type="text"/>	FYI
98 - (HRENTN) HR Shared Services	<input type="text"/>	Apply
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

Mandatory Levels defaulted from Electronic Approval Category Form (NTRACAT).

9. The popup box opens and HR Compensation Specialist User Name selections are displayed. Select the HR Compensation Specialist for your Center, then click the option button **Select**.

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## Valid Values

Search:

User Names,  
90 - HR Compensation

Fernandez-Quevedo, Jenny C. (FJENNY)  
Lapham, John S. (HJLAPH)  
Resende, Ivan (IRESENDE)  
Schaefer, Kimberly D. (HKSCHA)  
Vallenilla, Maria M. (HMVALL)

10. The popup box closes and the value selected is populated in the field **User Name**.

Personal Information **Employee** Finance

## EPAF Default Routing Queue

Home > EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category:

### Approval Queue

Approval Level	User Name	Required Action
90 - (HRCOMP) HR Compensation	<input type="text" value="HMVALL"/> Maria Milagros Vallenilla	FYI
98 - (HRENTN) HR Shared Services	<input type="text"/>	Apply
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

✓ Mandatory Levels defaulted from Electronic Approval Category Form (NTRACAT).

Repeat this procedure for the row titled **HR Shared Services**.

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11. When all selections have been made click the option button **Save and Add New Rows**:

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## EPAF Default Routing Queue

Home > EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: Supervisor Change EPAF, SUPVRC

### Approval Queue

Approval Level	User Name	Required Action
90 - (HRCOMP) HR Compensation	HMVALL Maria Milagros Vallenilla	FYI
98 - (HRENTN) HR Shared Services	HLWHIT Lauren Nichole White	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Mandatory Levels defaulted from Electronic Approval Category Form (NTRACAT).

The selected options are saved and the top of the page displays the message: **Your change was saved successfully:**

Your change was saved successfully.

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: Supervisor Change EPAF, SUPVRC

### Approval Queue

Approval Level	User Name	Required Action	Remove
90 - (HRCOMP) HR Compensation	HMVALL Maria Milagros Vallenilla	FYI	<input type="checkbox"/>
98 - (HRENTN) HR Shared Services	HLWHIT Lauren Nichole White	Apply	<input type="checkbox"/>
Not Selected		Not Selected	
Not Selected		Not Selected	
Not Selected		Not Selected	
Not Selected		Not Selected	

EPAF Originator Summary

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12. Click the link **Return to EPAF Menu** at the bottom of the page to return to the **EPAF Menu** page.

# How Do I Change an Employee/Supervisor Relationship using EPAF (Electronic Personnel Action Form)

13. To create a new Supervisor Change Request, select the link **New EPAF**:



The page **New EPAF Person Selection** is displayed:

A screenshot of the 'New EPAF Person Selection' form. At the top, there are navigation tabs: 'Personal Information', 'Employee' (highlighted), and 'Finance'. Below the tabs is the heading 'New EPAF Person Selection' and a breadcrumb trail: 'Home > New EPAF Person Selection'. The form contains a text box with the instruction: '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.' Below this is a legend: '\* - indicates a required field.' The form has three main fields: 'ID: \*' with two input boxes and a search icon; 'Query Date: MM/DD/YYYY \*' with a date input box containing '06/12/2017'; and 'Approval Category: \*' with a dropdown menu showing 'Not Selected'. A blue 'Go' button is located below the fields. At the bottom of the form, there are two links: 'EPAF Originator Summary' and 'Return to EPAF Menu'.

If the NSU ID of the Employee to be changed is known, enter it in the field **ID**. To search by employee name, click the search icon.

# How Do I Change an Employee/Supervisor Relationship using EPAF (Electronic Personnel Action Form)

14. When the search icon is selected, the page **Person Search** is displayed. Check the option box **Employee**, enter the relevant name criteria in the **Name** boxes and click the option button **Go**:

## Person Search

Home > Person Search

Check the box to limit the search to 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.

Enter either a First Name and or Last Name or an ID or a SSN/SIN/TIN.

**Search Criteria**

**Employee:**

**Last Name:**

**First Name:**

Or

**ID:**

Or

**SSN/SIN/TIN:**

**Records per Page:** 25

15. The screen displays the page **Person Search Results**. Click on the NSU ID of the appropriate employee, or click the link EPAF Person Search to generate a new search:

Home > Person Search Results

To choose a person, select a link under ID.

[EPAF Person Search](#)

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ID	Last Name	First Name	Middle Name	Birth Date	Name Type
<a href="#">N01355898</a>	Aguilar Cerrato	Karen	E		
<a href="#">N0003158</a>	Cerrato	Charles	M		
<a href="#">V00005191</a>	Cerrato	Michelle			

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[EPAF Person Search](#)



# How Do I Change an Employee/Supervisor Relationship using EPAF (Electronic Personnel Action Form)


16. The page **New Person Selection** is displayed with the **NSU ID** and **Name** of the selected employee; From the dropdown box **Approval Category**, select the option **Supervisor Change EPAF** and click the option button **Go**:

## New EPAF Person Selection

Home > New EPAF Person Selection

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.

\* - indicates a required field.

ID: \*   

Query Date: MM/DD/YYYY \*

Approval Category: \*

17. The page displays the field Employee Job Assignments with the employee's current job displayed.


Personal Information

## New EPAF Person Selection

Home > New EPAF Person Selection

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.

\* - indicates a required field.

ID: \*   

Query Date: MM/DD/YYYY \*

Approval Category: \*

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	999567	00	Director, HRIS/Shared Services	160600, Human Resources Dept	09/26/2015		06/02/2017	Active

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18. Click the option button **Go**; the page displays the employee's job information with the information Last Date Paid. Click the radio button in the field **Select**, then click the option button **Go**:

Personal Information **Employee** Finance

## New EPAF Job Selection

Home > New EPAF Job Selection

Enter or search for a new position number and enter the suffix, or select the link under Title.

**ID:** Karen E Aguilar Cerrato, N01355898

**Query Date:** 06/12/2017

**Approval Category:** Supervisor Change EPAF, SUPVRC

### Supervisor Information Update, SUPVRU

Search	Type	Position	Suffix	Title	Time Sheet Organization Department	Start Date	End Date	Last Paid Date	Status	Select
	Primary	999567	00	Director, HRIS/Shared Services	160600, Human Resources Dept 64-Human Resources	09/26/2015		06/02/2017	Active	<input checked="" type="radio"/>

Go

New EPAF

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19. The page displays the employee's information, and the section **Supervisor Information Update** is included with the current supervisor's NSU ID displayed in the field **Current Value**. Enter the NSU ID for the new supervisor in the field **New Value**. Click anywhere outside the box to update the page and display the selected new supervisor information.

Browse

[Jump to Bottom](#)  
\* - indicates a required field.

**Supervisor Information Update, 999567-00 Director, HRIS/Shared Services, Last Paid Date: 06/02/2017**

Item	Current Value	New Value
Supervisor Id: *	N00031386	<input type="text" value="N01322461"/>
		Bernard J. Erdmann 996869-00-HRIS Analyst III
Effective Date: MM/DD/YYYY*	01/30/2016	<input type="text" value="06/12/2017"/>
Job Change Reason: *(Not Enterable) 02009		<input type="text" value="03057"/>

**Routing Queue**

Approval Level	User Name	Required Action
90 - (HRCOMP) HR Compensation	<input type="text" value="HMVALL"/> Maria Milagros Vallenilla	<input type="text" value="FYI"/>
98 - (HRENTN) HR Shared Services	<input type="text" value="HLWHIT"/> Lauren Nichole White	<input type="text" value="Apply"/>
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

**Comment**

Approval Types ■ Routing Queue ■ Comments ■ Transaction History

20. Click the option button **Save**. The page displays the message **Your change was saved successfully**:

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## Electronic Personnel Action Form

Home > Electronic Personnel Action Form

✔ Your change was saved successfully.

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

<b>Name and ID:</b>	Karen E Aguilar Cerrato, N01355898	<b>Job and Suffix:</b>	999567-00, Director, HRIS/Shared Services
<b>Transaction:</b>	289683	<b>Query Date:</b>	06/12/2017
<b>Transaction Status:</b>	Waiting	<b>Last Paid Date:</b>	06/16/2017
<b>Approval Category:</b>	Supervisor Change EPAF, SUPVRC		

**Save** **Submit** **Delete**

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\* - indicates a required field.

**Supervisor Information Update, 999567-00 Director, HRIS/Shared Services, Last Paid Date: 06/16/2017**

Item	Current Value	New Value
Supervisor Id: *	N00031386	<input type="text" value="N01322461"/>
Effective Date: MM/DD/YYYY*	01/30/2016	<input type="text" value="06/12/2017"/>
Job Change Reason: *(Not Enterable) 02009		<input type="text" value="03057"/>

# How Do I Change an Employee/Supervisor Relationship using EPAF (Electronic Personnel Action Form)

21. Click the option button **Submit**;

Personal Information **Employee** Finance

## Electronic Personnel Action Form

Home > Electronic Personnel Action Form

**Transaction was not submitted. Please review errors.**

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

<b>Name and ID:</b>	Karen E Aguilar Cerrato, N01355898	<b>Job and Suffix:</b>	999567-00, Director, HRIS/Shared Services
<b>Transaction:</b>	289683	<b>Query Date:</b>	06/12/2017
<b>Transaction Status:</b>	Waiting	<b>Last Paid Date:</b>	06/16/2017
<b>Approval Category:</b>	Supervisor Change EPAF, SUPVRC		

**Save** **Submit** **Delete**

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### Errors and Warning Messages

Type	Message Type	Description
Supervisor Information Update	ERROR	*ERROR* Eff Date must be greater than Last Paid Date of 16-JUN-2017.

\* - indicates a required field.

**Supervisor Information Update, 999567-00 Director, HRIS/Shared Services, Last Paid Date: 06/16/2017**

22. Review and correct any errors, then re-select the option button **Save**:

# How Do I Change an Employee/Supervisor Relationship using EPAF (Electronic Personnel Action Form)

## Errors and Warning Messages

Type	Message Type	Description
Supervisor Information Update	ERROR	*ERROR* Eff Date must be greater than Last Paid Date of 16-JUN-2017.

\* - indicates a required field.

**Supervisor Information Update, 999567-00 Director, HRIS/Shared Services, Last Paid Date: 06/16/2017**

Item	Current Value	New Value
Supervisor Id: *	N00031386	<input type="text" value="N01322461"/>
Effective Date: MM/DD/YYYY*	01/30/2016	<input type="text" value="6/17/2017"/>
Job Change Reason: *(Not Enterable) 02009		<input type="text" value="03057"/>

23. When all error messages are cleared click the option button **Submit**:

Personal Information | **Employee** | Finance

## Electronic Personnel Action Form

Home > Electronic Personnel Action Form

✓ Your change was saved successfully.

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

<b>Name and ID:</b>	Karen E Aguilar Cerrato, N01355898	<b>Job and Suffix:</b>	999567-00, Director, HRIS/Shared Services
<b>Transaction:</b>	289683	<b>Query Date:</b>	06/12/2017
<b>Transaction Status:</b>	Waiting	<b>Last Paid Date:</b>	06/16/2017
<b>Approval Category:</b>	Supervisor Change EPAF, SUPVRC		

Save

Submit

Delete

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# How Do I Change an Employee/Supervisor Relationship using EPAF (Electronic Personnel Action Form)

The screen displays the message **The transaction has been successfully submitted:**

Personal Information | **Employee** | Finance

## Electronic Personnel Action Form

Home > Electronic Personnel Action Form

The transaction has been successfully submitted.

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

<b>Name and ID:</b>	Karen E Aguilar Cerrato, N01355898	<b>Job and Suffix:</b>	999567-00, Director, HRIS/Shared Services
<b>Transaction:</b>	289683	<b>Query Date:</b>	06/12/2017
<b>Transaction Status:</b>	Approved	<b>Last Paid Date:</b>	06/16/2017
<b>Approval Category:</b>	Supervisor Change EPAF, SUPVRC		

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\* - indicates a required field.

**Supervisor Information Update, 999567-00 Director, HRIS/Shared Services, Last Paid Date: 06/16/2017**

Item	Current Value	New Value
Supervisor Id: *	N00031386	<input type="text" value="N01322461"/>
Effective Date: MM/DD/YYYY*	01/30/2016	<input type="text" value="06/12/2017"/>
Job Change Reason: *(Not Enterable) 02009		<input type="text" value="03057"/>

**Transaction History** is displayed at the bottom of the page:

### Transaction History

Action	Date	User Name
Created:	06/12/2017	Bernard J Erdmann
Submitted:	06/12/2017	Bernard J Erdmann