

EPAF USER GUIDE

For Approvers

Revised: October 2026

Contents

EPAFs: An Introduction 3
EPAF Process at a Glance 4
EPAF Submission Deadlines 4
The EPAF System 5
EPAF Approver Summary 6
Approving an EPAF 7
EPAF Originator Summary 7
New EPAF 8
EPAF Proxy Records 8
Setting A Proxy 9
Act as a Proxy 10
EPAF Routing Queues 10

EPAFs: An Introduction

An **Electronic Personnel Action Form (EPAF)** is an online form created and submitted by an authorized employee to request a personnel action for another employee. Once submitted, the EPAF is reviewed and approved by the appropriate personnel and, if approved, applied.

As an **authorized EPAF user**, you have been granted access to create or approve EPAFs on behalf of your department, office, or division at the university. EPAF users generally serve in one of two roles:

- **Originators:** Create EPAFs and submit them for approval.
- **Approvers:** Review and approve EPAFs or return them to the originator for correction. Approvers may include supervisors, administrators, Human Resources or Payroll personnel, and others whose review and approval are required.

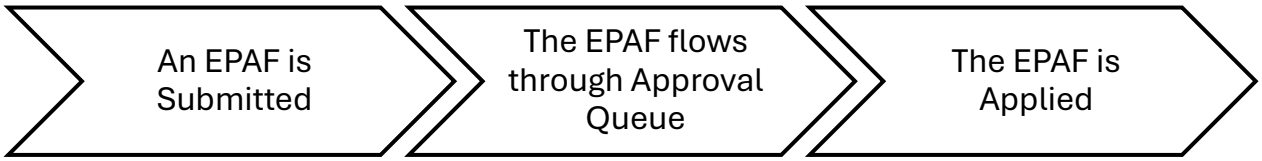
Depending on your position, you may serve as an originator or approver. **Users assigned to an approval queue cannot also serve as EPAF originators.**

EPAFs are used to process a variety of personnel actions, including:

- Hiring full-time faculty, full-time staff, or adjunct faculty.
- Hiring graduate assistants, research assistants, teaching assistants, student assistants, or work-study students.
- Processing one-time payments (OTP) or stipends for faculty and staff.
- Processing faculty teaching overloads or summer pay for chairs and directors.
- Ending a job assignment when an employee has completed a specific task or job.

This guide provides instructions for completing common personnel actions, with a focus on creating, submitting, reviewing, and approving EPAFs.

Process at a Glance



- An Originator creates an EPAF and submits for approval.
- Approvers review EPAF during their step of the queue.
- The Payroll Office applies EPAFs that have been approved by the EPAF deadline dates.

Once submitted, each EPAF personnel action must be approved at multiple levels by designated approvers. To streamline approvals, each EPAF action has been assigned an **Approval Category** that includes a predetermined **Routing Queue** identifying who in the organization must approve the EPAF. Finally, EPAFs are approved by the Payroll Office and applied to an employee's job record.

If there are problems with an EPAF, an approver can select "Return for Correction" and require the EPAF's originator to correct the EPAF. All EPAFs must be created, approved, and applied in a timely manner so the job record can be updated prior to payroll calculation.

Submission Deadlines

An EPAF must be at the Apply stage in the Payroll Office at least two (2) days before payroll is run. **To best meet this deadline**, an EPAF should be submitted at least ten (10) days before the pay date. To determine when an EPAF is due, contact Payroll.

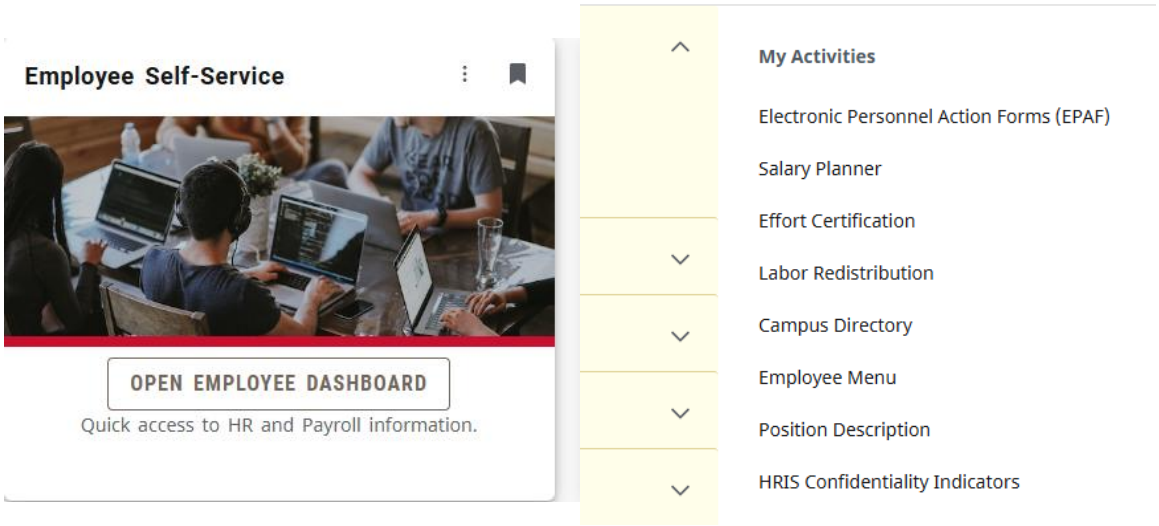


Timely EPAF completion is critical to ensure employees are paid accurately and on time. An EPAF is not effective until it reaches the Apply stage in Payroll, which occurs after all required reviews and approvals are completed. Delays in creating, submitting, reviewing, or approving EPAFs can impact personnel actions, including hiring and timely employee payment.

The EPAF System

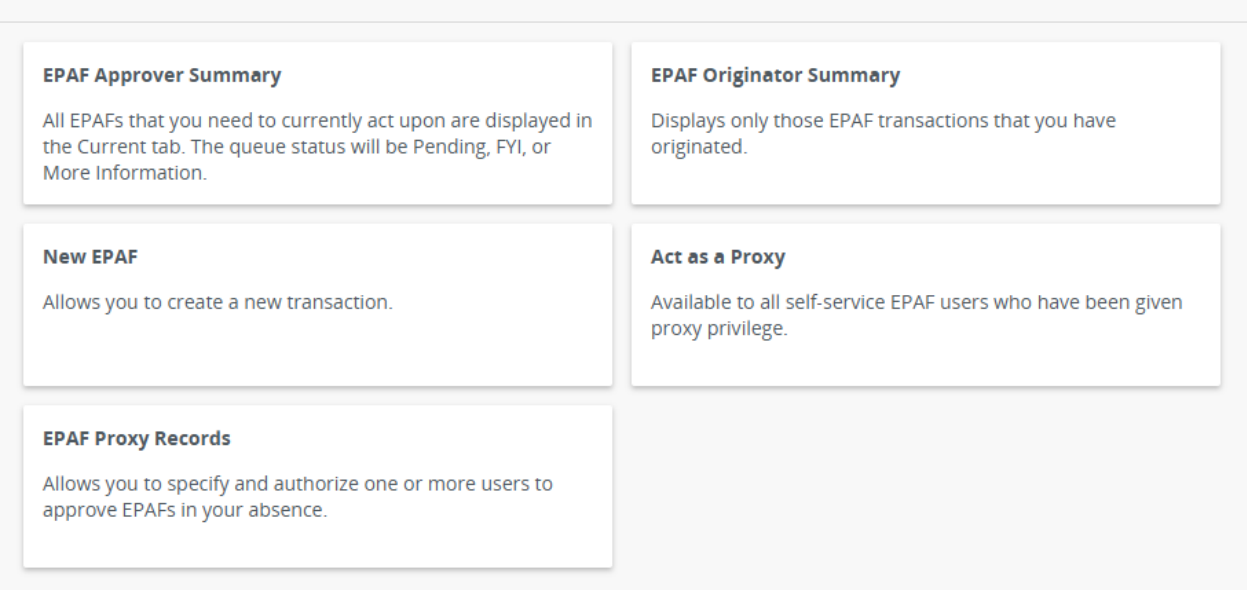
Employees who create or approve EPAFs must first be given EPAF access. An employee's department head requests access by filling out the EPAF access form, found on the Finance and Budget Information webpage. Budget and Financial Planning approves access for qualified employees and sends this approval to IT, which sets up EPAF access for approved employees.

Once you are an authorized EPAF user, you can access the EPAF system as follows:



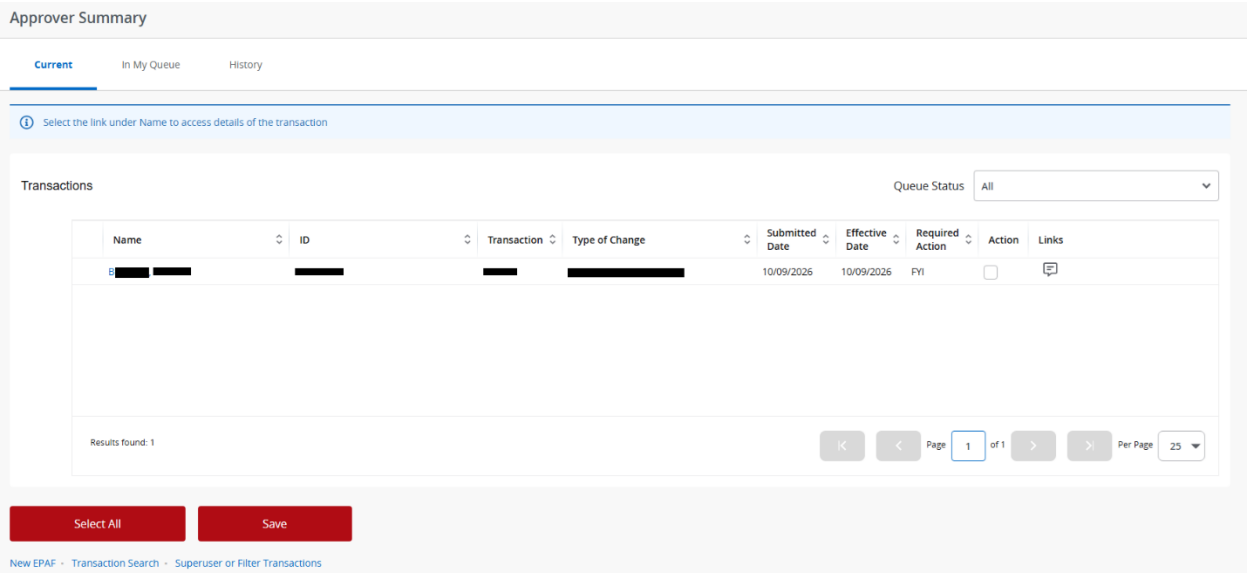
- Go to the **MySRSU** webpage and click on **Open Employee Dashboard,** under **Employee Self-Service**.
- On the Employee Dashboard click on **Electronic Personnel Action Forms (EPAF)** link, under My Activities.

After entering the EPAF system, you will find several menu options. Your menu options may differ, depending on your EPAF access rights and the EPAF tasks you need to complete.



- **EPAF Approver Summary:** EPAFs awaiting your approval; menu item available to those with approver status.
- **EPAF Originator Summary:** Submitted and draft EPAFs; menu item available to those with originator status.
- **New EPAF:** Create a new EPAF; originators will use this link.
- **EPAF Proxy Records:** Allows an approver to specify and authorize one or more users to approve EPAFs on their behalf.
- **Act as a Proxy:** Allows user to act on behalf of another EPAF user, if designated as a proxy for that other user.

EPAF Approver Summary



All users designated as EPAF approvers can access the EPAF Approver Summary page. This page contains three tabs:

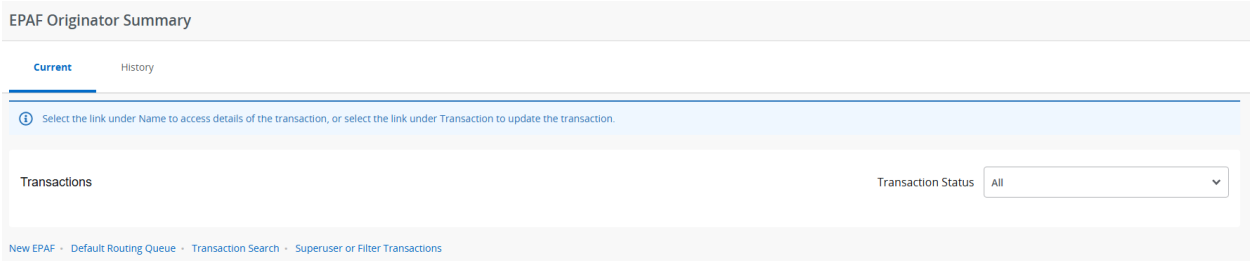
- **Current:** Lists all EPAFs still needing action by an approver.
- **In My Queue:** Lists all EPAFs that have the status “In the Queue” and have yet to be processed.
- **History:** Lists EPAFs that have been processed.

Approving an EPAF

Approving an EPAF indicates that you have reviewed the EPAF submission, found it to be correct, and agree with the personnel action. If you are a designated EPAF approver, you can approve for your step in the queue.

- Click on the Employee’s name to open an EPAF. Carefully review the information within. Using the menu at the bottom, you can select your action.
    - **Approve:** Accepts the EPAF & sends to next approver.
    - **Disapprove:** Rejects the EPAF. Approvers should always include a comment explaining why EPAF is being disapproved. Originators will need to create a new EPAF from scratch.
    - **Return for Correction:** Sends EPAF back to originator for correction. Approvers should always include a comment explaining why EPAF is being sent back & what corrections are needed. After correction, EPAF can be resubmitted and must be approved by all approvers again.
    - **More Info:** Allows approvers to add or request more information about EPAF. This option merely adds information & does not reject EPAF or return for correction. If approvers choose More Info, they should include a comment explaining their reasons.
    - **Add Comment:** Allows approvers to add comments to EPAF. Useful for explaining decisions.

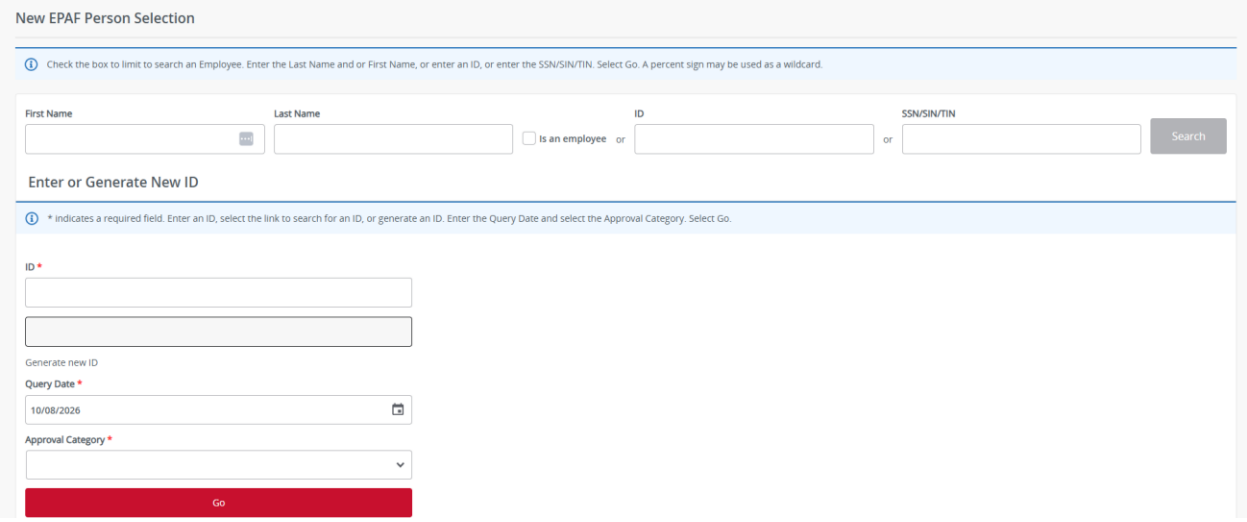
EPAF Originator Summary



All EPAF originators have access to the EPAF Originator Summary page. Here, originators can check the status of their EPAF submissions and draft EPAFs. This page consists of two tabs:

- **Current:** Lists all EPAFs still needing action by an approver.
- **History:** Lists EPAFs that have been processed.

New EPAF

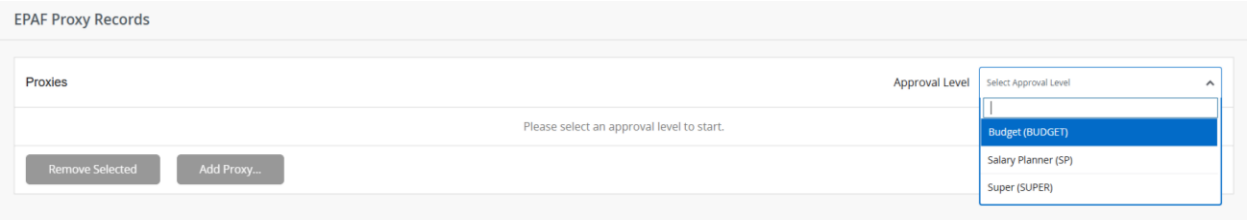


Clicking the New EPAF link on the EPAF menu takes EPAF originators to pages where they can create and submit EPAFs for review and approval.

Because the EPAF system allows originators to create many different types of EPAF, the pages that originators will navigate through after clicking New EPAF will vary depending on the type of EPAF. Regardless of type of EPAF, the first page users will reach after clicking the New EPAF link is the Person Selection screen.

The Person Selection page is important as all EPAF actions are connected to a single person working (or soon-to-be-working) for the University. Originators can select or search for a person by name. However, the Person Selection page defaults to searching for an individual by their ID.

EPAF Proxy Records



Clicking EPAF Proxy Records on the EPAF menu takes approvers to a page where they can designate a proxy, one or more users who can approve EPAFs in their absence.

The proxies an EPAF user can designate depends on the number of **Approval Levels** at which this user has been set up as an approver:

- Users who approve EPAFs at one level only will be able to name one or more proxies for that single Approval Level.
- Users who approve EPAFs at multiple levels will be able to name one or more proxies for each Approval Level. Proxies do not need to be the same individual(s) across all levels but may be different individuals.

Setting A Proxy

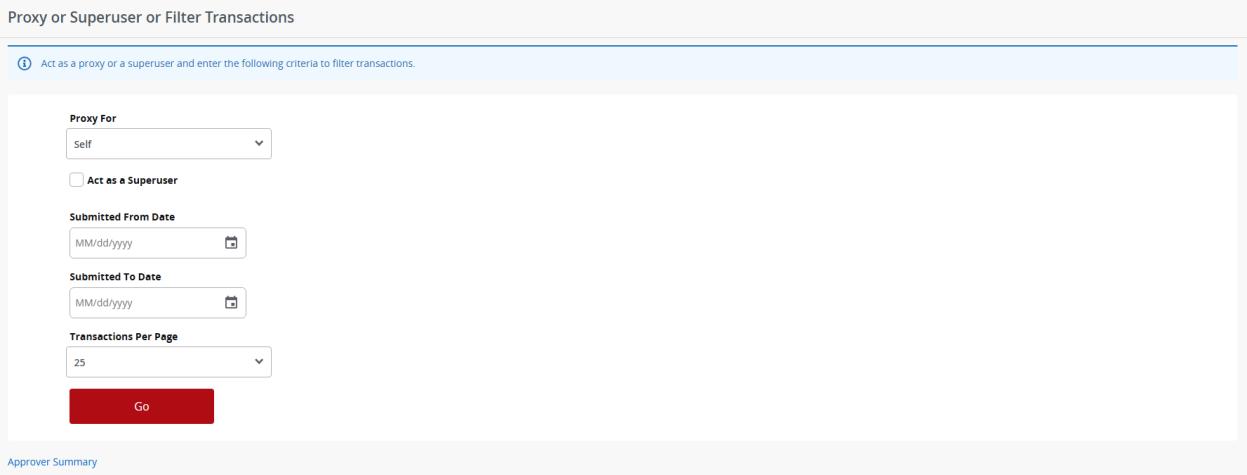
The EPAF proxy feature also allows approvers to remove or change proxies. To do so, start at the EPAF Proxy Records page:

- Select the Approval Level for which you want to designate a proxy. If you serve at multiple levels, you will have multiple choices.
- When the Name field appears, select a trusted employee to serve as your proxy. Check the Add box, then click Save.
- To add another proxy at this Approval Level, repeat the process of selecting a name, checking Add, and clicking Save.
- To remove a proxy, check the Remove box next to the proxy's name, then click Save.
- Once you have chosen a proxy, this employee can select the link Act as a Proxy from the main EPAF menu to perform this important function on your behalf.



For security, it is critical that approvers designate only those employees whom they trust and who are in their department or reporting chain as their proxies.

Act as a Proxy



Clicking Act as a Proxy on the EPAF menu enables EPAF users to act as a proxy for an approver who has designated them in this role, act as a superuser if this role has been granted to the user; and filter EPAFs to access submissions that fall within a specific date range.

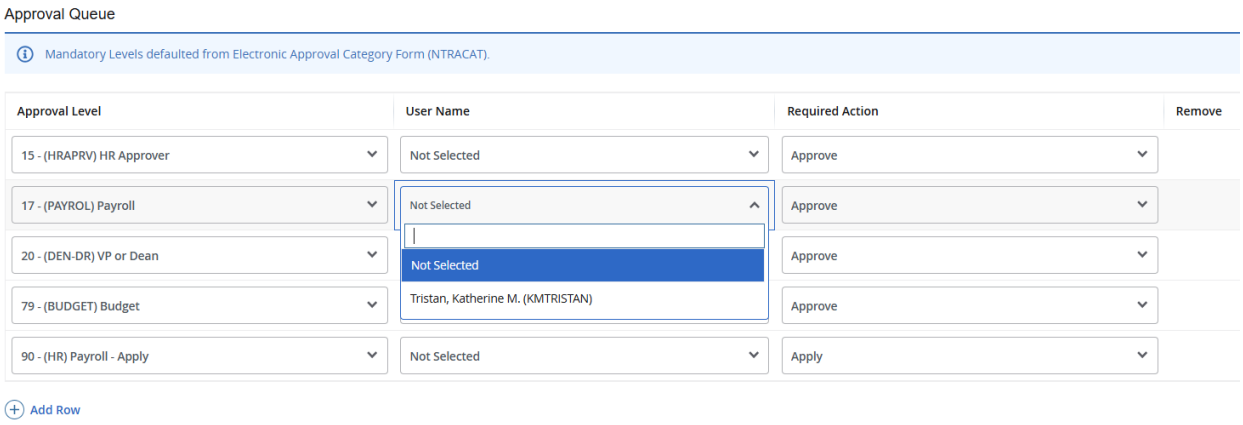
Routing Queues

When creating new EPAFs, users or originators will find a predefined Routing Queue included in each EPAF. The Approval Levels in each Routing Queue are mandatory to ensure that each EPAF action has been reviewed, approved, disapproved, returned for correction, or applied along the reporting chain responsible for that action. These approvals ensure careful implementation of actions that affect the university's budget.

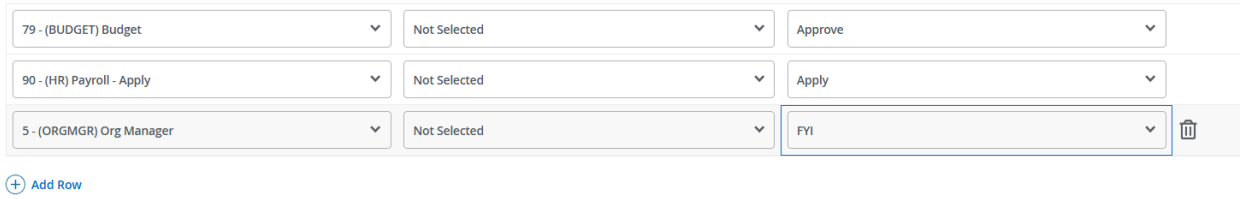
Each type of EPAF or Approval Category (new hire, re-hire, stipend, etc.) has its own predefined Approval Levels. Thus, one Approval Category may require approval by an academic department, the Provost, HR, and Payroll while another category may require approval by an administrative office, Division Vice President, HR, and Payroll.

For each Approval Level (HR, Payroll, etc.), the employee creating this EPAF must fill in the User Name with an authorized approver. These approvers are not random but are also predefined.

To select an approver, the EPAF originator clicks the dropdown next to a User Name field and chooses an approver from the list presented. Certain Approval Levels list one name only. Others require the originator to choose the approver best suited to the type of EPAF being created:



If your department's financial manager should be included in the routing queue, click Add Row, select Organization Manager as the Approval Level, choose their name in the User Name field, and select the appropriate required action. Don't worry about the order of the queue, as the approval levels will automatically sort when you click Save.





It is critical that you select the correct approver name for each Approval Level. Incorrect information will delay processing personnel actions, including hiring or paying employees on time. If you have any doubts about which names to select, reach out to Human Resources.