CHANGE IN SUPERVISOR

First, I will need to open up NIDA. I can do that by going to the main Andrews webpage, then under Faculty Staff at the top, click on NIDA Lookup. Once in, I can obtain my student's ID number, and I can confirm in the Employee line their position in my department.

I am now ready to start my EPAF.

Go to www.andrews.edu/go/myemployeedash. I may need to log in with my AU credentials. Once logged in, over on the right side of the screen, under My Activities, click on Electronic Personnel Action Forms (EPAF).

Once I am in the EPAF admin page, I will see some tiles. FYI if I have not ever been an approver, I will not see the EPAF Approver Summary tile, also if I have not been assigned in an approval queue for a submitted EPAF, I will not see the EPAF Proxy Records tile.

Something I need to keep in mind while I am working on completing the EPAF is that I will need to dismiss any messages that pop up at the right-hand corner. I can do that by clicking on the number in that corner.

To start the EPAF, I'll click on the New EPAF tile. On this first screen, I will go back to the NIDA screen and copy my student's ID number and paste it in the ID field here (remember: the leading zeros will ALWAYS need to be included). I will then tab over, and their name should appear in the field below.

Please note: do not click on the Generate new ID, we do not use this function

In the query date field, today's date will default in. If necessary, I will need to change this to be the effective date of the change in supervisor.

Next, I will need to select the EPAF category. Clicking the drop-down arrow, I select the Change Supervisor category. As soon as I select this category, if I scroll down, I will see all their active campus positions listed. (The All Jobs button will bring up terminated/prior positions).

Then I click the Go button.

The next screen will be selecting the job or position that I want to change the supervisor for. Click/check the box of the position to apply the change to and click Go.

This will now take me to the EPAF screen.

I can confirm all the information I entered or selected in the prior screen in the top section here.

On the category section heading, I will notice the position code, job title, and last paid date next to it.

The first thing I need to do is confirm the date field. What defaults in is the date I entered in the prior screen. IMPORTANT step: I need to look at the last paid date indicated on the section heading above and compare it to the effective date I entered. The effective date must be AFTER the last paid date–make the change if necessary. If my effective date is BEFORE the last paid date on the job, I will NOT be able to submit the EPAF.

The next three remaining fields are asking for the new supervisor information. I will go back to NIDA as that is where I will find all the information needed.

First, I will search for the supervisor. Then once I find them, I will note their ID number and go to the Employee line and hover over the "i" icon next to their position title. If the supervisor has multiple positions, I will grab the most appropriate one for my EPAF. The position code and the suffix will appear. I will enter these three pieces of information in the respective fields in the EPAF, copying their ID number and entering the position code and the full two-digit suffix.

The change reason has been defaulted and locked.

Lastly, the Routing Queue will be completed. I see two minimum required approval levels. These should not be changed. The first is the immediate supervisor. This can be the actual immediate supervisor, or it can be the hiring manager, if that is the structure and protocol in my department. I will go to the Username column and search for that individual and select their name. Then, for the next approval level, I will select the name listed in the Username of the HR applier. FYI, the applier will be the one to take the final action to reflect the change in supervisor for the job in Banner.

Additionally, if needed or appropriate, I can add an FYI approval level. They will be prompted to acknowledge, but the acknowledgement is not required for the EPAF to be applied.

If I mistakenly add an approval level, I can always delete it by clicking on the trash icon over to the right.

In the Comments section, I can add any additional comments that might be helpful for the EPAF.

Once I have completed filling out the EPAF fields and routing queue and any comments, I need to click Save at the bottom. I need to make sure no errors pop up at the top. If there are, I need to correct it and RE-SAVE (otherwise, my entries and correction are not saved). If I ever need to stop in the middle of completing a new EPAF, I can always click Save and come back to finish it later.

Important: I will always need to remember to SAVE any new EPAFs or updates to an EPAF. Saving does NOT submit the EPAF, but just saves it. Likewise, submitting does not Save any changes I've made since the last time I saved.

If I am ready to submit my EPAF, then I will click on the Submit button that appears after the initial save is done. Then I'm done! It will now be routed to the person indicated in the Immediate Supervisor approval level for approval. This EPAF will now appear under the History tab in the EPAF originator summary. I can get to the EPAF originator summary by clicking here.

Both the immediate supervisor approver and/or the HR applier may notice corrections that need to be made on the EPAF and can return it to me for correction. I will receive notification of this and will need to make the correction, SAVE, and submit the EPAF again.

FYI on notifications: I will be notified if any (additional) comments are entered and once the EPAF is applied.