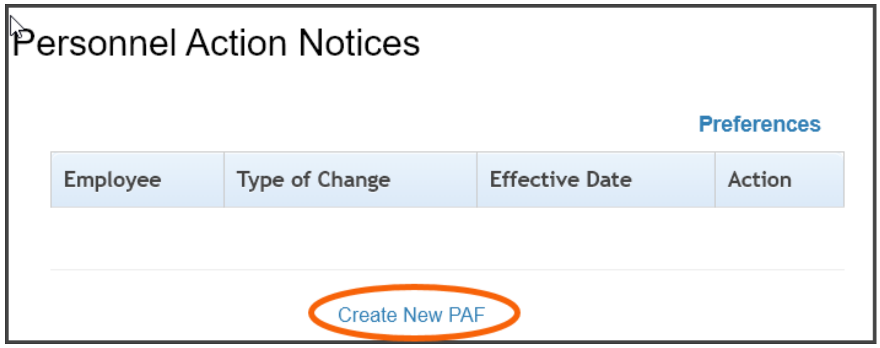
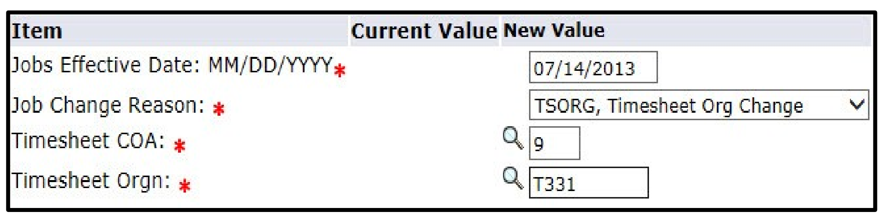
EPAF Quick Guide T-ORG Change

1. Log into **BengalWeb** and click on **Employees,** then **EPAFs**.
2. Click on **Create New PAF**



3. Enter the Employee ISU ID #. (*If you don't know their ID #, click the magnifying glass search icon (far right). Enter First and Last name or use the wildcard % and enter a partial name, i.e. Benny Bengal = Ben% Beng%.)* The employee's name will appear, along with their Banner ID #.
4. In the **Query Date** field, enter the effective date of the transaction (not necessarily today's date). Format the date as MM/DD/YYY.
   - **The EFFECTIVE DATE must be the start of a future pay period to avoid errors**
   - All pay periods begin on a Sunday, even if the employee's first/last day is not Sunday
5. In **Approval Category**, choose **TSORG**; click **Go**.
6. From the list of active jobs, find the position you wish to change. Click on the button in the **Select** column (far right) that corresponds with that job. Click **Go**.
7. When next page appears, click the **Save** button to assign a transaction number (required if you call HR for assistance).
8. Fill in the blank fields under **New Value**
   a. **Jobs Effective Date**: enter the effective date of the transaction (see above).
   b. **Timesheet Orgn**: enter the number of the new TORG. Then click **Save**.



9. The **Approval Levels** appear under Routing Queue. Click on the magnifying glass to lookup the name of each person you are assigning to each spot in the queue. **Do NOT choose one person for more than one Approval Level**, since it causes errors
10. If you wish to add additional Approval Levels, click on the **Not Selected** dropdown and choose the approval level you wish to add. Then assign someone to that level as explained in step 9. Under **Required Action** choose **FYI** if they only need to be able to view this transaction or **Approve** if they are to approve this transaction.
11. Click **Save**.
12. Add comments to the **Comment** section. Make sure your comments are relevant and professional. All comments in this section are a permanent part of the Banner record.
13. Review the data. If correct, click **Save**, then **Submit**. You can also save the transaction for submission at a later date OR delete the action if it is incorrect.
14. If no Errors appear you are finished. The EPAF will now go to the next person in the queue. (Do not be concerned about Warnings.)
    If Error messages appear, you *must* fix the errors before you can submit the EPAF.

NOTE: this request must be completely approved by the Friday prior to the end of the period.