Electronic Personnel Action Form (EPAF) Job Labor Distribution Changes

July 2015
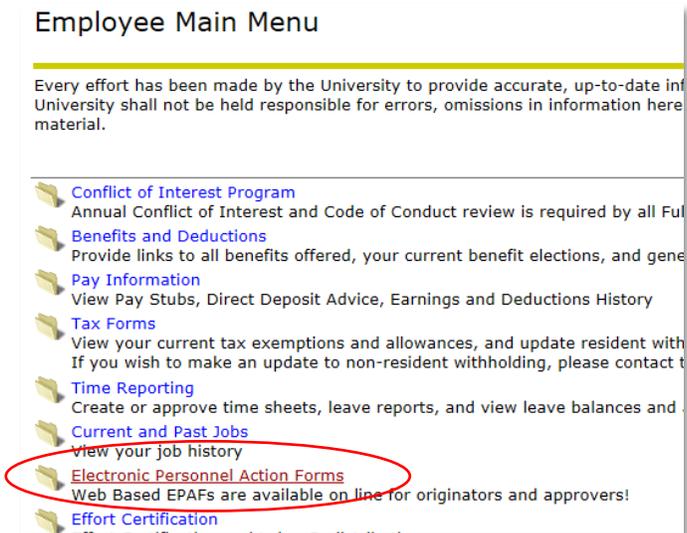
Submitting a Job Labor Distribution (FOAPAL) Change

1) Log in to DrexelOne (http://one.drexel.edu).
2) Select the **Employee** tab.
3) Select **More BannerWeb Employee Services** under the Payroll heading.

4) Select **Electronic Personnel Action Forms**.

5) Select **New EPAF.**

Electronic Personnel Action Form

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

RELEASE: 8.9.D

6) If you know the University ID (e.g. 12345678), enter the value in the **ID** field. You can also enter the user ID (e.g. abc123).

New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Q

✱ - indicates a required field.

ID: ✱ 14121459   Sheba Kitty Jennings

Query Date: MM/DD/YYYY✱ 06/12/2015
Approval Category: ✱   Not Selected

If you don't know the University ID, then initiate a search by select the Search icon 🔍 .

New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Quer

✱ - indicates a required field.

ID: ✱

Query Date: MM/DD/YYYY✱ 06/10/2015
Approval Category: ✱   Not Selected
Go

a.   The Person Search page will display. Select the Employee checkbox to limit your search to employee records and enter the search criteria. The % sign can act as a wildcard in the search if you are unsure of the spelling. Select the **Go** button to initiate the search.

b.   Select the **ID** to select the employee.

7) Enter a **Query Date** equal to the first date of a pay period. The payroll schedules can be found in the lower right corner of the Payroll Office website.

8) Enter the **Approval Category**. Select from the list of values or enter the value directly. Select the drop down menu to view the list of Approval Categories.

The available **Approval Categories** for this action are:

JOBLB1   Job Labor Change One Date

JOBLB2   Job Labor Change Two Dates

JOBLB3   Job Labor Change Three Dates

9) Select the **Go** button to search for the employee's jobs.

10) All of the employee's jobs will display. Use the **All Jobs** button to change the display from current and inactive jobs to only active jobs.

11) Use the **Select** button to indicate the job for which the change should occur.
Select the **Go** button to move to the next step.

12) Enter the new Chart of Accounts, Fund, Organization, Account, and Program (FOAPAL) values and the corresponding percentage.

One, two or three sections will appear based on which EPAF category was selected.

NOTE: Be sure to update the Effective Dates for all actions if multiple labor changes are entered.

13) Complete the **Routing Queue**. You can set a default routing queue so you don't have to enter it each time to create an EPAF.

Three levels of approval are required:

Level	Value	Action
College/School Budget Administration	Select approver using the search icon	Approve
HRIS	User name – EPAFHR	Approve
HRADMN	User name – EPAFHR	Apply

If the default has not been set, then enter the values by entering the user ID or selecting the Search icon.

a) Adding Additional Approvers and/or FYI Acknowledgement (Optional)

A list of approval levels can be accessed by clicking on the drop down arrow.

Routing Queue			
Approval Level	**User Name**		**Required Action**
15 - (DEPBUD) College/School Budget Admin	SLJ59	Susan L Jennings	Approve
98 - (HUMRES) HRIS	EPAFHR	Epafhr HR EPAF User for: HR	Approve
99 - (HRADMN) HR System Administration	EPAFHR	Epafhr HR EPAF User for: HR	Apply
Not Selected			Not Selected
Not Selected			Not Selected

Note: All approval actions must be taken prior to the change being applied to the employee record. "FYI" actions are not required for the change to be applied.

Typical additions are:

Approval Level	Required Action
Department	Approve or FYI
Principle Investigator	Approve

b) Adding a Comment (Optional)

Enter any comments in the comment field. These comments will become part of the employee's permanent job record.

Comment   Save

Temporary change. Budget transfer request attached.

14) Save the record by selecting the **Save** button. A confirmation message will appear at the top of the page and the status of the EPAF will change to "Waiting."

Electronic Personnel Action Form

✔ Your change was saved successfully.
💬 Enter the information for the EPAF and either Save or Submit

Name and ID: Sheba Kitty Jennings, 14121459
Transaction: 593105   Query Date: Jun 01, 2015
Transaction Status: Waiting
Approval Category: FOAPAL Change Two New Dates, FOAP02

Save   Submit   Delete

a) Attaching a Document (Optional)

The option to upload documents will appear at the bottom of the page after the record has been saved. Only Originators can upload documents. You may want to attach supporting documentation or budget transfers.

i. Select **Upload Document**.

Document

View Documents Loaded
Upload Document
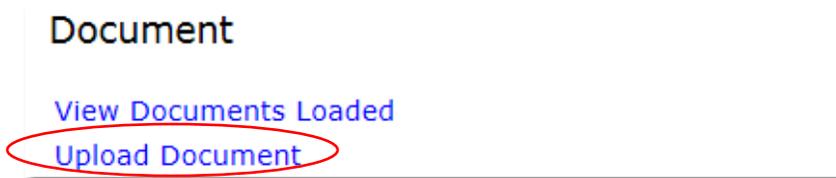
ii. Navigate to the document to be uploaded by selecting the **Browse button**, then select **Save**. Close the window by selecting the X in the upper right hand corner.

Upload a document   Submit

Sheba K. Jennings
  (14121459)

                Select the file to upload: _____ Browse...
                                        Save
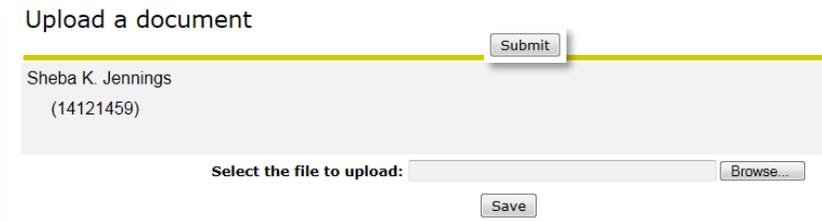
15) Submit the record by clicking on the **Submit** Button. A confirmation message will appear at the top of the form and the status of the EPAF will change to "Pending."

✔ The transaction has been successfully submitted.
💬 Enter the information for the EPAF and either Save or Submit

Name and ID: Sheba Kitty Jennings, 14121459
Transaction: 593105   Query Date: Jun 01, 2015
Transaction Status: Pending
Approval Category: FOAPAL Change Two New Dates, FOAP02
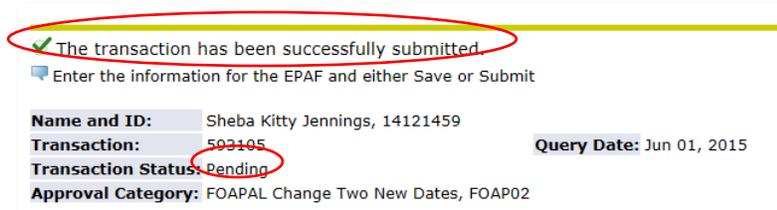
Approving/Acknowledging a Job Labor Distribution (FOAPAL) Change

1) Log in to DrexelOne (http://one.drexel.edu)
2) Select the **Employee** tab
3) Select **More BannerWeb Employee Services** under the Payroll heading
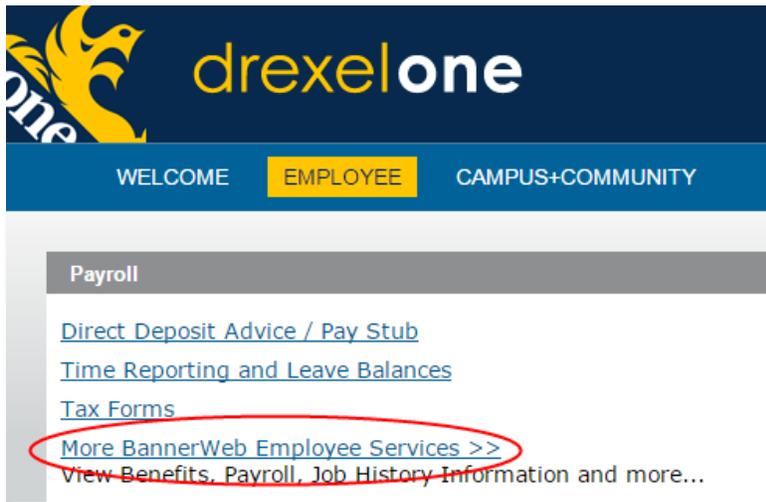
4) Select **Electronic Personnel Action Forms**

5) Select the **EPAF Approver Summary**

Electronic Personnel Action Form

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
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6) A list of transactions awaiting approval will display. Select the employee name to view the transaction.

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Fresenburg, Kimberly Associate Professor, 103970-00	14121460	593104	FOAPAL Change Two New Dates	Jun 11, 2015	Apr 01, 2015	Approve	☐	Comments
Jennings, Sheba K. Professor, 163298-00	14121459	593105	FOAPAL Change Two New Dates	Jun 12, 2015	Jun 01, 2015	Approve	☐	**Comments
Jennings, Susan L. Executive Director, HR Tech, 201110-00	14117547	588162	Fund Change	May 13, 2015	May 01, 2015	FYI	☐	Comments
Jennings, Susan L. Clerk IV, 114860-00	14117547	588240	Termination Job Only	Jun 02, 2015	Jun 03, 2015	Apply	☐	Comments

7) The transaction information will display.

Jump to Bottom

Job Labor Change One Date, 163298-00 Professor

Current

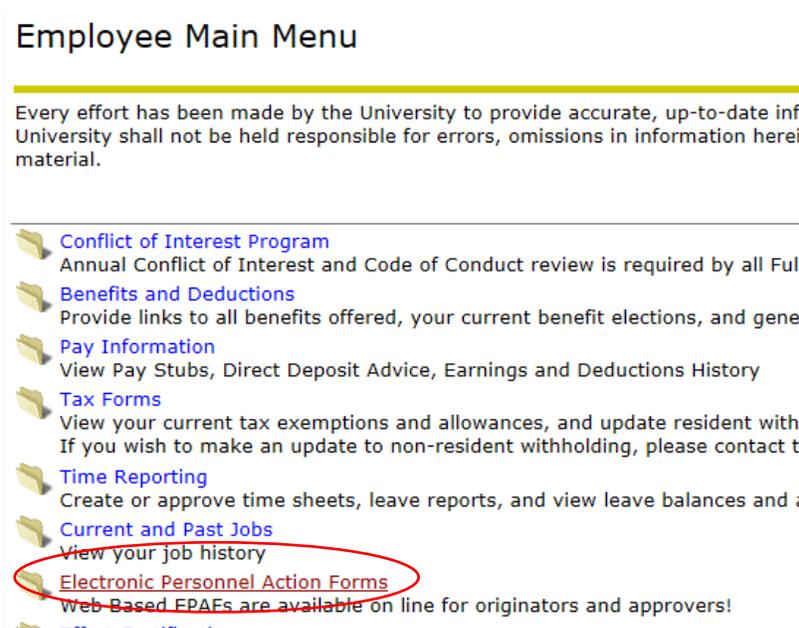**Effective Date: 01/01/2015**

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
D		110001	3173	2010	100					100.00		

New

Effective Date: 06/01/2015

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
D		110001	3173	2010	100					50.00		
D		110001	3281	2010	100					50.00		

Job Labor Change Two Dates, 163298-00 Professor

Current

Effective Date: 01/01/2015

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
D		110001	3173	2010	100					100.00		

New

Effective Date: 07/01/2015

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
D		110001	3173	2010	100					100.00		

The approver has three options:

Approve	The EPAF will move forward to the next approver or to be applied to Banner if you are the last approver.
Disapprove	The EPAF is canceled. If this option is selected, a corresponding comment must be entered.
Return for Correction	The EPAF is returned to the originator for correction. If this option is selected, a corresponding comment must be entered.

More Information	The EPAF is returned to the originator. If this option is selected, a corresponding comment must be entered.

Select the appropriate button to Approve, Disapprove, Return for Correction, or More Information.

| Approve | Disapprove | Return for Correction | More Info | Add Comment

The **More Information** button can be used by the approver to update the status of the EPAF without approving. This is an optional method to communicate to the originator that the approver has looked at the EPAF but is not ready to approve.

NOTE: The Next and Previous Buttons can be used to move between records instead of returning to the summary page.

EPAF Preview

Name and ID:	Sheba Kitty Jennings, 14121459	Job and Suffix:	163298-00, Pr
Transaction:	593105	Query Date:	Jun 01, 2015
Transaction Status:	Pending	Last Paid Date:	
Approval Category:	FOAPAL Change Two New Dates, FOAP02		

⊕ Previous   Next ⊕