Electronic Personnel Action Form (EPAF) Job Labor Distribution Changes

July 2015

Submitting a Job Labor Distribution (FOAPAL) Change	. 1
Approving/Acknowledging a Job Labor Distribution (FOAPAL) Change	. 8

Submitting a Job Labor Distribution (FOAPAL) Change

- 1) Log in to DrexelOne (<u>http://one.drexel.edu</u>).
- 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.



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 S	Selection					
	👎 Enter an ID, select the link to	o search for an ID, or generate an	ID. Enter the Q				
	* - indicates a required field.						
<	ID: * 14121459 Sheb	oa Kitty Jennings	å Q				
	Query Date: MM/DD/YYYY <mark>*</mark>	06/12/2015					
	Approval Category: *	Not Selected	•				

If you don't know the University ID, then initiate a search by select the Search icon \mathbb{R}

New EPAF Person S	Selection
👎 Enter an ID, select the link to	o 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.

Person Search						
👎 Check the bo	x to limit the search to an Employee. Enter the Last Name and or First Name					
<i>Search Criter</i> Employee: Last Name: First Name:	ia V Jennings					
Or						
ID: Or						
SSN/SIN/TIN	·					
Records per Pa	age: 25 💌					

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

er son	Search Res	Person Search Results							
To choose	a person, select a	a link under ID.							
Jmp to Bottom									
ump to Bot	tom								
ID	tom Last Name	▲ First Name	Middle Name	Birth Date	Name Type				
ID 10055151	Last Name ↓ Jennings	▲ First Name ▼ Scott	Middle Name	Birth Date Oct 18, 1970	Name Type				
10055151 10264534	Last Name	A First Name ▼ Scott Sarah	Middle Name William L	Birth Date Oct 18, 1970 Feb 20, 1986	Name Type				
ID 10055151 10264534 14117547	Last Name Jennings Jennings Jennings	A First Name ▼ Scott Sarah Susan	Middle Name William L	Birth Date Oct 18, 1970 Feb 20, 1986 Jan 01, 1990	Name Type				
10055151 10264534 14117547 14129047	Last Name Last Name Jennings Jennings Jennings Jennings	▲ First Name ▼ Scott Sarah Susan_ Sheba	Middle Name William L L Kitty	Birth Date Oct 18, 1970 Feb 20, 1986 Jan 01, 1990 Apr 04, 1980	Name Type				

- 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 <u>Payroll Office website</u>.
- 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.

New EPAF Perso	on Selection	
🔍 Enter an ID, select the	link to search for an ID, or genera	ite an ID. Enter the Query Date an
+ - indicates a required	field.	
ID: * 14121459	Sheba Kitty Jennings	å Q
Query Date: MM/DD/Y Approval Category: *	Not Selected	

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.

New	New EPAF Job Selection									
👎 Enter	\blacksquare Enter or search for a new position number and enter the suffix, or select the link under Title.									
ID:		Sheba	Kitty Je	ennings, 1	4121459					
Query	Date:	Jun 01	, 2015							
Approv	val Cate	JORY: FOAPA	L Chang	ge Two Ne	ew Dates, FOAP02					
FOAPA	L One Da	ate Change,	FOAP	01						
Search	Туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job									0
	Primary 163298 00 Professor 3173, Sociology Jan 01, 2015 Active 💿									
All Job Next A	All Jobs Next Approval Type Go									

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.

ob L	abor Cha	inde One Da	ate, 163298-	00 Profess	sor						
			,								
urrei	nt										
ITECT	ive Date: (ndex Eund	01/01/2015	an Account Drov	aram Activit	v Location Dr	viect Cost D	arcent Encu	mbrance O	verride En	d Date	
	1100	01 3173	2010 100		y Location Pro	Ject Cost Pt	100.00	indiance of		u Date	
lew		\sim									
ffecti	ve Date: MI	M/DD/YYYY 06	/01/2015								
OA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
D		4 110001	3173	Q 2010	Q 100					50.00	
ι D		Q 110001	3281	Q 2010	Q 100					50.00	
2		Q	Q	Q	Q						
2		Q	Q.	Q	Q						
2		Q	Q	Q	Q						
Defau Db Li	ilt from Inde abor Cha	x Save and A inge Two Da	dd New Rows ates, 163298	-00 Profes	ssor						
urre	nt										
ffect	ive Date: (01/01/2015									
	ndex Fund	Organizatio	on Account Pro	gram Activit	y Location Pro	oject Cost Po	ercent Encu	mbrance Ov	/erride En	d Date	
	1100	01 5175	2010 100				100.00				
lew		_									
ffecti	ve Date: MI	M/DD/YYYY 07	/01/2015								
AO	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
۶ D		Q 110001	Q 3173	Q 2010	Q 100					100.00	
2		Q	Q	Q	Q						
2		Q	Q	Q	Q						
2		- Q	Q	Q							

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 $\frac{q}{2}$.

Defaulting values for Labor Distribution Default from Index Save and Add New Row	fron vs	n the Job records.		
Routing Queue				
Approval Level	Us	ser Name		Required Action
15 - (DEPBUD) College/School Budget Admin	Q	SLJ59	Susan L Jennings	Approve
98 - (HUMRES) HRIS	Q	EPAFHR	Epafhr HR EPAF User for: HR	Approve
99 - (HRADMN) HR System Administration	9	EPAFHR	Epafhr HR EPAF User for: HR	Apply
Not Selected	9)		Not Selected
Not Selected	- 0	•		Not Selected
Not Selected	• •	•		Not Selected
Not Selected	• 0	•		Not Selected
Save and Add New Rows				

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	Q SLJ59	Susan L Jennings	Approve
98 - (HUMRES) HRIS	Q EPAFHR	Epafhr HR EPAF User for: HR	Approve
99 - (HRADMN) HR System Administration	Q EPAFHR	Epafhr HR EPAF User for: HR	Apply
Not Selected			Not Selected
Not Colocted	↓ Q		Not Colocted

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	
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."



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.



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

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."



Approving/Acknowledging a Job Labor Distribution (FOAPAL) Change

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

drexelone					
WELCOME	EMPLOYEE	CAMPUS+COMMUNITY			
Payroll					
Direct Deposit Advice / Pay Stub Time Reporting and Leave Balances					
Tax Forms <u>More BannerWeb Employee Services >></u> View Benefits, Payroll, Job History Information and more					

4) Select Electronic Personnel Action Forms

Employee Main Menu
Every effort has been made by the University to provide accurate, up-to-date info University shall not be held responsible for errors, omissions in information herei material.
Conflict of Interest Program Annual Conflict of Interest and Code of Conduct review is required by all Full
Benefits and Deductions Provide links to all benefits offered, your current benefit elections, and gener
Pay Information View Pay Stubs, Direct Deposit Advice, Earnings and Deductions History
Tax Forms View your current tax exemptions and allowances, and update resident with If you wish to make an update to non-resident withholding, please contact t
Time Reporting Create or approve time sheets, leave reports, and view leave balances and a
Current and Past Jobs
Electronic Personnel Action Forms Web Based EPAFs are available on line for originators and approvers!

5) Select the EPAF Approver Summary



6) A list of transactions awaiting approval will display. Select the employee name to view the transaction.

EPAF Transactions								
▲ Name ▼	▲ ID ▼	A Transaction ▼	≜ Type of Change ⊽	▲ Submitted Date ▼	▲ Effective Date ▼	A 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, 162298-00	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.

Job Labor Change One Date, 163298-00 Professor						
Cumant						
Current	- D-t 01 (01 (001F					
Effective	e Date: 01/01/2015					
COA Ind	lex Fund Organizat	ion Accour	it Program Activity	Location Project Cost Percent Encumbrance Override End Dat		
D	110001 3173	2010	100	100.00		
New						
Effectiv	e Date: 06/01/2015					
COA Ind	lex Fund Organizat	ion Accour	nt Program Activity	Location Project Cost Percent Encumbrance Override End Dat		
D	110001 3173	2010	100	50.00		
D	110001 3281	2010	100	50.00		
D	110001 3281	2010	100	50.00		
D	110001 3281	2010	100	50.00		
D Job Labo	110001 3281 or Change Two Dates	2010 5, 163298-	100 00 Professor	50.00		
D Job Labo	110001 3281 or Change Two Dates	2010 5 , 163298 -	100 00 Professor	50.00		
D Job Labo Current	110001 3281 or Change Two Dates	2010 5, 163298-	100 00 Professor	50.00		
D Job Labo Current Effective	110001 3281 or Change Two Dates e Date: 01/01/2015	2010 5, 163298 -	100 00 Professor	50.00		
D Job Labo Current Effectivo COA Ind	110001 3281 or Change Two Dates e Date: 01/01/2015 lex Fund Organizat	2010 5, 163298 - ion Accourt	100 <i>OO Professor</i> nt Program Activity	50.00 Location Project Cost Percent Encumbrance Override End Dat		
D Job Labo Current Effective COA Ind D	110001 3281 or Change Two Dates e Date: 01/01/2015 lex Fund Organizat 110001 3173	2010 5, 163298- ion Accour 2010	100 00 Professor nt Program Activity 100	50.00 Location Project Cost Percent Encumbrance Override End Dat 100.00		
D Job Labo Current Effective COA Ind D	110001 3281 or Change Two Dates e Date: 01/01/2015 lex Fund Organizat 110001 3173	2010 5, 163298- ion Accour 2010	100 <i>00 Professor</i> 11 Program Activity 100	50.00 Location Project Cost Percent Encumbrance Override End Dat 100.00		
D Job Labo Current Effective COA Ind D	110001 3281 or Change Two Dates e Date: 01/01/2015 lex Fund Organizat 110001 3173	2010 5, 163298- ion Accour 2010	100 <i>00 Professor</i> 10 100	50.00 Location Project Cost Percent Encumbrance Override End Dat 100.00		
D Job Labo Current Effective COA Ind D New Effective	110001 3281 or Change Two Dates e Date: 01/01/2015 lex Fund Organizat 110001 3173	2010 5, 163298- ion Accour 2010	100 <i>00 Professor</i> 10 100	50.00 Location Project Cost Percent Encumbrance Override End Dat 100.00		
D Job Labo Current Effective COA Ind D New Effective	110001 3281 or Change Two Dates e Date: 01/01/2015 lex Fund Organizat 110001 3173 e Date: 07/01/2015	2010 5, 163298- ion Accour 2010	100 <i>00 Professor</i> 10 100	50.00 Location Project Cost Percent Encumbrance Override End Dat 100.00		
D Job Labo Current Effective COA Ind D New Effective COA Ind	110001 3281 or Change Two Dates e Date: 01/01/2015 lex Fund Organizat 110001 3173 e Date: 07/01/2015 lex Fund Organizat	2010 5, 163298- ion Accour 2010	100 00 Professor 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 100 1	50.00 Location Project Cost Percent Encumbrance Override End Dat 100.00 Location Project Cost Percent Encumbrance Override End Dat		

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 Ajid 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							
4	😌 Previous 🛛 Next ອ	>							