

## Overview

This job aid outlines how to create a funding change ePAF (electronic personnel action form). Make sure to only update the fields outlined in the training materials. If any additional changes are needed, a paper PA form will be required.

## Create a Funding Change ePAF

- 1. Log into HR Direct and navigate to the ePAF Home Page.
  - a. Access NavBar by selecting the Compass and choose **Department Self Service** and then the **ePAF Home Page.**



2. Click on the link to Start a new ePAF



3. Choose the Edit Existing Job link



4. Search for the employee using one of the various options. For example, enter the **Last name** or **Employee ID** and click **Search**. Select the employee from the search results.

## Select An Employee

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value	
▼Search Criteria	
Empl ID = 🗸	Q
Empl Record = 🗸	
Name begins with 🗸	Q
Last Name begins with 🗸	Q
Department begins with 🗸	Q
Employee Group begins with 🗸	Q
Case Sensitive	
Search Clear Basic Search	Save Search Criteria
Search Results	
View All	First 🕚 1 of 1 🕑 Last
Empl ID Empl Record Name L	ast Name Department Employee Group Payroll Status

5. In the Job Data section, enter the **Effective Date** and tab out of the field. Note the eForm ID # appears at the top of the page. Click **Next** at the bottom of the page.

Job Data				
*Effective Date:	01/15/2020			
*Employee Group:	Professional (W60) N	Ion Unit		
*ls this a Positioned Job?	No 🗸			
Supervisor ID:	1	F		
*Department:	W821900	Pathology		
*Job Code:	MB0266	Education Program Specialist	*Full/Part Time	Full-Time 🗸
*Location Code:	ASHERMAN	Albert Sherman Building	*Regular/Temporary	Regular 🗸
*Standard Hours:	40.00 *FTE:	1.000000		
Mail Drop ID:	156			
		<< Previous	Next >>	
		<< Search	Save for Later C	lose

6. Next update the **Compensation Data** by clicking the Add Date Range button.

Compensation	Data												
Employee Type	e: Exception Hourly	[	$\checkmark$										
Bi-Weekly Rate	2091.06120	0	Annual Rate:	\$54,367.591									
Plan	W60 Salary Gra	de 41											
Add Addi	tional Components of Pa	у?											
Change Amou	int: 0.000000	Char	ige Percent: 0.000	)									
Compensatio	n Rate \$5	4,367.591											
Begin Date	e 07/01/2019											_	
								Earnings	Distribution		Personalize   Find		
Changed	GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Code	Туре		Commitment Amount	Fund End Date	
1 🗹	W103658	51453	W821900000	A01					Percent	100.000	\$0.000		1 🚍
				Add	Date Range								
Begin Date	e 01/15/2020	21				-							
											Personalize   Find	First	1 of 1 🕨 Last
Changed	GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code	Distribution P	ercent			Key Value
1 🗹	[]Q	L I						Q	Percent 🗸	0.000	\$0.000	Ħ	- ± -
			<< Prev		ext >>								
				Save	for Later								

- A new grid appears below. Enter the Begin date and GL Combination Codes. Once the code is entered, the fund department and program code will populate. Leave the Earnings Code blank. Update the Percent and include a Fund End Date (defaults to end of FY if blank). Click Next.
- 8. Review the Time and Labor Data and click **Next**.

Time and Labor Data		
Union Code:	W60	Non-Unit Professional
*Pay Group:	UMW	UMass Worcester
*Empl Class	2	Professional
Workgroup:	W_PROF	Professional
Taskgroup:	UM_EXP	Exception Taskgroup
Time and Labor Sched	ule	
C Schedule differen	t from standard?	
		<< Previous       Next >>       Save for Later

- 9. The Action & Action Reasons should include the **DTA** and **FCG** codes. Add any Comments if needed and choose one of the following actions.
  - a. If the form is for non-grant funding and does not require any Principal Investigator signatures, choose the **Submit button and skip ahead to step #25a.**
  - b. If the funding change requires Principal Investigator signature, click **Save for Later** and continue following the steps below to obtain the required approvals.

eFo	orm ID: 3	320810					
Act	ions & Actior	1 Reasons					
	Action Code	Action Description	Reason Code	Action Reason Descri	ption		
1	DTA 🔍	Data Change	FCG 🔍	Funding Change			+ -
File	Attachments	3		Personalize   Find   🗖	First 🛛	1 of 1 🕨 Last	
	Upload	View	<b>Description</b>		Attachment Id		
1	Upload	View		Q		Delete	
	Add File Attac	hment					
Con	nments						
	ur Comment: est ePAF.		*	<<	Previous	Submit Save for Later	
	mment Histo	ry:					
8	Refresh						

10. Next you will see the Form Finalized screen with a note in the Form Status that "You have just PLACED ON HOLD this form."

Department:	W821900	Pathology	Gei						
eForm ID:	320810								
Form Status									
You have just f	PLACED ON	HOLD this form.							
Process Visua	alizer								
1: Warner,Lind (TESTGT10002		2: HCMU_GT_DEPT_APRV	3: HCMU_GT_CE_ADMIN	<ul> <li>4: HCMU_GT_PI</li> </ul>	5: HCMW_GT_FIN_DEF	> T_HD	e. HCMW_GT_FIN_DEPT_HD2	> HC	7: mu_gt_grants
REAL STREET	REVIEWER	9: HCMU_GT_HR_UPDATE	10: HCMU_GT_HR_UPDATE_2	> 11: Integration Broker	> 12: System				
<u>Go To Worklis</u> View This Forr Go To ePAF H <u>Close This For</u>	<mark>m</mark> Iome Page								

- 11. Click on the View This Form link.
- 12. When viewing the form, the page loads with the Form Contents and Comments which include the funding grid.
- 13. From your web browser window, choose File and Print.



- 14. When the Print Option opens, Select Adobe PDF for the Printer and click Print.
- 15. Next choose where you would like to save the PDF of the ePAF and enter the File name.

- 16. The PDF will open, but if it doesn't, open it from the file location where you saved the form. The form needs to be routed to the appropriate PI's for signature approval.
- 17. Using DocuSign, create an envelope, add a signature line, enter all PI's who need to approve and send the envelope out for approval.
- 18. Once the PDF has been electronically signed by all PI's, log back into HR Direct to attach the approvals.
- 19. Navigate to the ePAF home page and choose Resubmit, Change or Withdraw an ePAF.

Elect	ronic Personnel Action Form (ePAF) Home Page
	Wy Worklist Work the items that have been routed to you.
( <sup>®</sup>	<u>Start a new ePAF</u> Start a new ePAF, which will then be routed to the appropriate approvers.
<b>E</b>	Resubmit, Change, or Withdraw an ePAF Make changes to an ePAF that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.
B	View an ePAF View a recently submitted ePAF, including information about its handling so far. ePAFs submitted in the last month are listed here. This is a read-only view.

20. Search by the ePAF ID, Employee ID, etc. or choose the Workflow Form status "On Hold" PAF Update All

Find an Existing Va	lue		
Search Criteria			
eForm ID	begins with 🗸		
Empl ID	begins with 🗸		
Workflow Form Type	begins with $\checkmark$		Q
Workflow Form Status	- ~	On Hold	~
Empl Record	- ~		
Name	begins with $\checkmark$		
Last Name	begins with 🗸		
Original Operator	begins with $\checkmark$		
Originated Date From	>= 🗸		31
Originated Date Thru	<= 🗸		31
Last Operator	begins with $\checkmark$		

Enter any information you have and click Search. Leave fields blank for a list of all v

Case Sensitive

Search

Clear Basic Search 🖾 Save Search Criteria

21. Click Next on the first three pages to navigate to the screen with the File attachment options.

	I Neusons						
Action Code	Action Description	Reason Code	Action Reason Descri	ption			
1 DTA 🔍	Data Change	FCG Q	Funding Change				+ -
File Attachments	\$		Personalize   Find   🗖	Firs	at 🔳	1 of 1 🕨 Last	
Upload	View	Description		Attachment	ld		
1 Upload	View		٩			Delete	
Add File Attac	chment						
Comments			Re	esubmit		Withdraw	
Your Comment	:		<<	Previous		Next >>	
		×.				Save for Later	
Comment Histo	ry:						
** Linda M Warne ** Fri, Dec 13 19, Test ePAF.	r (TESTGT10002378) 11:29:43 AM						

- 22. Upload the signed PDF document for the funding change. Note, the Description field needs to be populated with Other.
- 23. Add any comments if needed and click the **Resubmit** button.

Actions & Action Reasons									
Action Code Action Desc	ription Reaso Code		Action Reas	on Description					
1 DTA Q Data Chang	je FCG	Q	Funding Ch	ange				+	-
ile Attachments		Ē	Personalize   <u>F</u>		First	K 1	of 1 🖸 Last		
Upload View	Description			Attachment Id					
1 Upload View	N Other		Q	TESTGT10002 12-13-13.21.21		19-	Delete		
Add File Attachment									
Comments				Resubm	it	V	Nithdraw		
Your Comment:	<b>&amp;</b>			<< Previo	us		Next >>		
	×					Sav	ve for Later		
Comment History: ** Linda M Warner (TESTGT10 ** Fri, Dec 13 19, 11:29:43 AM	002378)								
Test ePAF.									

24. A popup message will appear, click Yes



- 25. The form will move to the next approval step in the workflow and the Form status will be updated to RESUBMTTED.
  - a. ePAFs that do not need PI approval using DocuSign will be Submitted and the popup message below will appear. Click **Yes**.

Message
Submit this form? (24642,112)
The form will be directed to the next approver, if any.
Yes No

26. The form status indicates that the form has been **SUMITTED**. The Process visualizer allows you to view the workflow for the form.



The funding change has been submitted!