

New EPAF – FOAP - CFOAP (Labor Distribution Change)

Click on this link to obtain Payroll Calendars

<https://www.emich.edu/controller/payroll/calendars.php>

1) Select New EPAF

The screenshot shows the 'Electronic Personnel Action Forms' interface. A blue header bar contains the 'ellucian' logo and navigation links for 'Home' and 'Personnel Actions'. Below the header, the main content area is titled 'Electronic Personnel Action Forms'. It features several interactive cards: 'EPAF Approver Summary' (describing transactions in the Current tab), 'EPAF Originator Summary' (describing transactions originated by the user), 'Act as a Proxy' (for self-service users with proxy privileges), and 'EPAF Proxy Records' (for authorizing users to approve EPAFs). The 'New ePAF' card, which allows creating a new transaction, is highlighted with a red border and a blue callout bubble.

2) Enter EID into ID Field

a) If you don't know the EID, you can also search by First Name and Last Name

The screenshot displays the 'New EPAF Person Selection' form. At the top, there are search fields for 'First Name' and 'Last Name', with callout bubbles pointing to them. Below these is a section titled 'Enter or Generate New ID' which includes a note: '* indicates a required field. Enter an ID, select the link to search for an ID, or generate'. The 'ID' field is highlighted with a red box and a callout bubble, and contains the value 'E00629914'. Below the ID field is a dropdown menu showing 'Andre G Bravo'. Further down, there are fields for 'Query Date' (set to 11/16/2022) and 'Approval Category'. A blue 'Go' button is at the bottom of the form.

3) Select **“Enter Labor Distribution Change – CFOAP”** in Approval Category


a) Select the drop down arrow on the Approval Category Field and Select “Enter Labor Distribution Change – CFOAP”

ID *


Andre G Bravo

[Generate new ID](#)

Query Date *

Approval Category *



[Go](#)

Drop down arrow here

4) Enter **Query Date** for which change will become **EFFECTIVE** in Banner

<https://www.emich.edu/controller/payroll/calendars.php>

a) Using the appropriate payroll calendar, enter the PAY PERIOD associated with the next future pay period, in the “Query Date” Field. (When considering the time needed to advance the ePAF through the approval routing queue. **If the request does not make it through the approval queue by the ePAF due date, it will need to be voided and re-created.**

b) Locate the “Last Paid Date” found in the “Employee Job Assignments to guide (below Approval Category). **EX: If the last paid date listed is 11/15/22, then 11/16/22 would be the Query Date that should be used.**

c) ****Caution, incorrect date will cause error when submitting ePAF****

The screenshot shows the Banner ePAF form and the Employee Job Assignments table. The form fields are: ID (E00629914), Name (Andre G Bravo), Query Date (11/16/2022), and Approval Category (Enter Labor Distribution Change, CFOAP). The 'Go' button is highlighted. The table below shows job assignments with columns: Position, Suffix, Title, Time Sheet Organization, Start Date, End Date, Last Paid, and Status. Callouts point to the 'Query Date' field, the 'Approval Category' dropdown, the 'Go' button, the 'Primary' job row, and the 'Last Paid' date (11/15/2022) in the table.

	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid	Status
Secondary	111410	00	Mascot	122750, HR Operations	06/01/2021		07/16/2022	Active
Primary	111411	00	HRIS Specialist	122750, HR Operations	07/16/2022		11/15/2022	Active
Secondary	111428	00	Tax/Payroll Manager	122750, HR Operations	10/16/2022		11/15/2022	Active
Secondary	C00001	00	Employee Consultant-Hourly	122750, HR Operations	10/16/2022			Active

5) Click **“Go”**

Continued on Next Page.

6) **Select jobs record for desired change**

a) Must be active jobs record (Typically updating the primary jobs record FOAP information)

Details

ID: Andre G Bravo, E00629914 Query Date: 11/16/2022 Approval Category: Labor Dist Change, CFOAP

Enter CFOAP, CFOAP

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
<input type="checkbox"/>	New Job	<input type="text"/>	<input type="text"/>						
<input type="checkbox"/>	Secondary	111410	00	Mascot	122750, HR Operations	06/01/2021		07/16/2022	Active
<input checked="" type="checkbox"/>	Primary	111411	00	HRIS Specialist	122750, HR Operations	07/16/2022		11/15/2022	Active
<input type="checkbox"/>	Secondary	111428	00	Tax/Payroll Manager	122750, HR Operations	10/16/2022		11/15/2022	Active
<input type="checkbox"/>	Secondary	C00001	00	Employee Consultant-Hourly	122750, HR Operations	10/16/2022			Active

Choose Primary Job

Click 'Go'

7) **Click "Go"**

Continued on next page

8) **Enter ePAF Information:**

- a) "Job Begin Date" this will default to Job begin date **(No action needed)**
- b) "Job End Date" for Restricted/Grant related funds: If end date is present, **this means job has a termination record that must be removed (Must contact HR_PAFs for assistance, If necessary)**
- c) "Contract Begin Date and Contract End Date" - Grants/Restricted Funds ONLY
 1. Only to be used for restricted funds or grant related funds. If not grant/restricted, **please leave blank**
 2. If grant/restricted funds related please enter the start date of the grant and the end date of the grant into the Contract Begin and End Date fields.
- d) Enter "Job effective date" ****Note – Effective date needs to be the first day of the pay period (Same as "Query Date"). If start date is in a pay period that was already processed, you must use first date of the next pay period.****
- e) Enter "Personnel date" (Needs to be the actual date that you would like this request to go into effect)
- f) "Job Change Reason" Defaults to the Action Code "CFOAP" **(No action needed)**

Job Begin Date *

A

Job End Date

B

Contract Begin Date

C 

Contract End Date

C 

Jobs Effective Date *

D 

Personnel Date *

E 

Job Change Reason *

F

9) **Enter updated job labor distribution (FOAP information)**

- a) Click "Add Row"
- b) "Current" FOAP information is found here
- c) Enter your "New/Updated" FOAP information here
 - i) ****Must add "E" into COA field or ePAF will not submit****
 - **Note activity code and location code are optional choices****

B) Current FOAP here

C) Must add "E" here

A) Click "Add"

Activity/Location (Optional)

D) Enter new FOAP info

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
E		G00005	122750	1210	60					100	

Effective Date MM/DD/YYYY: 11/16/2022

COA	Index	Fund	Org	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
		G00005		1210	60					50		
E		G00005	119950	1650	60					50		

Buttons: + E t from Index, + Add Row

Continued on next page

10) **Routing Queue**

a) Enter correct usernames for approval process

i) If FOAP Change is for a Grant/Restricted fund, the **“Project Director”** and **“Grants accounting”** must be added to Routing queue (**Move to Steps 11 and 12**)

ii) If FOAP Change is for Athletic, the **“Department Head”** must be added to the Routing Queue (**Skip to Step 13**)

b) ****Note: Do not change or remove “Approval Levels”. This will cause an error when submitting ePAF. Approval levels can be added to the ePAF, but these 4 cannot be change or removed****

Routing Queue

Approval Level	User Name	Required Action	Remove
45 - (BUDGET) University Budget	MHADLOCK - Campbell, Michelle L.	Approve	
90 - (HRIS) HR Offices	SBYRD13 - Byrd, Soyini A.	Approve	
95 - (PAYFYI) Payroll FYI	JSALVIA1 - Salvia, John J.	FYI	
99 - (PAYROL) Payroll Apply	JSALVIA1 - Salvia, John J.	Apply	

+ Add Row

Comments

Add Comment

Remaining Characters : 4000

Save

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11) APPROVAL QUEUE FOR (PRJDIR - for restricted/grant related funds only)

- a) PRJDIR is also known as Principal Investigator (PI)
- b) Click "Add Row"
- c) Select "15 - (PRJDIR) Project Director"
- d) Select the correct user name.
- e) Select "Approve" for "Required Action"

B) Select "PRJDIR"

C) Select User Name

A) Click "Add row"

The screenshot shows an 'Approval Queue' table with the following columns: Approval Level, User Name, Required Action, and Remove. The table contains several rows, with the last row selected. A callout 'A' points to the '+ Add Row' button. A callout 'B' points to the '15 - (PRJDIR) Project Director' dropdown menu. A callout 'C' points to the 'User Name' dropdown menu, which is open and shows a list of users. A callout 'D' points to the 'Required Action' dropdown menu, which is set to 'Approve'. Below the table is a 'Comments' section with an 'Add Comment' text area.

Approval Level	User Name	Required Action	Remove
45 - (BUDGET) University Budget	MHADLOCK - Campbell, Michelle L.	Approve	
90 - (HRIS) HR Offices	ABRAVOZ - Bravo, Andre G.	Approve	
95 - (PAYFYI) Payroll FYI	DBUSH1 - Moore Bush, Dawn M.	FYI	
99 - (PAYROL) Payroll Apply	DBUSH1 - Moore Bush, Dawn M.	Apply	
15 - (PRJDIR) Project Director	Not Selected	Not Selected	

D) Select "Approve"

12) APPROVAL QUEUE FOR (GRANTS - for restricted/grant related funds only)

- a) Click "Add Row"
- b) Select "17 - (GRANTS) Grants Accounting"
- c) Select the correct user name.
- d) Select "Approve" for "Required Action"

B) Select "PRJDIR"

C) Select User Name

Routing Queue

Approval Level	User Name	Required Action
45 - (BUDGET) University Budget	MHADLOCK - Campbell, Michelle L.	Approve
90 - (HRIS) HR Offices	ABRAVO2 - Bravo, Andre G.	Approve
95 - (PAYFYI) Payroll FYI	DBUSH1 - Moore Bush, Dawn M.	FYI
99 - (PAYROL) Payroll Apply	DBUSH1 - Moore Bush, Dawn M.	Apply
15 - (PRJDIR) Project Director	JALEXANDE1 - Alexander, Jessica	Approve
17 - (GRANTS) Grants Accounting	Not Selected	Not Selected

A + Add Row B C D

Comments

Add Comment

AFO - Fo, Anne
 JGRIWICKI - Griwicki, Judy L.
 KHOOPS - Schortgen, Katharyn K.
 EYESKO - Tefft, Emily A.

A) Click "Add row"

D) Select "Approve"

B) Select "PRJDIR"

13) APPROVAL QUEUE FOR (DEAN - for Athletics related funds only)

- a) Click "Add Row"
- b) Select "20 - (DEAN) Dean/Assoc Dean/VP"
- c) Select the correct user name.
- d) Select "Approve" for "Required Action"

C) Select User Name

A) Click "Add row"

Routing Queue

Approval Level	User Name	Required Action	Remove
45 - (BUDGET) University Budget	MHADLOCK - Campbell, Michelle L.	Approve	
90 - (HRIS) HR Offices	ABRAVO2 - Bravo, Andre G.	Approve	
95 - (PAYFYI) Payroll FYI	DBUSH1 - Moore Bush, Dawn M.	FYI	
99 - (PAYROL) Payroll Apply	DBUSH1 - Moore Bush, Dawn M.	Apply	
20 - (DEAN) Dean/Assoc Dean/VP	Not Selected	Approve	

A + Add Row B C D

Comments

Add Comment

sc
 SWETHER1 - Wetherbee, Scott

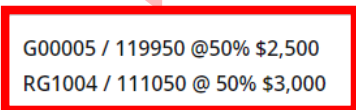
D) Select "Approve"

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14) **Comment Box only for Grants/Restricted funds**

a) Restricted/Grant fund **related changes must add the following into the comment box:**

i) **Fund / Org / % / \$Amount**



G00005 / 119950 @50% \$2,500
RG1004 / 111050 @ 50% \$3,000


Remaining Characters : 3944

[Save](#)

[New EPAF](#) · [EPAF Originator Summary](#)

15) Click **“Save”**

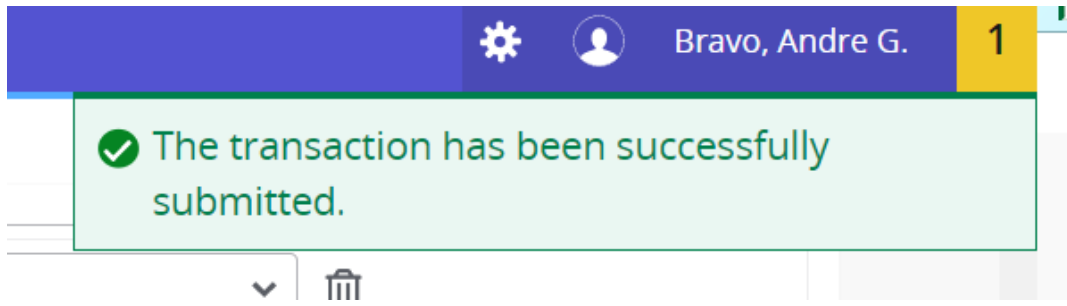
16) **Finally, click “Submit”**



[Delete](#) [Save](#) [Submit](#)

[New EPAF](#) · [EPAF Originator Summary](#)

17) **You will receive this green banner (below) indicating your ePAF has been submitted:**



The screenshot shows a user interface with a dark blue header bar. On the right side of the header, there is a gear icon, a user profile icon, the name "Bravo, Andre G.", and a yellow badge with the number "1". Below the header, a light green notification box contains a green checkmark icon and the text "The transaction has been successfully submitted." Below the notification box, there are two icons: a downward-pointing chevron and a trash can icon.

Questions and Concerns regarding your ePAF submissions can be directed to
HR-PAFS@emich.edu