

Job Assignment Default Labor Change Process Guidelines For Originators

Business Purpose

The purpose of this process is to initiate, via UAOnline, a change to default labor distribution charges for employees with existing assignments. This process should be used to generate a new labor change (LDCH) job record. Once the process is initiated in UAOnline, the requested change will be applied automatically to Banner each evening through a batch process, and email communications will be forwarded to the appropriate process participants based on the specific information entered into the Electronic Personnel Action Form (EPAF).

For additional information, refer to the paperless job process overview on the project website at <http://www.alaska.edu/hr/hr-procedures/paperless-job-processing/>.

Documentation Purpose

These instructions cover the entry of labor distribution job records through the EPAF process. Completion of this process will electronically change an employee's job assignment and send notification emails to the Employee, Time Sheet Approver, Supervisor, FYI Reviewer, Grants, Budget, etc., users as designated. Any future dated labor distribution records applicable in the employee's job assignment will be removed and will require an assessment of their validity before future labor distribution changes are reinserted through the electronic process.

Responsibilities

The PPA/CCC (Originator) must attend training sessions offered for this process or complete the online tutorial (to be available in future on the Labor Distribution Change Process page at <http://www.alaska.edu/hr/hr-procedures/paperless-job-processing/lbrchg/>).

Originators must complete EPAF entries within established timelines, and must be familiar with University payroll processing cycles so that the appropriate labor distribution records are reflected on the paper timesheet or on the web timesheet in UAOnline.

Security

Special UAOnline access, "EPAF Administrator Role," is required to enter an EPAF for changing an employee's job assignment labor distribution defaults through this process. Each originator must complete a Security Access Request Form for their campus. Request the "HR_EPAF_CLS" and "HRV_EPAF_CLS" security classes on the form and submit it to your HR security coordinator. If you have previously submitted a security access form and been granted access for another paperless job process (PJP), you do not need to submit another security access form.

Security forms are located at the following links:

UAA: http://www.uaa.alaska.edu/finsys/upload/Fin_HR.pdf

UAF: <http://www.uaf.edu/files/uafhr/HR-Access-Request-Form-Rev-8-2011.pdf>

UAS: http://www.alaska.edu/oit/sc/about/forms_newdocs/formAdminAccessUnixOracleBannerEDIR.pdf

SW: http://www.alaska.edu/oit/sc/about/forms_newdocs/formAdminAccessUnixOracleBannerEDIR.pdf

Definitions

LDCH – Labor Distribution Change

This type of job assignment change is used to identify a revision to the fund code, orgn code, and/or percentage that departments are charged for employee salaries and benefits. Changes to an employee’s job assignment will be reflected on their paper and/or online timesheet applicable for the effective date of the change.

Retroactive changes to labor distribution set-up cannot be made through this process. If retroactive charges are required for prior pay periods, a labor redistribution form must be completed and submitted to the campus budget office. A departmental assignment (D-Level org value on PEAEMPL) cannot be changed through this process at this time.

For more information on Labor Account Changes through the paper job form, please refer to the procedures at http://www.alaska.edu/files/hr/personnel.changes.labor_account.pdf.

Logging On

UAOnline

For PIN resets for UAOnline, please refer to <http://www.alaska.edu/oit/services/uaonline/help/>.

Access UAOnline at <http://uaonline.alaska.edu>.

Select “Login to Secured Area.” Enter your UA ID and PIN.

Select the following menus in sequential order:

- Employee Services
 - Electronic Personnel Action Forms
 - New EPAF (to begin a new transaction)
- OR
- EPAF Originator Summary (to finalize a previously saved transaction or review the progress of a submitted transaction)

General Instructions

If a labor distribution change for a date prior to the employee’s Last Paid Date is needed, the EA process in UAOnline cannot be used; a manual job form must be submitted to the campus Human Resources office. A manual job form must also be submitted for new hires or for other types of job assignment changes of an employee’s existing assignment.

Setting-up an EPAF Default Routing Queue

You can avoid having to select the routing queue set-up for each labor change transaction by referring to the Electronic Approval Routing Queue Set-up procedure found at http://www.alaska.edu/files/hr/ntrrout_setup.pdf.

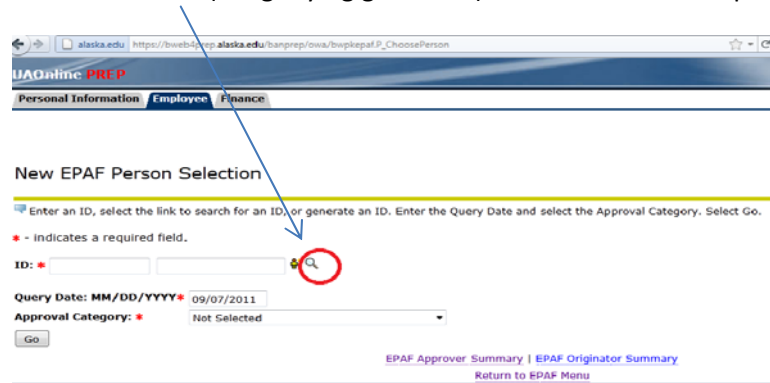
All subsequent transactions created by you for the “Labor Change, LBRCHG” electronic process will then use the default set-up from your routing queue.

Prior to entering transactions:

Transaction entries are limited to one entry per day for each employee position/suffix combination. If more than one transaction is entered for an employee’s position/suffix on the same day, one or more of the future-dated records inserted for the employee may be deleted during the daily NOPEAMA process. This issue has been reported to the software vendor; modifications are in progress to address the issue.

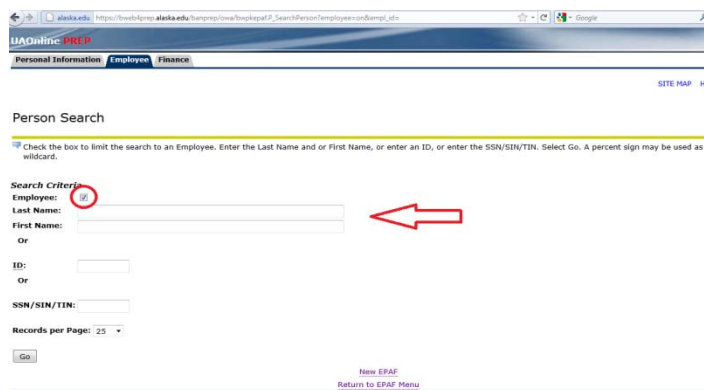
To Start a New Transaction:

- 1) Select New EPAF – the “New EPAF Person Selection” screen will appear.
- 2) Enter the employee ID or choose Search (magnifying glass icon) to search for the employee’s ID.



The “Person Search” screen is presented. Enter a portion or all of the information known about the employee. Select the “Go” button to be presented with a list of employees that match the entered search criteria.

Note: The Search functionality allows the use of the percent (%) as a wildcard for partial value entry of an employee name, ID, and/or SSN.



Click on the employee from the list of search results. You will be returned to the “New EPAF Person Selection” screen with the selected employee’s information inserted into the appropriate fields.

- 3) Enter a date in the “Query Date” field that is applicable for the employee’s job assignment labor distribution change. The query date will default as the effective date of the labor distribution change; however, the date can be changed at a later stage in the process, if needed.

Effective Date entries:

The Effective Date cannot be on or before the employee's Last Paid Date. Transactions with effective dates on or before the Last Paid Date will not be inserted into Banner. Instead, a paper job form must be submitted to your regional Human Resources office.

Note: Dates entered in any of the following formats will automatically revert to a MM/DD/YYYY format;

<u>Entry Format</u>	<u>Example</u>	<u>Entry Format</u>	<u>Example</u>
DDMONYYYY	25APR2011	MM/DD/YY	04/25/11
MM-DD-YY	04-25-11	MMDDYYYY	04252011
DDMONYY	25APR11	MMDDYY	042511
MM-DD	04-25	MM/DD	04/25
MMDD	0425		

alaska.edu https://bweb4prep.alaska.edu/banprep/owa/bwpkepaf.P_ChoosePerson?p_epafid=30039521

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Personal Information Employee Finance

New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

* - Indicates a required field.

ID: * 30039521 Irish Lass

Query Date: **MM/DD/YYYY** 09/07/2011

Approval Category: * Not Selected

Go

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)
[Return to EPAF Menu](#)

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Note: The value entered into the “Query Date” field will be brought forward to the “New EPAF Job Selection” screen and default into the EPAF transaction as the job assignment effective date for the new job change transaction. The date can be changed at a later stage in the process, if needed.

- 4) Select “Update Labor Distribution LBRCHG” from the “Approval Category” drop-down list. Select the “Go” button.

The “New EPAF Job Selection” screen will be displayed listing the employee’s open job assignments applicable for the “Query Date” entered on the “New EPAF Person Selection” screen.

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Personal Information Employee Finance

RETURN TO EMPLOYEE MENU

New EPAF Job Selection

Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: Irish Lass, 30039521
Query Date: Sep 01, 2011
Approval Category: Labor Distribution Change, LBRCHG

Update Job Labor Distribution 3, UJLBD3

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									
	Primary	210456	00	Admin Generalist 4	T800, Butrovich Bldg 2nd Floor	Apr 15, 2007		Jan 29, 2011	Active	<input type="radio"/>

All Jobs
Go

New EPAF
Return to EPAF Menu

Note: An “All Jobs” button is present to allow you to see a list of all past and present job assignments for the employee. However, at least one entry under the “Select” column must be made prior to selecting the “All Jobs” button. If no selection is made, you will receive an error message dialog box to make a selection before proceeding.

- 5) Select the appropriate job assignment for the employee, and then press the “Go” button to start the transaction entry.

You will be able to see key information about the employee’s current job assignment set-up and when the employee was last paid for this job assignment.

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Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: Irish Lass, 30039521
Transaction: Query Date: Jul 14, 2011
Transaction Status: Last Paid Date: Jan 29, 2011
Approval Category: Update Labor Distribution, LBRCHG

Save

Account Distribution | Routing Queue | Transaction History

Note: The “Account Distribution,” “Routing Queue,” and “Transaction History” jump links will direct you to the selected area of the transaction.

Selecting the Account Distribution link will display current information about the employee’s job assignment labor distribution set-up. The current labor distribution set-up will default into the data entry fields and be available for you to change. You can modify the fund and organization codes and their distribution as needed.

Current						
Effective Date: 02/13/2011						
COA Fund	Organization	Account	Program	Activity	Percent	
B 101010	16004	1251	4261GA		50.00	
B 101010	80039	1251	0166GA		50.00	

Note: When you move your mouse over the Fund or Organization fields displayed, the Fund name, main researcher associated with the Fund, and the Organization name will appear on both the “Current” and “New” sections of data. This information can be used to ensure the correct default labor charge set-up is selected for the job assignment.

When entering a new account line, you must include a Fund code, Organization (Org) code, and a Percent. However, if a default Org code is set-up for a Fund, the default Org and Account (Acct) code will default into the data entry line as soon as you navigate away from the Fund field.

The same action will occur if a default Fund is associated with an Org. You will be able to skip the Fund code entry, and fill in the Org code. As soon as you navigate away from the Org code field, the Fund and Acct code will default in the appropriate fields. The COA (Chart of Accounts code) can be entered, but will also default as soon as you navigate away from the Fund code field. The program code should be left blank and will default when the transaction is saved. You will not be able to change the account or program codes.

New						
Effective Date: MM/DD/YYYY 07/14/2011						
COA	Fund	Organization	Account	Program	Activity	Percent
B	101010	16004	1251	4261GA		0
B	101010	80039	1251	0166GA		50.00
B	103010	80159	1251			50
Total:						100.00

Note: For labor records that no longer needed, change the percent to zero; the line can be removed after you save the transaction.

- After completing the desired new labor distribution entry, select the “Save” button to save the transaction



- 7) If any labor distribution lines need to be removed (lines with a zero percent), you can remove these entries by checking the Remove box presented to you after the initial save of the transaction information. Saving the transaction a second time will remove the marked lines.

New
 Effective Date: MM/DD/YYYY 07/14/2011

COA	Fund	Organization	Account	Program	Activity	Percent	Remove
B	101010	16004	1251	4261GA		.00	<input checked="" type="checkbox"/>
B	101010	80039	1251	0166GA		50.00	<input type="checkbox"/>
B	103010	80125	1251	0166GA		50.00	<input type="checkbox"/>
Total:						100.00	

Any and all errors encountered will be presented to you within the top third of the screen. Refer to the Troubleshooting section of this document for additional details regarding error messages.

- 8) Once the labor distribution set-up is completed, the total percentage equals 100 percent, and no error messages are displayed when you save the entry, select the "Submit" button to finalize the transaction.

Update Job Labor Distribution 3, 305220-00 Manager, Last Paid Date: Dec 04, 2010

Current
 Effective Date: 09/18/2005

COA	Fund	Organization	Account	Program	Activity	Percent
B	104110	14326	1251	4242AS		10.00
B	104110	16049	1251	4261GA		25.00
B	101010	80125	1251	0166GA		25.00
B	101010	80126	1251	0166GA		17.50
B	106910	66910	1251	382RRR		3.20
B	998000	14326	1251	4242AS		4.30
B	103010	65001	1251	3016ID		10.00
B	103010	65003	1251	3016ID		5.00

New
 Effective Date: MM/DD/YYYY 06/30/2011

COA	Fund	Organization	Account	Program	Activity	Percent	Remove
B	101010	16049	1251	4261GA		25.00	<input type="checkbox"/>
B	101010	80125	1251	0166GA		25.00	<input type="checkbox"/>
B	101010	80126	1251	0166GA		25.00	<input type="checkbox"/>
B	103010	65001	1251	3016ID		12.50	<input type="checkbox"/>
B	103010	65003	1251	3016ID		12.50	<input type="checkbox"/>
Total:						100.00	



9) A message will be displayed at the top of the page if the transaction was “successfully submitted.”



10) Originators can view the status of any EPAF transaction by accessing the “Originator Summary” page from the “Electronic Personnel Action Forms” menu.

EPAF Originator Summary

Two tabs are displayed on this page: “Current” and “History.” The Current tab allows you to view the status of your submitted transactions that still require action at some level. The History tab allows you to view historical transactions that do not require further action. Transactions will remain on the History tab for six months.

Current Tab

To search transaction data submitted by you (as the originator) in UAOOnline:

On the Employee tab, select:

- Electronic Personnel Action Forms
- EPAF Originator Summary
- Current tab

EPAF Originator Summary

Current History

Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

Transaction Status: All Waiting Go

New EPAF | Default Routing Queue | Search | Superuser or Filter Transactions

1 - 2 of 2

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Adler, Happy Manager, 305220-00	30030404	3998	Update Labor Distribution		Apr 29, 2011	Waiting	Comments
Lass, Irish Admin Generalist 4, 210456-00	30039521	4041	Update Labor Distribution		Jul 14, 2011	Waiting	Comments

1 - 2 of 2

Return to Top

**Comments Exist

New EPAF | Default Routing Queue | Search | Superuser or Filter Transactions

Return to EPAF Menu

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The Current Tab will display any items which have a Transaction Status of "Waiting." If a labor distribution change transaction has a status of "Waiting," the transaction was saved but not yet submitted. To make corrections or updates to transactions that have a status of "Waiting," see the "Performing Actions on Transactions" section below.

Links Column

The Links column displays some or all of the messages and links listed below:

Comments

The "Comments" link exists for each record and directs you to the Comments page. Two asterisks listed next to the link (**Comments) indicates that comments for the transaction exist. Comments are listed chronologically from newest to oldest on the Current tab and can be added by the originator if desired. Access the comments by selecting the **Comment link. You can also view comments by clicking on the employee's name and scrolling to the bottom of the EPAF Preview screen.

Performing Actions on Transactions

If a transaction has been saved but not submitted, open the transaction by clicking on the employee name. The EPAF Preview page will open. Your choices for each transaction are "Void," "Delete," "Update," or "Add Comment."



EPAF Preview

✓ You are acting as an Originator.

Name and ID: Irish Lass, 30039521

Job and Suffix: 210456-00, Admin Generalist 4

Transaction: 4041

Query Date: Jul 14, 2011

Transaction Status: Waiting

Last Paid Date: Jan 29, 2011

Approval Category: Update Labor Distribution, LBRCHG

⏪ Previous

Delete Void Update | Add Comment

- Click **Void** to completely end the transaction.
- Click **Update** to make any needed corrections and/or changes to the job information. Note your corrections and/or changes in the Comment box, if desired. Once your changes are made, click **Save** and then click **Submit**. You **must select Save prior to submitting the record**. If you do not save prior to submitting, any changes you have made will be lost. Upon clicking the submit button, the transaction will be ready to be applied to the employee's job assignment as part of that evening's batch processing.
- Click **Add Comment** to add a comment and then select **Save**; this action will not remove the transaction from your Current tab.

History Tab

The History tab allows you to view historical transactions that do not require further action. Transactions will stay on the History tab for six months. To review the history of a transaction submitted by you (as the originator) in UAOnline:

On the Employee tab, select:

- Electronic Personnel Action Forms
- EPAF Originator Summary
- History tab

Under the History tab, you will be able to view all EPAF transactions which you have submitted within the last six months. For detailed descriptions about the transaction statuses, refer to the Transaction Status listing at http://www.alaska.edu/files/hr/ea_trans_statuses.pdf.

The screenshot shows the UAOnline interface for the EPAF Originator Summary. The 'History' tab is selected. Below the tab, there is a search bar for 'Transaction Status' with a dropdown menu set to 'All' and a 'Go' button. Below the search bar, there is a table of transactions with the following columns: Name, ID, Transaction, Type of Change, Submitted Date, Effective Date, Transaction Status, and Links. The table contains 10 rows of transaction data.

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
SW, Kline, Susan Computer Operator, 101042-00	30029588	3783	Update Labor Distribution	May 09, 2011	May 08, 2011	Voided	Comments
Swan, Barbie H. Admin Generalist 4, 210456-00	30014262	4035	Update Labor Distribution	Sep 02, 2011	May 30, 2011	Completed	Warnings
Swan, Barbie H. Admin Generalist 4, 210456-00	30014282	4022	Update Labor Distribution	Sep 02, 2011	Jun 30, 2011	Completed	
SW Reynolds, Mary Administrative Assistant, 299052-00	30029586	3991	Update Labor Distribution	Aug 29, 2011	Apr 29, 2011	Approved	Comments Errors
Smith, Jane M. Admin Specialist 2, 100222-00	30039823	4027	Update Labor Distribution	Aug 31, 2011	Oct 31, 2011	Approved	Comments Errors
Lass, Irish Admin Generalist 4, 210456-00	30039521	4000	Update Labor Distribution	Aug 30, 2011	Apr 25, 2011	Approved	Comments Errors
Lass, Irish Admin Generalist 4, 210456-00	30039521	3999	Update Labor Distribution	Aug 29, 2011	Jun 29, 2011	Approved	Comments Errors
Lass, Irish Admin Generalist 4, 210456-00	30039521	3927	Update Labor Distribution	Aug 05, 2011	Jun 05, 2011	Approved	Comments Errors

As long as a record is at an Approved status, you may return the transaction to your queue for correction. To do so, click on the employee's name in the EPAF Transaction list on the History tab. The EPAF Preview form will open.

EPAF Preview

✓ You are acting as an Originator.

Name and ID: Jane M Smith, 30039823

Job and Suffix: 100222-00, Admin Specialist 2

Transaction: 4027

Query Date: Oct 31, 2011

Transaction Status: Approved

Last Paid Date: Dec 04, 2010

Approval Category: Update Labor Distribution, LBRCHG

⊕ Previous Next ⊕

[Return for Correction](#) [Void](#) [Add Comment](#)

[Account Distribution](#) | [Errors](#) | [Comments](#) | [Routing Queue](#) | [Transaction History](#)

- Click on [Return for Correction](#). The EPAF Preview will reload and acknowledge that the transaction was successfully completed. You may now choose “Void,” “Update,” or “Add Comment.” If you choose Update, make the necessary changes, Save, and then Submit the record.
- Click [Void](#) to end the progress of the transaction. The status will change to Voided. Add a comment stating the reason for voiding the transaction.

When a transaction is in a “Completed” status, it has been applied to the employee’s job assignment in Banner. You may see the [Cancel Transaction](#) option in the EPAF Preview. This option will not reverse or allow you to cancel a job submitted in error and should not be selected. If the button is selected, the Transaction Status will change to “Canceled” even though the transaction records have been applied in Banner. You can still add a comment for the transaction to clarify the record’s status. To add a comment for a cancelled transaction, choose the [Add Comment](#) button on the EPAF Preview page.

Trouble Shooting and Error Messages

❖ **I am unable to successfully login to UAOnline.**

Refer to the “UAOnline Help” page at <http://www.alaska.edu/oit/services/uaonline/help/>. Select the following headings for detailed instructions.

- Logging in to UAOnline
- For your PIN?
- Campus Contact Information

❖ **I don’t have the “Electronic Personal Action Forms” option from the “Employee Services” menu.**



You have not been granted “EPAF Administrator Role” access for UAOnline. Refer to the “Security” section on page 1 for details on requesting access from your campus security administrator.

❖ **What do I do when receiving the following error message(s)?**

***ERROR* Effective Date must be Greater than Last Paid Date of (date).**

The Electronic Personal Action Form page will display the following information when trying to “submit” the transaction.

Electronic Personnel Action Form

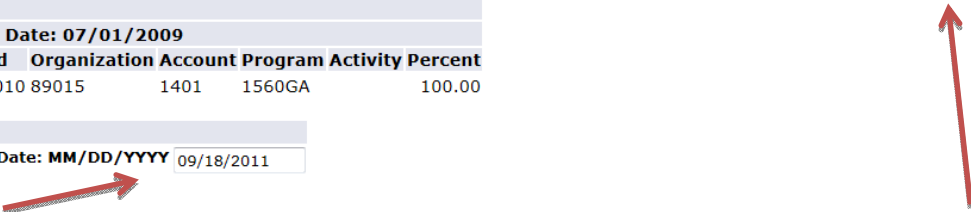
 **Transaction was not submitted. Please review errors.**
 Enter the information for the EPAF and either Save or Submit

Errors and Warning Messages

Type	Message Type	Description
Update Job Labor Distribution 3	ERROR	*ERROR* Effective must be greater than Last Paid Date of 24-SEP-2011.
Update Job Labor Distribution 3	ERROR	*ERROR* Effective must be greater than Last Paid Date of 24-SEP-2011.

Update Job Labor Distribution 3, 100622-00 Human Resources Professional 2, Last Paid Date: Sep 24, 2011

Current				
Effective Date: 07/01/2009				
COA Fund	Organization	Account	Program	Activity Percent
B	101010 89015	1401	1560GA	100.00
New				
Effective Date: MM/DD/YYYY 09/18/2011				



The effective date of the transaction must be changed to a date that is later than the Last Paid Date for the employee. In this example, the 09/18/2011 date must be changed to exceed the Last Paid Date of Sep 24,2011. If the transaction was previously saved before receiving this error, you must check all of the Remove Labor Lines box(es), save the record, enter the new effective date, and then re-enter the intended labor distribution default lines again. Save and then submit the transaction.