

Everest electronic Personnel Action (ePA) Form Guide

*The University of Alabama
Payroll Services*

Everest, Powered by K2® is being utilized for several different UA processes, but this guide is specifically for the Payroll electronic Personnel Action (ePA) form process.

Contents

ePA ORIGINATORS.....	2
ePA APPROVERS.....	2
ACCESSING THE ePA.....	2
EMPLOYEE INFORMATION.....	2
Employee Type.....	2
Purpose.....	2
Superseding PA.....	3
Enter CWID.....	3
Additional Information Button.....	3
Deans, Directors, and Department Heads Mailing List.....	3
Requisition Number.....	3
Budget Change Form Number(s).....	4
ASSIGNMENT INFORMATION.....	4
From:.....	4
Appoint, Reappoint or Change To:.....	5
ATTACHMENTS.....	6
Adding Attachments.....	6
Editing Attachments.....	6
Deleting Attachments.....	7
Most Common Attachment Types & Notes.....	7
BUILD APPROVAL LIST.....	7
Adding Approvers.....	7
Editing Approver Information.....	8
Deleting Approvers.....	8
REQUEST ROUTE.....	8
Department & Department Route.....	8

Contract and Grant & Budget Checkboxes.....	8
University Route	8
COMMENTS	9
ACTION	9
Save:	9
Clear:.....	10
Create PDF:	10
Close for Originators:.....	10
Close for Approvers:	10
Submit:.....	10
PDF HISTORY.....	10
REWORKS.....	10

ePA ORIGINATORS

Originators are responsible for completing the ePA form and routing it through the appropriate approvers. Approvers may edit the Requisition Number field, Budget Change Number fields and Attachments. Otherwise, approvers must send the ePA back to the originator for a Rework. If an ePA is returned, the originator will receive an email notification with a link to the form (see REWORKS section) and one escalation notice if no action is taken within 3 days. Originators also have the ability to track their forms throughout the approval process.

ePA APPROVERS

Approvers will receive an email notification when an ePA form is ready for review and an escalation notice will be sent if no action is taken within 3 days. In addition to email notifications, approvers may access their tasks via myEverest—a combined Worklist and Tracking Tool. *Approver access to the Tracking Tool is by request only.* Approvers have two options—Approve or return to the originator for Rework. Approvers may edit the Requisition Number field, Budget Change Number fields and Attachments. For any other edits, the form must be returned to the originator.

ACCESSING THE ePA

1. Log in to www.mybama.ua.edu
2. Click the Employee tab
3. Navigate to the Payroll Services section
4. Click the ePA Form link beneath the Everest electronic Personnel Action Forms heading
5. Log in using myBama credentials

EMPLOYEE INFORMATION

Employee Type

Select the appropriate Employee Type from the drop-down menu. “Other (non-employee)” should only be selected when the purpose of the ePA is Occasional Pay.

Purpose

Select the ePA Purpose from the drop-down menu. Purposes are listed in alphabetical order. For guidance on selecting the appropriate purpose, refer to the [ePA Purposes](#) document or contact Human Resources.

The ePA Purpose drives the form layout, i.e. based on the purpose selected, certain fields may collapse. For example, when New Employee is selected, the FROM section of Assignment Information disappears.

Superseding PA

A Superseding ePA is completed only to replace an ePA that was submitted with an error, not to make changes during an active assignment, such as a salary or labor distribution change. The intent is to override the original ePA with a superseding (correction) ePA. Before submitting a superseding ePA, use the myEverest tracking tool to see if the original ePA is complete. If the original is still active, contact the current approver, request a Rework and then make the necessary corrections. If the original ePA is complete, begin a new ePA and check the Superseding PA box.

Superseding PA's should only be prepared if the date of the change is the exact same date of the ePA that was originally submitted OR if only the begin date needs to be corrected. In the FROM section of Assignment Information put the information of the ePA that was originally submitted and needs to be replaced. The FROM section of a superseding ePA should always have an assignment that needs to be stopped, or corrected in some way. This is vital information to ensure the correct assignment is replaced. Add the corrected assignment information in the APPOINT, REAPPOINT, OR CHANGE TO section. Also describe the change in the comments section.

For questions regarding Superseding PA's, contact Payroll Input.

Enter CWID

Enter the employee's Campus Wide Identification Number (CWID) and press tab on the keyboard. The employee's name should automatically populate. If the wrong name populates, check the CWID for accuracy. If the CWID is correct, but the name is not, contact Payroll Input. Names cannot be edited on this form. Official name changes with appropriate documentation must be submitted to the Human Resources Service Center.

Additional Information Button

This button will appear after an employee's CWID is entered. When clicked it will display Enrollment Status (students only) and Job History (all employees). It is available to originators and approvers and is updated in real time.

STUDENT ENROLLMENT STATUS

- Effective Date is always equal to today
- Level identifies a student's classification as Undergraduate or Graduate
- Class identifies a student's year in school (i.e. Freshman, Sophomore, Junior, Senior or Graduate)
- Current Term displays a student's Enrolled and Registered Hours
- Next Term displays a student's Enrolled and Registered Hours

EMPLOYEE JOB HISTORY

- Position lists all positions
- Description is the title associated with position number
- FTE
- Last Effective Date is the last time the position was updated or changed
- End Date

Deans, Directors, and Department Heads Mailing List

This field is required to be completed on all Faculty and Staff type ePA's. It is used to maintain the Deans, Directors and Department Heads Mailing List in Banner. It will default to N/A, but originators may change the selection to Add or Remove.

Requisition Number

If the employee was hired through a UA recruiting system (Faculty, Staff or Student), include the requisition number on the ePA for reference. ePA originators and approvers may add or edit the Requisition Number.

Budget Change Form Number(s)

Two Budget Change Form Number fields are provided to account for fiscal year splits. Fill as needed. ePA originators and approvers may add or edit Budget Change Form Numbers. For questions regarding Budget Change Form Numbers, contact the Budget Office.

ASSIGNMENT INFORMATION

From:

The FROM section is used to end an assignment or provide current assignment information to approvers.

POSITION NUMBER

- Enter the position number and press the tab key on the keyboard
- Suffix, Title/Rank, Employee Class and description, Position Class and EEO Code will automatically populate based on position number entered
 - If “Invalid Posn” or “null” appears in any of these fields, verify the position number
 - If the information populated is incorrect, contact Human Resources to update the position
 - Changes should be processed in Banner before submitting an ePA

SUFFIX

- Automatically populates based on position number

TITLE/RANK

- Automatically populates based on position number

EMPLOYEE CLASS

- Automatically populates based on position number

POSITION CLASS

- Automatically populates based on position number

EEO CODE

- Automatically populates based on position number

ORG NUMBER

- Enter the Home Org number and press the tab key on the keyboard
- Org description will automatically populate

COMPOSITE FTE (Full Time Equivalent)

- Enter the FTE (0.000)

TOTAL SALARY

- Enter the Total Salary

MONTHLY OR HOURLY RATE

- Monthly or Hourly Rate will be displayed depending upon the Employee Class
- Enter the Monthly Rate for monthly paid employees or the Hourly Rate for Bi-weekly paid employees
- Do NOT enter a Monthly or Hourly Rate for one-time Supplemental payments

LABOR DISTRIBUTION

Adding rows

1. Click the Add button or click (Add new row) beneath the FUND heading
2. Enter the *Fund, Org, Account, Prog, Activity (if needed) and Dist %
3. Add as many labor distribution rows as needed

Note: Dist % must equal 100.00%

*The Org and Prog will automatically populate for Contract & Grant funds and should NOT be changed

Editing rows

1. Click the Edit button or double click within the row
2. Make corrections as needed

Deleting rows

1. Click the row
2. Click the Delete button

Appoint, Reappoint or Change To:

The APPOINT, REAPPOINT, OR CHANGE TO section is used to begin an assignment.

POSITION NUMBER

- Enter the position number and press the tab key on the keyboard
- Suffix, Title/Rank, Employee Class and description, Position Class and EEO Code will automatically populate based on position number entered
 - If “Invalid Posn” or “null” appears in any of these fields, verify the position number
 - If the information populated is incorrect, contact Human Resources to update the position
 - Changes should be processed in Banner before submitting an ePA

SUFFIX

- Automatically populates based on position number

TITLE/RANK

- Automatically populates based on position number

EMPLOYEE CLASS

- Automatically populates based on position number

POSITION CLASS

- Automatically populates based on position number

EEO CODE

- Automatically populates based on position number

ORG NUMBER

- Enter the Home Org number and press the tab key on the keyboard
- Org description will automatically populate

MAIL DISTRIBUTION ORG

- The Mail Distribution Org will default to the Org Number (above), but may be changed
 - It is only necessary to change the Mail Distribution Org when the employee receives mail in a different location than the Box Number assigned to the Org Number
 - *Example:* An employee works in the Payroll Office, but is housed in a separate building with the Financial Affairs Information Technology (FAIT) department. The Payroll employee’s Mail Distribution Org needs to be changed to the FAIT Org so that the employee receives mail in FAIT’s campus box.

COMPOSITE FTE (Full Time Equivalent)

- Enter the FTE

HOURS IN WORK WEEK

- Enter the number of hours the employee is expected to work in a week

TOTAL SALARY

- Enter the Total Salary

MONTHLY OR HOURLY RATE

- Monthly or Hourly Rate will be displayed depending upon the Employee Class
- Enter the Monthly Rate for monthly paid employees or the Hourly Rate for Bi-weekly paid employees
- Do NOT enter a Monthly or Hourly Rate for one-time Supplemental payments

BEGIN DATE

- Use the calendar feature to select the appropriate Begin Date OR
- Enter the Begin Date (MM/DD/YYYY)

END DATE

- Use the calendar feature to select the appropriate End Date OR
- Enter the End Date in this format (MM/DD/YYYY)
 - If the employee should be put on payroll until further notice, leave the End Date blank and check the FURTHER NOTICE box

FURTHER NOTICE

- Check this box in lieu of entering an End Date for further notice employees

REGULAR EMPLOYEE WITH NO PERMANENT BUDGET

- Check this box if applicable

HR USE ONLY (TIP)

- This check box is reserved for Human Resources

PAYROLL USE ONLY

- This text box is reserved for Payroll Input

LABOR DISTRIBUTION

Labor Distribution Calculator

Available for split distributions to calculate a Dist % based on Dist Amt, or vice versa. Click the Total button after the last row is entered.

Adding rows

1. Click the Add button or click (Add new row) beneath the FUND heading
2. Enter the Fund, Org, Account, Prog, Activity (if needed) and Dist %
3. Add as many labor distribution rows as needed

Note: Dist % must equal 100.00%

*The Org and Prog will automatically populate for Contract & Grant funds and should NOT be changed

Editing rows

1. Click the Edit button or double click within the row
2. Make corrections as needed

Deleting rows

1. Click the row
2. Click the Delete button

ATTACHMENTS

When uploading attachments to ePA's, it is very important to select the appropriate document type. The document type is matched with the employee's CWID, so the uploaded file(s) may be automatically indexed to the correct category of the employee's file. Multiple attachments—of the same or different type—may be added to an ePA, and may be combined when beneficial.

Adding Attachments

Attachments must be scanned (if paper) and saved in order to upload to an ePA form. Users may name attachments however they like, but certain special characters are not allowed in the file name. Special Characters NOT allowed in uploaded file name: Ampersand (&), Angle Brackets (<>), Asterisk (*), Backslash (\), Braces ({}), Colon (:), Number Sign (#), Percent (%), Pipe (|), Plus Sign (+), Question Mark (?), Quotation Mark ("), Slash (/) and Tilde (~).

Acceptable File Name: John Smith<Supplemental Pay Request>

Unacceptable File Name: John Smith Supplemental Pay Request

The Attachments section on an ePA is collapsed upon opening the form. [Click here](#) for a list of the most common attachment types that may be uploaded to an ePA and important notes for each category.

1. Expand the Attachments section by clicking the down arrow on the far right side of the Attachments heading bar.
2. Click the Add button.
3. Select the appropriate attachment type from the drop-down menu beneath the Type heading.
4. Click in the section marked "Click here to attach a file" beneath the File heading.
5. A Choose File to Upload pop-up box will appear.
6. Locate the file to upload.
7. Either double click on the file name or select the file and then click Open.

Editing Attachments

Once an attachment has been added, the type may be changed and file uploaded may be replaced.

1. Click on the row that needs to be edited.
2. Click the Edit button.
 - a. To change the type, select the appropriate attachment type from the drop-down menu.

- b. To replace a file, click the small, gray X in the upper right corner of the box containing the file and then add a new file by following steps 4-7 in the Adding Attachments section above.

Deleting Attachments

Once an attachment has been added, it may be deleted.

1. Click on the row that needs to be deleted
2. Click the Delete button

Most Common Attachment Types & Notes

PAY – Contracts

- Approval Request for Supplemental or Occasional Pay Form
- Intellectual Property Agreement
- Promotion, Raise or Salary Change documentation
- Resignation letters
- Memorandum of Appointment

Notes on Contracts:

- Do NOT send documents with information on multiple employees (e.g. a spreadsheet approving raises for 10 employees). Remember, this information is being uploaded to an employee's personnel file and does not need to include documentation on other employees. If there is no way to avoid it, black out the names of the other employees before attaching the document to the ePA.
- If attaching an email strand as documentation, keep emails precise and to the point. Again, this information is being captured in an employee's personnel file and does not need to include personal conversations.
- Do NOT submit Intellectual Property Agreements for staff employees hired through the PageUp People recruitment system. That information is being captured when the employee accepts an offer.

PAY – Demographic and Setup Forms

- New Hire Form

Notes on Demographic and Setup Forms:

- Do NOT submit New Hire Forms for student employees.
- Do NOT submit New Hire Forms for staff employees hired through the PageUp People recruitment system. That information is being captured when the employee accepts an offer.

PAY - Wireless Communication

- Cell Phone Stipend Forms ONLY.

Notes on Wireless Communication:

- If an employee changes position numbers and will continue receiving a cell phone stipend, a new form must be completed for the new position number.

Additional Information:

- **I-9's must be sent directly to the Human Resources Service Center and should never be attached to an ePA.**
- Scan attachments right-side-up and make sure they are complete.

BUILD APPROVAL LIST

This section is used to build the ePA's *departmental* approval route. [University Route](#) approvers, Principal Investigators (for Contract & Grant funding), and Contract & Grant Accountants should NOT be added in this section. Forms are automatically routed to the appropriate PI(s) and CGA(s) based on the Fund numbers entered.

Adding Approvers

1. Click the Add button.
2. Click the Lookup button that appears.

3. An EPAF LDAP User Search 2 pop-up box will appear.
4. Search for the approver by entering the “Last Name” or “Last Name, First Name” and then click the Search button.
5. Names matching the search criteria will appear.
6. Double click the row of the appropriate approver and the pop-up box will close.
 - a. The approver’s *myBama* username will appear beneath the FQN column.
 - b. The approver’s name as it is in Banner will appear beneath the Display Name column.
7. In the Description field, type the approver’s title or role in the ePA approval process, e.g. Budget Manager.
 - a. For audit purposes, it is important to develop a standardized naming system and to be consistent with approver descriptions.
8. In the Order field, the sequence number of the approver will automatically populate, but may be changed if necessary, e.g. number 1 for the first approver, 2 for the second approver and so on.

Editing Approver Information

Once an approver has been added, the description and order may be edited.

1. Click on the row that needs to be edited.
2. Click the Edit button.
 - a. To edit the description, click in the description field and delete and re-type or edit as needed.
 - b. To edit the order, click in the order field and delete and re-type or edit as needed.
 - i. Order numbers may contain decimals. This is useful if the originator forgets to add an approver who needs to approve between two other approvers, i.e. if an approver needs to be added between approver number 1 and 2, add the approver as 1.5.

Deleting Approvers

1. Click on the row that needs to be deleted.
2. Click the Delete button.

REQUEST ROUTE

Department & Department Route

These fields are used only if the department has a saved department route. If the same approval route is used frequently, it may be beneficial to save a department route instead of building it on the form. For more information on saving department routes, contact Cindy Blakney at 205.348.8731 or cblakney@fa.ua.edu or Erica Williams at 205.348.3760 or ewilliams@fa.ua.edu.

Follow the steps below to select a saved department route.

1. In the field to the right of Department, click the search icon.
2. A Search pop-up box will appear.
3. Type the department name or a portion of the name in the Find field, and then click the search icon.
4. Departments meeting the search criteria will appear in the Display Name section.
5. Either double click the appropriate department name or select it and then click OK.
6. The Department Route drop-down menu will then return all saved department routes for that department.
7. Select the appropriate route from the drop-down menu.

Contract and Grant & Budget Checkboxes

Depending upon the funding source(s), check the appropriate box(es)—Budget, Contract and Grant or both.

University Route

University routes are predefined based on the employee type. A University route is required on every ePA. To select a route, choose the employee type from the drop-down menu to the right of University Route. The predefined routes are listed below. Department approvers should be included in the Build Approval List section or in a saved Department Route.

FACULTY UNIVERSITY ROUTE

1. Academic Affairs
2. Contract & Grant Accounting, or the Budget Office or both, based on the funding source(s) selected
3. Payroll Input (ePA is complete at this point)
 - a. Payroll Processors
 - b. Benefits Office

GRADUATE UNIVERSITY ROUTE

1. Graduate School
2. Contract & Grant Accounting, or the Budget Office or both, based on the funding source(s) selected
3. Payroll Input (ePA is complete at this point)
 - a. Payroll Processors
 - b. Benefits Office

STAFF UNIVERSITY ROUTE

1. Contract & Grant Accounting, or the Budget Office or both, based on the funding source(s) selected
2. Human Resources
3. Payroll Input (ePA is complete at this point)
 - a. Payroll Processors
 - b. Benefits Office

UNDERGRADUATE UNIVERSITY ROUTE

1. Contract & Grant Accounting, or the Budget Office or both, based on the funding source(s) selected
2. Payroll Input (ePA is complete at this point)
 - a. Payroll Processors
 - b. Benefits Office

COMMENTS

The Comments section should be used by both Originators and Approvers to note any necessary information that is not already being captured on the form. Comments will be saved in the APPROVAL HISTORY for everyone in the process to view. Also, all comments will be saved on the form and the final version will be stored in UA's imaging system and emailed to the Originator. If an Approver is returning a form for Rework, the necessary corrections should be noted in the Comments section. Listed below are a few other examples of how this section is used.

Example: If it's a Superseding ePA, note the element that is being changed so that it is easier for approvers to identify, such as, "Begin Date on originally submitted ePA was incorrect (8/01/2015). Correct Begin Date is 8/16/2015."

ACTION

Save:

Originators may Save a form and submit it later. When the Save button is clicked, all information on the ePA is captured, EXCEPT for Comments. If Comments are necessary, they must be entered before clicking Submit. Once a form has been saved, the Originator may close it and return to it later. In order to complete a saved form, open a new form, enter the employee's CWID and press the tab key on the keyboard. The saved information should appear on the form. *Only one form per employee may be saved without submitting.* If a subsequent form is saved for the same employee (without submitting the first), it will override the previously saved information.

Approvers may Save the changes they make to a form (Requisition Number, Budget Change Form Numbers and Attachments) and submit it later.

Clear:

Originators may use the Clear button (lower left corner) to delete *all* information entered on a form and start over.

Create PDF:

Originators and Approvers may create a PDF of the form to save for future reference. The form will be captured in its current state. The Create PDF button is located in the lower right corner of the form. Click the button, and it will turn from white to green. When the button turns white again, the PDF is ready to view. See PDF HISTORY section. Also, a PDF copy of the *completed* form will be sent to the Originator as an attachment to the Completion Email.

Close for Originators:

The Close button allows Originators to exit an ePA. Any information on the form is discarded unless it was saved before closing.

Close for Approvers:

The Close button allows Approvers to exit an ePA. Any comments entered without submitting the form are discarded when closed. Approvers still have access to forms that are closed, but not submitted.

Submit:

- When an Originator clicks Submit, a pop-up box that reads, "Submission Successful" should appear, and the ePA is routed to the first approver for review. The approver will receive an email notification, and the Originator may begin tracking the form via myEverest.
- When an Approver selects Approve and clicks Submit, the form is routed to the next approver and that approver will receive an email notification and so on.
- When an Approver selects Rework and clicks Submit, the Originator will receive a Rework Notification email.
- The final approval step is always Payroll Input. Once Payroll Input Approves the form, the following steps occur simultaneously.
 - Originator receives a Completion email notification with a PDF copy of the completed form
 - ePA is routed to the Payroll Processors and Benefits Office for review
 - ePA and all attachments are swept into the employee's personnel file in UA's imaging system

PDF HISTORY

Any PDF's of the form that have been created throughout the approval process will appear in this section. To view the PDF's, click the drop-down arrow on the right side of the PDF HISTORY bar. If multiple PDF's have been created, the most recent version will appear last on the list. To open a form, click the green link. To delete a PDF, click within the row (without clicking the green link) and then click the delete button.

REWORKS

If an ePA is returned for a Rework, the originator will receive a Rework Notification email. Click the link in the email to open the form and check the comments section to see what the approver is requesting. *Reworks are also accessible via the originator's myEverest Worklist.* If the approver is requesting a modification to the form, simply update the form, select Resubmit from the drop-down menu and then click Submit. If the approver indicates that the form should be canceled, select Cancel from the drop-down menu and then click Submit. *It is important that all forms returned for a Rework are either resubmitted or canceled.* If not, forms will remain active, appear on active reports and severely alter the ePA average duration statistics.