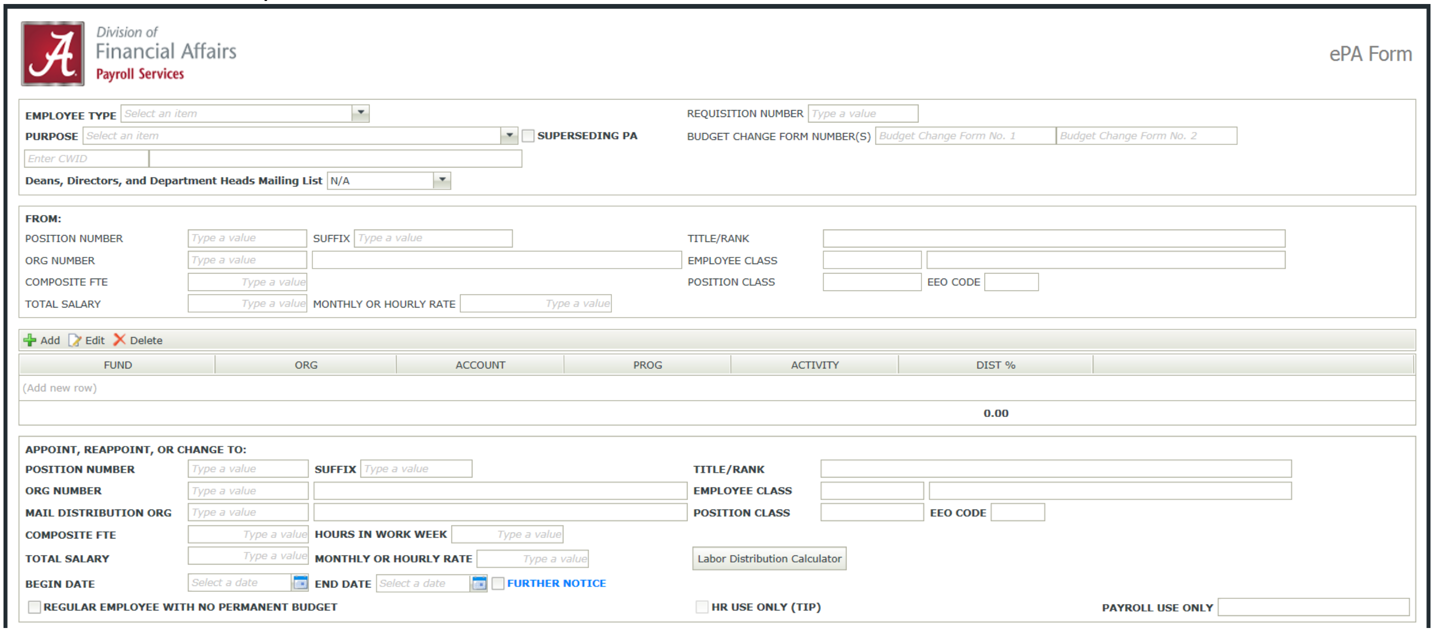
electronic Personnel Action (ePA) Form: Phase 2 Enhancements

Implementation Date: Sunday, June 5, 2016

Employee & Assignment Information

1. Enhanced form layout



Division of
Financial Affairs
Payroll Services

ePA Form

EMPLOYEE TYPE Select an item
PURPOSE Select an item
SUPERSEDING PA
Enter CWID
Deans, Directors, and Department Heads Mailing List N/A
REQUISITION NUMBER Type a value
BUDGET CHANGE FORM NUMBER(S) Budget Change Form No. 1 Budget Change Form No. 2

FROM:
POSITION NUMBER Type a value SUFFIX Type a value
ORG NUMBER Type a value
COMPOSITE FTE Type a value
TOTAL SALARY Type a value MONTHLY OR HOURLY RATE Type a value
TITLE/RANK
EMPLOYEE CLASS
POSITION CLASS EEO CODE

Add Edit Delete

FUND	ORG	ACCOUNT	PROG	ACTIVITY	DIST %
(Add new row)					
					0.00

APPOINT, REAPPOINT, OR CHANGE TO:
POSITION NUMBER Type a value SUFFIX Type a value
ORG NUMBER Type a value
MAIL DISTRIBUTION ORG Type a value
COMPOSITE FTE Type a value HOURS IN WORK WEEK Type a value
TOTAL SALARY Type a value MONTHLY OR HOURLY RATE Type a value
BEGIN DATE Select a date END DATE Select a date FURTHER NOTICE
TITLE/RANK
EMPLOYEE CLASS
POSITION CLASS EEO CODE
Labor Distribution Calculator
REGULAR EMPLOYEE WITH NO PERMANENT BUDGET
HR USE ONLY (TIP)
PAYROLL USE ONLY

2. Requisition Number can be added/edited by all Approvers
3. Removed FROM section for the following purposes
    a. Additional Assignment
    b. Interim
    c. Occasional Pay
    d. Summer I
    e. Summer II
    f. Summer Research
    g. Supplemental Pay
4. Removed “Status Change-Different Position Number”
5. Renamed “Status Change-Same Position Number” to “Status Change”
6. Deans, Directors, and Department Heads Mailing List will default to N/A
    a. Originators may change the selection to Add or Remove
7. Added an Additional Information button
    a. Button will appear after CWID entered
    b. When clicked, will display Enrollment Status (students only) and Job History (all employees)
    c. Available to Originators and Approvers and updated in real time
8. Added Labor Distribution Calculator (for those currently using the EXCEL version of the calculator)
9. If End Date is before Begin Date and dates are not corrected, Submit is disabled
10. Restricted FOAP to numeric values only and restricted number of digits allowed
    a. Fund – 5
    b. Organization – 6
    c. Account – 6
    d. Program – 3
11. Added validation for Contract & Grant Funds (funds beginning with 2, 7, 14, 17 and 19)
    *Funds validated in the “Appoint, Reappoint or Change **TO**” section only*
    a. Org and Program Code will default from Banner
    b. Check Banner to ensure Fund is active
        i. If not, a pop-up message will appear and must contact Contract & Grant Accounting before proceeding
    c. Check Begin and End Dates to ensure they fall within the period of the grant
        i. If not, a pop-up message will appear and must contact Contract & Grant Accounting before proceeding
    d. Form automatically routed to the appropriate Principal Investigator(s) and Contract & Grant Accountant(s)

   i. Descriptions for Principal Investigators and Contract & Grant Accountants will always be PI and CGA, respectively
   ii. If PI and/or CGA is assigned to multiple funds on the same form, will only be included in the route once
   iii. PI's and CGA's should no longer be included in built or saved department routes
   iv. *Contact the ePA Admin. Team to adjust previously saved routes*

   New Routing Order
   - Built or Saved Department Route
   - PI(s), if applicable
   - CGA(s), if applicable
   - University Route

12. Added total calculation on DIST AMT column

Attachments

13. Removed Miscellaneous Deductions type
14. Removed Tax Documents type (employees should complete tax forms via myBama>Employee tab>Banner Self-Service)

Build Approval List

15. Limited number of characters allowed in the Description field to 50 to ensure the entire Step Name is displayed in the Approval History section
16. Order number defaults as approvers are added
17. Principal Investigators (PI) and Contract & Grant Accountants (CGA) should no longer be included in built routes

Request Route

18. Principal Investigators (PI) and Contract & Grant Accountants (CGA) should no longer be included in saved Department Routes
    a. *Contact the ePA Admin. Team to adjust previously saved routes.*

Action

19. Added a Clear button to delete all information entered on a form and start over (Originators)
20. Added a Save button for Approvers to save changes (Requisition Number, Budget Change Form Numbers and Attachments), close form and submit at a later time

Approval History

21. Added Originator's email address as an active link next to name

Transaction Number

22. Will appear in the bottom left corner of the form once Originator initially submits the transaction

Email Notifications

23. ePA Complete Email (Originators)
    a. Completed PDF copy of the form added as an email attachment
24. Personnel Action Form Notification Email (Approvers)
    a. Added links to Approver Resources
25. Added Escalation Emails
    a. Department Approvers and PI's will receive one reminder email if no action is taken in 3 days
    b. Originators will receive one reminder email for Reworks if no action is taken in 3 days

Reminders!

1. Check myEverest often to ensure no forms are left outstanding!
   a. If reviewing forms via mobile device (cell phone, tablet, etc.), check myEverest to ensure forms move to the next approver once submitted.
2. If forms are active for longer than 90 days, Originators lose the ability to track them in myEverest.
3. Check your online directory listing and update if necessary. Email notifications are sent to the email address provided in the online directory. https://www.ua.edu/directory/?q=&_action=submit
4. Originators, when completing forms which lack a FROM section, when necessary, please note what is changing in the Comments section (e.g. Position Modification, note what has been modified in the Comments section).
5. Keep Comments *brief* and *professional*. Remember, employees, auditors, legal teams, etc. may request copies of completed ePA's. Do not include information that is not pertinent to the approval process.