myEverest & electronic Personnel Action (ePA) Form: Phase 3 Enhancements
Implementation Date: Thursday, February 15, 2018

myEverest
1. Added an **ePA Saved Requests List**
    a. Originators may view a list of saved (but not submitted) ePA forms via a link in myEverest
    b. Click the EPA.Main bar for the Saved Electronic Personnel Action Forms button to appear

Employee & Assignment Information
2. Restricted Purposes drop-down list based on Employee Type selected
3. Added pop-up notification requesting a resignation letter or other documentation, if available, when the Voluntary Separation purpose is selected for Faculty and Staff
4. Additional Information button renamed to **Employee Information** and relocated from top right of form to top left beneath CWID field
    a. *This button displays Employee Job History for Faculty, Staff and Students and Enrollment Status for Students*
5. Added Employee Class to the Employee Job History section of Employee Information button
6. Added checkboxes for Moving Allowance and Temporary Living Allowance on Faculty and Staff ePA's
    a. *More information coming soon from HR*

Contract & Grant Accounting Funds
7. If a C&G fund does not exist in Banner, "Invalid" will display in the Org field and an error message will appear
8. If the Begin Date of the ePA is prior to the month in which the form is originated, the Originator and cgaccounting@research.ua.edu will receive an email with the subject "Urgent: Additional Information Required for ePA" and the following message in the body:
    ACTION REQUIRED! Request a Rework from the current approver due to the following:
    The begin date of this ePA, (FOLIO including form details), falls within a closed financial period and, therefore, requires a comment explaining why a correction is necessary and how the charge is allocable and allowable as revised by this ePA. If an effort report for the dates of the ePA has already been certified, please explain the reason the incorrect report was certified or if this correction was made on the report. If this change is over 90 days, please explain what procedures have been put in place to ensure more timely corrections in the future.
    Examples:
    Form originated on 8/03/2016, but ePA Begin Date is 7/01/2016. Action or comment required.
    Form originated on 8/03/2016, but ePA Begin Date is 8/16/2016. No action or comment required because correction is within the current month.
    For questions, contact Contract & Grant Accounting at cgaccounting@research.ua.edu or 205.348.5592.

Attachments
9. Removed Wireless Communication type
    a. Cell Phone Stipend forms should be submitted directly to Payroll Services

Request Route
10. If both the Budget and Contract and Grant checkboxes are left unchecked, an error message will appear, and the form may not be submitted
    a. One or both boxes must be checked depending upon the funding source(s)

Action
11. (Originators) Completed PDF copy of the form will include checkboxes in the **Action** section indicating which payroll will be impacted and whether or not the transaction involves a Labor Redistribution

Reminders!
1. Check myEverest often to ensure no forms are left outstanding.
    a. If reviewing forms via a mobile device (cell phone, tablet, etc.), check myEverest to ensure forms move to the next approver once submitted.
2. If forms are active for more 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 which is not pertinent to the approval process.