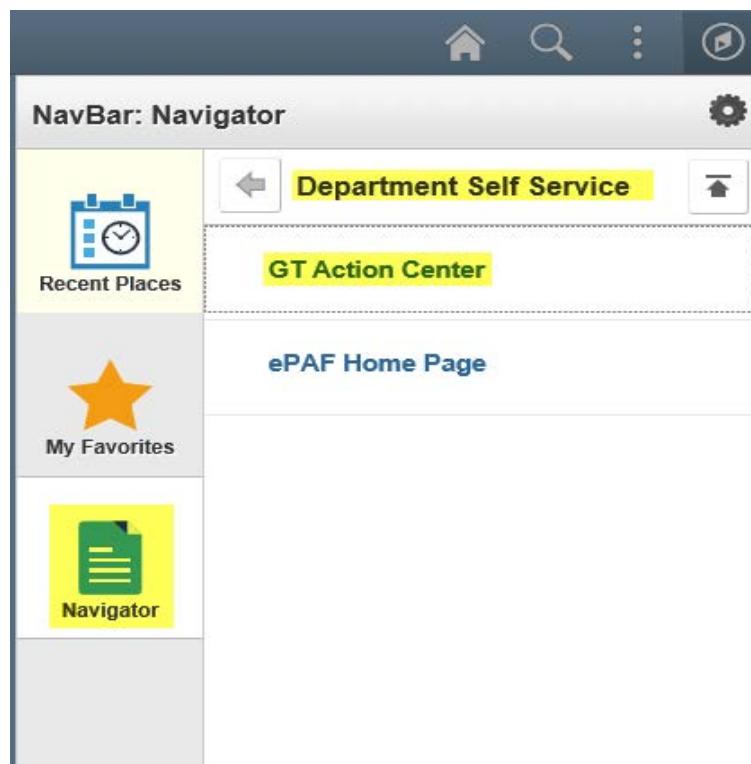


### Overview

This job aid outlines how to approve a funding change ePAF (electronic personnel action form). ePAF's are created by department initiators and are electronically routed for approvals which include notifications, finally the data is updated in the HR system.

### Review and Approve a Funding Change ePAF

1. Log into HR Direct and navigate to the ePAF Home Page.
  - a. Access NavBar by selecting the Compass and choose **Department Self Service** and then the **GT Action Center**.



The GT Action Center page, includes instructions on approving and submitting the form from the summary page. Before submitting, view the forms to validate the funding change information is correct.

2. To view the form click on the link in the Forms Needing Action section - Form: Last,First Name on the right side of the page.

**UMass Action Center** User ID: TESTGT10043487

Scan summaries of forms awaiting your action, drill into more detail or the form itself, and work multiple forms at once. The page displays a maximum of 100 forms.

Please add a comment if you are returning the form(s) to the initiator or denying the grade change.

You can approve forms individually or follow these steps under the Actions section:

- 1) Click on Select All (or select individual checkboxes)
- 2) Specify the Action
- 3) Set the Action on selected forms
- 4) Click on Submit All

Click on the Refresh button to update the list of the forms. Please note: it can take several minutes for forms to be processed if you withdraw or approve a large number of forms.

**Filter List**

Form Type	Start Date	Apply Filter
	[date]	
Last Name	End Date	Clear
	[date]	

**Forms**

1 of 1 Filtered      1 of 1 Displayed      0 of 1 Selected

**Actions**

Refresh    Select All    Clear Selections    Action    Set Action on Selected eForms    Submit All

**Forms Needing Action**

232057 Job Change    Employee Group: Grad Students

<p>Effdt: 2018-08-15    Action: Data Change</p> <p>Employee: [ ]    Reason: [ ]</p> <p>Employee ID: [ ]</p>	<span style="border: 1px solid red; border-radius: 50%; padding: 2px;">Form: Last,First Name</span> More Info																		
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>Department</th> <th>Job Code</th> <th>Std Hrs</th> <th>Biweekly Comp</th> <th>End Dt</th> </tr> </thead> <tbody> <tr> <td>New</td> <td>Neurobiology</td> <td>UMass Graduate Student</td> <td>15.2</td> <td>[ ]</td> <td></td> </tr> <tr> <td>Old</td> <td>Neurobiology</td> <td>UMass Graduate Student</td> <td>15.2</td> <td>[ ]</td> <td></td> </tr> </tbody> </table>		Department	Job Code	Std Hrs	Biweekly Comp	End Dt	New	Neurobiology	UMass Graduate Student	15.2	[ ]		Old	Neurobiology	UMass Graduate Student	15.2	[ ]		Action    [ ]    Submit <input type="checkbox"/>
	Department	Job Code	Std Hrs	Biweekly Comp	End Dt														
New	Neurobiology	UMass Graduate Student	15.2	[ ]															
Old	Neurobiology	UMass Graduate Student	15.2	[ ]															

Submit All

3. Review the form for accuracy before approving. Note the Compensation Data section includes the current and proposed funding data. The Begin Date is highlighted above the new rows. Also the Changed box is selected next to the new GL Combination Codes.

Compensation Rate    \$

Begin Date 07/01/2018

Personalize   Find   <input type="button" value="Print"/>   First <input type="checkbox"/> 1-2 of 2 <input type="checkbox"/> Last													
Changed	GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code	Distribution Type	Percent	Commitment Amount	Fund End Date	Key Value
1 <input type="checkbox"/>	W126961	53106	W404500049	A02	S61110000038371		02/11/2021		Percent	66.250	\$0.000	02/19/2019	1 <input type="checkbox"/>
2 <input type="checkbox"/>	W112465	52132	W404500021	B01					Percent	33.750	\$0.000		2 <input type="checkbox"/>

Add Date Range

Generate Sequences

Begin Date 08/15/2018

Personalize   Find   <input type="button" value="Print"/>   First <input type="checkbox"/> 1-2 of 2 <input type="checkbox"/> Last													
Changed	GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code	Distribution Type	Percent	Commitment Amount	Fund End Date	Key Value
1 <input checked="" type="checkbox"/>	W126309	53106	W821900022	B03	S61110000038611		09/29/2018		Percent	60.000	\$2,783.869	09/29/2018	<input type="checkbox"/>
2 <input checked="" type="checkbox"/>	W112465	52132	W404500021	B01					Percent	40.000	\$12,910.699		<input type="checkbox"/>

4. At the bottom of the form, you have the option to **Approve** or **Reprocess Chg**. Note, the Action Reason should always be **Funding Change**.

**Actions & Action Reasons**

Action Code	Action Description	Reason Code	Action Reason Description
1 DTA	Data Change	FCG	Funding Change

**File Attachments**

Upload	View	Description	Attachment Id	Delete
1 Upload	View			Delete

**Add File Attachment**

**Comments**

Your Comment:

Comment History:

\*\* Tara M Keegan (TESTGT10012359)  
\*\* Thu, Aug 23 18, 01:37:36 PM  
Test ePAF 1

**Approve**

**Reprocess Chg**

**Save for Later**

5. Click **Approve** to move the form to the next workflow step.  
6. A popup message will appear to confirm that you approve. Click **Yes**.  
7. The Form Status section shows confirmation that the form has been approved. The Process Visualizer shows that the form has moved to the next workflow step.

**Form Status**

You have just APPROVED this form. This action passed the form to HCMW\_GT\_FIN\_DEPT\_HD for further processing.

**Process Visualizer**

1: Kegan Tara M (TESTGT10012359) > 2: HCMU\_GT\_DEPT\_APRV (~1 minute) > 3: HCMU\_GT\_CE\_ADMIN > 4: HCMU\_GT\_PI (50 minutes) > 5: HCMW\_GT\_FIN\_DEPT\_HD (highlighted) > 6: HCMW\_GT\_FIN\_DEPT\_HD2 > 7: HCMU\_GT\_GRANTS  
8: HCMU\_GT\_HR\_REVIEWER > 9: HCMU\_GT\_HR\_UPDATE > 10: HCMU\_GT\_HR\_UPDATE\_2 > 11: Integration Broker > 12: System

[Go To Workflow](#)  
[View This Form](#)  
[Go To ePAF Home Page](#)  
[Close This Form](#)

Note that Funding Changes require a Finance Department approver for both the FROM department and TO departments.

## Reprocess a Funding Change ePAF

1. If the ePAF will not be approved, enter a note in the **Comments** field and then click the **Reprocess Chg** button.

This will send the ePAF form back to the originator for changes and once re-submitted, the form will be routed through all approval steps.

Actions & Action Reasons			
Action Code	Action Description	Reason Code	Action Reason Description
1 DTA	Data Change	FCG	Funding Change

File Attachments			
Upload	View	Description	Attachment Id
1 <a href="#">Upload</a>	<a href="#">View</a>	<input type="text"/> <a href="#">Search</a>	<a href="#">Delete</a>

[Add File Attachment](#)

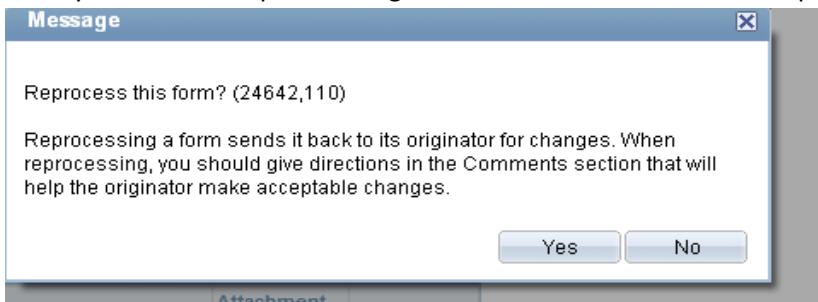
  

Comments	
<b>Your Comment:</b> <input type="text"/> <a href="#">Check</a>	
<b>Comment History:</b> <pre>** Tara M Keegan (TESTGT10012359) ** Thu, Aug 23 18, 01:37:36 PM Test ePAF 1</pre>	

[Approve](#) [Reprocess Chg](#) [Save for Later](#)

2. Once you click the Reprocess Chg button a second verification will popup to verify. Click **Yes**.



3. The Form Status will indicate that the form has been RECYCLED. The Process Visualizer section displays the next workflow approver, in this case it will show the form was sent back to the initiator at the first step.

**Form Status**

eForm ID: 4102

You have just RECYCLED this form. This action passed the form to Colleen J Baldelli for further processing.

**Process Visualizer**

```
graph LR; 1[1: Baldelli, Colleen J (TESTGT10084761)] --> 2[2: HCMU_GT_DEPT_APPR<br/>(34 days<br/>1 hour<br/>46 minutes)]; 2 --> 3[3: HCMU_GT_CE_ADMIN]; 3 --> 4[4: HCMU_GT_PI]; 4 --> 5[5: HCMW_GT_FIN_DEPT_HD]; 5 --> 6[6: HCMW_GT_]; 6 --> 8[8: HCMU_GT_HR_REVIEWER]; 8 --> 9[9: HCMU_GT_HR_UPDATE]; 9 --> 10[Integration Broker]; 10 --> 11[System];
```

1: Baldelli, Colleen J (TESTGT10084761)

2: HCMU\_GT\_DEPT\_APPR (34 days 1 hour 46 minutes)

3: HCMU\_GT\_CE\_ADMIN

4: HCMU\_GT\_PI

5: HCMW\_GT\_FIN\_DEPT\_HD

6: HCMW\_GT\_

8: HCMU\_GT\_HR\_REVIEWER

9: HCMU\_GT\_HR\_UPDATE

10: Integration Broker

11: System