![University of Massachusetts Medical School logo]

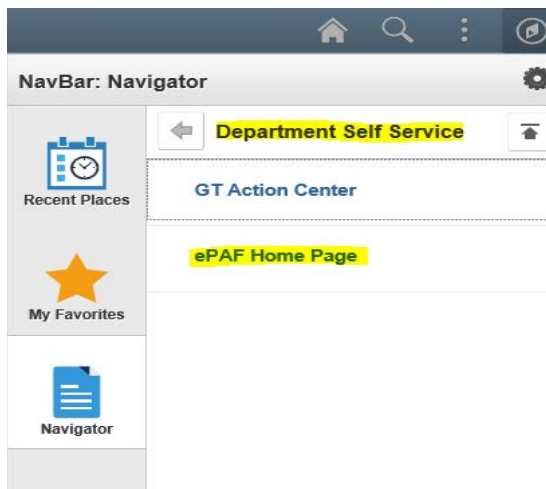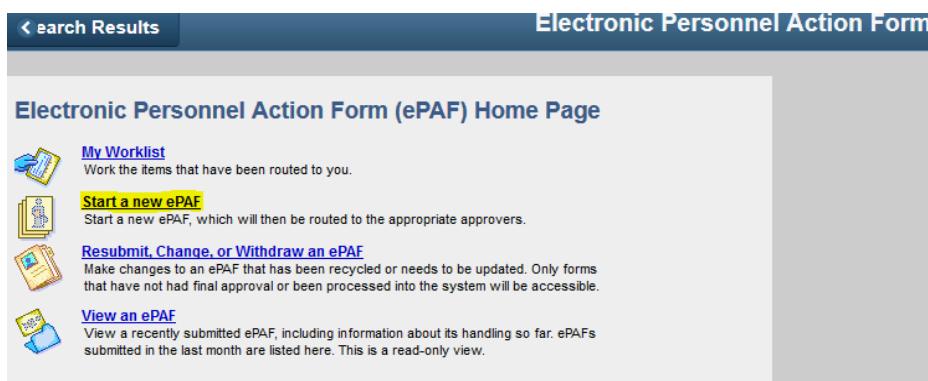**Creating an ePAF for a Funding Change**
Job Aid

Overview

This job aid outlines how to create a funding change ePAF (electronic personnel action form). Make sure to only update the fields outlined in the training materials. If any additional changes are needed, a paper PA form will be required.

Create 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 **ePAF Home Page.**

2. Click on the link to Start a new ePAF

3. Choose the **Edit Existing Job** link

Start a New electronic Personnel Action Form (ePAF)

Hire an Employee

Use this form to hire a new employee into your department, or to add an additional job for an employee that already works in your department.

Edit Existing Job

Use this form to edit the job of an employee currently working in your department.
Edit Existing Job

Change Employment Status

Use this form to submit a termination, retirement, leave of absence or return from leave.

Return to Electronic Personnel Action Form (ePAF) Home Page

4. Search for the employee using one of the various options. For example, enter the **Last name** or **Employee ID** and click **Search**. Select the employee from the search results.

Select An Employee

Enter any information you have and click Search. Leave fields blank for a list of all values.

| Find an Existing Value |

▼ Search Criteria

Empl ID	= ∨	
Empl Record	= ∨	
Name	begins with ∨	
Last Name	begins with ∨	
Department	begins with ∨	
Employee Group	begins with ∨	

☐ Case Sensitive

| Search | Clear | Basic Search 🔍 Save Search Criteria |

Search Results

View All			First ◄ 1 of 1 ► Last			
Empl ID	Empl Record	Name	Last Name	Department	Employee Group	Payroll Status

5. In the Job Data section, enter the **Effective Date** and tab out of the field. Note the eForm ID # appears at the top of the page. Click **Next** at the bottom of the page.

6. Next update the **Compensation Data** by clicking the Add Date Range button.

7. A new grid appears below. Enter the **Begin date** and **GL Combination Codes**. Once the code is entered, the fund department and program code will populate. Leave the Earnings Code blank. Update the Percent and include a Fund End Date (defaults to end of FY if blank). Click **Next**.
8. Review the Time and Labor Data and click **Next**.

9. The Action & Action Reasons should include the **DTA** and **FCG** codes. Add any Comments if needed and choose one of the following actions.

   a. If the form is for non-grant funding and does not require any Principal Investigator signatures, choose the **Submit button and skip ahead to step #25a.**

   b. If the funding change requires Principal Investigator signature, click **Save for Later** and continue following the steps below to obtain the required approvals.
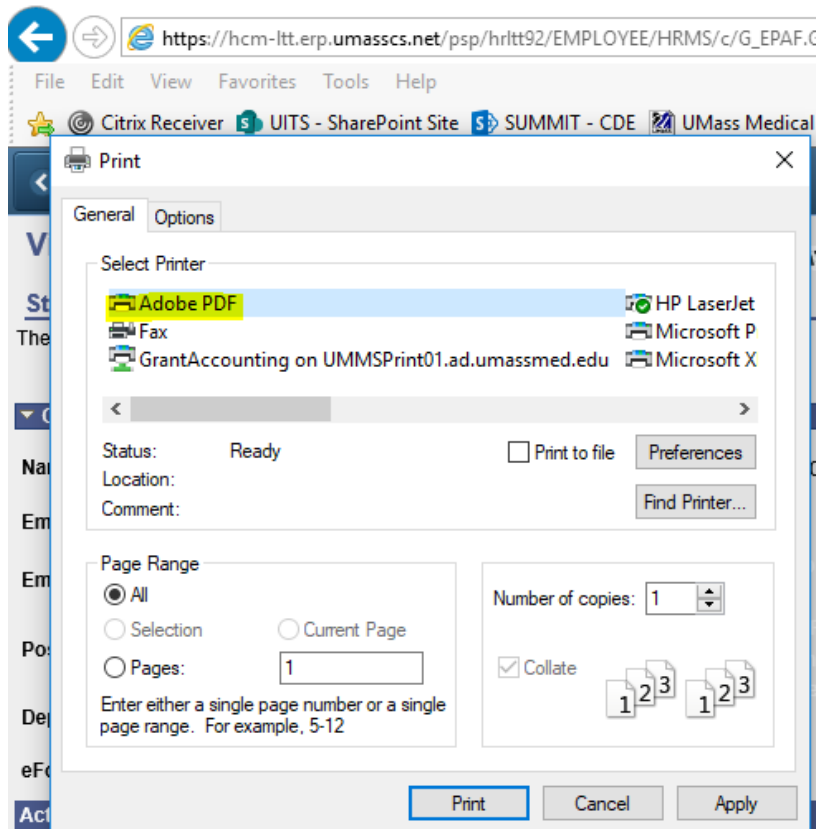

10. Next you will see the Form Finalized screen with a note in the Form Status that "You have just PLACED ON HOLD this form."
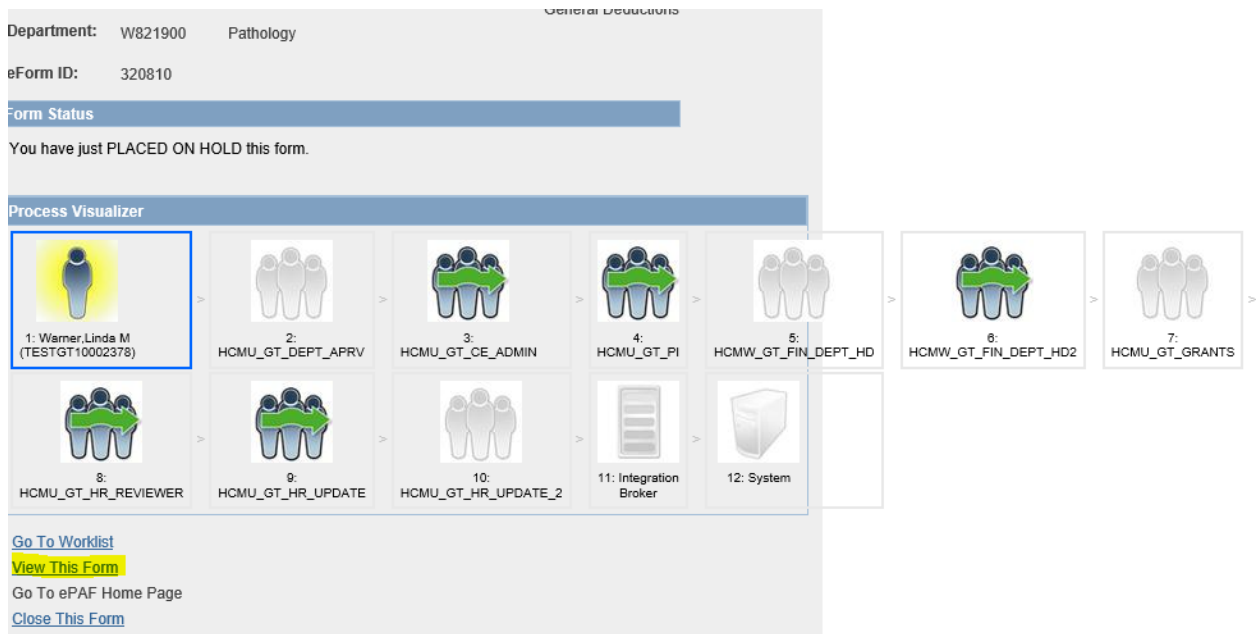
11. Click on the **View This Form** link.
12. When viewing the form, the page loads with the Form Contents and Comments which include the funding grid.
13. From your web browser window, choose **File** and **Print**.

14. When the Print Option opens, Select **Adobe PDF** for the Printer and click Print.
15. Next choose where you would like to save the PDF of the ePAF and enter the File name.

16. The PDF will open, but if it doesn't, open it from the file location where you saved the form. The form needs to be routed to the appropriate PI's for signature approval.
17. Using DocuSign, create an envelope, add a signature line, enter all PI's who need to approve and send the envelope out for approval.
18. Once the PDF has been electronically signed by all PI's, log back into HR Direct to attach the approvals.
19. Navigate to the ePAF home page and choose **Resubmit, Change or Withdraw an ePAF.**

Electronic Personnel Action Form (ePAF) Home Page

My Worklist
Work the items that have been routed to you.

Start a new ePAF
Start a new ePAF, which will then be routed to the appropriate approvers.

Resubmit, Change, or Withdraw an ePAF
Make changes to an ePAF that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.

View an ePAF
View a recently submitted ePAF, including information about its handling so far. ePAFs submitted in the last month are listed here. This is a read-only view.

20. Search by the ePAF ID, Employee ID, etc. or choose the Workflow Form status "On Hold"

ePAF Update All

Enter any information you have and click Search. Leave fields blank for a list of all v

Find an Existing Value

▼ **Search Criteria**

eForm ID	begins with ▾
Empl ID	begins with ▾
Workflow Form Type	begins with ▾
Workflow Form Status	= ▾ On Hold ▾
Empl Record	= ▾
Name	begins with ▾
Last Name	begins with ▾
Original Operator	begins with ▾
Originated Date From	>= ▾
Originated Date Thru	<= ▾
Last Operator	begins with ▾

☐ Case Sensitive

Search   Clear   Basic Search   Save Search Criteria

21. Click Next on the first three pages to navigate to the screen with the File attachment options.

22. Upload the signed PDF document for the funding change. Note, the Description field needs to be populated with Other.
23. Add any comments if needed and click the **Resubmit** button.

24. A popup message will appear, click **Yes**

Message

Resubmit this form? (24642,108)

The form will be sent to the next approver with any changes and/or comments you may have made.

| Yes | No |

25. The form will move to the next approval step in the workflow and the Form status will be updated to RESUBMTTED.

    a. ePAFs that do not need PI approval using DocuSign will be Submitted and the popup message below will appear. Click **Yes**.

Message

Submit this form? (24642,112)

The form will be directed to the next approver, if any.

| Yes | No |
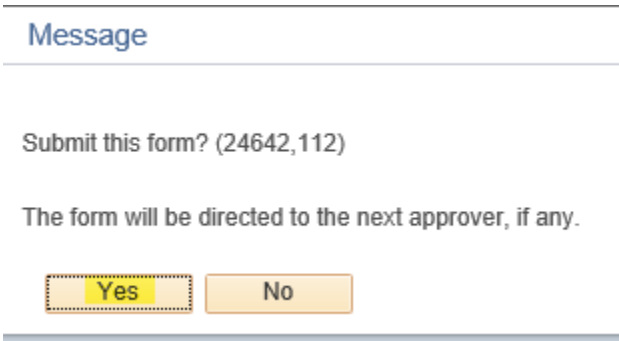
26. The form status indicates that the form has been **SUMITTED**. The Process visualizer allows you to view the workflow for the form.

eForm ID: 320817

Form Status

You have just RESUBMITTED this form. This action passed the form to HCMU_GT_DEPT_APRV for further processing.

Process Visualizer

1: Warner,Linda M (TESTGT10002378) (2 minutes)
2: HCMU_GT_DEPT_APRV
3: HCMU_GT_CE_ADMIN
4: HCMU_GT_PI
5: HCMW_GT_FIN_DEPT_HD
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 Worklist
View This Form
Go To ePAF Home Page
Close This Form

The funding change has been submitted!