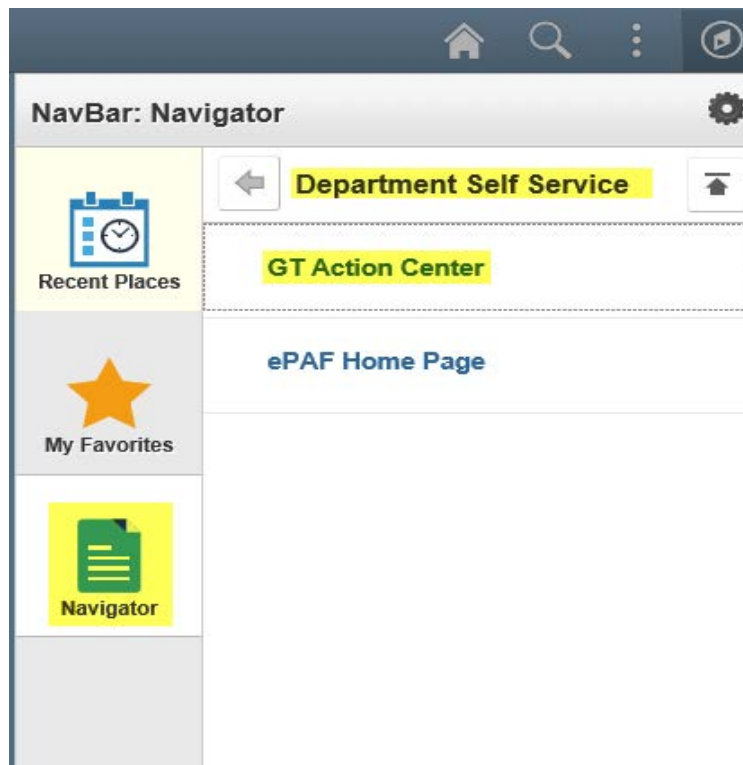


## Overview

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.

- 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:    
 Last Name:  End Date:

**Forms**

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

**Actions**

Action:

**Forms Needing Action** Find First 1 of 1 Last

232057 Job Change Employee Group: Grad Students

Effdt: 2018-08-15 Action: Data Change  
 Employee:  Reason:  
 Employee ID:

	Department	Job Code	Std Hrs	Biweekly Comp	End Dt
New	Neurobiology	UMass Graduate Student	15.2	<input type="text"/>	
Old	Neurobiology	UMass Graduate Student	15.2	<input type="text"/>	

Form: Last,First Name  
  
 Action:

- 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

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
<input type="checkbox"/>	W126961	53106	W404500049	A02	S61110000038371		02/11/2021		Percent	66.250	\$0.000	02/19/2019	1
<input type="checkbox"/>	W112465	52132	W404500021	B01					Percent	33.750	\$0.000		2

Begin Date **08/15/2018**

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
<input checked="" type="checkbox"/>	W126309	53106	W821900022	B03	S61110000038611		09/29/2018		Percent	60.000	\$2,783.869	09/29/2018	
<input checked="" type="checkbox"/>	W112465	52132	W404500021	B01					Percent	40.000	\$12,910.699		

- 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	
1 <input type="button" value="Upload"/>	<input type="button" value="View"/>	<input type="text"/>		<input type="button" value="Delete"/>

**Comments**

Your Comment:

Comment History:

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

- Click **Approve** to move the form to the next workflow step.
- A popup message will appear to confirm that you approve. Click **Yes**.
- 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**


[Go To Worklist](#)  
[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.

The screenshot displays the 'Actions & Action Reasons' section with a table containing one row: Action Code 'DTA', Action Description 'Data Change', Reason Code 'FCG', and Action Reason Description 'Funding Change'. Below this is the 'File Attachments' section with a table containing one row with an 'Upload' button, a 'View' button, a description field, an 'Attachment Id' field, and a 'Delete' button. An 'Add File Attachment' button is located below the table. The 'Comments' section includes a 'Your Comment:' text area with a copy icon, a 'Comment History:' section showing a previous comment by Tara M Keegan, and three buttons at the bottom: 'Approve', 'Reprocess Chg' (highlighted in yellow), and 'Save for Later'.

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

Upload	View	Description	Attachment Id
1 <input type="button" value="Upload"/>	<input type="button" value="View"/>	<input type="text"/>	<input type="text"/>

**Comments**

Your Comment:

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

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

The screenshot shows a 'Message' dialog box with the text: 'Reprocess this form? (24642,110)'. Below this is a paragraph explaining that reprocessing sends the form back to the originator for changes and that directions should be given in the comments. At the bottom are 'Yes' and 'No' buttons.

Message

Reprocess this form? (24642,110)

Reprocessing a form sends it back to its originator for changes. When reprocessing, you should give directions in the Comments section that will help the originator make acceptable changes.











- 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**

 1: Baldelli, Colleen J (TESTGT10084761)	>	 2: HCMU_GT_DEPT_APRV (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				