EPAF Guide: Initiating A New Labor Distribution EPAF

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What is Labor Distribution EPAF (Electronic Personnel Authorization Form) in Banner?

- Changing the FOAP / splitting FOAPs for an existing position at the same salary level
- Starting with a payroll period in the future and going forward – NOT retroactive

How does it work?

- An Originator completes/fills out the online EPAF form in Banner Self-Service providing all relevant information
- After submission, the EPAF is digitally work flowed through Banner Self-Service for review and approval
  - Non-Grant Distribution: Dept. Budget Manager → Budget Office (FYI) → Human Resources (FYI) → Payroll
  - Grant/3-Fund Distribution: Dept. Budget Manager → PI Approvers → RAS/GCA → Budget Office (FYI) → Human Resources (FYI) → Payroll

What to have ready before originating / starting to fill out a Labor Distribution EPAF?

- Identify the per payroll period dollar amount and the total dollar amount, the starting payroll period, and the number of payroll periods the change is for. For example, $2,000 will be charged to FOAP xxxxxx per payroll period for a total of $10,000 over 5 payroll periods, starting on May 16, 2021.
  - Please Note: an end date is not automatically assigned to a labor distribution EPAF. When the requested change is no longer in effect, another EPAF will need to be originated in Banner SSB for future changes to take effect
- Make sure to check there is budget available on the FOAP(s) you are moving the salary distribution to
- If it is a Grant/3-Fund FOAP, in addition to checking the available budget, also ensure that the award is active for the period of the labor distribution
- Reach out to the RAS team before you originate a Grant Labor Distribution EPAF should you have any questions
Step 1: First, log into MyIIT Portal and from the Work page, click on the Employee Dashboard icon.

Step 2: You will be routed to a new page and half way down the page under My Activities, you should see Electronic Personnel Action Forms (EPAF), click on it. If you do not see this option and need to start a new EPAF, please contact OTS Support Desk (supportdesk@iit.edu) to gain access.
To pull up the individual whose labor distribution you want to change, you can search for them by first and last name, A#/CWID or SSN#, or if you know their A#/CWID, you type it directly into the ID field to locate the individual.

Step 3: A new window will open and you will want to select the New EPAF option.

On the new page, you can search for or enter the information of the individual whose Labor Distribution you want to change.
**Step 4:** If you choose to search for the individual, once you hit **Search**, a list of potential matches will appear in a pop up window. Double click the **ID** of the person you want and the **ID*** field will populate with the A# and name of the individual you selected.
You can also type in the A# of the individual you need directly into the ID* field to pull up the individual.

**Step 5**: Now you can select your **Query Date** and **Approval Category** (the specific EPAF), then hit the **Go** button to move onto the next steps.

The **Query Date** should be the *First Day or Start Date of a future pay period*, bi-weekly or monthly (first day of the month). The payroll calendars can be located on the Payroll website ([https://web.iit.edu/payroll/calendars](https://web.iit.edu/payroll/calendars)).

Select **Non-Grant, ELABOR** if you are:
- Moving from one non-grant FOAP to another non-grant FOAP
- Splitting between more than one non-grant FOAPs
- Moving from a grant-FOAP to a non-grant FOAP

Select **Grant(3-fund), ELBRGR** if you are:
- Moving from a grant/3-fund FOAP to another grant/3-fund FOAP
- Moving from a non-grant FOAP to a grant/3-fund FOAP
- Splitting between more than one FOAPs that includes a grant/3-fund FOAPs
**Step 6:** On the Details screen that shows up next, please make sure you select the line that says **Primary** under **Type**, as you are working with an existing position when you change Labor Distribution.

Then hit **Go**.
Step 7: On the next page, you will see the **Current** labor distribution and below it you can make changes in the **New** section.

**Effective Date:** This will be defaulted from the **Query Date** you entered on the previous page, so please make sure you enter in the correct first pay period date in **Query Date**.

You can enter the **new FOAP** in this section, or if you need to add another FOAP/split FOAP, just click on the **Add Row** button and you will get another FOAP line. Please make sure to enter all components of the FOAP including 1 for **COA** (chart of account) and that the **percentage splits add up to 100**.
Step 8a: Scroll down and you can select the specific approver for each step of the predetermined Approval Routing Queue.

A **User Name must be selected** from the drop down list **for each step of the approval flow**, they are also searchable within the list. You are responsible to know and select the **correct** Budget Manager/1\(^{st}\) Level Approvers for the new FOAP.

If you do not see your approver’s name in the drop down please contact **Malcolm Brown** or **Snow Rutkowske**.

Routing Queue - Non-Grant EPAF

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 - (BDMANG) 1st Level Approvers</td>
<td>ANASSELL - Wessel, Adrienne J.</td>
<td><img src="Image" alt="Approve" /></td>
</tr>
<tr>
<td>40 - (BUDGET) Budget Office</td>
<td>BUDGET BATCH - Banner Nonperson Acct, Budget Dept Approvals</td>
<td><img src="Image" alt="FYI" /></td>
</tr>
<tr>
<td>90 - (HR) Human Resources</td>
<td>HR BATCH - Banner Nonperson Acct, HR Batch Acct</td>
<td><img src="Image" alt="FYI" /></td>
</tr>
<tr>
<td>99 - (PAYROL) Payroll</td>
<td>PAYROLL BATCH - Banner Nonperson Acct, Payroll Batch Acct</td>
<td><img src="Image" alt="Apply" /></td>
</tr>
</tbody>
</table>

**DO NOT CHANGE** anything in the Approval Level or Required Action columns and associated fields. These are pre-set for each type of EPAF and will result in errors if you change them yourself.

Please always select **HR_BATCH** for HR and **PAYROLL_BATCH** for Payroll.
**Step 8b:** If you have selected the Grant/3-Fund Labor Distribution EPAF, you will see a different Approval Routing Queue, with the PI Approvers and Grants and Contract Accounting office added as additional steps.

Similarly, a **User Name must be selected** from the drop down list **for each step of the approval flow** and **DO NOT CHANGE** anything in the Approval Level or Required Action columns and associated fields.

Please always select **GCA_BATCH** for GCA, **HR_BATCH** for HR and **PAYROLL_BATCH** for Payroll.

<table>
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<th>User Name</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 - (BDMANG) 1st Level Approvers</td>
<td>MCHALE - McHale, Darci L.</td>
<td>Approve</td>
</tr>
<tr>
<td>35 - (PIAPP) PI Approvers</td>
<td>LSHAW2 - Shaw, Leon L.</td>
<td>Approve</td>
</tr>
<tr>
<td>40 - (GCA) Grants and Contract Accounting</td>
<td>GCA_BATCH - Banner Nonperson Acct, Grants Dept Approvals</td>
<td>Approve</td>
</tr>
<tr>
<td>40 - (BUDGET) Budget Office</td>
<td>TKC - KC, Tejaswini</td>
<td>FYI</td>
</tr>
<tr>
<td>90 - (HR) Human Resources</td>
<td>HR_BATCH - Banner Nonperson Acct, HR Batch Acct</td>
<td>FYI</td>
</tr>
<tr>
<td>99 - (PAYROL) Payroll</td>
<td>PAYROLL BATCH - Banner Nonperson Acct, Payroll Batch Acct</td>
<td>Apply</td>
</tr>
</tbody>
</table>
Step 8c: If you are doing a split FOAP Labor Distribution that needs approvals by more than one Budget Manager or PI Approver, you can add additional approvers by clicking on the Add Row button. Please note you can only add additional approvers if the Approval Level is already in the defaulted routing queue lineup, for example, you cannot add a 2nd Level Approver to the Labor Distribution EPAFs because it was never build into the workflow queue.

Please also make sure you select the SAME Required Action from the drop down list that correspond to the specific approval level, in most cases that should be Approve.

Note that EPAF approvals are sequential not concurrent, so if you have 2 budget manager or PI approvers, the one appearing first in EPAF approval queue will need to approve first before the 2nd individual can approve.
Step 9: Scroll down and you will be able to input the specific required information in the Comments section.

Then scroll down to the bottom of the page and hit the Save button. Once you Save, you’ll see additional options appear:

- **Delete** – if you no longer need to make this change or if you selected the wrong EPAF
- **Save** – if you made additional updates but are not ready yet to Submit
- **Submit** – you are ready to submit your EPAF for approvals through to HR application in Banner

Please note that you **MUST SAVE first** before you have the option to **SUBMIT**.

If you submitted **successfully**, you’ll get a green notification at the top of the page. Otherwise, red **error message(s)** will point out to you what you need to fix before re-Save and re-Submit.

**MUST INCLUDE:**
- Per payroll period dollar amount
- Total dollar amount
- Starting payroll period
- Number of payroll periods the change is for / duration
**Checking the Real Time Status of Your EPAFs**

Once you have Saved or Submitted your EPAF, you can check the real time status of them and where they are sitting in the approval process by going back to the Electronic Personnel Action Forms homepage and clicking on EPAF Originator Summary.

Under the **Current** tab you will find the EPAFs that you have saved but not yet submitted.

Under the **History** tab, you will find all the EPAFs that you have submitted that are approved or going through the approval process.

Click on the **Transaction #** to view more details of your EPAF and options for next steps.
Your EPAF will be rejected/returned for correction if:

• You do not have enough money / budget on the FOAP / Grant or if you do not have an Advanced Expenditure Authorization (AEA) on file
• The Grant has expired already
• A mismatch between the Grant and requested labor distribution period – new distribution from June through September, but the Grant is expiring in July
• Not enough information provided in the Comments section which must include the per payroll period dollar amount and the total dollar amount, the starting payroll period, and the number of payroll periods the change is for.
  • For example, $2,000 will be charged to FOAP xxxxxxx per payroll period for a total of $10,000 over 5 payroll periods, starting on May 16, 2021.
Checking the Real Time Status of Your EPAFs

At the bottom of the details page, you can **Delete** or **Void** an EPAF that’s no longer needed or **Update** it then **Save/Submit** for approval.
Checking the Real Time Status of Your EPAFs

For EPAFs you have already submitted, you can track the step-by-step status of approval / application.