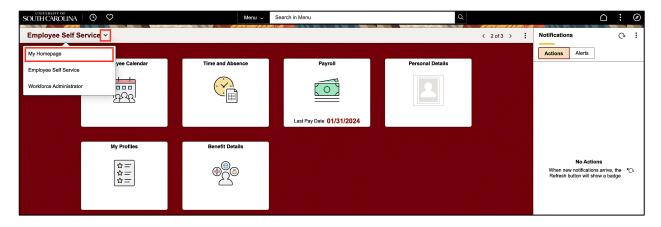


## **Controller's Office - Payroll**

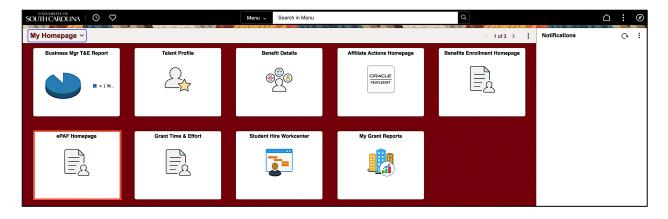
## Using the Account Funding Change eForm in PeopleSoft HCM

Step 1: Use the Query SC\_PY\_FUND\_BYPROJ\_DATE to identify all grant funding sources and end dates to help track expiring or inactive grants. Note: Use the job aid Using HCM Queries – Funding End Dates in Payroll, to help run this query in PeopleSoft HCM.

**Step 1:** Click the **Homepage Selector** drop-down arrow and select My Homepage/My Work.



Step 2: Click ePAF Homepage tile.



**Step 3:** To search for an employee, begin by clicking in the **Search for Person** field and enter their EMPL ID or name.

Step 4: Now, click the Search button.

$\leftarrow$   O $\heartsuit$	Q. Search in Menu
EPAF	
Start a Personnel Action Form	
Search for VOE	Welcome to the University of South Carolina's Electronic Personnel Action Form (EPAF) Center. This is where you will manage HR/Payroll actions for employees.
Just	To start a new form, enter a name or employee ID in the Search for Person omnibox, and hit the Search button. Use Just Search In to narrow down your search.
Search In	When you find the right person, click the down arrow, and choose the action you want to take. You'll be guided into the correct form.
Search Clear	Evaluate an ePAF eForm lists any ePAF forms waiting for your approval.
Act on Personnel Action Form	Update an ePAF eForm lets you make changes to a form and resubmit.
	View an ePAF eForm shows you existing forms.
Getting Started	Manage Adjunct Faculty Benofits lists active employees enrolled in State insurance benefits.
Evaluate an EPAF eForm	Need help? <u>Click here</u>
5 Update an ePAF eForm	
View an ePAF eForm	

It is important to note that some employees may have more than one record return, indicating they have a primary and secondary job here at the university. Be sure to click the **Related Action Menu** button on the job requiring an account funding change.

**Step 5:** Click the **Related Actions** drop-down arrow and select the **Account Funding Change** option. Account Funding Change refers to current and future dated Payroll funding changes.

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EPAF	and the second con-	View Personal Data				Marcana <b>Kan</b> araha
Start a Personnel Action Form	Current Employee	View Job Data	D	Business Unit SCCOL USC Columbia		
Search for Person V0		Separation/Retirement	t d 0	Job Indicator Primary Job		
Just Search In		Leave w/out Pay	nt 135800 PSYCHOLOGY	Empl Class RGP Research Grant Position		
Search Clear	Q	Job Change	le UK63HE02 Post Doctoral Fellow	Faculty/Staff Staff		
Act on Personnel Action Form		Additional Pay				
Getting Started		Account Funding Chang	nge			
Evaluate an EPAF eForm						
5 Update an ePAF eForm						
J View an ePAF eForm						

**Step 6:** Review the Employee Details.

$\leftarrow \mid \odot  \heartsuit$	Q. Search in Menu
EPAF	
+ Account Funding Change : Distribution Details	Form ID 688713
Employee Details	
Position Number Post Doctoral Fellow	Name
Department 135800 PSYCHOLOGY	Empi ID
Pay Group P12	Empl Record 0
Compensation 63000.000000	

**Step 7:** Click the **Look up Pay Period Effective Date** button. For this example, the employee's salary is 50% funded by a USCSP project (sponsored award) that is ending 3/31/24. The new year of funding is not yet available, and therefore the employee will need to be paid from departmental funds in the interim.

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EPAF					
+ Account Funding Change :	Distribution Details			For	m ID 688713
Employee Details					
Position Number	r Post Doctoral Fellow		Name		
Department	t 135800 PSYCHOLOGY		Empl ID		
Pay Group	P12		Empl Record 0		
Compensation	63000.000000				
Effective Date					
Pay Period Effective Date	2024-01-16 Q				

**Step 8:** Select an appropriate future dated **Effective Date**. For this example, 4/1/24 is the appropriate date since the project is ending 3/31/24.

$\leftarrow$ 100	Cancel	Lookup	∴ ÷ ⊛
EPAF	Search for: Pay Period Effective Date Search Criteria		
+ Account Funding Change :	✓ Search Results		Form ID 688713
Account Funding Change .			23 rows
Employee Details	Value 1↓	Description ↑↓	
Position Number	2024-01-16	2024-01-31	
Department	2024-02-01	2024-02-15	
Pay Group	2024-02-16	2024-02-29	
Compensation	2024-03-01	2024-03-15	
Effective Date	2024-03-16	2024-03-31	
Pay Period Effective Date	2024-04-01	2024-04-15	
Current Distribution This segment displays current funding. Use	2024-04-16	2024-04-30	
	2024-05-01	2024-05-15	2 rows

**Step 9:** To update the current funding, begin by clicking the **Toggle** button to **Yes** for the distribution row that needs to be changed.

I ©					Q Search in M						Ć	з <del>Ф</del> :
٩F												
+ Acc	count Funding Change	: Distribution	Details									Form ID 688
mployee	Details											
	Position Number	er Po	st Doctoral Fellow					Name				
	Departmen	nt 135800 PSY	CHOLOGY					Empl ID				
	Pay Grou	p P12						Empl Record 0				
	Compensatio	n 63000.000000										
urrent Di	Pay Period Effective Dat	e 2024-04-01	٩									
his segme	nt displays current funding. Us	se select buttons I	o copy any current fun	ding into new funding.	Copy any rows of fu	inding you want t	o keep as is, and co	py any rows you want to	keep and update.			2
1	Percent of Distribution †↓	Amount 1↓	Operating Unit 1	Department 1	Fund Code ↑↓	Account 1	Class Field ↑↓	Business Unit ↑↓	Project/Grant 1	Activity ID 1	Cost Share ↑↓	Select 1↓
1	50.000000	31500.000000	CL071	135800	F1000	51300	202	USCSP	10012813	1		Yes
2	50.000000	31500.000000	CL071	135800	F1000	51300	202	USCSP	10012810	1		No

**Step 10:** If only the funding is changing for one distribution row, be sure to update the percent to 100%. If there are multiple lines, add the appropriate percentage for each line.

Step 11: Click the Select Chartstring button to update the funding.

is segment displays cu	rrrent funding. Us	e select buttons to	copy any current fund	ing into new funding.	Copy any rows of fu	inding you want to	o keep as is, and co	py any rows you want to	keep and update.			
Percent of D	istribution 1↓	Amount 1↓	Operating Unit ↑↓	Department 1	Fund Code ↑↓	Account 1	Class Field 1	Business Unit ↑↓	Project/Grant ↑J	Activity ID 1	Cost Share ↑↓	Select
	50.000000	31500.000000	CL071	135800	F1000	51300	202	USCSP	10012813	1		Yes
	50.000000	31500.000000	CL071	135800	F1000	51300	202	USCSP	10012810	1		No
Select All												
w Distribution	able below inclu	de any rows you y	vant to keen from curre	nt funding. Use the +	and - buttons on the	far right side of t	the table to add or d	elete mws as needed. [	elete anv rows withou	t a funding percent	amount Funding perc	ent must total tr
	able below. Inclu	de any rows you v	vant to keep from curre					lelete rows as needed. [				
ild new funding in the I		de any rows you v Amount		Onconting		Fund		Business		vCost	Combination	ent must total te Insert A Del Row F

**Step 12:** On the Select Chartfield page, enter the **Combination Code** for the new funding. If you don't have the combination code, use the available fields to narrow down the search. More than one Combination Code may appear, so be careful to select the correct one. Entering as much data as possible in the search section of the page to narrow down the number of search options returned.

**Step 13:** Click the **Search** button to return to the Account Funding Change page.

	Select Chartstring											×
Combination Code	A0000007166	٩										
	GL Combination Code	Effective Date	Description	Short Description								
Operating Unit CL071	A0000007166	07/01/2019	CL071135800A0001101				Business Unit USCSP C		oject/Grant 0012813	Activity ID	Cost Share	۹
Search			/_								/	

**Step 14:** Check to ensure the new combination code populated in the New Distribution row.

**Step 15:** The Account Change eForm is complete, click the **Submit** button to start the approval process.

**Note:** Attachments are not required, but providing support documentation for the change is <u>highly</u> <u>recommended</u> for audit and approval purposes.

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E	EPAF													/ 1 / RD				and a
	1	50.000000	31500.000000	CL071	15	5800	F1000	51300	202		USCSP	1001281	3	1			Yes	)
	2	50.000000	31500.000000	CL071	13	5800	F1000	51300	202		USCSP	1001281	0	1			No	j
	Select All																	
	New Distribution Build new funding in the ta	able below lask	udo any rows you y	ant to	koon from ourront fu	ding Lico the d	+ and - buttons on th	o for right	cide of the tabl	a to add o	r delete rowe en r	veeded. Delete any re	we without a fi	unding porce	nt/amount Eurodina	porcept mu	at total to	
	100%.	able below. Incit	ude any rows you w	antio	keep irom current fu	iding. Ose the 4	+ and - buttons on th	e iai nyni	side of the tabl		r delete rows as r	leeded. Delete any ro	ws without a it	mung perce	nvamouni. Funding	percent mu	si iolar lo	
L																		row
	Percent of Distribu	tion î↓	Amount	ti s	Select ChartString	Operating Unit	1↓ Department 1↓	Fund Code	11 Account 1	↓ Class Field	1↓ Business 1↓ Unit	1↓ Project/Grant	N↓ Activity ↑ ID	↓ Cost Share	t↓ Combination Code	<sup>↑↓</sup> Insert Row	A Delete Row	
α	1 100.0	00000	63000.00000	0	Select ChartString	CL071	135800	A0001	51300	101					A0000007166	+	-	
ľ	Total Distribution																	_
L	Total Distribution																	
		Percent Tot	al 100.00															
L	File Attachments																	
L	Status		Act	ion	Dec	cription 1						File Name 1↓				Delete	11	row
L	1											The Hume to			ſ			-
L	1		Upl	bad			~								l	Delete		
	Add																	
	> Comments																	
	Search Save	Submit																

**Step 16:** The form is successfully submitted. Click the **View Approval Route** to view the list of approvers.

$\leftarrow$ 0 $\heartsuit$		Q. Search in Menu				Ċ Ĉ	: 0
EPAF							
Start a Personnel Action Form Search for Person V05631933	+ Account Funding Change : Finalize	d				Form	n ID 688713
Person V05631933	You have successfully submitted your eForm. The eForm has been routed to the next approval ste	зр.					
Search Clear Act on Personnel Action Form	multiple approvers.						
Getting Started	View Approval Route Transaction / Signature Log						1 row
Evaluate an EPAF eForm	Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed	
5 Update an ePAF eForm	1 02/13/2024 1:41:06PM	Initiated	ELLISRL	Robert Ellis	Submit		
5 View an ePAF eForm	Refresh Log						
Manage Adjunct TFAC Benefits							

**Step 17:** To view the approvers at each level, click the Multiple Approvers link. To close the View Approval Route page, click the **Done** button.

$\leftarrow$ 1 $\odot$ $\heartsuit$		Q	Search in Menu			Δ÷: @
EPAF						
EPAF Start a Personnel Action Form Search for Person V05631933 Jest Search III Clear Act on Personnel Action Form Cetting Started Evaluate an EPAF eForm Update an ePAF eForm View an ePAF eForm Manage Adjunct TFAC Benefits	View Approval Route	ed your eForm.	View Approval Route	Don Pending	e Form Action Submit	Form ID 688713 1 row Time Elapsed