

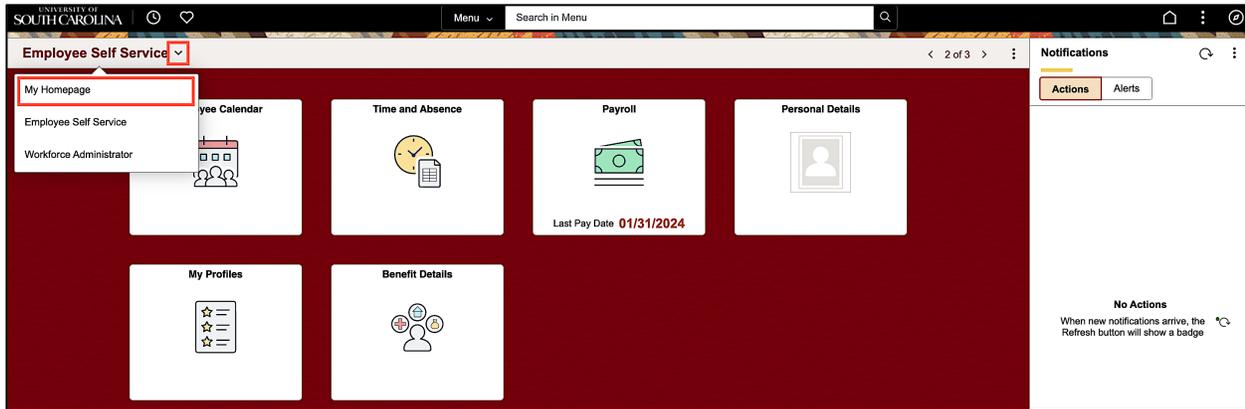


## Controller's Office - Payroll

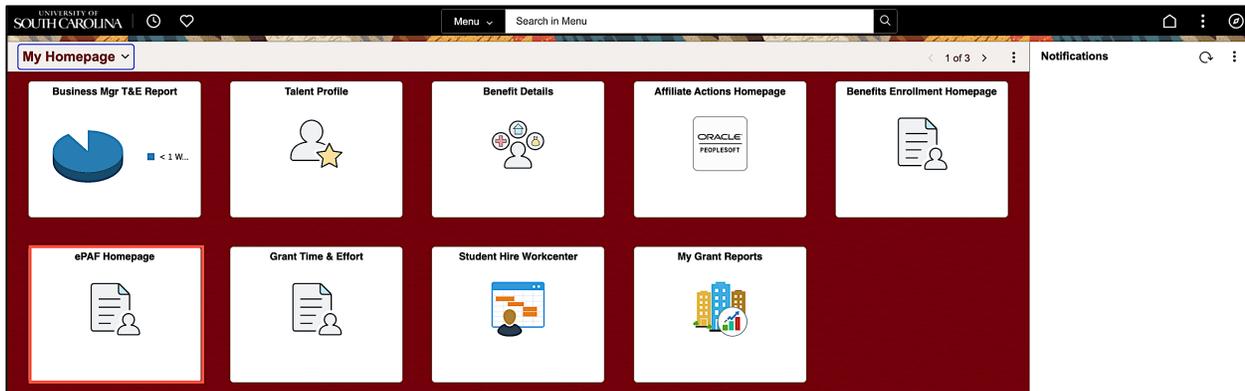
### Using the Account Funding Change eForm in PeopleSoft HCM

**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.

The screenshot shows the EPAF interface. On the left, there is a sidebar with a 'Search for Person' field containing 'V0' and a 'Search' button. Below this are links for 'Evaluate an ePAF eForm', 'Update an ePAF eForm', and 'View an ePAF eForm'. The main content area has a heading 'EPAF' and a sub-heading 'Start a Personnel Action Form'. It contains a welcome message and instructions: '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. 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. 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.' Below this are links for 'Evaluate an ePAF eForm', 'Update an ePAF eForm', and 'Manage Adjunct Faculty Benefits'. A 'Need help? Click here' link is also present.

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.

The screenshot shows the EPAF interface with the 'Actions' dropdown menu open. The 'Account Funding Change' option is highlighted with a red box. The background shows employee details for a 'Current Employee' with a 'Related Action Menu' icon. The employee details include: Business Unit: SCCOL USC Columbia, Job Indicator: Primary Job, Empl Class: RGP Research Grant Position, Faculty/Staff: Staff. The 'Actions' menu includes: View Personal Data, View Job Data, Separation/Retirement, Leave w/out Pay, Job Change, Additional Pay, and Account Funding Change.

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

The screenshot shows the EPAF interface with the 'Employee Details' section expanded. The 'Account Funding Change : Distribution Details' section is visible at the top right, with 'Form ID 688713'. The 'Employee Details' section contains the following information:

Position Number	Post Doctoral Fellow	Name	
Department	135800 PSYCHOLOGY	Empl 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.

The screenshot shows the EPAF form with the following details:

- Account Funding Change : Distribution Details** (Form ID 688713)
- Employee Details:**
  - Position Number: [Redacted] Post Doctoral Fellow
  - Department: 135800 PSYCHOLOGY
  - Pay Group: P12
  - Compensation: 63000.000000
  - Name: [Redacted]
  - Empl ID: [Redacted]
  - Empl Record: 0
- Effective Date:**
  - Pay Period Effective Date: 2024-01-16 [Search icon]

**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.

The screenshot shows the EPAF form with a 'Lookup' dialog box open. The dialog box contains a search bar and a table of results:

Search for: Pay Period Effective Date

Search Criteria: [Redacted]

Search Results: 23 rows

Value 1:	Description 1:
2024-01-16	2024-01-31
2024-02-01	2024-02-15
2024-02-16	2024-02-29
2024-03-01	2024-03-15
2024-03-16	2024-03-31
2024-04-01	2024-04-15
2024-04-16	2024-04-30
2024-05-01	2024-05-15

The row for 2024-04-01 is highlighted with a red border. The dialog box also shows '2 rows' at the bottom right.

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

**Employee Details**

Position Number: [redacted] Post Doctoral Fellow  
 Department: 135800 PSYCHOLOGY  
 Pay Group: P12  
 Compensation: 63000.000000

Name: [redacted]  
 Empl ID: [redacted]  
 Empl Record: 0

**Effective Date**

Pay Period Effective Date: 2024-04-01

**Current Distribution**

This segment displays current funding. Use select buttons to copy any current funding into new funding. Copy any rows of funding you want to keep as is, and copy any rows you want to keep and update.

Percent of Distribution %	Amount	Operating Unit	Department	Fund Code	Account	Class Field	Business Unit	Project/Grant	Activity ID	Cost Share	Select
50.000000	31500.000000	CL071	135800	F1000	51300	202	USCSP	10012813	1		<input checked="" type="checkbox"/> Yes
50.000000	31500.000000	CL071	135800	F1000	51300	202	USCSP	10012810	1		<input type="checkbox"/> 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.

**Current Distribution**

This segment displays current funding. Use select buttons to copy any current funding into new funding. Copy any rows of funding you want to keep as is, and copy any rows you want to keep and update.

Percent of Distribution %	Amount	Operating Unit	Department	Fund Code	Account	Class Field	Business Unit	Project/Grant	Activity ID	Cost Share	Select
50.000000	31500.000000	CL071	135800	F1000	51300	202	USCSP	10012813	1		<input checked="" type="checkbox"/> Yes
50.000000	31500.000000	CL071	135800	F1000	51300	202	USCSP	10012810	1		<input type="checkbox"/> No

[Select All](#)

**New Distribution**

Build new funding in the table below. Include any rows you want to keep from current funding. Use the + and - buttons on the far right side of the table to add or delete rows as needed. Delete any rows without a funding percent/amount. Funding percent must total to 100%.

Percent of Distribution %	Amount	Select ChartString	Operating Unit	Department	Fund Code	Account	Class Field	Business Unit	Project/Grant	Activity ID	Cost Share	Combination Code	Insert A Row	Delete A Row
<input type="text" value="100.000000"/>	<input type="text" value="31500.000000"/>	<a href="#">Select ChartString</a>	CL071	135800	F1000	51300	202	USCSP	10012813	1		A00000097254	<input type="button" value="+"/>	<input type="button" value="-"/>

**Total Distribution**

**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.

**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 **highly recommended** for audit and approval purposes.

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

The screenshot shows the EPAF interface. On the left, there are sections for 'Start a Personnel Action Form' and 'Act on Personnel Action Form'. The main area displays a confirmation message: 'Account Funding Change : Finalized' with 'Form ID 688713'. Below the message is a 'View Approval Route' button, which is highlighted with a red box. Underneath, there is a 'Transaction / Signature Log' table with one row of data.

Transaction / Signature Log	Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
1	02/13/2024 1:41:06PM	Initiated	ELLISRL	Robert Ellis	Submit	

**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.

The screenshot shows the 'View Approval Route' dialog box overlaid on the EPAF interface. The dialog has a title bar with 'View Approval Route' and 'Done' buttons. Below the title bar, there is a 'Review/Edit Approvers' section. Under 'Basic Stage', it shows 'G3FORM\_ID=688713' with a 'Pending' status. The 'Basic Path' section shows a flow: 'Pending' (with a 'Multiple Approvers' link highlighted in red) leads to 'Not Routed' (with 'Multiple Approvers Finance Project Mgr' as an option), which then leads to another 'Not Routed' step (with 'Multiple Approvers Payroll Acct' as an option). The 'Done' button in the top right of the dialog is also highlighted with a red box.