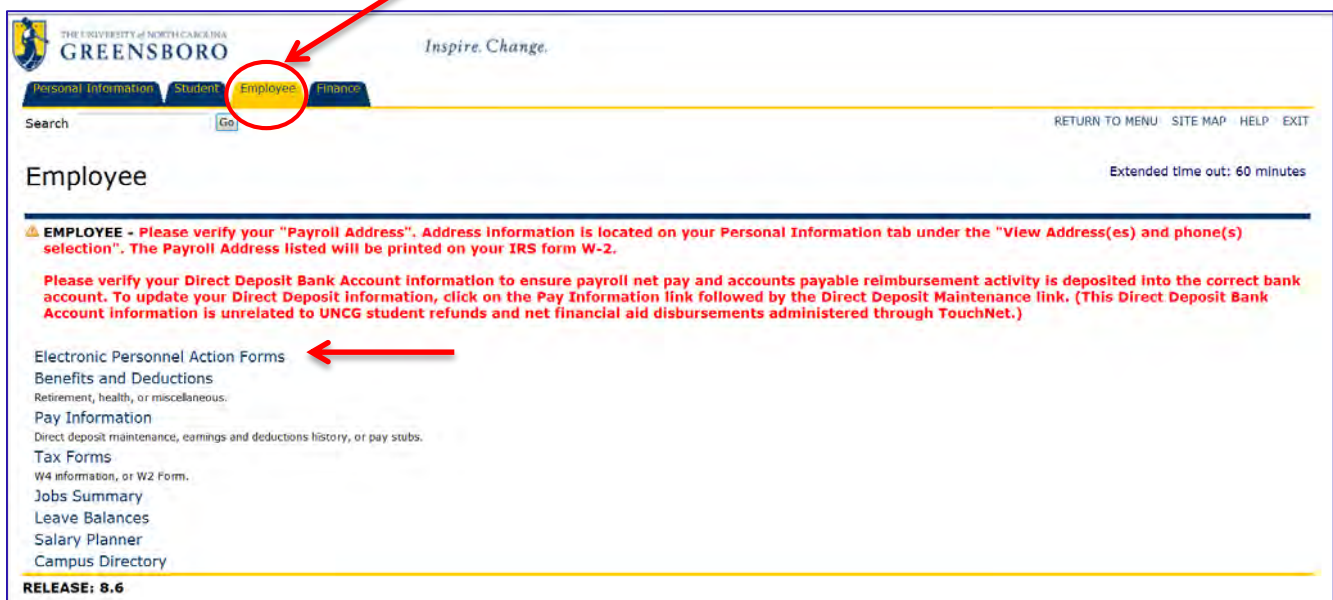# Electronic Position Action Forms

There are two entry portals for electronic personnel actions, which are located on the "Employee Tab" in UNCGenie. The **Position Actions Portal** is for PAFs that perform actions which only update the position. **The Person, Job, and Position Actions Portal** is for changes to person or job actions or a combination of person, job, and position actions, which can update both jobs and positions.

The Electronic PAF **WILL NOT** be used to establish, abolish or make organization changes to positions. Specific Position Action Forms for these transactions are located on the Budget Office Website at **http://fsv.uncg.edu/budgets/bud_forms.html.**

Entrance into Position Actions Portal

Enter into UNCGenie. Select **Employee Tab**.

Select **Electronic Personnel Action Forms** on the menu. Select **Position Actions**.

The Electronic Position Action, that touches only the position, requires a position number to begin. If position number is known enter it into the **Position Number** field. If the position number is unknown, you can search for the position number by clicking on the magnifying glass icon 🔍. You can search for a position number by the Employee Class, the COA or the Budget Organization (UNCG Org Security Guidelines apply). Click the appropriate position number and it will populate the position field.

Select the **"PAF POSITION Labor Distribution, PAFLBD"** from the **Approval Category** drop down box.

Click on **"Go"** to access the Electronic **PAF POSITION Labor Distribution, PAFPLD**.

PAF POSITION Labor Distribution, PAFLBD

The **PAF POSITION Labor Distribution, PAFLBD** can perform multiple **permanent** actions. The PAF can decrease/increase Budget or FTE, move Budget and FTE from one position to another or change the funding source on a position.

Decrease/Increase Budget and FTE

Current Position Information for Position 014166:

Decrease Budget/FTE:
Budget or FTE may be decreased separately or you may decrease both at the same time. Simply enter the **Effective Date** that the change will take effect, the **New Budget** (as necessary) and the **New FTE** (as necessary).

(Example 1: Position 014166 has a current budget of $150,000 and 1.00 FTE. Position needs to be reduced to three-quarters time.)

Click **Save** to update Total.

Electronic Personnel Action Form

✔ Your change was saved successfully.
💬 Enter the information for the EPAF and either Save or Submit

Name and ID: None (Position Only)
Transaction: 143358   **Query Date:** Nov 07, 2012
Transaction Status: Waiting
Approval Category: PAF POSITION Labor Distribution, PAFPLD

[Save] [Submit] [Delete]

Routing Queue | Transaction History

**Changes have been saved.
Note the differences to
Amount to Post and Totals.**

✱ - indicates a required field.

NBAPBUD Labor Distribution, 014166-00 Tech Support Technician

Add / Change
Effective Date: MM/DD/YYYY 12/01/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
G	110154	110154	12228	101110	101	16.67	18753.00	.0900	-6247.00	☐
G	110161	110161	12228	101110	101	16.67	18754.00	.0900	-6246.00	☐
G	115083	115083	10805	101110	152	66.66	75000.00	.5700	-25000.00	☐
						Total:	100.00	112507.00	.75	-37493.00

[Default from Position Index]   [Save and Add New Rows]

Routing Queue

It is important to note the following on PAF POSITION Labor Distribution, PAFPLD:

1. The **Percent** will automatically update based on the budget that you enter. The **Percent** is a non-enterable field.

2. The **FTE** can only be taken to 2 decimal places, e.g., .75, .50, .33. If the **FTE** is carried out more than 2 decimal places, the PAF will be returned to the originator for correction.

3. For positions that have more than one funding source, you may change as few or as many Budgets or FTEs as needed for the transaction.

4. Always include a **comment** on the PAF to help clarify the action that is being performed.

Divisional Procedures have not been altered: a transfer from paper to Electronic PAFs is all that has changed. Approval levels remain the same as with the paper PAFs. Applicable approval levels must be selected in the routing queues as specified by your division.

Electronic Personnel Action Form

✔ Your change was saved successfully.
💬 Enter the information for the EPAF and either Save or Submit

Name and ID: None (Position Only)
Transaction: 143358   **Query Date:** Nov 07, 2012
Transaction Status: Waiting
Approval Category: PAF POSITION Labor Distribution, PAFPLD

[Save] [Submit] [Delete]

Routing Queue | Transaction History

✱ - indicates a required field.

NBAPBUD Labor Distribution, 014166-00 Tech Support Technician

Add / Change
Effective Date: MM/DD/YYYY 12/01/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
G	110154	110154	12228	101110	101	16.67	18753.00	.0900	-6247.00	☐
G	110161	110161	12228	101110	101	16.67	18754.00	.0900	-6246.00	☐
G	115083	115083	10805	101110	152	66.66	75000.00	.5700	-25000.00	☐
						Total:	100.00	112507.00	.75	-37493.00

[Default from Position Index]   [Save and Add New Rows]

Routing Queue

Approval Level	User Name	Required Action	Remove
40 - (BUDGET) Budget Office		Approve	
99 - (APPLY) EPAF Apply		Apply	
Not Selected ▼		Not Selected ▼	
Not Selected ▼		Not Selected ▼	
Not Selected ▼		Not Selected ▼	
Not Selected ▼		Not Selected ▼	

For areas listed in the approval levels, select on the magnifying glass under User Name $^{\mathbb{Q}}$ to select approver. To add an approval level, click on the drop down arrow to select the appropriate level; then click on the magnifying glass under User Name to select approver for that level. Select required action for approvers that you have added.

Errors and Warning Messages

Type	Message Type Description
Routing Queue ERROR	Required Action must be entered.

✱ - indicates a required field.

NBAPBUD Labor Distribution, 014166-00 Tech Support Technician

Add / Change
Effective Date: MM/DD/YYYY 12/01/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
G	110154	110154	12228	101110	101	16.67	18753.00	.0900	-6247.00	☐
G	110161	110161	12228	101110	101	16.67	18754.00	.0900	-6246.00	☐
G	115083	115083	10805	101110	152	66.66	75000.00	.5700	-25000.00	☐
						Total:	100.00	112507.00	.75	-37493.00

[Default from Position Index]   [Save and Add New Rows]

Routing Queue

Approval Level	User Name		Required Action	Remove
40 - (BUDGET) Budget Office	EPAFBUDG	EPAFBUDG Approver Diagnostic	Approve	
99 - (APPLY) EPAF Apply	EPAFCTRL	EPAFCTRL Apply Diagnostic	Apply	
12 - (DEPT) Department	BBHEMPHI	Barbara B Hemphill	FYI	
Not Selected			Not Selected	

Save PAF after selecting Routing Queue. A message **"Your change was saved successfully"** will appear along with a **"Submit"** button. Click the **"Submit"** button to start the PAF processing through the approval levels.

Electronic Personnel Action Form

✔ Your change was saved successfully.
💬 Enter the information for the EPAF and either Save or Submit

Name and ID: None (Position Only)
Transaction: 143358   **Query Date:** Nov 07, 2012
Transaction Status: Waiting
Approval Category: PAF POSITION Labor Distribution, PAFPLD

[Save] [Submit] [Delete]

Routing Queue | Transaction History

✱ - indicates a required field.

NBAPBUD Labor Distribution, 014166-00 Tech Support Technician

Add / Change
Effective Date: MM/DD/YYYY 12/01/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
G	110154	110154	12228	101110	101	16.67	18753.00	.0900	-6247.00	☐
G	110161	110161	12228	101110	101	16.67	18754.00	.0900	-6246.00	☐
G	115083	115083	10805	101110	152	66.66	75000.00	.5700	-25000.00	☐

Increase Budget/FTE:

Budget or FTE may be increased separately or may be increased both at the same time. Simply enter the **Effective Date** that the change will take effect, the **New Budget** (as necessary) and the **New FTE** (as necessary).

Current Position Information for Position 013170:

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: None (Position Only)
Transaction: **Query Date:** Nov 08, 2012
Transaction Status:
Approval Category: PAF POSITION Labor Distribution, PAFPLD

[Save]

Routing Queue | Transaction History

* – indicates a required field.

NBAPBUD Labor Distribution, 013170-00 Building & Environmental Techn

Add / Change
Effective Date: MM/DD/YYYY 11/08/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post
G	117507	117507	56408	101110	180	100.00	11166.00	.5000	.00
					Total:	100.00	11166.00	.50	.00

✔ Defaulting values for Labor Distribution from the Position Labor Distribution records.

[Default from Position Index]   [Save and Add New Rows]

Routing Queue

Approval Level	User Name	Required Action
40 - (BUDGET) Budget Office		Approve

(Example 2: Position 013170 has a current budget of $11,166 and .50 FTE. Position will be built to a full-time status.)

NBAPBUD Labor Distribution, 013170-00 Building & Environmental Techn

Add / Change
Effective Date: MM/DD/YYYY 12/01/2012

Changes have been made to Effective Date, Budget, and FTE prior to being saved.

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post
G	117507	117507	56408	101110	180	100.00	22332	1.0	.00
					Total:	100.00	11166.00	.50	.00

✔ Defaulting values for Labor Distribution from the Position Labor Distribution records.

[Default from Position Index]   [Save and Add New Rows]

Click **Save** to update Total.

Electronic Personnel Action Form

✔ Your change was saved successfully.
📑 Enter the information for the EPAF and either Save or Submit

Name and ID: None (Position Only)
Transaction: 143363   **Query Date:** Nov 08, 2012
Transaction Status: Waiting
Approval Category: PAF POSITION Labor Distribution, PAFPLD

[Save] [Submit] [Delete]

Routing Queue | Transaction History

Changes have been saved. Note the differences to Amount to Post and Totals.

* - indicates a required field.

NBAPBUD Labor Distribution, 013170-00 Building & Environmental Techn

Add / Change
Effective Date: MM/DD/YYYY 12/01/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
🔍 G	🔍 117507	🔍 117507	🔍 56408	🔍 101110	🔍 180	100.00	22332.00	1.0000	11166.00	☐
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
					Total:	100.00	22332.00	1.00	11166.00	

[Default from Position Index] [Save and Add New Rows]

Approval levels remain the same as with the paper PAFs. Applicable approval levels must be selected in the routing queues as specified by your division.

Routing Queue

Approval Level	User Name		Required Action	Remove
40 - (BUDGET) Budget Office	🔍 EPAFBUDG	EPAFBUDG Approver Diagnostic	Approve	
99 - (APPLY) EPAF Apply	🔍 EPAFCTRL	EPAFCTRL Apply Diagnostic	Apply	
34 - (HR) HR Office ▾	🔍 EPAFHRS	SPA and EPA NONFACULTY Diagnostic	FYI ▾	
Not Selected ▾	🔍		Not Selected ▾	
Not Selected ▾	🔍		Not Selected ▾	
Not Selected ▾	🔍		Not Selected ▾	

[Save and Add New Rows]

Comment

For areas listed in the approval levels, select on the magnifying glass under User Name 🔍 to select approver. To add an approval level, click on the drop down arrow to select the appropriate level; then click on the magnifying glass under User Name to select approver for that level. Select required action for approvers that you have added.

Electronic Personnel Action Form
_____

Your change was saved successfully.
Enter the information for the EPAF and either Save or Submit

Name and ID:	None (Position Only)
Transaction:	143363	Query Date: Nov 08, 2012
Transaction Status:	Waiting
Approval Category:	PAF POSITION Labor Distribution, PAFPLD

[Save] [Submit] [Delete]

Comments | Routing Queue | Transaction History

* - indicates a required field.

NBAPBUD Labor Distribution, 013170-00 Building & Environmental Techn

Add / Change
Effective Date: MM/DD/YYYY 12/01/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
🔍 G	🔍 117507	🔍 117507	🔍 56408	🔍 101110	🔍 180	100.00	22332.00	1.0000	11166.00	☐
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
					Total:	100.00	22332.00	1.00	11166.00	

[Default from Position Index] [Save and Add New Rows]

Routing Queue

Approval Level		User Name			Required Action		Remove
34 - (HR) HR Office	▾	🔍 EPAFHRS	SPA and EPA NONFACULTY Diagnostic		FYI	▾	☐
40 - (BUDGET) Budget Office	▾	🔍 EPAFBUDG	EPAFBUDG Approver Diagnostic		Approve		
99 - (APPLY) EPAF Apply	▾	🔍 EPAFCTRL	EPAFCTRL Apply Diagnostic		Apply		
Not Selected	▾	🔍			Not Selected	▾	
Not Selected	▾	🔍			Not Selected	▾	
Not Selected	▾	🔍			Not Selected	▾	

Save PAF after selecting Routing Queue. A message **"Your change was saved successfully"** will appear along with a **"Submit"** button. Click the **"Submit"** button to start the PAF processing through the approval levels.

Move Budget and/or FTE from One Position to Another

The labor distribution on a PAF works differently than the labor distribution on an EPAF. Budget and FTE can be moved from one position to another on the Labor Distribution grid. PAFs may take budget **FROM** one position and add it **TO** a different position. Therefore, 2 PAFS will be required to complete the **FROM** and **TO** actions. The first PAF is completed to take Budget and/or FTE **FROM** one position. The second PAF adds Budget and/or FTE **TO** a position. Both PAFs must be completed at the same time in order to be approved by the Budget Office.

(Example 3: Move Budget of $25,000 and FTE of .25 from position 000898 to position 000047.)

F R O M

(See page 2 for detailed instructions.)

* - indicates a required field.

NBAPBUD Labor Distribution, 000898-00 Professor

Add / Change
Effective Date: MM/DD/YYYY 11/18/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post
🔍 G	🔍 110042	🔍 110042	🔍 12203	🔍 101030	🔍 101	100.00	135000.00	1.0000	.00
🔍	🔍	🔍	🔍	🔍	🔍				
🔍	🔍	🔍	🔍	🔍	🔍				
🔍	🔍	🔍	🔍	🔍	🔍				
🔍	🔍	🔍	🔍	🔍	🔍				
					Total:	100.00	135000.00	1.00	.00

✔ Defaulting values for Labor Distribution from the Position Labor Distribution records.

[Default from Position Index] [Save and Add New Rows]

* - indicates a required field.

NBAPBUD Labor Distribution, 000898-00 Professor

Add / Change
Effective Date: MM/DD/YYYY 11/18/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
🔍 G	🔍 110042	🔍 110042	🔍 12203	🔍 101030	🔍 101	100.00	110000.00	.7500	-25000.00	☐
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
					Total:	100.00	110000.00	.75	-25000.00	

[Default from Position Index] [Save and Add New Rows]

* - indicates a required field.

NBAPBUD Labor Distribution, 000047-00 Director (OA30)

Add / Change
Effective Date: MM/DD/YYYY 11/19/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post
G	117027	117027	68804	101010	170	100.00	78280.00	1.0000	.00
					Total:	100.00	78280.00	1.00	.00

✔ Defaulting values for Labor Distribution from the Position Labor Distribution records.

[Default from Position Index] [Save and Add New Rows]

---

* - indicates a required field.

NBAPBUD Labor Distribution, 000047-00 Director (OA30)

Add / Change
Effective Date: MM/DD/YYYY 11/19/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
G	117027	117027	68804	101010	170	100.00	103280.00	1.2500	25000.00	☐
					Total:	100.00	103280.00	1.25	25000.00	

[Default from Position Index] [Save and Add New Rows]

Change the FOAP and/or the Budget and FTE on a Position

It is important to note the following: Just like an EPAF…**never key the parts of a FOAP** …your PAF will not submit if you do so.

(Example 4: Position 003663 will be changing from FOAP 117503 101110 to FOAP 117507 101110. This position will also receive a $5000 reduction in salary and .10 decrease in FTE.)

Current Position Information for Position 003663:

NBAPBUD Labor Distribution, 003663-00 Adminstrative Support Spec'st

Add / Change
Effective Date: MM/DD/YYYY 11/08/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post
G	117503	117503	56404	101110	180	100.00	40853.00	1.0000	.00
					Total:	100.00	40853.00	1.00	.00

✔ Defaulting values for Labor Distribution from the Position Labor Distribution records.

[Default from Position Index] [Save and Add New Rows]

Routing Queue

Approval Level	User Name		Required Action
40 - (BUDGET) Budget Office			Approve
99 - (APPLY) EPAF Apply			Apply
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected

[Save and Add New Rows]

To change the FOAP, Enter **'G'** for Chart of Accounts. Enter **only** the **Index number**. Press the [**Default from Index]** key. Banner completes the FOAP, without the Account number.

NBAPBUD Labor Distribution, 003663-00 Adminstrative Support Spec'st

Add / Change
Effective Date: MM/DD/YYYY 11/08/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post
G	117503	117503	56404	101110	180	100.00	40853.00	1.0000	.00
G	117507	117507	56408		180	.00	.00	.0000	
					Total:	100.00	40853.00	1.00	.00

[Default from Position Index]   [Save and Add New Rows]

Scroll back to the Labor Distribution grid, and enter the **Account Number**. Click [**Save]**, or [**Save and Add New Rows]**.

NBAPBUD Labor Distribution, 003663-00 Adminstrative Support Spec'st

Add / Change
Effective Date: MM/DD/YYYY 11/08/2012

<div style="border:1px solid red; color:blue; font-weight:bold;">Account added. Changes to Budget and FTE have been saved.</div>

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
G	117503	117503	56404	101110	180	53.26	40853.00	1.0000	.00	☐
G	117507	117507	56408	101110	180	46.74	35853.00	.9000	35853.00	☐
					Total:	100.00	76706.00	1.90	35853.00	

[Default from Position Index]   [Save and Add New Rows]

Routing Queue

Enter **Budget** and **FTE** as needed for necessary changes. Click [**Save]**, or [**Save and Add New Rows]**.   In the above example, **Budget** and **FTE** need to be removed from the OLD FUND 117503. Simply click on the **"Remove"** box beside the OLD FOAP or **"Zero"** out the Budget and FTE associated with the OLD FOAP.

NBAPBUD Labor Distribution, 003663-00 Adminstrative Support Spec'st

Add / Change
Effective Date: MM/DD/YYYY 11/08/2012

<div style="border:1px solid red; color:blue; font-weight:bold;">Note changes made prior to being saved.</div>

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
G	117503	117503	56404	101110	180	53.26	0	0	.00	☑
G	117507	117507	56408	101110	180	46.74	35853.00	.9000	35853.00	☐
					Total:	100.00	76706.00	1.90	35853.00	

[Default from Position Index]   [Save and Add New Rows]

Click **Save** and the FOAP will be removed from the Labor Distribution.

NBAPBUD Labor Distribution, 003663-00 Adminstrative Support Spec'st

Note changes after being saved.
Old FOAP has been removed.

Add / Change
Effective Date: MM/DD/YYYY 11/08/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
G	117507	117507	56408	101110	180	99.99	35853.00	.9000	35853.00	☐
						Total:	99.99	35853.00	.90	-5000.00

[Default from Position Index] [Save and Add New Rows]

Approval levels remain the same as with the paper PAFs. Applicable approval levels must be selected in the routing queues as specified by your division.

Routing Queue

Approval Level	User Name		Required Action	Remove
40 - (BUDGET) Budget Office	🔍		Approve	
99 - (APPLY) EPAF Apply	🔍		Apply	
Not Selected	🔍		Not Selected	
Not Selected	🔍		Not Selected	
Not Selected	🔍		Not Selected	
Not Selected	🔍		Not Selected	

[Save and Add New Rows]

For areas listed in the approval levels, select on the magnifying glass under User Name 🔍 to select approver. To add an approval level, click on the drop down arrow to select the appropriate level; then click on the magnifying glass under User Name to select approver for that level. Select required action for approvers that you have added.

Electronic Personnel Action Form

✓ Your change was saved successfully.

💭 Enter the information for the EPAF and either Save or Submit

Name and ID: None (Position Only)
Transaction: 143460   **Query Date:** Nov 19, 2012
Transaction Status: Waiting
Approval Category: PAF POSITION Labor Distribution, PAFPLD

[Save] (Submit) [Delete]

Routing Queue | Transaction History

Save PAF after selecting Routing Queue. A message **"Your change was saved successfully"** will appear along with a **"Submit"** button. Click the **"Submit"** button to start the PAF processing through the approval levels.

Remove a FOAP from a Split or Multi Funded Position

(Example 5: Position 3663 will be taken from split funding down to one funding source of 117507 101110.)

Current Position Information for Position 003663:

NBAPBUD Labor Distribution, 003663-00 Adminstrative Support Spec'st

Add / Change
Effective Date: MM/DD/YYYY 11/08/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post
G	117503	117503	56404	101110	180	100.00	40853.00	1.0000	.00
G	117507	117507	56408	101110	180	.00	35853	.90	
						Total: 100.00	40853.00	1.00	.00

[Default from Position Index]   [Save and Add New Rows]

Click to **SAVE** button and the **REMOVE** check box will appear.

NBAPBUD Labor Distribution, 003663-00 Adminstrative Support Spec'st

Add / Change
Effective Date: MM/DD/YYYY 11/08/2012

Note changes made prior to being saved.

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
G	117503	117503	56404	101110	180	53.26	0	0	.00	☑
G	117507	117507	56408	101110	180	46.74	35853.00	.9000	35853.00	☐
						Total: 100.00	76706.00	1.90	35853.00	

[Default from Position Index]   [Save and Add New Rows]

Click the **"Remove"** box beside the FOAP(s) that need to be removed. Click **SAVE** again.

NBAPBUD Labor Distribution, 003663-00 Adminstrative Support Spec'st

Add / Change
Effective Date: MM/DD/YYYY 11/08/2012

Note changes after being saved. FOAP has been .

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
G	117507	117507	56408	101110	180	99.99	35853.00	.9000	35853.00	☐
						Total: 99.99	35853.00	.90	-5000.00	

[Default from Position Index]   [Save and Add New Rows]

The FOAP(s) have been removed from the Position Labor Distribution.

Approval levels remain the same as with the paper PAFs. Applicable approval levels must be selected in the routing queues as specified by your division.

For areas listed in the approval levels, select on the magnifying glass under User Name 🔍 to select approver. To add an approval level, click on the drop down arrow to select the appropriate level; then click on the magnifying glass under User Name to select approver for that level. Select required action for approvers that you have added.

Save PAF after selecting Routing Queue. A message **"Your change was saved successfully"** will appear along with a **"Submit"** button. Click the **"Submit"** button to start the PAF processing through the approval levels.

PAF Position and Job Labor Distribution, PAFLDS

Sometimes it is necessary to update the **POSITION** and the **JOB** or a combination **of PERSON, JOB, and POSITION** actions. This will require the **Person, Job, and Position Actions PAF**. This PAF is simply a combination of the **POSITION ONLY PAF** and the **LABOR DISTRIBUTION CHANGE w/SALARY EPAF**.

Enter into UNCGenie. Select **Employee Tab**. Select **Electronic Personnel Action Forms** on the menu.

Select **Person, Job, and Position Actions** from the menu.

The Electronic Person, Job and Position Actions, that touches jobs or positions, requires a University ID to begin.

If the University ID is unknown, you can search for the ID number by clicking on the magnifying glass icon. You can search for ID number by name or Social Security Number (if known).

Click on **"Go"** to search for University ID.
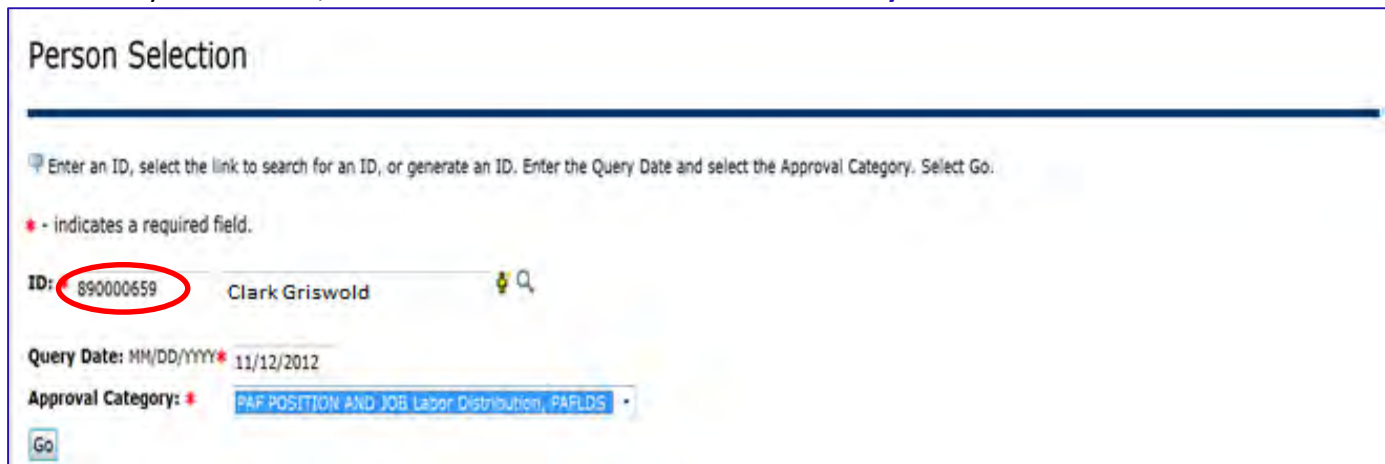
Person Search Results

To choose a person, select a link under ID.

ID	Last Name	First Name	Middle Name	Birth Date	Name Type
890001274	Levens	Amanda	Phipps	Apr 02, 1966	Social Security Name SSAV
885689640	Levens	Alan			University Advancement Name UADV
880907441	Levens	Alan	C	Jul 14, 1987	

Select **"ID"** number for Employee.

If University ID is known, enter it into the **"ID"** field. Enter the **Query Date**.

Select the Approval Category **PAF Position and Job Labor Distribution, PAFLDS,** from the drop down menu.
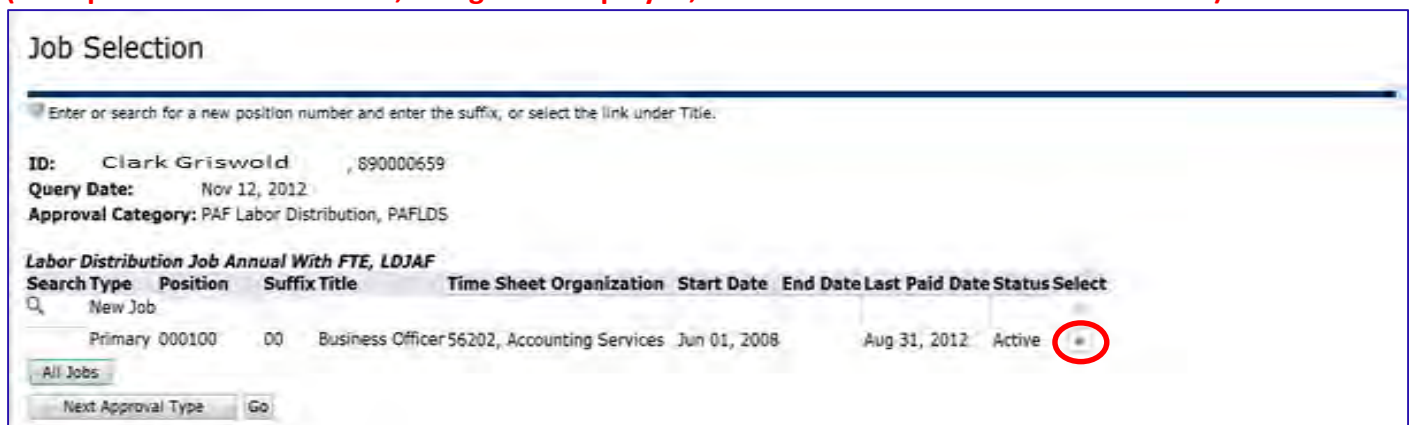
Click on **"Go"** to access the Electronic **PAF Position and Job Labor Distribution, PAFLDS**.

Decrease/Increase Person, Job, Budget, and FTE

Decrease Person, Job, Budget, and FTE:

(Example 1:   Position 000100, along with employee, must be reduced to a half-time status.)

Select **Active Job** for the employee. Click on **"Go"** to access job and position data.

Current Position Information for Position 000100:

Enter **Effective Date, Budget** and **FTE** changes on NBAPBUD (Position Budget) Labor Distribution as applicable.

Click **Save** to update Total.

Enter Labor Distribution Job according to UNCG EPAF guidelines as presented by Human Resources training materials.

Approval levels remain the same as they were with the paper PAFs and EPAFs. Applicable approval levels must be selected in the routing queues as specified by your division.

For areas listed in the approval levels, select on the magnifying glass under User Name $^{\mathbb{Q}}$ to select approver. To add an approval level, click on the drop down arrow to select the appropriate level; then click on the magnifying glass under User Name to select approver for that level. Select required action for approvers that you have added.

Save PAF after selecting Routing Queue. A message **"Your change was saved successfully"** will appear along with a **"Submit"** button. Click the **"Submit"** button to start the PAF processing through the approval levels.

It is important to note the following guidelines:
1. Budget procedures have not been altered: a transfer from paper to Electronic PAFs is all that has changed. State funds must remain in balance. Therefore, if an entry is made to reduce/increase a state funded position then an entry must be done to offset the original entry by one of the following methods:
   a. Moving the salary dollars and FTE to another position within the same Program and Account
   b. Initiating a flex to move the salary dollars and FTE to another position outside of the current Program and account (Except Faculty 101030 positions).
   c. Initiating a flex to move the salary dollars to Operating (OTP) lines and abolishing FTE.

Increase Person, Job, Budget, and FTE:

(Example 2: Employee and positions 013170 will be increased to full-time status).

Job Selection

Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: Homer Simpson,   895054978
Query Date: Dec 01, 2012
Approval Category: PAF Labor Distribution, PAFLDS

Labor Distribution Job Annual With FTE, LDJAF

Search Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job								
	Primary 013170	00	Building & Environmental Techn	56408, Housekeeping	Apr 02, 2012		Aug 31, 2012	Active	*

All Jobs

Next Approval Type   Go

Select **Active Job** for the employee. Click on **"Go"** to access job and position data.

Current Position Information for Position 013170:

Name and ID: Homer Simspon, 895054978
Transaction:
Transaction Status:
Approval Category: PAF POSITION AND JOB Labor Distribution, PAFLDS

Save

Approval Types | Account Distribution | Routing Queue | Transaction History

* - indicates a required field.

NBAPBUD Labor Distribution, 013170-00 Building & Environmental Techn, Last Paid Date: Aug 31, 2012

Add / Change
Effective Date: MM/DD/YYYY 12/01/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post
🔍 G	🔍 117507	🔍 117507	🔍 56408	🔍 101110	🔍 180	100.00	11166.00	.5000	.00
🔍	🔍	🔍	🔍	🔍	🔍				
🔍	🔍	🔍	🔍	🔍	🔍				
🔍	🔍	🔍	🔍	🔍	🔍				
🔍	🔍	🔍	🔍	🔍	🔍				
					Total:	100.00	11166.00	.50	.00

Enter **Effective Date, Budget** and **FTE** changes on NBAPBUD (Position Budget) Labor Distribution as applicable.

Name and ID: Homer Simpson, 895054978
Transaction: 143379
Transaction Status: Waiting
Approval Category: PAF POSITION AND JOB Labor Distribution, PAFLDS

Save   Submit   Delete

Note changes prior to being saved.

Approval Types | Account Distribution | Routing Queue | Transaction History

* - indicates a required field.

NBAPBUD Labor Distribution, 013170-00 Building & Environmental Techn, Last Paid Date: Aug 31, 2012

Add / Change
Effective Date: MM/DD/YYYY 12/01/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
🔍 G	🔍 117507	🔍 117507	🔍 56408	🔍 101110	🔍 180	100.00	22332.00	1.0000	11166.00	
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
					Total:	100.00	22332.00	1.00	11166.00	

Default from Position Index.   Save and Add New Rows

Click **Save** to update Total.

Approval levels remain the same as they were with the paper PAFs and EPAFs. Applicable approval levels must be selected in the routing queues as specified by your division.

For areas listed in the approval levels, select on the magnifying glass under User Name 🔍 to select approver. To add an approval level, click on the drop down arrow to select the appropriate level; then click on the magnifying glass under User Name to select approver for that level. Select required action for approvers that you have added.

Save PAF after selecting Routing Queue. A message **"Your change was saved successfully"** will appear along with a **"Submit"** button. Click the **"Submit"** button to start the PAF processing through the approval levels.

Move Budget and/or FTE from One Job/Position to Another

(Example 3: Budget and Job on Position 000075 was reduced by $7500 and FTE was reduced by .10, which was transferred to position 000100.)

Job Selection

Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: Abigal Angel   , 890001274
Query Date: Dec 01, 2012
Approval Category: PAF Labor Distribution, PAFLDS

Labor Distribution Job Annual With FTE, LDJAF

Search Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job								
	Primary 000075	00	Budget Analyst	56203, Financial Planning & Budgets	Jun 01, 2008		Aug 31, 2012	Active	•

All Jobs

Select current **Active Job** for the employee. Select Go.

Enter **Budget** and **FTE** changes on NBAPBUD (Position Budget) Labor Distribution as applicable.

F R O M

(See page 15 for detailed instructions.)

NBAPBUD Labor Distribution, 000075-00 Budget Analyst, Last Paid Date: Aug 31, 2012

Add / Change
Effective Date: MM/DD/YYYY 12/01/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
🔍 G	🔍 117029	🔍 117029	🔍 56203	🔍 101110	🔍 170	100.00	41723.00	.9000	-7500.00	☐
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍					
					Total:	100.00	41723.00	.90	-7500.00	

Default from Position Index   Save and Add New Rows

Labor Distribution Job Annual With FTE, 000075-00 Budget Analyst, Last Paid Date: Aug 31, 2012

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY *	07/01/2012	12/01/2012
Personnel Date: MM/DD/YYYY *	07/01/2012	12/01/2012
Annual Salary:	49223	41723
FTE:	1	.90
Job Change Reason: *	LISI	FTEC, FTE Change

Labor Distribution, 000075-00 Budget Analyst, Last Paid Date: Aug 31, 2012

Current
Effective Date: 07/01/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
G	117029	117029	56203	101110	170					100.00	

New
Effective Date: MM/DD/YYYY 12/01/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date MM/DD/YYYY	Remove
🔍 G	🔍 117029	🔍 117029	🔍 56203	🔍 101110	🔍 170					100.00		☐
🔍	🔍	🔍	🔍	🔍	🔍							
🔍	🔍	🔍	🔍	🔍	🔍							
🔍	🔍	🔍	🔍	🔍	🔍							
🔍	🔍	🔍	🔍	🔍	🔍							
									Total:	100.00		

Default from Index   Save and Add New Rows

Enter Labor Distribution Job according to UNCG EPAF guidelines as presented by Human Resources training materials.

Approval levels remain the same as they were with the paper PAFs and EPAFs. Applicable approval levels must be selected in the routing queues as specified by your division.

For areas listed in the approval levels, select on the magnifying glass under User Name 🔍 to select approver. To add an approval level, click on the drop down arrow to select the appropriate level; then click on the magnifying glass under User Name to select approver for that level. Select required action for approvers that you have added.
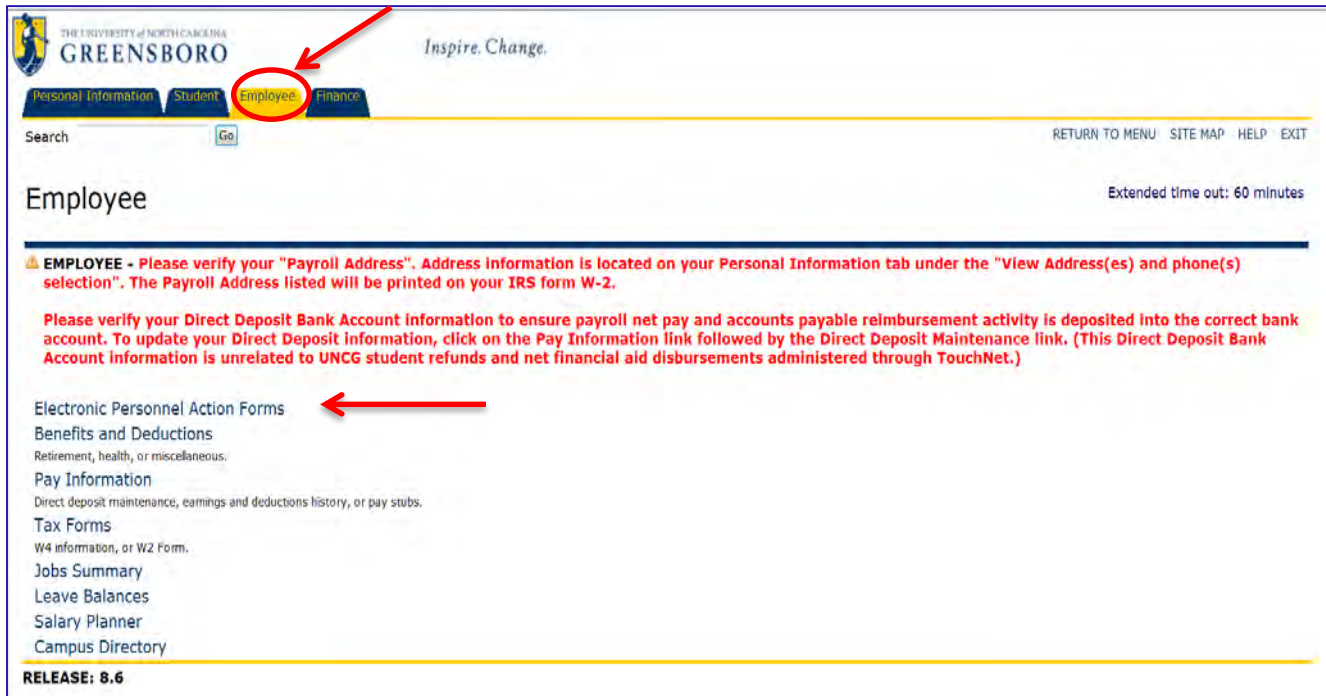

Save PAF after selecting Routing Queue. A message **"Your change was saved successfully"** will appear along with a **"Submit"** button. Click the **"Submit"** button to start the PAF processing through the approval levels.

REPEAT STEPS ABOVE TO COMPLETE THE "TO" TRANSACTION SIDE OF EXAMPLE 1:

Select current **Active Job** for the employee. Select Go.

Enter **Budget** and **FTE** changes on NBAPBUD (Position Budget) Labor Distribution as applicable.

NBAPBUD Labor Distribution, 000100-00 Business Officer, Last Paid Date: Aug 31, 2012

Add / Change
Effective Date: MM/DD/YYYY 12/01/2012

COA	Index	Fund	Organization	Account	Program	Percent	Budget	FTE	Amount to Post	Remove
G	117028	117028	56202	101110	170	100.00	43760.00	.8500	7500.00	☐
						Total: 100.00	43760.00	.85	7500.00	

[Default from Position Index]   [Save and Add New Rows]

Labor Distribution, 000100-00 Business Officer, Last Paid Date: Aug 31, 2012

Current
Effective Date: 07/01/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
G	117028	117028	56202	101110	170					100.00	

New
Effective Date: MM/DD/YYYY 12/01/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date MM/DD/YYYY	Remove
G	117028	117028	56202	101110	170					100.00		☐
										Total: 100.00		

[Default from Index]   [Save and Add New Rows]

Enter Labor Distribution Job according to UNCG EPAF guidelines as presented by Human Resources training materials.

Clarify your actions by **including comments** on both PAFS:

Sample Comment on the FROM PAF:
Position 000075 was reduced by $7500 and FTE was reduced by .10. Job was reduced by $7500 and the FTE on the JOB was reduced by .10 FTE. Position 000100 was increased by $7500 and FTE was increased by .10. Job was increased by $7500 and FTE was increased by .10.

Sample Comment on the TO PAF:
Position 000100 was increased by $7500 and FTE was increased by .10. Job was increased by $7500 and the FTE on the JOB was increased by .10 FTE. Position 000075 was reduced by $7500 and FTE was reduced by .10. Job was reduced by $7500 and FTE was reduced by .10.

Approval levels remain the same as they were with the paper PAFs and EPAFs. Applicable approval levels must be selected in the routing queues as specified by your division.

For areas listed in the approval levels, select on the magnifying glass under User Name 🔍 to select approver. To add an approval level, click on the drop down arrow to select the appropriate level; then click on the magnifying glass under User Name to select approver for that level. Select required action for approvers that you have added.

Save PAF after selecting Routing Queue. A message **"Your change was saved successfully"** will appear along with a **"Submit"** button. Click the **"Submit"** button to start the PAF processing through the approval levels.

It is important to note the following on PAF Position and Job Labor Distribution, PAFPLS:

1. The **Percent** will automatically update based on the budget that you enter. The **Percent** is a non-enterable field.

2. The **FTE** can only be taken to 2 decimal places, e.g., .75, .50, .33. If the **FTE** is carried out more than 2 decimal places, the PAF will be returned to the originator for correction.

3. To change the percentages of pay in the JOBS section, manually enter the new percentage for each fund under PERCENT. When totaled, all lines must equal 100%.

4. For positions that have more than one funding source, you may change as few or as many Budgets or FTEs as needed for the transaction.

5. Always include a **comment** on the PAF to help clarify the action that is being performed.

Change the FOAP, BUDGET/FTE on JOB and Position

It is important to note the following: Just like an EPAF…**never key the parts of a FOAP** …your PAF will not submit if you do so.

(Example 4: Employee in position 014210 will receive an increase of $5000. FOAP will be changed from 117029 to 117033.)

Select current **ACTIVE Job** for the employee. Select Go.

Enter **Budget** and **FTE** changes on NBAPBUD (Position Budget) Labor Distribution as applicable.

To change the FOAP, Enter **'G'** for Chart of Accounts. Enter **only** the **Index number**. Press the [**Default from Index**] key. Banner completes the FOAP, without the Account number.

Scroll back to the Labor Distribution grid, and enter the **Account Number**. Click **[Save]**, or **[Save and Add New Rows]**.

Account added. Changes to Budget and FTE have been saved.

Enter **Budget** and **FTE** as needed for necessary changes. Click **[Save]**, or **[Save and Add New Rows]**.   In the above example, **Budget** and **FTE** need to be removed from the OLD FUND 117503. Simply click on the **"Remove"** box beside the OLD FOAP or **"Zero"** out the Budget and FTE associated with the OLD FOAP.

Note changes made prior to being saved.

Click **Save** and the FOAP will be removed from the Labor Distribution.

Note changes after being saved. Old FOAP has been removed.

Position changes have been completed. Modifications need to be made to the employee's Job. Enter Labor Distribution Job according to UNCG EPAF guidelines as presented by Human Resources training materials.

Enter the new **Index number**.

Press the [**Default from Index**] key. Banner completes the FOAP, without the Account number.

Scroll back to the Labor Distribution grid, and enter the **Account Number**. Click **[Save]**, or **[Save and Add New Rows]**.

Approval levels remain the same as they were with the paper PAFs and EPAFs. Applicable approval levels must be selected in the routing queues as specified by your division.

For areas listed in the approval levels, select on the magnifying glass under User Name 🔍 to select approver. To add an approval level, click on the drop down arrow to select the appropriate level; then click on the magnifying glass under User Name to select approver for that level. Select required action for approvers that you have added.

Save PAF after selecting Routing Queue. A message **"Your change was saved successfully"** will appear along with a **"Submit"** button. Click the **"Submit"** button to start the PAF processing through the approval levels.

PAF Supervisor Change, PAFSPV

Universities must transmit data to UNC General Administration. Data is generally pulled out of the Banner System and uploaded to UNC General Administration; therefore, Banner data must be current. The **PAF Supervisor Change, PAFSPV** allows departments to change supervisory data. **PAF Supervisor Change, PAFSPV,** can be accessed through the **Position Actions Portal**.

Enter into UNCGenie. Select **Employee Tab**. Select **Electronic Personnel Action Forms** on the menu.

Select **Position Actions**.

The Electronic Position Action, that touches only the position, requires a position number to begin. If position number is known enter it into the **Position Number** field. If the position number is unknown, you can search for the position number by clicking on the magnifying glass icon 🔍. You can search for a position number by the Employee Class, the COA or the Budget Organization (UNCG Org Security Guidelines apply). Click the appropriate position number and it will populate the position field.

Select the **"PAF Supervisor Change, PAFSPV"** from the **Approval Category** drop down box.

Click on "Go" to access the Electronic **PAF Supervisor Change form, PAFSPV**.

Enter the **New Supervisor Position Number** in the **"New Value"** Field.   If the position number is unknown, you can search for the position number by clicking on the magnifying glass icon.

Electronic Personnel Action Form

💬 Enter the information for the EPAF and either Save or Submit.

Name and ID: None (Position Only)
Transaction: **Query Date:** Nov 14, 2012
Transaction Status:
Approval Category: PAF Supervisor Change, PAFSPV

Save

Approval Types | Routing Queue | Transaction History

✱ - indicates a required field.

POSN Supervisor Change, 000075-00 Budget Analyst

Item	Current Value	New Value
Position Reports To: ✱ 000113	🔍 000173	

Approval levels remain the same as they were with the paper PAFs and EPAFs. Applicable approval levels must be selected in the routing queues as specified by your division.

Routing Queue

Approval Level	User Name		Required Action	Remove
40 - (BUDGET) Budget Office	🔍		Approve	
99 - (APPLY) EPAF Apply	🔍		Apply	
Not Selected ▾	🔍		Not Selected	
Not Selected ▾	🔍		Not Selected ▾	
Not Selected ▾	🔍		Not Selected ▾	
Not Selected ▾	🔍		Not Selected ▾	

Save and Add New Rows

For areas listed in the approval levels, select on the magnifying glass under User Name 🔍 to select approver. To add an approval level, click on the drop down arrow to select the appropriate level; then click on the magnifying glass under User Name to select approver for that level. Select required action for approvers that you have added.

Electronic Personnel Action Form

✓ Your change was saved successfully.
💬 Enter the information for the EPAF and either Save or Submit

Name and ID: None (Position Only)
Transaction: 143486   **Query Date:** Nov 19, 2012
Transaction Status: Waiting
Approval Category: PAF Supervisor Change, PAFSPV

Save   Submit   Delete

Save PAF after selecting Routing Queue. A message **"Your change was saved successfully"** will appear along with a **"Submit"** button. Click the **"Submit"** button to start the PAF processing through the approval levels.

Routing Queues

Just like an EPAF, the **PAF** Routing Queue lists the persons or departments through which the **PAF** must travel for approval. Certain approval levels are hard coded on the PAFs. These approval levels should not be changed as they are required approvers and must be included. You must select a name for each level that has been hard coded into the PAF. If you leave one blank, the PAF will not submit successfully.

Additional approval levels can be added to accommodate each unique position action. For example, if a position is funded by grant funds, the Principal Investigator and Contracts and Grants should be added to the routing queue.

Approval Levels for PAFS:

PAF Position ONLY Labor Distribution Change, PAFPLD		PAF Position and Jobs Labor Distribution Change, PAFLDS	
10	Principal Investigator –If applicable	10	Principal Investigator –If applicable
12	Department – If applicable	12	Department – If applicable
15	Unit – If applicable	15	Unit – If applicable
20	Division – Hard coded as an Approver	20	Division – Hard coded as an Approver
34	Human Resource Services – Hard Coded as FYI	34	Human Resource Services – Hard Coded as Approver
35	Contracts and Grants – If applicable	35	Contracts and Grants – If applicable
40	Budget Office – Hard Coded as Approver	40	Budget Office – Hard Coded as Approver
99	EPAF/PAF Apply – Hard Coded to Apply	99	EPAF/PAF Apply – Hard Coded to Apply

Searching PAFS in Genie

Unlike EPAFS that can be searched by an employee name, ID number or transaction number, Position Only PAFs can only be searched by a transaction number in Genie. However, PAFs will appear first in the list of transactions.