

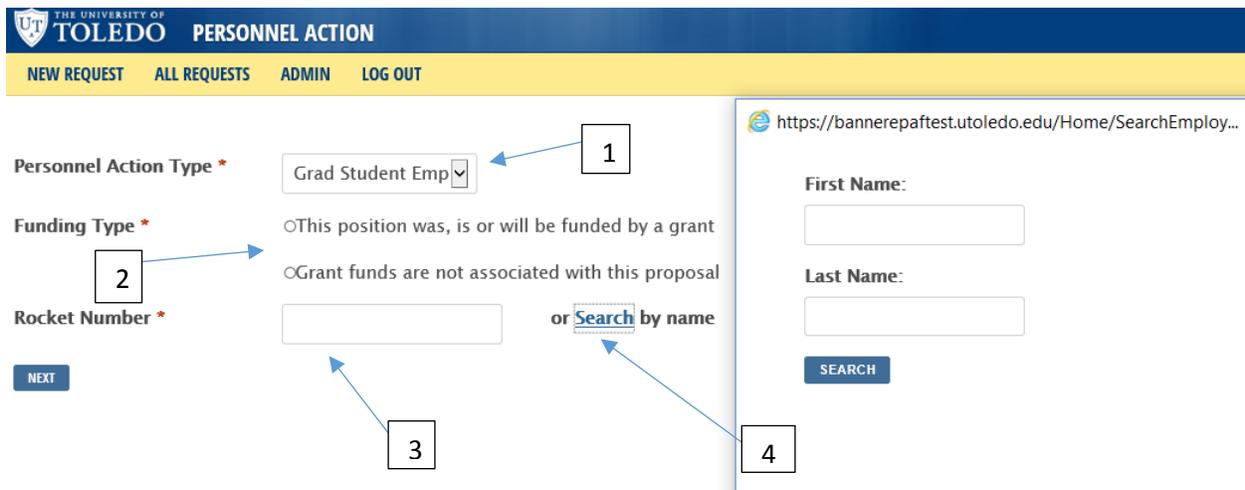
## Labor Distribution Change for Graduate Students

### Step One: Electronic Personnel Action Form Screen

1. Select Personnel Action Type
2. Select funding type:
  - a. This position was, is or will be funded by a grant
  - b. Grant funds are not associated with this proposal – no funding from a grant

Note: If student is to receive any type of grant funding such as stipend, general fees, health insurance, etc., select 2a. This will generate an email to the originator asking for information about the grant, which will be forwarded to Grants Accounting and Research and Sponsored Programs.

3. Enter Rocket ID of student (must enter capital R); student’s name will populate if admitted in Banner
4. Use Search link if student’s ID is not available



The screenshot shows the 'PERSONNEL ACTION' form interface. At the top, there is a navigation bar with 'NEW REQUEST', 'ALL REQUESTS', 'ADMIN', and 'LOG OUT'. The main form area includes the following fields and options:

- Personnel Action Type \***: A dropdown menu currently showing 'Grad Student Emp'. A blue arrow labeled '1' points to this dropdown.
- Funding Type \***: Two radio button options: 'This position was, is or will be funded by a grant' and 'Grant funds are not associated with this proposal'. A blue arrow labeled '2' points to the first option.
- Rocket Number \***: A text input field. A blue arrow labeled '3' points to this field.
- Search**: A link labeled 'or Search by name' with a blue arrow labeled '4' pointing to it.

On the right side of the form, there is a search section with the URL 'https://bannerepafest.utoledo.edu/Home/SearchEmploy...'. It includes input fields for 'First Name:' and 'Last Name:', and a 'SEARCH' button.

5. Once Rocket ID is entered or search option completed, student information will populate



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### PERSONNEL ACTION

[NEW REQUEST](#) [ALL REQUESTS](#) [ADMIN](#) [LOG OUT](#)

**Personnel Action Type \***

**Funding Type \***  
 This position was, is or will be funded by a grant  
 Grant funds are not associated with this proposal

**Rocket Number \***   or [Search by name](#)

**Name** Vanover, Brenden Michael  
**Date of Birth** 08/26/1992  
**College** College of Arts and Letters  
**Degree** Master of Arts  
**Major** Spanish  
**Concentration (If available)**  
**Program** MA in Spanish

Note: If College, Degree, Major, or Program do not populate, student is not completely admitted into the College of Graduate Studies. There are several reasons why this may occur, so please contact [graduateonlineapplication@utoledo.edu](mailto:graduateonlineapplication@utoledo.edu), 419-530-4723, or student can check their application status online. Until student is completely admitted, ePAF cannot be created.

6. Select Next button

**Step Two:** Enter Position Information –Select Action – Labor Distribution Change GA

1. Click radio button of PCN changing from (Position Control Number i.e. P94258)
2. Enter Start Date or use calendar to select date



**Rocket Number** R00832076      **Name** Vanover, Brenden Michael

**Select Action:**

Labor Distribution Change GA

1

**All Employee Positions**

Select an existing position or type in a new position below

Type	POSN	Suffix/Title	Time Street Organization	Start Date	End Date	Last Paid Date	FTE	Status
<input checked="" type="radio"/>	Primary P94258	00 Graduate Assistants - Pooled	100910, Spanish	08/22/2016	05/05/2018	05/05/2017	0.5	Terminated

Or type in new position here

or Search by Organization/Index

2

**Start Date**

08/28/2017

Aug 2017

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5

3. Select the Next button

**Step Three: Tuition Waiver**

1. Exemption Code – displayed is the currently charged tuition waiver; if different exemption code is to be charged, check box to remove current tuition waiver
  - a. Codes with letters of GFS in description stand for Grant-Funded Stipend – use when outside source is paying for student’s stipend
  - b. Codes with GA only are for TA’s and AA’s – use for general fund monies
  - c. Codes with Tuition Waiver must be submitted using Tuition Scholarship form, located on COGS website
2. Enter new exemption code to charge or use search link to look up code by Index Number
3. If changing exemption code tuition is charged to, select Term(s)/semester(s) and enter # of hours
  - a. Limit of 3 active semesters can be selected at one time



## Tuition Waivers

Rocket Number R00832076 Name Vanover, Brenden Michael

### Current Waivers

1

Below is a list of current waivers that may be affected by this request. Please select the ones needs to be REMOVED.

Remove	Term Code	Exemption Code	Exemption Description	Detail Code	Detail Description
<input checked="" type="checkbox"/>	201740	99	GA – Spanish	EASG	GA – Spanish A10091

### New Waiver

Type in Exemption Code: 69 GA – German

or [Search](#) by Index

Term (2)

2

Term \* Fall 2017 Credit Hours: \* 9 REMOVE

Term \* Spring 2018 Credit Hours: \* 9 REMOVE

ADD TERM

3

SAVE

4. Select Save button

**Step Four: Review Document**

1. Review all information; if any information is not correct, please select the Start Over button at the bottom of the page
2. If information is correct, select Submit button



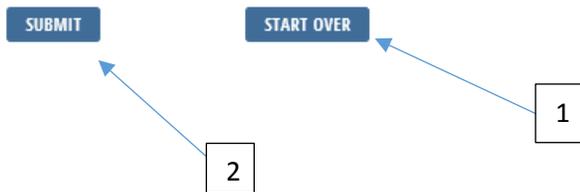
## Confirm Personnel Action

### Employee Information

Rocket Number	R00832076
Name	Vanover, Brandon Michael
Date of Birth	08/26/1992
College	College of Arts and Letters
Degree	Master of Arts
Major	Spanish
Concentration (If available)	
Program	MA in Spanish

### Personnel Action Information

Personnel Action Group	Grad Student Emp
Action Type	Labor Distribution Change GA
New Position Number	P94258
New Position Suffix	00
Position Start Date	08/28/2017
Position End Date	



Note: Once Submit button is selected, an ePAF will be created.

# Guide for Creating Labor Distribution Change ePAFs for Grad Student Employees



## Step Five: Change Labor Distribution

Note: All information from previous screens and current Banner information has populated to this ePAF.

1. Check Remove box
2. Then enter New Index #, Account #, and Percentage

Personal Information | Student | Faculty Services | **Employee** | Finance | Proxy

Search  Go [RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

### Electronic Personnel Action Form

Enter the information for the ePAF and either Save or Submit

<b>Name and ID:</b>	Brenden Michael Vanover, R00832076	<b>Job and Suffix:</b>	P94258-00, Graduate Assistants - Pooled
<b>Transaction:</b>	75886	<b>Query Date:</b>	Aug 11, 2017
<b>Transaction Status:</b>	Waiting	<b>Last Paid Date:</b>	May 05, 2017
<b>Approval Category:</b>	Labor Distribution Change GA, LDGRD		

[Approval Types](#) | [Account Distribution](#) | [Routing Queue](#) | [Comments](#) | [Transaction History](#)  
[New ePAF](#) | [ePAF Originator Summary](#)  
[Return to ePAF Menu](#)

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Labor Distribution Record, P94258-00 Graduate Assistants - Pooled, Last Paid Date: May 05, 2017

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	05/05/2017	<input type="text" value="08/26/2017"/>
Personnel Date: MM/DD/YYYY(Not Enterable)	05/05/2017	<input type="text" value="08/28/2017"/>
Job Change Reason: (Not Enterable)	100	<input type="text" value="35"/>

**Current**

Effective Date: 08/22/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override E
T	A10091	100000	100910	61302	1103					100.00	

**New**

Effective Date: MM/DD/YYYY

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End	Date Rem
T	A10091	100000	100910	61302	1103					100.00		<input checked="" type="checkbox"/>
T	A10090			61314						100.00		
<b>Total:</b>										100.00		

2

1

# Guide for Creating Labor Distribution Change ePAFs for Grad Student Employees



3. After selecting the Save button, Labor Distribution Record will look like this

Personal Information | Student | Faculty Services | **Employee\*** | Finance | Proxy

Search  Go [RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

## Electronic Personnel Action Form

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

<b>Name and ID:</b>	Brenden Michael Vanover, R00832076	<b>Job and Suffix:</b>	P94258-00, Graduate Assistants - Pooled
<b>Transaction:</b>	75886	<b>Query Date:</b>	Aug 11, 2017
<b>Transaction Status:</b>	Waiting	<b>Last Paid Date:</b>	May 05, 2017
<b>Approval Category:</b>	Labor Distribution Change GA, LDGRD		

Save Submit Delete

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Labor Distribution Record, P94258-00 Graduate Assistants - Pooled, Last Paid Date: May 05, 2017

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	05/05/2017	<input type="text" value="08/26/2017"/>
Personnel Date: MM/DD/YYYY(Not Enterable)	05/05/2017	<input type="text" value="08/28/2017"/>
Job Change Reason: (Not Enterable)	100	<input type="text" value="35"/>

**Current**

Effective Date: 08/22/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override
T	A10091	100000	100910	61302	1103					100.00	

**New**

Effective Date: MM/DD/YYYY

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
<input type="text" value="T"/>	<input type="text" value="A10090"/>	<input type="text" value="100000"/>	<input type="text" value="100900"/>	<input type="text" value="61314"/>	<input type="text" value="1103"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="100.00"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Total:</b>										100.00		

Default from Index Save and Add New Rows

**Step Six: Routing Queue**

1. Designate appropriate approvers
  - a. PREAPP – will always be BANWORX
  - b. DEPT – should be Department Chair
  - c. DEANBM – should be Dean/Business Manager/Designee
  - d. COGS – should be ECOOPSH – Elaine Coopshaw
  - e. HRSTAF – should be PWILLARD – Paula Willard
  - f. HRAPPL – should be KGULDEN – Kelley Guldenpfennig

Note: The originator, DEPT, and DEANBM cannot be the same people. There must be a minimum of two different approvers before it routes to the College of Graduate Studies.

Routing Queue

Approval Level	User Name	Required Action	Remove
5 - (PREAPP) Pre-Approval Review	BANWORX	Approve	
10 - (DEPT) Dept Chair		Approve	
20 - (DEANBM) Business Mgr/Dean/Designee		Approve	
30 - (COGS) College of Graduate Studies		Approve	
91 - (HRSTAF) HRIS		Approve	
99 - (HRAPPL) HR Apply/Superuser		Apply	
Not Selected		Not Selected	
Not Selected		Not Selected	
Not Selected		Not Selected	
Not Selected		Not Selected	

Save and Add New Rows

Comment

**Date:** Aug 16, 2017 11:34:00 AM  
**Made by:** Banworx, BANWORX  
**Comments:** NEW FEE WAIVER  
 TERM: 201740 EXEMPTION CODE: 69 EXEMPTION DESC: GA - German DETAIL CODE: EAGG DETAIL DESC: GA - German A10090 CREDIT HOURS: 9  
 TERM: 201810 EXEMPTION CODE: 69 EXEMPTION DESC: DETAIL CODE: DETAIL DESC: CREDIT HOURS: 9  
 EXISTING FEE WAIVER TO BE REMOVED  
 TERM: 201740 EXEMPTION CODE: 99 EXEMPTION DESC: GA - Spanish DETAIL CODE: EASG DETAIL DESC: GA - Spanish A10091

3

2

Transaction History

Action	Date	User Name
Created:	Aug 16, 2017	Bonnie Marie Harrell

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Save Submit Delete

4

2. Comments box – shows detail information concerning tuition waiver
3. Box below comments is where you can enter information concerning this ePAF
4. Save and Submit ePAF; you can Save and review and return to this ePAF to Submit at a later time if needed