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.
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.
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.
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:

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

Click Save to update Total.
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.

### 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.)
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:
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].

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.
Click **Save** and the FOAP will be removed from the 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.
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 Administrative Support Spec's

<table>
<thead>
<tr>
<th>COA</th>
<th>Index</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Percent</th>
<th>Budget</th>
<th>FTE</th>
<th>Amount to Post</th>
</tr>
</thead>
<tbody>
<tr>
<td>G</td>
<td>117503</td>
<td>117503</td>
<td>56404</td>
<td>101110</td>
<td>180</td>
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<td>40853.00</td>
<td>1.00</td>
<td>.00</td>
</tr>
<tr>
<td>G</td>
<td>117507</td>
<td>117507</td>
<td>56408</td>
<td>101110</td>
<td>180</td>
<td>.00</td>
<td>35853</td>
<td>.90</td>
<td>.00</td>
</tr>
</tbody>
</table>

Total: 100.00 40853.00 1.00 .00

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

NBAPBUD Labor Distribution, 003663-00 Administrative Support Spec's

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

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.

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 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).

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

Current Position Information for Position 013170:

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

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.)

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

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

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.

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].

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.

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

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.
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:

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

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.