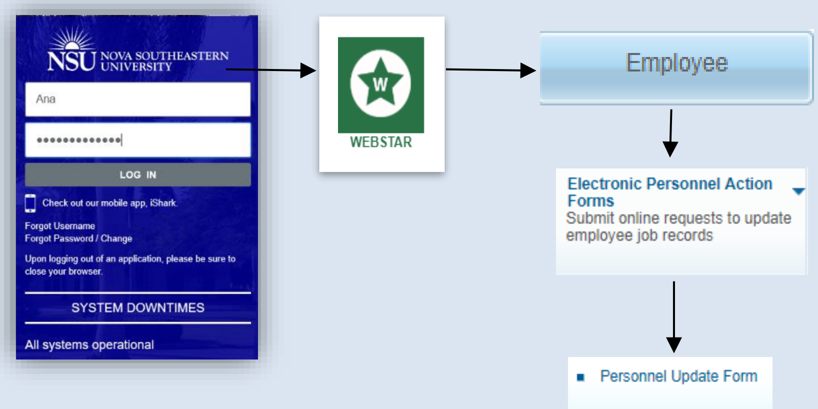
PAF- Labor Distribution Change- Quick reference Guide

1. Personnel Update Form access

The electronic version of the Personnel Update form is intended to streamline updates to active employee records by use of Banner Workflow/EPAF automation for regular employees, student employees, and temporary employees, and to provide status notifications to the originator from begin to end of the transaction.

Note: Google Chrome is the required browser for this form

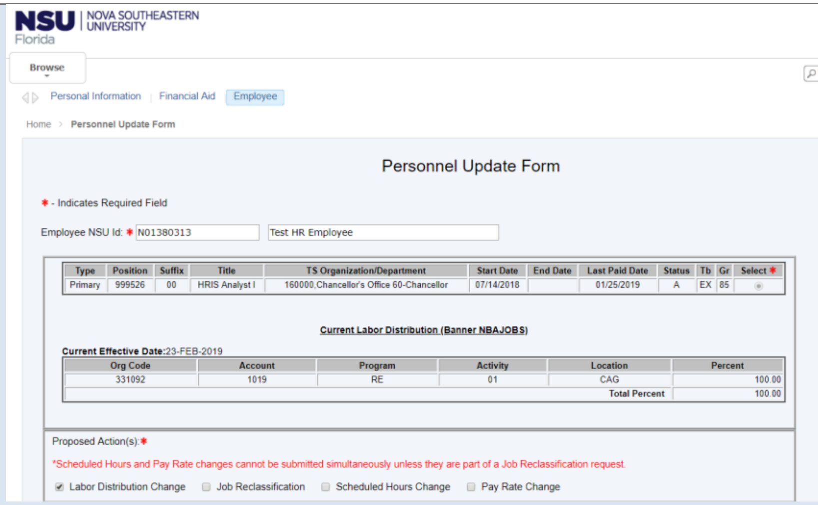


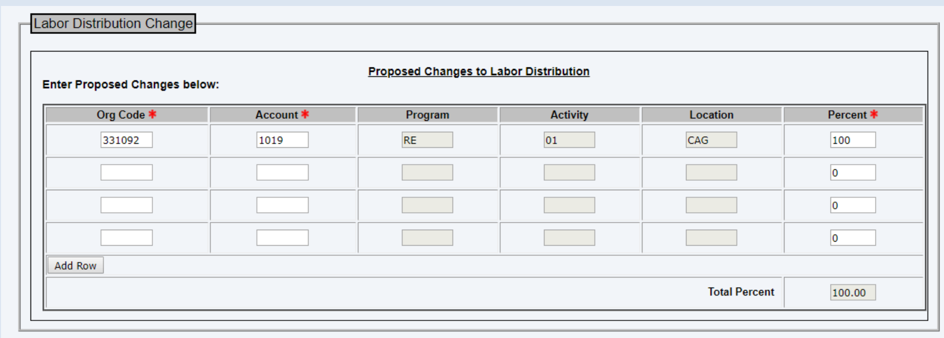
Personnel Update Form Access:

1- Open Google Chrome
2- Go to http://SharkLink.nova.edu.
3- Type Username, Password and click the Log In button
4- Click on WEBSTAR
5- Click on the Employee button →Electronic Personnel Action Forms →Personnel Update Form:
   a. Type the Employee NSU ID
   b. Verify the employee name is correct
   c. Select the Job (the employee can have more than one job) and verify the Type, Position, Suffix, Title, TS Organization Department, Start Date, End Date, Last Paid Date, Status TB, and Grade are correct
   d. Review the Current Labor Distribution (Banner NBAJOBS)
   e. Select Labor Distribution Change in the Proposed Action section

2. Fill out Labor Distribution Change

The following example shows how to complete the Labor Distribution Change section:





This process Excludes the following positions: Adjunct, Clinical Faculty, Cluster employee, Core Faculty P/T and Overloads.

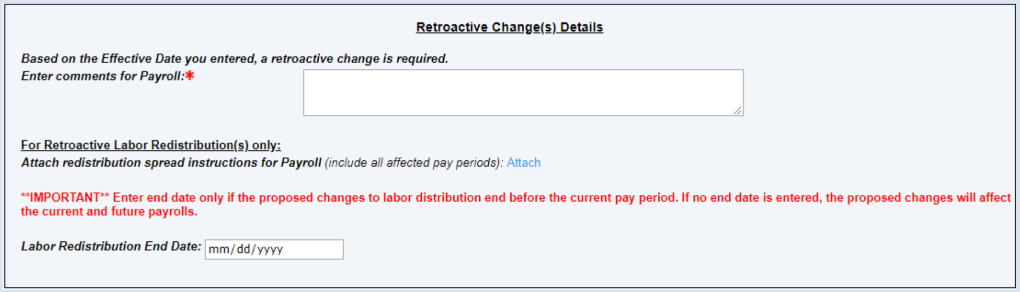
1- Enter the New Effective Date (retroactive, current and future dates)
2- Enter the Proposed Changes to Labor Distribution by entering: Org Code, Account and Percent – Program, Activity and Location will auto-populate from Banner

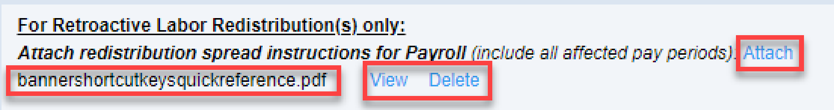
Tips:

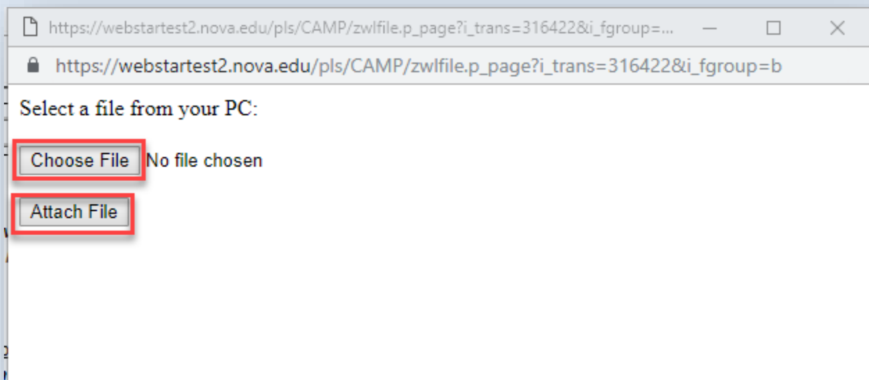
- Total Percent must equal 100% or the form will display warnings
- The Add Rows button allows you to add additional rows for data entry

3. Completing the Retroactive Changes (Details)

This is a Dynamic grid, and only displays when the user (originator) enters a retroactive New Effective Date (new effective date is on or before the employee's Last Paid Date).







All retroactive distributions are manually handled by the Payroll Department after the regularly scheduled payroll is processed and a separate email notification is sent out to the originator upon completion.

Section 1: Enter comments for Payroll field

This is a mandatory field that should include special instructions needed for Payroll to process the request correctly; including pay #s, org #s along with corresponding percentages, etc.

Section 2: For Retroactive Labor Redistribution(s) only

This section allows the originator to attach an excel spread sheet detailing what the spread should be if the effective date of the retroactive request begins and/or ends in the middle of a pay period.

Payroll is unable to set the spread by day, so the spread needs to be calculated for the entire pay period.

Sample Labor Redistribution spread:

For example, the spread information should look like for the pay period if the changes do not start at the beginning and or does not continue to the end of a pay period.

Pay #: 4	**Index # & %:** 331XXX-50%/333XXX 50%
Pay #: 5-7	**Index # & %:** 331XXX-100%

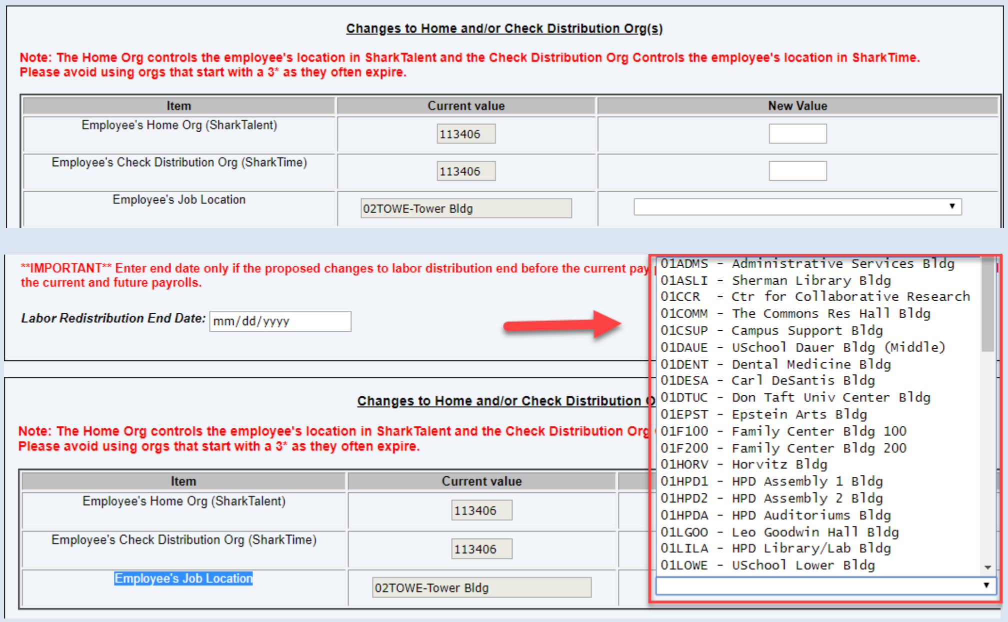
How to attach a document:

1- Click on the Attach button (next to Attach redistribution spread instructions for Payroll)
2- Click on the Choose File button (another window opens)
3- Select the file from your computer
4- Click on the Attach File button

4. Completing the Changes to Home and/or Check Distribution Org/s

1- **The Employee's Home Org** controls the employee's location in SharkTalent
2- **The Employee's Check Distribution Org** controls the employee's location in SharkTime
3- **The Employee's Job Location indicates the physical work location of the employee**

Remember: avoid using orgs that start with a 3* as they often expire.



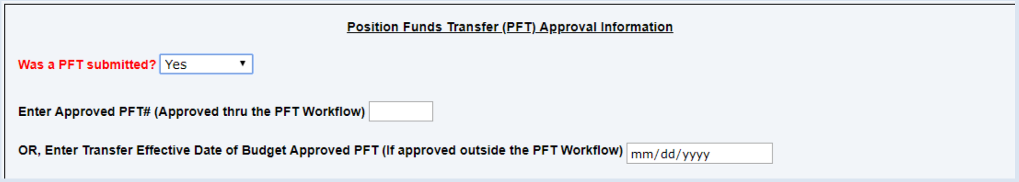
The **Current Value** in Banner is displayed for all three fields. To update this information, please enter/select from a drop-down the updated information in the **New Value** column:

1- Enter new value for Employee's Home Org (SharkTalent)
2- Enter new value for Employee's Check Distribution Org (SharkTime)
3- Select Employee's Job Location

5. Position Funds Transfer (PFT) Approval Information

This dynamic section is displayed for any personnel updates unless the current and proposed changes to labor distribution are 100% funded by orgs that start with the number 3.

If a PFT form is required, it must be submitted and approved prior to submitting a personnel update request, as in the current paper process.

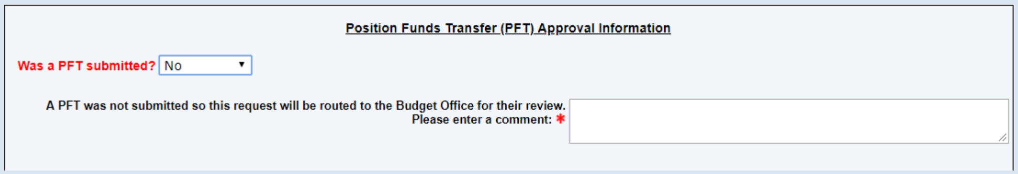


Position Funds Transfer (PFT) Approval Information

Was a PFT submitted? Yes

Enter Approved PFT# (Approved thru the PFT Workflow)

OR, Enter Transfer Effective Date of Budget Approved PFT (If approved outside the PFT Workflow) mm/dd/yyyy



Position Funds Transfer (PFT) Approval Information

Was a PFT submitted? No

A PFT was not submitted so this request will be routed to the Budget Office for their review.
Please enter a comment: *

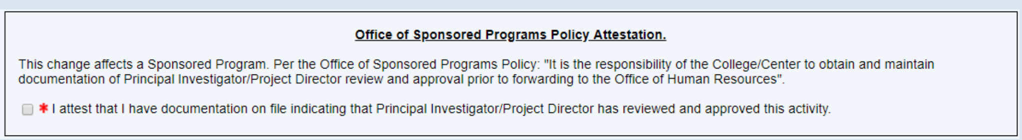
Initially, the user is asked whether a PFT was submitted: **Was a PFT submitted? Y/N**

Then, the user (Originator) should select one of the following answers:

- If **Yes** is selected, the form displays two fields, one of them being mandatory to complete:
    - **Enter Approved PFT # (Approved thru the PFT Workflow)** – information will be automatically validated against the PFT Workflow (once in Production)
    - **OR, enter Transfer Effective Date of Budget Approved PFT (If approved outside the PFT Workflow)** – enter the Transfer Effective Date from your paper PFT once approved by Budget
- If **No** is selected, the form displays a mandatory field and the request is routed to the Budget Office for their approval:
    - **A PFT was not submitted so this request will be routed to the Budget Office for their review. Please enter a comment:**

6. Office of Sponsored Programs Policy Attestation

This dynamic section is displayed in the form, when any Sponsored Program orgs are involved in the request (orgs have “CAG” in their Location field in Banner).



Office of Sponsored Programs Policy Attestation.

This change affects a Sponsored Program. Per the Office of Sponsored Programs Policy: "It is the responsibility of the College/Center to obtain and maintain documentation of Principal Investigator/Project Director review and approval prior to forwarding to the Office of Human Resources".

☐ * I attest that I have documentation on file indicating that Principal Investigator/Project Director has reviewed and approved this activity.

- Check the attestation Check box **“I attest that I have documentation on file indicating that Principal Investigator/Project Director has reviewed and approved this activity. “**

7. Submit and Cancel button

Remember: If you submit the form before selecting options or checking the sponsored programs attestation box the system will display a warning pop-up and not allow you to submit the Personnel Update form

8. Informational/Task Notification Emails

The Personnel Update form/workflow sends **informational emails** along the process to the **originator** every time the request is approved or denied, and once the process is completed.

The emails contain the following subject lines:

1- Submitted: PAF LD Update for Center XX – last name, first name (N#) - Effective dd/mm/yyyy – Position #-Suffix #-EX or NE Grade #
2- Update: PAF LD Update for Center XX – last name, first name (N#) - Effective dd/mm/yyyy – Position #-Suffix #-EX or NE Grade #
3- Processed: PAF LD Update for Center XX – last name, first name (N#) - Effective dd/mm/yyyy – Position #-Suffix #-EX or NE Grade #

All emails contain all the information supplied in the Personnel Update form by the originator.

The Personnel Update form/workflow will also send **task notification emails** to each **approver** requesting their review and approval.

The emails contain the following subject line:

1- Action Required: PAF LD Update for Center XX – last name, first name (N#) - Effective dd/mm/yyyy – Position #-Suffix #-EX or NE Grade #

Remember: if a task is denied by error, the request will be terminated, and the originator will need to submit a new Personnel Update Form to start the process again