

New Chart of Account (T)

Home Organization Number & Labor Distribution Updates

Quick Guide

This guide is to show you where to look and ensure you enter the correct chart T information in your EPAFs

Tip:

- Use the crosswalk tool to find the labor distribution that reflects chart T for the position number you want to use
- You can download the crosswalk tool onto your desktop by going to the COA Share Point site [here](#)

Employee Info

Item	Current Value	New Value
Employee Status:		Active <input type="button" value="v"/>
Employee Class Code:		<input type="text"/>
Home COAS:		T <input type="text"/>
Home Organization:		<input type="text"/>
Distribution COA:		T <input type="text"/>
Distribution Orgn:		<input type="text"/>
Current Hire Date: MM/DD/YYYY		<input type="text"/>
Adjusted Serv. Date: MM/DD/YYYY		<input type="text"/>
I9 Form Indicator:		Not Selected <input type="button" value="v"/>
I9 Date: MM/DD/YYYY		<input type="text"/>
I9 Expiration Date: MM/DD/YYYY		<input type="text"/>

- Enter Chart T for Home COAS
- Enter the chart T org for Home Organization
- Enter Chart T for Distribution COA
- Enter the chart T org for Distribution Orgn

Timesheet Orgn: *

- Enter chart T org for Timesheet Orgn

Pro Tip: This org should reflect chart T and should be the same as the Home Organization

New												
Effective Date: MM/DD/YYYY 07/01/2020												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override End Date
T	C10516									.00		
Total:										.00		

- Enter "T" in the COA field
- Enter the index to reflect chart T in the index field
- Click on Default from Index

Pro Tip: Use the crosswalk tool to find the index that reflects chart T

- An error should occur to notify you that the account code is required
- Scroll back down to the labor distribution to continue

Errors and Warning Messages

Type	Message Type	Description
Faculty Change	ERROR	Account code is required.

* - indicates a required field.

New

Effective Date: MM/DD/YYYY 07/01/2020

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
Q T	Q C10516	Q 110001	Q 53447	Q 6052	Q 910	Q				100.00	
Q	Q	Q	Q	Q	Q	Q					
Q	Q	Q	Q	Q	Q	Q					
Q	Q	Q	Q	Q	Q	Q					

Default from Index

Save and Add New Rows

Total: .00

• Enter the account code

• Ensure that the total percent equals 100

Pro Tip: You can get the account code using the crosswalk tool and entering the old account code

If you have any issues that you cannot resolve, please contact the Human Resources department for assistance. When contacting HR, please provide them with the ID# of the employee and the EPAF transaction number found at the top of the page under the employee's name.

Contact Human Resources:

Stockton: (209) 946-2124

Sacramento: (916) 739-7031

San Francisco: (415) 929-6468