

2017-2018

Electronic Personnel Action Form (ePAF) Training Guide

**University of Massachusetts Boston
Human Resources Department**

Revised September 2017

ePAF (Electronic Personal Action Form) Training Guide

Electronic personnel action form (ePAF) is a module within PeopleSoft that allows for paperless employment transactions such as hiring an employee, job or pay changes, and end of employment. The ePAF is initiated by a department initiator, and then it is electronically routed for appropriate approvals and notifications, and finally entered by HR into the system.

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Login to HR Direct

Step I



Step II



Secure Access Login

Campus User ID:

Password:

Campus:

- Choose Campus ...
- Amherst
- Boston
- Dartmouth
- Lowell
- President's Office Service
- Worcester

must always sign out completely from the system and close out of all internet windows.

[Forgot Password?](#) | [Need Help?](#)

Step I	Action
	Go to www.umb.edu/hr
	Click on the HR Direct Logo

Step II	Action
3.	Enter your username (first name.lastname)
4.	Enter your password (password is you email password) Note: if your email password is changed your HR Direct login password will change.
5.	Click on the arrow and choose the campus (Boston)
6.	Click login
Note:	Please Note if you are using a public computer please always remember to sign out of the HR Direct system and do not save any passwords

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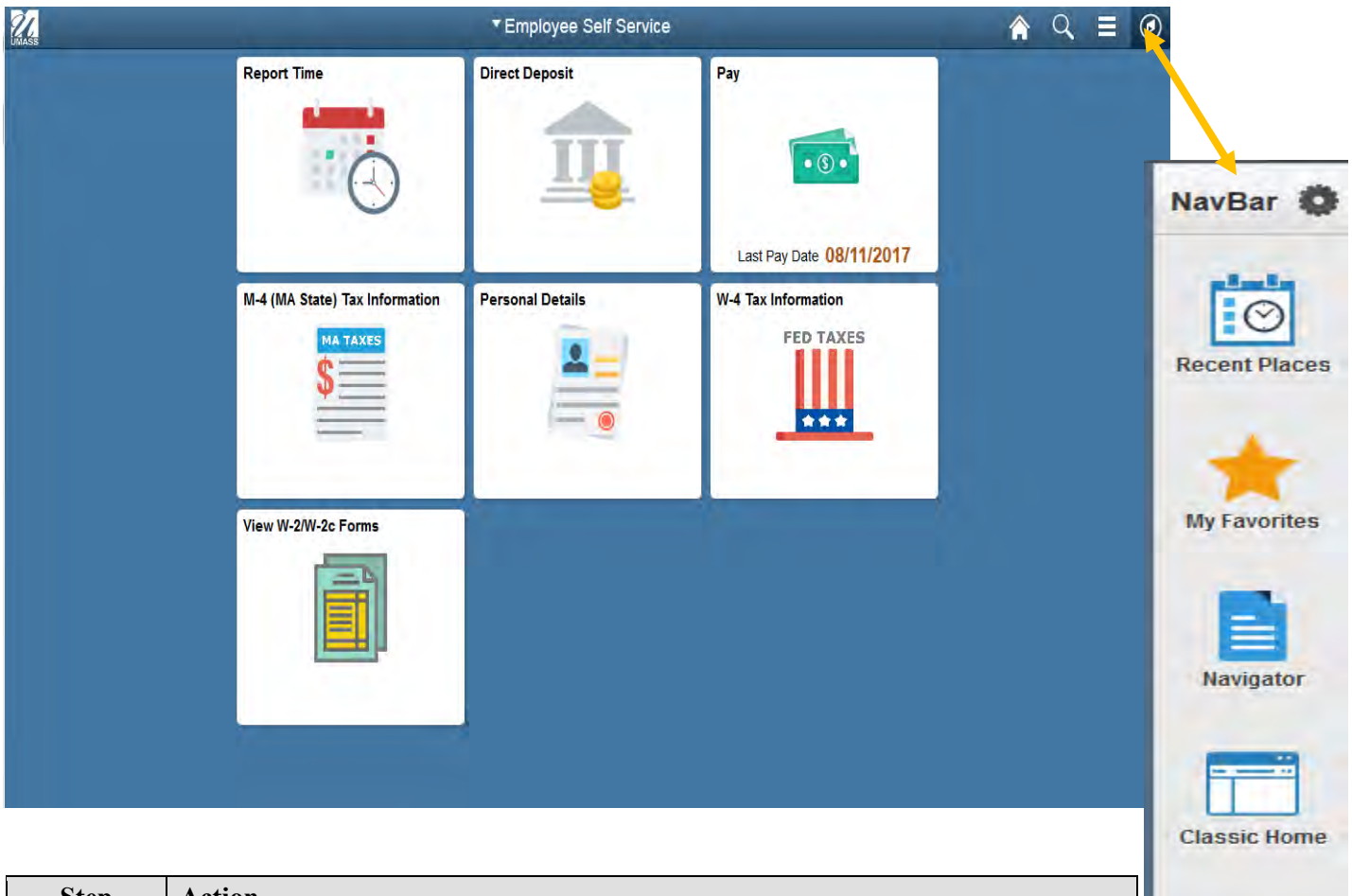
Adding an Benefitted employee into a position

Upon completion of this topic, you will be able to add a benefitted employee into a position.

Key Information:

Employee Group: Faculty-Teaching

Is this a Positioned Job?: Yes



Step	Action
1.	Begin by navigating to the NavBar . Click on Navigator , Click on Department Self Service .

For this example, you are hiring a benefitted employee into position.

Step	Action
2.	Click the Start a new ePAF link. Start a new ePAF

Step	Action
3.	Click the Hire an Employee link. Hire an Employee

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Step	Action
4.	Click the Add New Employee button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Add New Employee</div>

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■ GIDEON TAYLOR

Hire an Employee

Step 1 of 9: Enter ID

If you know the SSN of the person you are hiring: Please enter the SSN and search for an existing employee or start a new employee.

If you know the Employee ID of the person you are hiring: Please enter that information and search for the employee's record.

If you know the Applicant ID and Job Opening ID of the person you are hiring: Please enter that information and search for the employee's record.

If you do not know any of this information: Please start a new employee. (If the employee already exists, they will be tied to the form later in the process.)

Employee ID:

Applicant ID: **Job Opening ID:**

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Hire an Employee

Step 2 of 6: Employee Name

Please fill in the fields below.

Clone eForm ID

Personal Info

Empl ID: NEW **Hiring Campus:** Univ of Mass Boston

***First Name:** **Middle:**

***Last Name:** **Suffix:**

Step	Action
Note:	If you wanted to clone a previous eForm and use it as a template for multiple hires of the same type, you would enter the Clone eForm ID here (or you could search for the Clone eForm ID if you did not know it).
5.	Enter the desired information into the First Name field. Example: Jane
6.	Enter the desired information into the Middle field. Example: Test
7.	Enter the desired information into the Last Name field. Example: Smith
8.	Click the Next button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Next >></div>

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Hire an Employee

Step 3 of 6: Job Information

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Indicate the type of employee you are hiring by choosing a value in the Empl Group field.

Fill in the remaining fields and choose "Next".

eForm ID: 16077

Personal Info

Name: Jane Smith Personal Data
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW **Empl Rcd#:**

Applicant Data

Applicant ID **Job Opening ID**

Job Data

***Effective Date:**

***Employee Group:**

- Benefited Classified
- Benefited Professional
- Faculty - Teaching
- Faculty Administrator
- Graduate Students
- Librarian
- Non-Benefited Classified
- Non-Benefited Professional
- Post Doc
- Student

<< Previous
Next >>

Step	Action
9.	Click the Effective Date calendar button.
10.	Choose the Effective Date . Example: 09/01/2012
11.	Click the Employee Group list.
12.	Choose the Employee Group Example: Faculty Teaching
Note:	The eForm ID has now been assigned to this form. Please take a moment and write this number down for future use. Example: 16077

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Applicant ID	Job Opening ID		
Job Data			
*Effective Date:	<input type="text" value="09/01/2012"/> <small>BT</small>	End Date:	<input type="text"/> <small>BT</small> <input type="checkbox"/> End Job Automatically
*Employee Group:	<input type="text" value="Faculty - Teaching"/>		
*Is this a Positioned Job?	<input type="text" value="Yes"/>		
*Position Number:	<input type="text" value="00024945"/> <small>Q</small>	Assistant Professor	
Reports To Position Number:	<input type="text" value="00010234"/>	Chrm.Of Department U Of M	
Department:	<input type="text" value="B006700"/>	Psychology	
Job Code:	<input type="text" value="90014"/>	Assistant Professor	Full/Part Time: Full-Time
Location Code:	<input type="text" value="MCCORMACK"/>	McCormack Hall	Regular/Temporary: Regular
*Academic or Calendar?	<input type="text" value="Academic"/>		
Standard Hours:	<input type="text" value="40.00"/>	FTE:	<input type="text" value="1.000000"/>
Mail Drop ID:	<input type="text" value="C30"/>		
<input style="margin-right: 10px;" type="button" value=" << Previous "/> <input style="margin-left: 10px;" type="button" value=" Next >> "/>			

Step	Action
13.	Click the Is this a Positioned Job? Choose Yes or No <div style="border: 1px solid black; width: 100px; height: 20px; margin: 5px 0;"></div> Example: Benefited position we will choose Yes
14.	Enter Position Number. Do Not Search <b style="color: red;">If you do not know the position number contact the Office of Budget and Financial Planning.
Note:	Once Position number is entered the following fields will Auto Populate: Reports to, Department, Job Code, Location Code, Full/Part Time, Regular/Temporary Standard Hours, FTE
15.	Click the Academic or Calendar? (we were asked to choose this based on the employee group chosen Faculty-Teaching) Example: Academic
16.	Enter Mail Drop ID Example: C30
17.	Click the Next button. <div style="border: 1px solid black; width: 100px; height: 20px; margin: 5px 0; text-align: center; background-color: #cccccc;">Next >></div>

Step 4 of 7: Faculty Information ?

Please fill in the Faculty Information below

eForm ID: 16077

Personal Info

Name: Jane Smith Job Data
Additional Pay

Empl ID: NEW Empl Rcd#: Additional Pay

Faculty Data

Tenure Status:

Tenure Track Start Date: BT

Tenure Home: Q Psychology

Mandatory Review Dt: BT

FTE:

Step	Action
Note	Complete the Faculty Tenure Data section then click the Next button. <div style="border: 1px solid black; width: 100px; height: 20px; margin: 5px 0; text-align: center; background-color: #cccccc;">Next >></div>

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eForm ID: 16077

Personal Info

Name: Jane Smith Personal Data
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW Empl Rcd#:

Compensation Data

Employee Type: Exception Hourly

Bi-Weekly Rate: 2000.000000 Annual Rate: \$52,000.000

Plan: B40 Salary Grade: 03

Add Additional Components of Pay?

Total Annual Rate: \$52,000.000

Begin Date: 09/01/2012

	GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
1	B101070	11000	B006700000	A00				

Add Date Range

Step	Action
18.	Enter the desired information into the Bi-Weekly Rate field. Example: "2000".
Note:	Notice that the Begin Date defaults to the hire date. This date should not be changed. Once you have entered Bi-Weekly rate Annual Rate will auto populate.
19.	Enter the GL Combination Code . Do not search Click Tab
Note:	Once you enter the GL Combination Code the following rows will auto populate Fund Code, Department, Program Code, Project/Grant (only if applicable)
20.	Leave the Earnings Code blank.

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Personal Data
[Job Data](#)
[Additional Pay](#)

Annual Rate: \$52,000.000

\$52,000.000

Program Code	Project/Grant	Class Field	End Date	Earnings Code	Distribution Type	Percent	Commitment Amount	Fund End Date
A00					Percent	100.000	\$43,285.714	

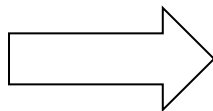
Amount
Percent

Add Date Range

<< Previous Next >>

Step	Action
21.	Click the Distribution Type list. <input type="text" value="Percent"/>
22.	Click the Percent (always for benefitted positions)
24.	The Percent field amount cannot exceed 100%, but you may have multiple rows that add up to 100%. For this example, enter "100". Click Tab
25.	The Commitment Amount will auto populate and is a calculated amount
26.	Leave the Fund End Date blank
Note:	To add additional rows, use the plus sign. To delete rows, use the minus sign.
Note:	The Add Date Range field is not required
27.	Click the Next button. <input type="button" value="Next >>"/>

This will take you to the **Update Hire Time and Labor** page.



Update Hire Authorized by
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Step 5 of 7: Time and Labor
 Update the employee's Time and Labor and additional information as needed.

eForm ID: 16077

Personal Info

Name: Jane Smith [Personal Data](#)
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW Empl Rcd#:

Time and Labor Data

*Union Code: B40 MSP/FSU Faculty & Librarian

*Pay Group: UMB UMass Boston

*Empl Class: 0 Faculty-Academic Year



Workgroup: B_MSPACAD Academic Year Faculty

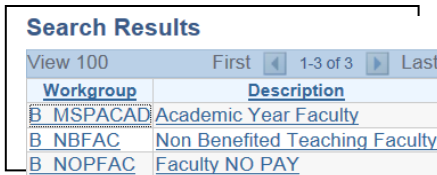
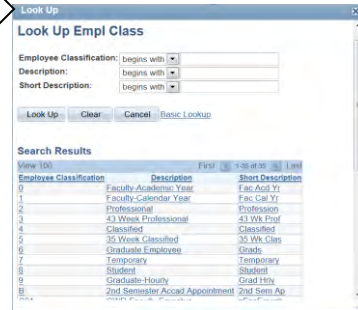
Taskgroup: UM_EXP Exception Taskgroup

Time and Labor Schedule

Schedule different from standard?

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Step	Action
Note:	The Time and Labor Data page allows human resources to establish a person into the appropriate groups necessary for reporting time.
28.	Click the Empl Class look up button.  click on appropriate choice Example: Faculty-Academic Year
29.	Click the Workgroup look up button.  click on appropriate choice Example: Academic Year Faculty



Step	Action
Note:	<p>Schedule different from standard</p> <p><input type="checkbox"/> Schedule different from standard?</p> <p>Leave unchecked. If different, attach or send to Human Resources a “Schedule Form “.</p>
30.	<p>Click the Next button.</p> <p><input type="button" value="Next >>"/></p>

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eForm ID: 16077

Personal Info

Name: Jane Smith Personal Data
Job Data
Additional Pay

Empl ID: NEW

Actions & Action Reasons

Action	Action Description	Reason Code	Action Reason Description
1 HIR	Hire	HIR	Hire

Action: Hire Action Override Flag

*Reason Code: Hire

Form Messages

Message Text	Description
<input checked="" type="checkbox"/> Attach hire documentation	Please attach all necessary hire documentation in the Attachments section below. By acknowledging this message, you are confirming the completion of this task.

File Attachments

Upload	View	Description	Attachment Id
1 Upload	View		Delete

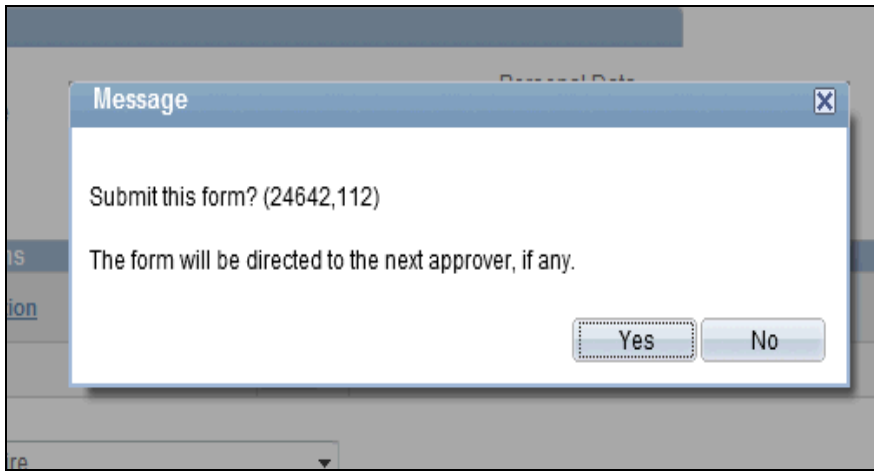
Add File Attachment


Comments

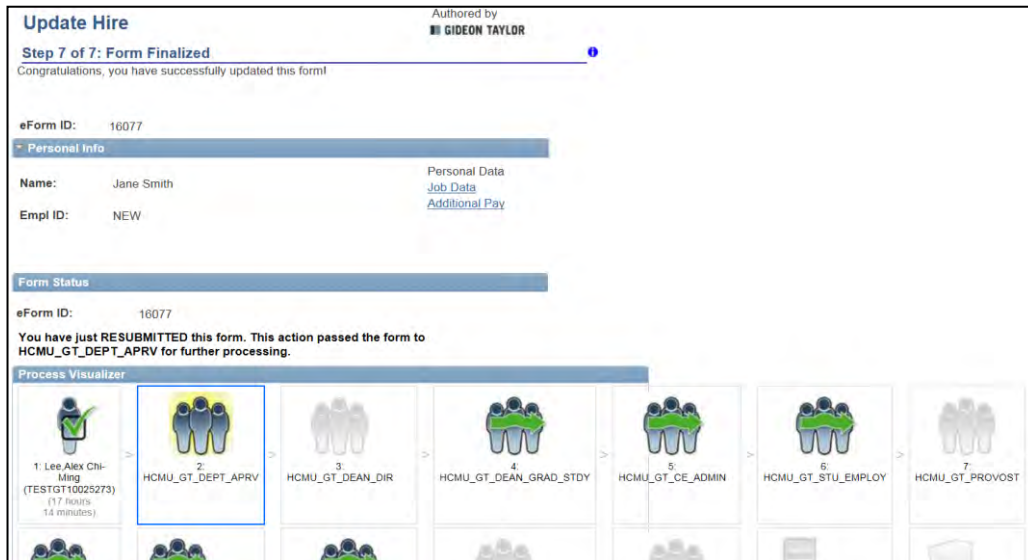
Your Comment:

Step	Action
Note:	Action Hire – Reason Code Hire
31.	Whether you are attaching documentation or not, you must always acknowledge Form Messages and confirm that you have completed attaching any documentation. Always click the Attach hire documentation option. <input type="checkbox"/>
Note:	For attaching documents please reference the <i>Attaching a Document</i> section of the training guide
32.	If needed, you may add comments.
33.	Click the Submit button. <input type="button" value="Submit"/>

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Step	Action
34.	Confirm that you are ready to submit this form, and click the Yes button. 

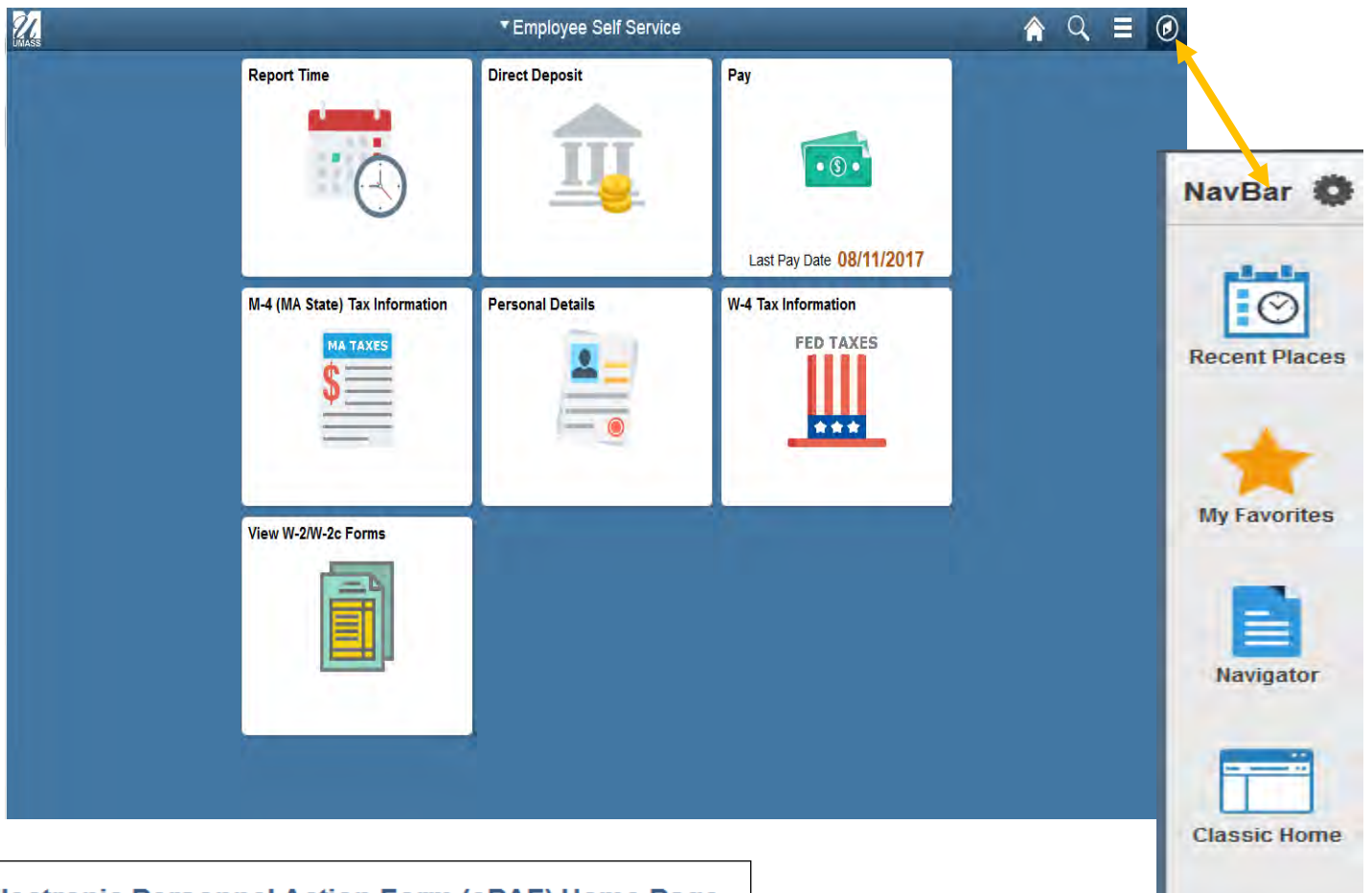


Step	Action (Form Finalized)
35.	The Form Status indicates that you have submitted this form. The form is now routed to the next level approver.
36.	Congratulations! You have added a benefited employee into a position. End of Procedure.


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Adding a Non-Benefitted or Graduate Student Employee into a Job


Step	Action
1	Begin by navigating to the NavBar . Click on Department Self Service .
2.	Click the ePAF Home Page link.
3.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.




Electronic Personnel Action Form (ePAF) Home Page

- 

My Worklist
Work the items that have been routed to you.
- 

Start a new ePAF
Start a new ePAF, which will then be routed to the appropriate approvers.
- 

Resubmit, Change, or Withdraw an ePAF
Make changes to an ePAF that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.
- 

View an ePAF
View a recently submitted ePAF, including information about its handling so far. ePAFs submitted in the last month are listed here. This is a read-only view.

4.	Click the Start a new ePAF link. Start a new ePAF
5.	Click the Hire an Employee link. Hire an Employee

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Hire an Employee

Authored by
■ GIDEON TAYLOR

Step 1 of 6: Enter ID

If you know the SSN of the person you are hiring: Please enter the SSN and search for an existing employee or start a new employee.

If you know the Employee ID of the person you are hiring: Please enter that information and search for the employee's record.

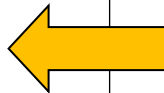
If you know the Applicant ID and Job Opening ID of the person you are hiring: Please enter that information and search for the employee's record.

If you do not know any of this information: Please start a new employee. (If the employee already exists, they will be tied to the form later in the process.)

Employee ID:

Applicant ID: Job Opening ID:

Step	Action
6.	Click the Add New Employee button. <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin: 5px;">Add New Employee</div>



Hire an Employee

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Step 2 of 6: Employee Name

Please fill in the fields below.

Clone eForm ID

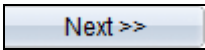
Personal Info

Empl ID: NEW Hiring Campus: Univ of Mass Boston

*First Name: Middle:

*Last Name: Suffix:

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Step	Action
7.	Enter the desired information into the First Name field. Enter " Joe ".
8.	Enter the desired information into the Middle field. Enter " Test ".
9.	Enter the desired information into the Last Name field. Enter " Smith ".
10.	Click the Next button. 

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Hire an Employee

Step 3 of 6: Job Information

Indicate the type of employee you are hiring by choosing a value in the Empl Group field.

Fill in the remaining fields and choose "Next".

eForm ID: 16167

Personal Info


Name: Joe Smith Personal Data
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW Empl Rcd#:

Applicant Data

Applicant ID Job Opening ID



Job Data

*Effective Date: 09/01/2012 

*Employee Group: Non-Benefited Classified

- Benefited Classified
- Benefited Professional
- Faculty - Teaching
- Faculty Administrator
- Graduate Students
- Librarian
- Non-Benefited Classified
- Non-Benefited Professional
- Post Doc

<< Previous
Next >>

Step	Action
11.	Click the Effective Date calendar button. 
12.	Choose the Effective Date. Example: 09/01/2012
13.	Click the Employee Group drop down list. 
14.	Example: Non-Benefitted Classified
Note	The eForm ID has now been assigned to this form. Please take a moment and write this number down for future use. Example: 16167

ePAF (Electronic Personal Action Form) Training Guide

Name:	Joe Smith	Job Data
Empl ID:	NEW	Additional Pay
Empl Rcd#:		
Applicant Data		
Applicant ID	Job Opening ID	
Job Data		
*Effective Date:	<input type="text" value="09/01/2012"/>	*End Date: <input type="text" value="09/07/2013"/> <input checked="" type="checkbox"/> End Job Automatically
*Employee Group:	<input type="text" value="Non-Benefited Classified"/> ▼	
*Is this a Positioned Job?	<input type="text" value="No"/> ▼	
Supervisor ID:	<input type="text" value="10030522"/>	Manuel Delacruz
*Department:	<input type="text" value="B006000"/>	Art
*Job Code:	<input type="text" value="H05T54"/>	Departmental Assistant -Hourly
		*Full/Part Time <input type="text" value="Part-Time"/> ▼
*Location Code:	<input type="text" value="MCCORMACK"/>	McCormack Hall
		*Regular/Temporary <input type="text" value="Temporary"/> ▼
*Standard Hours:	<input type="text" value="20.00"/>	*FTE: <input type="text" value="0.500000"/>
Mail Drop ID:	<input type="text" value="C30"/>	
<input style="margin-right: 10px;" type="button" value=" << Previous "/> <input style="margin-left: 10px;" type="button" value=" Next >> "/>		

Step	Action
15.	Click the Is this a Positioned Job? <input type="text" value="No"/> ▼ This field will always state “NO”
16.	Enter the desired information into the Supervisor ID field of an active employee. Example: "10030522". Note: You can also use the Supervisor ID look up button to search for this value.
17.	Enter the desired information into the Department field. Example: B006000 Note: You can also use the Department look up button to search for this value.
18.	Click the Job Code look up button. Job Code drop down list is tied to employee group that you selected
19.	Select Job Code - Example: H05T54
20.	Click the Full/Part Time list. <input type="text" value="Part-Time"/> ▼
21.	Click the Regular/Temporary list. <input type="text" value="Temporary"/> ▼
22.	Change Standard Hours if applicable. Once you tab FTE will auto populate.
23.	Enter Mail Drop ID
24.	Click the Next button. <input style="margin-left: 20px;" type="button" value=" Next >> "/>

ePAF (Electronic Personal Action Form) Training Guide

eForm ID: 16167

Personal Info

Name: Joe Smith [Personal Data](#)
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW Empl Rcd#:

Compensation Data

Employee Type: Hourly

Hourly Rate: 15.000000 Annual Rate: \$15,600.000

Plan Salary Grade

Total Annual Rate \$15,600.000

Begin Date: 09/01/2012

	GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
1	B100981	51025	B006000000	A00				

Add Date Range

<< Previous Next >>
 Save for Later

Step	Action
25.	Enter the desired information into the Hourly Rate field. Example: "15".
Note:	Notice that the Begin Date defaults to the hire date. This date should not be changed. Once you have entered hourly rate annual rate will auto populate.
26.	Enter the GL Combination Code . Do not search Click Tab
Note:	Once you enter the GL Combination Code the following rows will auto populate Fund Code, Department, Program Code, Project/Grant (only if applicable)
27.	Leave the Earnings Code blank.

ePAF (Electronic Personal Action Form) Training Guide

Step	Action
28.	Click the Distribution Type list. <input type="text" value="Amount"/> If Hourly (add amount), If salaried (add percentage)
29.	Click the Percent or Amount list item. Example: Amount
30.	Please enter the commitment amount. For this example, enter " 10,000 ". Click Tab Note: Multiple accounts must use percentage equal to 100%
31.	Click Allow Overspend (Amount only)
32.	Leave the Fund End Date blank
Note:	To add additional rows, use the plus sign. To delete rows, use the minus sign.
33.	Click the Next button. <input type="button" value="Next >>"/>

[Personal Data](#)
[Job Data](#)
[Additional Pay](#)

Annual Rate: \$31,200.000

\$31,200.000

Program Code	Project/Grant	Class Field	End Date	Earnings Code	Distribution Type	Dollar Amount	Allow Overspend?	Fund End Date
A00				<input type="text" value=""/>	Amount	10000.00	<input checked="" type="checkbox"/>	<input type="text" value=""/>

ePAF (Electronic Personal Action Form) Training Guide


eForm ID: 16167


Personal Info


Name: Joe Smith [Personal Data](#)
[Job Data](#)
[Additional Pay](#)


Empl ID: NEW Empl Rcd#:

Time and Labor Data

*Union Code: B00  Non-Benefited

*Pay Group: UMB  UMass Boston

*Empl Class: 4  Classified


Workgroup: B_NSTUHRLY  Non Student Hourly

Taskgroup: UM_POS Positive Taskgroup

Time and Labor Schedule

Schedule different from standard?

<< Previous
Next >>
Save for Later

Step	Action
34.	The Time and Labor Data page allows human resources to establish a person into the appropriate groups necessary for reporting time.
35.	Click the Workgroup look up button.  click on appropriate choice Example: Non Student Hourly
Note:	Schedule different from standard. If schedule is different than standard please send a schedule form to Human Resources. <input type="checkbox"/> Schedule different from standard?
36.	Click the Next button. Next >>

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eForm ID: 16167

Personal Info

Name: Joe Smith [Personal Data](#)
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW

Actions & Action Reasons

Action	Action Description	Reason Code	Action Reason Description
1 HIR	Hire	HIR	Hire

Action: Hire Action Override Flag

*Reason Code: Hire

Form Messages

Message Text	Description
<input type="checkbox"/> Attach hire documentation	Please attach all necessary hire documentation in the Attachments section below. By acknowledging this message, you are confirming the completion of this task.

File Attachments Customize | Find | First 1 of 1 Last

Upload	View	Description	Attachment Id
1 <input type="button" value="Upload"/>	<input type="button" value="View"/>		<input type="button" value="Delete"/>

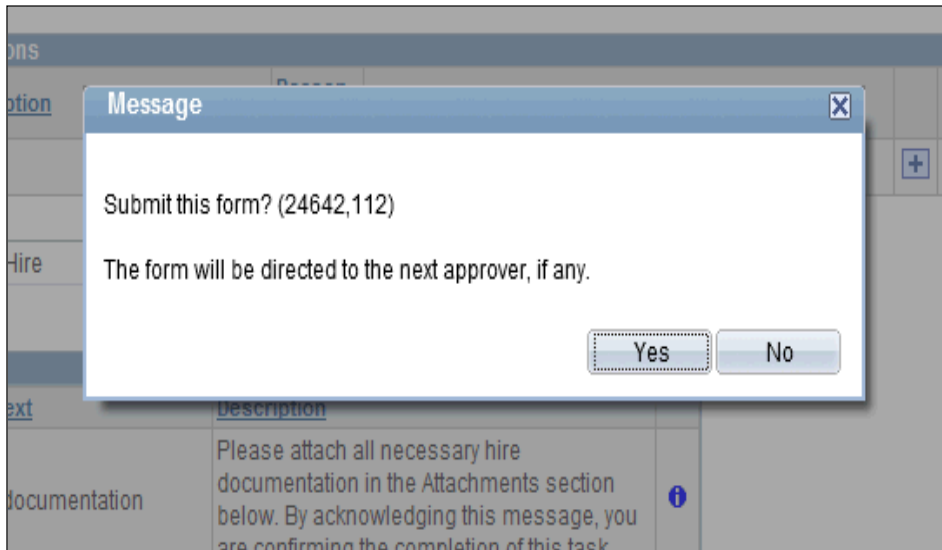
Comments

Your Comment:

Step	Action
Note:	Action – Hire / Reason Code - Hire
37.	Whether you are attaching documentation or not, you must always acknowledge Form Messages and confirm that you have completed attaching any documentation. Click the Attach hire documentation option. <input type="checkbox"/>
Note:	For attaching documents please reference the Attaching a Document section of the training guide
38.	Comments, if needed.
39.	Click the Submit button. <input type="button" value="Submit"/>

Step	Action
40.	Verify that you are ready to submit this form and click Yes . <input type="button" value="Yes"/>

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Step 6 of 6: Form Finalized
Congratulations, you have successfully updated this form!

eForm ID: 16167

Personal Info

Name:	Joe Smith	Personal Data
		Job Data
Empl ID:	NEW	Additional Pay

Form Status

eForm ID: 16167
You have just **RESUBMITTED** this form. This action passed the form to HCMU_GT_DEPT_APRV for further processing.

Process Visualizer

1: Lee, Alex Chi-Ming (TESTGT10026273) (2 hours 50 minutes)	2: HCMU_GT_DEPT_APRV	3: HCMU_GT_DEAN_DIR	4: HCMU_GT_DEAN_GRAD_STDY	5: HCMU_GT_CE_ADMIN	6: HCMU_GT_STU_EMPLOY	7: HCMU_GT_PROVOST
---	----------------------	---------------------	---------------------------	---------------------	-----------------------	--------------------

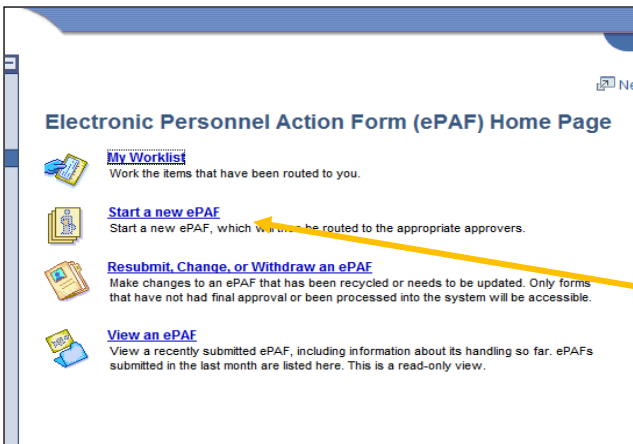
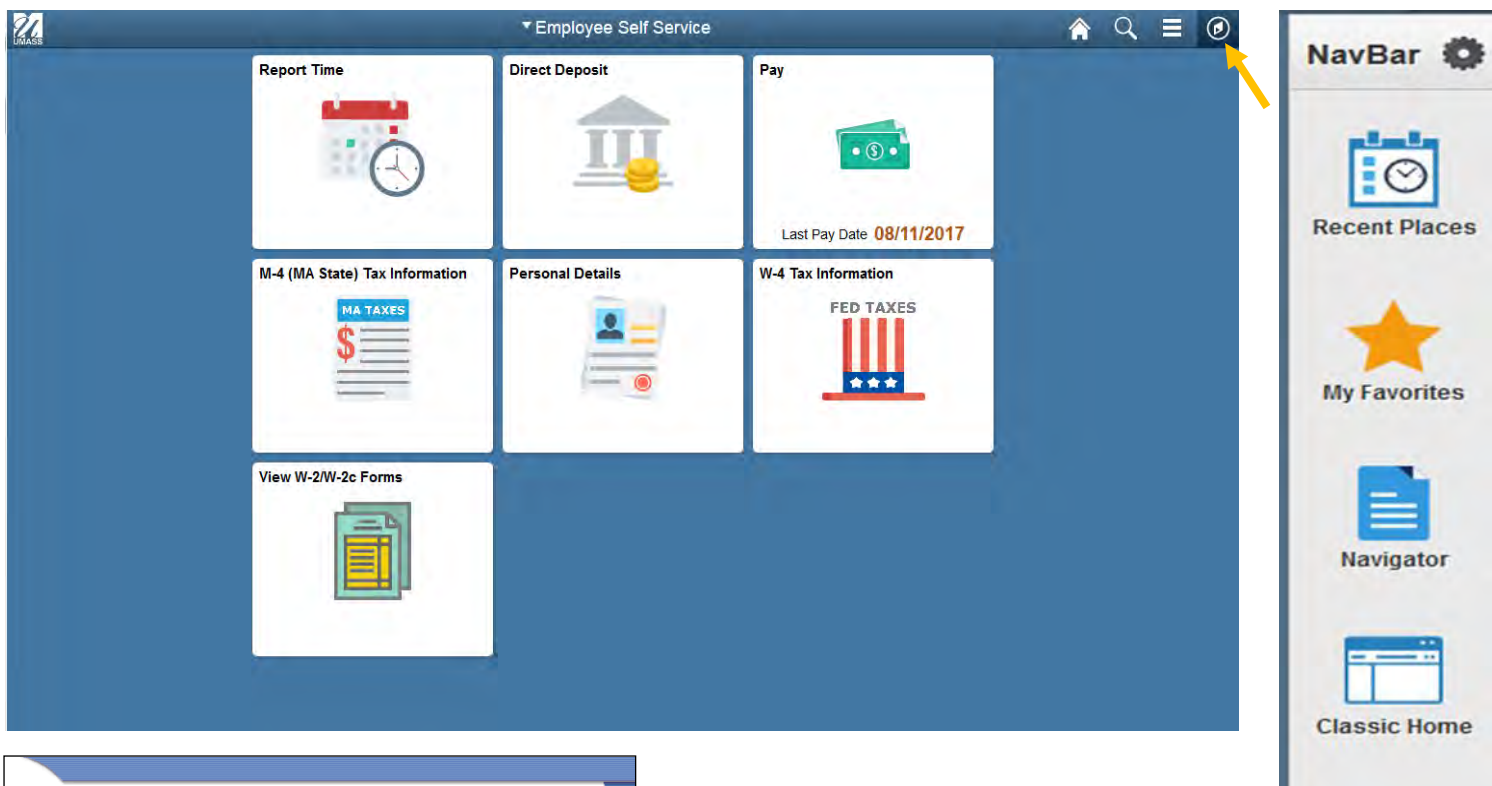
Step	Action
41.	The Form Status indicates that you have submitted this form. The form is now routed to the next level approver.
42.	Congratulations! You have added a non-benefited employee into a position. End of Procedure.

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Hiring Student Employees

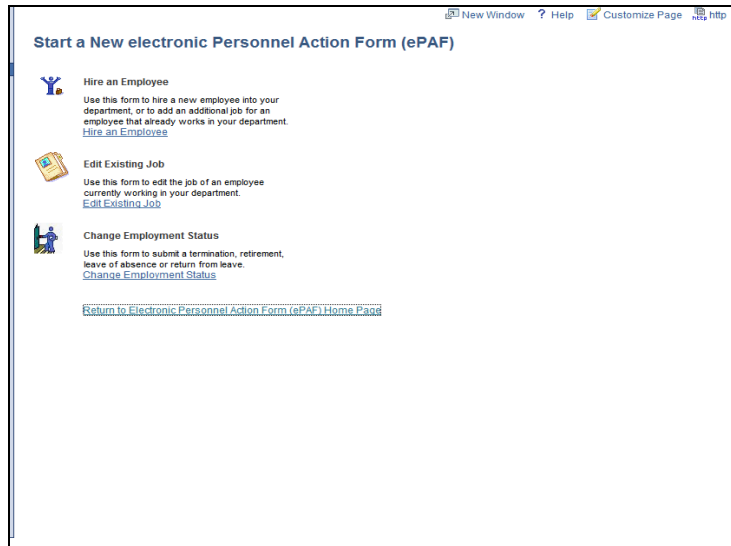
Upon completion of this topic, you will be able to hire a Student for work study

Step	Action
1.	Begin by navigating to the NavBar . Click on Navigator , Click on Department Self Service .
2.	Click the ePAF Home Page link.
3.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.



Step	Action
1.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
2.	Click the Start a new ePAF link. Start a new ePAF

ePAF (Electronic Personal Action Form) Training Guide



Step	Action
3.	Click the Hire an Employee link. Hire an Employee



Step	Action
4.	Click the Add New Employee button. Add New Employee

ePAF (Electronic Personal Action Form) Training Guide

Hire an Employee

Step 2 of 6: Employee Name

Please fill in the fields below.

Clone

eForm ID

Authorized by

Step	Action
5.	Enter the desired information into the First Name field. Example: "Susan".
6.	Enter the desired information into the Middle field. Example: "Test".
7.	Enter the desired information into the Last Name field. Example: "Smith".
8.	Click the Next button. <div style="text-align: center;"><input type="button" value="Next >>"/></div>

Personal Info

Empl ID: NEW Hiring Campus: Univ of Mass Bos

*First Name: Middle:

*Last Name: Suffix:

Hire an Employee

Step 3 of 6: Job Information

Indicate the type of employee you are hiring by choosing a value in the Empl Group field.

Fill in the remaining fields and choose "Next".

eForm ID: 16195

Authorized by

GIDEON TAYLOR

Personal Info

Name: Susan Smith [Personal Data](#)
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW Empl Rcd#:

Applicant Data

Applicant ID Job Opening ID

Job Data

*Effective Date:

*Employee Group:

Step	Action
9.	Click the Effective Date calendar look up button. Example: 09/02/2012
Note:	For students the effective date must be a Sunday
10.	Click the Employee Group list. Only choose Student <input type="text"/>

ePAF (Electronic Personal Action Form) Training Guide

Applicant Data	
Applicant ID	Job Opening ID
Job Data	
*Effective Date: 09/02/2012 <input type="button" value="B"/>	End Date: 06/29/2013 <input type="button" value="B"/> <input checked="" type="checkbox"/> End Job Automatically
*Employee Group: Student <input type="button" value="v"/>	Job Number: <input type="text"/>
<input checked="" type="checkbox"/> Workstudy?	
*Is this a Positioned Job? No <input type="button" value="v"/>	
Supervisor ID: 10018332 <input type="button" value="M"/>	Maria Mahoney
*Department: B008300 <input type="button" value="M"/>	Biology
*Job Code: ST9999 <input type="button" value="M"/>	UMass Student
*Location Code: WHEATLEY <input type="button" value="M"/>	Wheatley Hall
*Standard Hours: 20.00	*FTE: 0.500000
Mail Drop ID: C30	
<input style="margin-right: 10px;" type="button" value=" << Previous "/> <input style="margin-left: 10px;" type="button" value=" Next >> "/>	

Step	Action
11.	For Workstudy students always choose an End Date . Click End Job Automatically For Non Workstudy students no End Date is required
12.	Only click Workstudy box if it is a workstudy student
13.	Always leave Job Number blank
14.	Click the Is this a Positioned Job? Always choose No <input style="width: 50px;" type="button" value="v"/>
15.	Enter the desired information into the Supervisor ID field. Example: "10018332". <i>Note:</i> You may also use the Supervisor ID look up button.
16.	Click the Department look up button. Choose the appropriate Department Location Code will auto populate

17.	For students the Job Code will always be ST9999 .
18.	Click the Full/Part Time list. <input style="width: 50px;" type="button" value="v"/> For students always choose Part Time
19.	Click the Regular/Temporary list. <input style="width: 50px;" type="button" value="v"/> For students always choose Temporary
20.	Standard Hours - For Students enter 20 Standards Hours and it will auto populate to .5 FTE
21.	Enter Mail Drop ID - Example: C30
22.	Click the Next button. <input style="width: 100px;" type="button" value=" Next >> "/>

ePAF (Electronic Personal Action Form) Training Guide

eForm ID: 16195

Personal Info

Name: Susan Smith [Personal Data](#)
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW Empl Rcd#:

Compensation Data

Employee Type: Hourly

Hourly Rate: 8.000000 Annual Rate: \$8,320.000

Plan Salary Grade

Total Annual Rate \$8,320.000

Begin Date: 09/02/2012

	GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
1	B101317	51025	B008300000	A00				

Add Date Range

Step	Action
23.	The Employee Type defaults to Hourly do not change
24.	Enter the desired information into the Hourly Rate field. Example: "8". Annual Rate will auto populate
Note:	Notice that the Begin Date defaults to the hire date. Please do not change this date.
25.	Enter the GL Combination Code Example: B101317 Once you choose the GL Combination Code the following rows will auto populate Fund Code Department Program Code Project/Grant (only if applicable)
26.	Leave the Earnings Code blank.

ePAF (Electronic Personal Action Form) Training Guide

Personal Data
Job Data
Additional Pay

Annual Rate: \$8,320,000

\$8,320,000

Program Code	Project/Grant	Class Field	End Date	Earnings Code	Distribution Type	Dollar Amount	Allow Overspend?	Fund End Date
A00					Amount	5000.00	<input checked="" type="checkbox"/>	

Add Date Range

<< Previous Next >>

Step	Action
27.	Click the Distribution Type list. <div style="border: 1px solid black; width: 80px; height: 20px; margin: 5px 0;"></div> <p>Note: For students always choose Amount</p>
28.	Enter the desired information into the Dollar Amount field. Example: " 5000 " For Workstudy students Dollar Amount should always be the amount the student was awarded by financial aid
29.	Always click the Allow Overspend
30.	Always leave the Fund End Date blank
31.	Click the Next button. <div style="border: 1px solid black; width: 100px; height: 20px; margin: 5px 0; text-align: center;">Next >></div>

ePAF (Electronic Personal Action Form) Training Guide

eForm ID: 16195

Personal Info

Name: Susan Smith Personal Data
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW Empl Rcd#:

Time and Labor Data

*Union Code: Non-Benefited

*Pay Group: UMass Boston

*Empl Class: Student

Workgroup: On-Campus Student WorkStudy FY

Taskgroup: UM_POS Positive Taskgroup

Time and Labor Schedule

Schedule different from standard?

<< Previous
Next >>
Save for Later

Step	Action
32.	The Time and Labor Data page allows Human Resources to establish a person into the appropriate groups necessary for reporting time.
33.	Never choose Schedule different from standard . <div style="border: 1px solid black; padding: 2px; display: inline-block;"><input type="checkbox"/> Schedule different from standard?</div>
Note:	Based on the employee group that you have chosen Union Code, Pay Group, Emp Class will auto populate
34.	Click the Workgroup look up button.
35.	Click the B_STUDWS link. <i>Note:</i> For Workstudy students always choose B_STUDWS . For non workstudy students choose B_STUDHRLY .
Note:	Based on the Workgroup chosen Taskgroup will auto populate
36.	Never choose Schedule different from standard . <div style="border: 1px solid black; padding: 2px; display: inline-block;"><input type="checkbox"/> Schedule different from standard?</div>
37.	Click the Next button. <div style="border: 1px solid #ccc; padding: 2px 10px; display: inline-block; margin-top: 5px;">Next >></div>

ePAF (Electronic Personal Action Form) Training Guide

eForm ID: 16195

Personal Info

Name: Susan Smith Personal Data
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW


Actions & Action Reasons

Action	Action Description	Reason Code	Action Reason Description
1 HIR	Hire	HIR	Hire

Action: Hire Action Override Flag

*Reason Code: Hire

Form Messages

Message Text	Description
<input type="checkbox"/>  Attach hire documentation	Please attach all necessary hire documentation in the Attachments section below. By acknowledging this message, you are confirming the completion of this task.

File Attachments

Upload	View	Description	Attachment Id
1 Upload	View		Delete

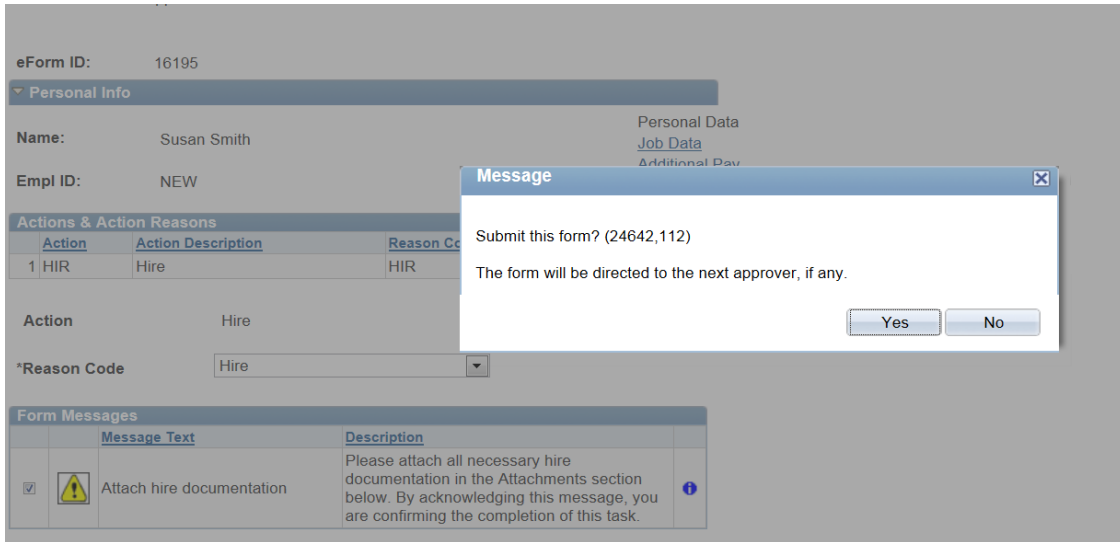
Add File Attachment

Comments

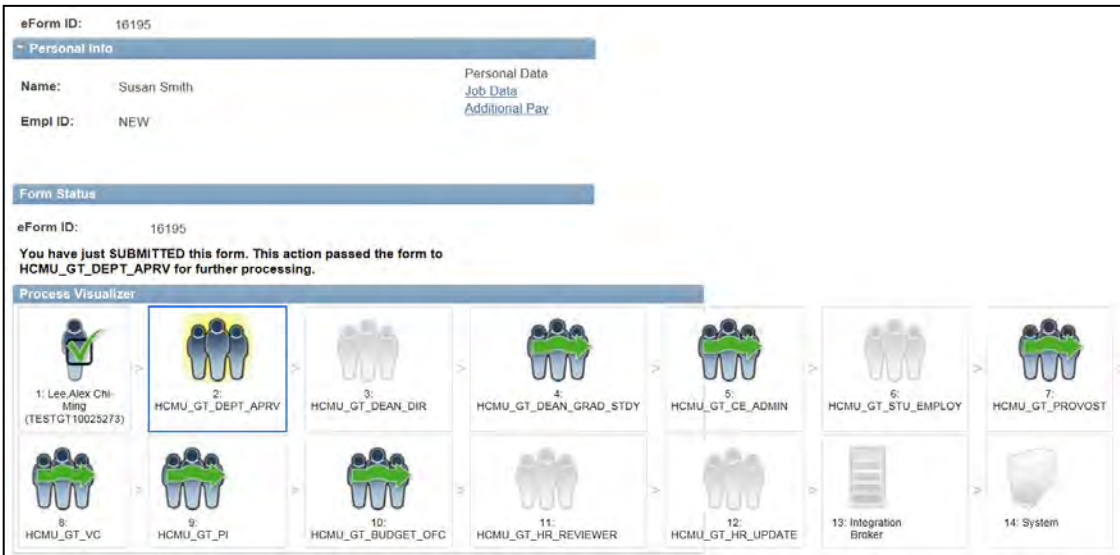
Your Comment:

Step	Action
38.	<p>Whether you are attaching documentation or not, you must always acknowledge Form Messages and confirm that you have completed attaching any documentation.</p> <p>Click the Attach hire documentation option.</p> <p><input type="checkbox"/></p>
Note:	Comments – when entering comments please reference new business process
39.	<p>Click the Submit button.</p> <p><input type="button" value="Submit"/></p>

ePAF (Electronic Personal Action Form) Training Guide



40.	<p>Verify that you are ready to submit this form and click Yes.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Yes</div>
-----	---

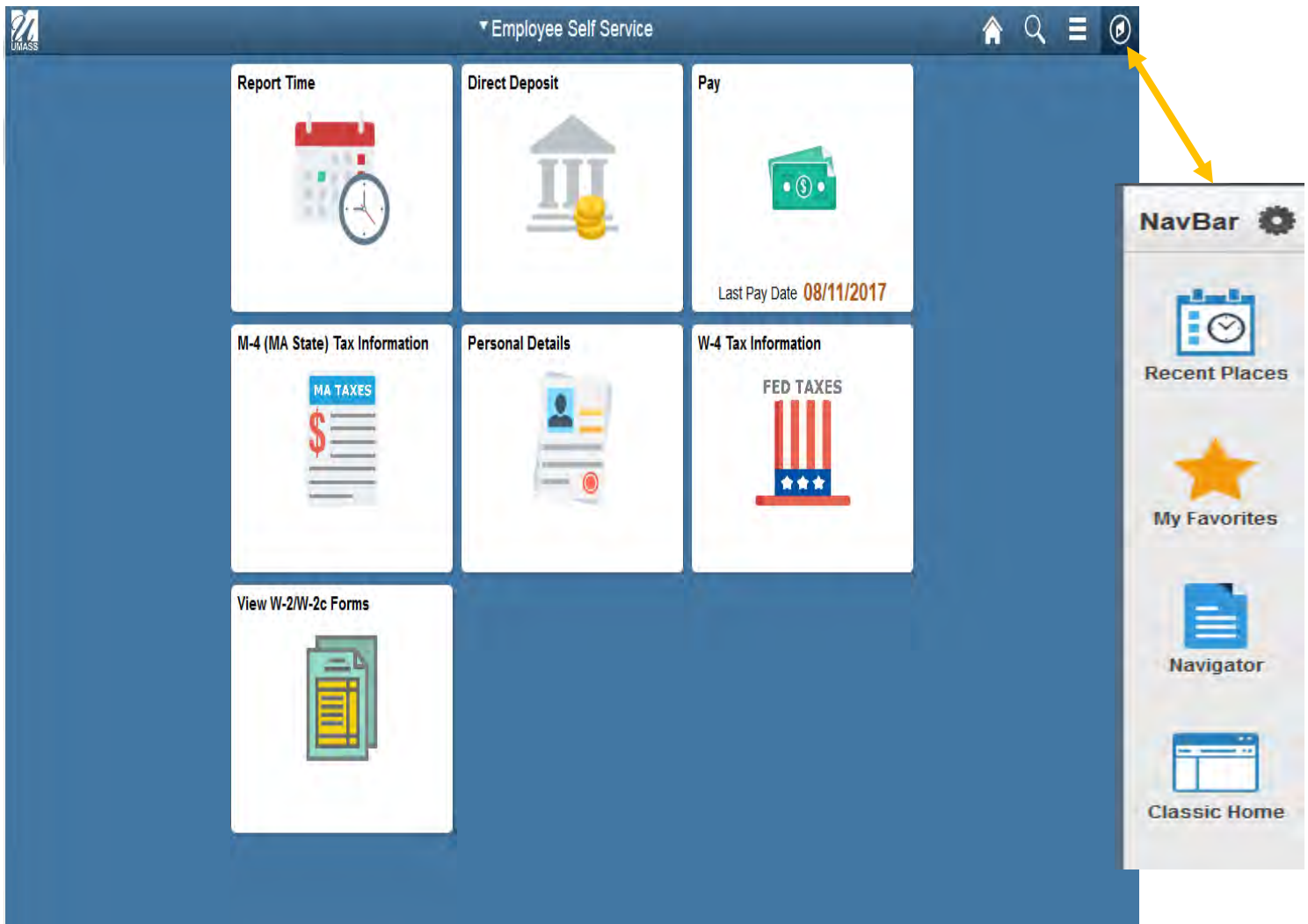


Step	Action
41.	<p>The Form Status indicates that you have submitted this form.</p> <p>The form is now routed to the next level approver.</p>
42.	<p>Congratulations! You have hired a student for workstudy. End of Procedure.</p>

ePAF (Electronic Personal Action Form) Training Guide

Entering a Rehire


Step	Action
1.	Begin by navigating to the NavBar . Click on Navigator , Click on Department Self Service .
2.	Click the ePAF Home Page link.
3.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.





ePAF (Electronic Personal Action Form) Training Guide


Step	Action
4.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
5.	Click the Start a new ePAF link. Start a new ePAF

Electronic Personnel Action Form (ePAF) Home Page

- 

[My Worklist](#)
Work the items that have been routed to you.
- 


[Start a new ePAF](#)
Start a new ePAF, which will then be routed to the appropriate approvers.
- 


[Resubmit, Change, or Withdraw an ePAF](#)
Make changes to an ePAF that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.
- 


[View an ePAF](#)
View a recently submitted ePAF, including information about its handling so far. ePAFs submitted in the last month are listed here. This is a read-only view.

New Window ?

Start a New electronic Personnel Action Form (ePAF)

- 

Hire an Employee
Use this form to hire a new employee into your department, or to add an additional job for an employee that already works in your department.
[Hire an Employee](#)
- 

Edit Existing Job
Use this form to edit the job of an employee currently working in your department.
[Edit Existing Job](#)
- 

Change Employment Status
Use this form to submit a termination, retirement, leave of absence or return from leave.
[Change Employment Status](#)

[Return to Electronic Personnel Action Form \(ePAF\) Home Page](#)

Step	Action
6.	Click the Edit Existing Job link. Edit Existing Job

ePAF (Electronic Personal Action Form) Training Guide

Select An Employee

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300):

Empl ID: =

Empl Rcd Nbr: =

Name: begins with

Last Name: begins with

Department: begins with

Employee Group: begins with

Case Sensitive

Search
Clear
[Basic Search](#)
 [Save Search Criteria](#)

Step	Action
7.	Enter the desired information into the Last Name OR Empl ID field. Example " 10152498 ".
8.	Click the Search button. <div style="border: 1px solid black; background-color: #ffffcc; padding: 2px 10px; display: inline-block; margin-top: 5px;">Search</div>

ePAF (Electronic Personal Action Form) Training Guide

Authorized by
GIDEON TAYLOR

Change Job Data

Step 1 of 5: Enter Job Change Details i

Please enter the date the change should go into effect, and identify the Employee Group that the employee should be in after the change, if applicable.

▼ Current Job Info

Name: _____ **Empl ID:** 10152498

Empl Group: Faculty - Teaching **Empl Rcd#:** 0

Empl Status: Terminated [Job Data](#)
[Additional Pay](#)

Position: _____

Department: B006900 Economics

eForm ID: 16247

[View Original Job Data](#)

▼ Job Data

***Effective Date:** 09/01/2012 BT **End Date:** 08/31/2013 BT **End Job Automatically**

***Employee Group:** Faculty - Teaching ▼

***Is this a Positioned Job?** No ▼

Supervisor ID: 10092949 🔍 Julie Nelson

***Department:** B006900 🔍 Economics

Step	Action
9.	The Change Job Data form is used to edit the information of an existing employee.
10.	Click the Effective Date look up button. Choose the effective date Example: 09/01/2012
11.	Click the End Date to change End Date Example: 08/31/2012
12.	Click the End Job Automatically

ePAF (Electronic Personal Action Form) Training Guide

[View Original Job Data](#)

Job Data

*Effective Date: 09/01/2012 End Date: 08/31/2012 End Job Automatically

*Employee Group: Faculty - Teaching

*Is this a Positioned Job? No

Supervisor ID: 10092949 Julie Nelson

*Department: B006900 Economics

*Job Code: 90250 Lecturer *Full/Part Time: Part-Time

*Location Code: WHEATLEY Wheatley Hall *Regular/Temporary: Regular

*Academic or Calendar? Academic

*Standard Hours: 10.00 *FTE: 0.250000

Mail Drop ID: C81

Step	Action
Note:	<p>You may make changes to any of the open areas, if needed.</p> <p>Example: Effective Date and End Date changed</p> <p>Click the Next button.</p>

Name: Diego Ibarren Empl ID: 10152498

Empl Group: Faculty - Teaching Empl Rcd#: 0

Empl Status: Terminated [Job Data](#)
[Additional Pay](#)

Position:

Department: B006900 Economics

eForm ID: 16248

[View Original Faculty Data](#)

Faculty Data

Tenure Status:

Tenure Track Start Date: 09/27/2012

Tenure Home: B006900 Economics

Mandatory Review Dt:

FTE: 0.25

Step	Action
13.	Enter the Faculty Tenure Data
14.	Click Next

ePAF (Electronic Personal Action Form) Training Guide

eForm ID: 16248
[View Original Comp Data](#)

Compensation Data

Employee Type: Exception Hourly

Bi-Weekly Rate: 323.150000 Annual Rate: \$8,401.900

Plan Salary Grade

Add Additional Components of Pay?

Compensation Rate \$8,401.900

Begin Date 07/01/2012

GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code	Distribution Type	Percent	Commitment Amount
1 B106287	51079	B005703000	A00					Percent	100.000	\$0.000

Add Date Range

<< Previous Next >>
 Save for Later

Step	Action
Note:	You may make changes to any of the open areas, if needed. Example: we have accepted the previous Compensation Date with no changes for the rehire.
15.	Click the Next button. <div style="border: 1px solid black; padding: 5px; display: inline-block; margin-top: 5px;">Next >></div>

[View Original TL Data](#)

Time and Labor Data

*Union Code: B00 Non-Benefited

*Pay Group: UMB UMass Boston

*Empl Class: D Faculty-Academic Year

Workgroup: B_NBFAC Non-Benefited Teaching Faculty

Taskgroup: UM_EXP Exception Taskgroup

Time and Labor Schedule

00 00

Schedule different from standard?

Schedule Description:

<< Previous Next >>
 Save for Later

Step	Action
Note:	You may make changes to any of the open areas, if needed. Example: we have accepted the previous Time and Labor Data with no changes for the rehire.
16.	Click the Next button. <div style="border: 1px solid black; padding: 5px; display: inline-block; margin-top: 5px;">Next >></div>

ePAF (Electronic Personal Action Form) Training Guide

Authored by
GIDEON TAYLOR

Change Job Data

Step 5 of 6: Finalize Form

Before submitting the eForm, please acknowledge any form messages, attach necessary documentation, and add any appropriate explanatory comment.

Current Job Info

Name: Diego Iribarren **Empl ID:** 10152498

Empl Group: Faculty - Teaching **Empl Rcd#:** 0

Empl Status: Terminated [Job Data](#)
[Additional Pay](#)

Position:

Department: B006900 Economics

eForm ID: 16248

Actions & Action Reasons

Action Code	Action Description	Action Reason Description
1 REH	Rehire	

File Attachments

Upload	View	Description	Attachment Id
1 Upload	View		Delete

Add File Attachment

Step	Action – Change Job Data – Finalize Form
Note:	Notice that the Action Code section is notated as Rehire . By Clicking the search icon you may change Action and Reason Code if it is not identified correctly Note: Action code always defaults to CCA (Concurrent Appointment)

Look Up Reason Code

SetID: UMBOS
Employee Group: FACNA
Action: REH
Reason Code: begins with

Look Up Clear Cancel [Basic Lookup](#)

Search Results

View 100 First 1-8 of 8 Last

Reason Code	Description
BUY	Course Buy Out on Grant
NTB	Rehire from Non-Ben to Benefit
PST	Rehire Post Retirement Appt
RBS	Rehire Break Service
RCC	Reh Connect Service w/ Changes
REH	Rehire
TBN	Rehire Benefit to Nonbnft Stat
TUM	Transfer within UMass

Step	Action
17.	Click the search button for the Reason Code
18.	Select appropriate Reason Code

Empl Status: Terminated [Job Data](#)
[Additional Pay](#)

Position:

Department: B006900 Economics

eForm ID: 16248

Actions & Action Reasons

Action Code	Action Description	Reason Code	Action Reason Description
1 REH	Rehire	REH	Rehire

File Attachments

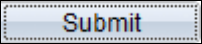
Upload	View	Description	Attachment Id
1 Upload	View		Delete

Add File Attachment

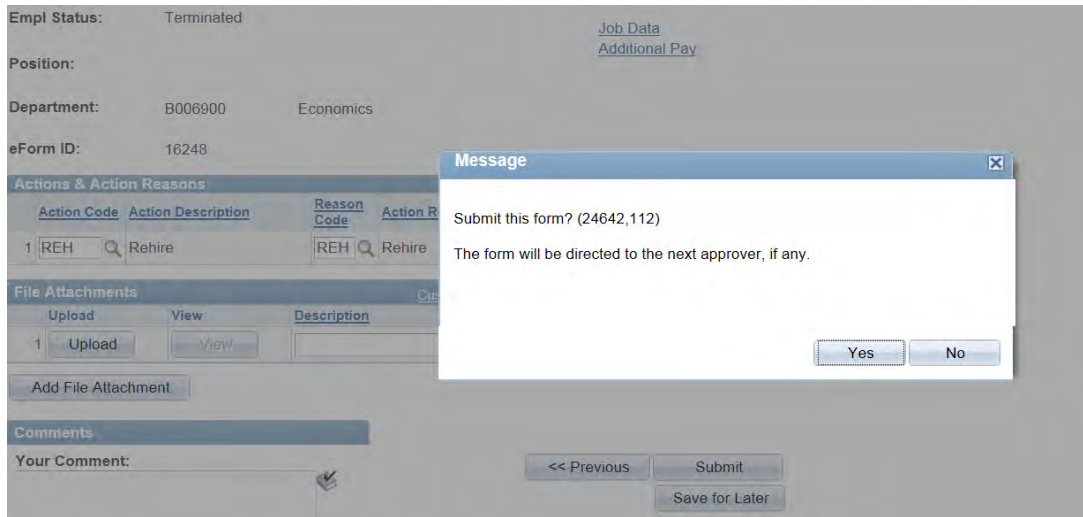
Comments

Your Comment: << Previous Submit Save for Later

Comment History:

Step	Action
19.	Click the Submit button. 

ePAF (Electronic Personal Action Form) Training Guide



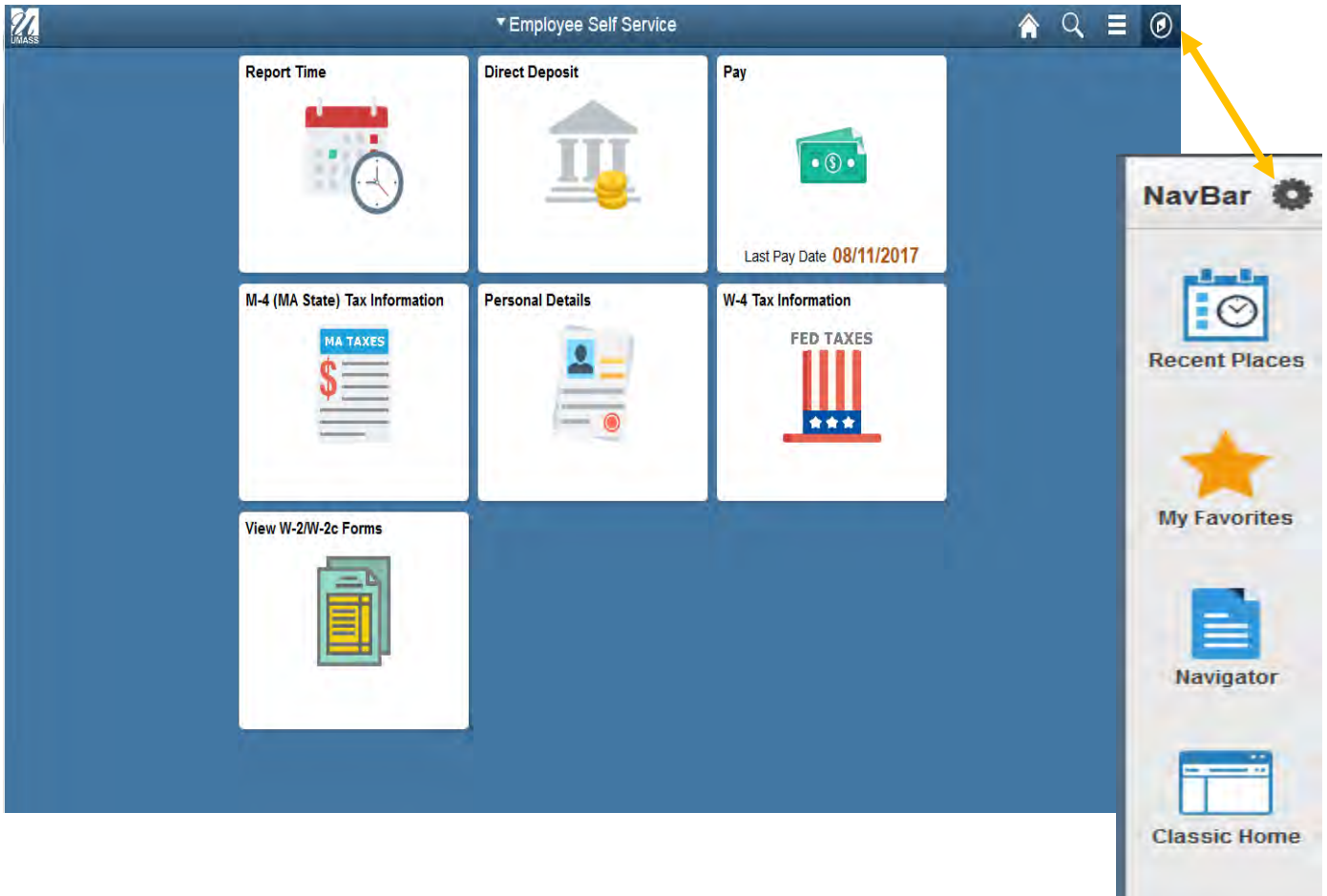
Step	Action
20.	Confirm that you are ready to submit this form and click the Yes button.



Step	Action
21.	The Form Status indicates that you have submitted this form.
22.	Congratulations! You have entered a rehire. End of Procedure.

ePAF (Electronic Personal Action Form) Training Guide

Entering a Funding Swap (Change in funds)



Step	Action
1.	Begin by navigating to the NavBar . Click Navigation , Click on Department Self Service .
2.	Click the ePAF Home Page link.

ePAF (Electronic Personal Action Form) Training Guide

Step	Action
3.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the Start a new ePAF link. Start a new ePAF

Start a New electronic Personnel Action Form (ePAF)

Hire an Employee
Use this form to hire a new employee into your department, or to add an additional job for an employee that already works in your department.
[Hire an Employee](#)

Edit Existing Job
Use this form to edit the job of an employee currently working in your department.
[Edit Existing Job](#)

Change Employment Status
Use this form to submit a termination, retirement, leave of absence or return from leave.
[Change Employment Status](#)

[Return to Electronic Personnel Action Form \(ePAF\) Home Page](#)

Step	Action
5.	Click the Edit Existing Job link. Edit Existing Job

ePAF (Electronic Personal Action Form) Training Guide

Select An Employee

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300):

Empl ID:

Empl Rcd Nbr:

Name:

Last Name:

Department:

Employee Group:

Case Sensitive

Step	Action
6.	Enter the desired information into the Last Name or Emp ID field. For this example, enter "Jones".
7.	Click the Search button. <input type="button" value="Search"/>

Job Data

*Effective Date: End Date: End Job Automatically

*Employee Group:

*Is this a Positioned Job?

*Position Number: Senior Research Fellow

Reports To Position Number:
00005154 Director, Inst Comm Inclusion

Department: B009900 Institute Community Inclusion

Job Code: BC2405 Senior Research Fellow **Full/Part Time** Full-Time

Location Code: WHEATLEY Wheatley Hall **Regular/Temporary** Regular

Standard Hours: 40.00 FTE: 1.000000

Mail Drop ID:

Step	Action
8.	Click the Effective Date button. Choose effective date Example: 09/01/2012
9.	Click the End Date button. Choose End Date
10.	Click Next

ePAF (Electronic Personal Action Form) Training Guide

eForm ID: 16292
View Original Comp Data

Compensation Data

Employee Type: Exception Hourly

Bi-Weekly Rate: 2568.959750 Annual Rate: \$66,792.954

Plan Salary Grade

Add Additional Components of Pay?

Compensation Rate \$66,792.954

Begin Date 07/01/2012

GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code	Distribution Type	Percent	Commitment Amount	Fund End Date
1 B106203	52129	B009900000	B00					Percent	20.000	\$11,119.928	
2 B106343	53106	B009900000	A00	S20100000013345		09/30/2012		Percent	20.000	\$1,100.983	
3 B105815	53106	B009900000	B00	S20090000009663		09/29/2012		Percent	20.000	\$1,064.283	
4 B105836	53416	B009900000	B00	S20090000008258		06/30/2013		Percent	40.000	\$22,239.852	

Add Date Range

<< Previous Next >>

Step	Action
11.	Example: remove a funding source and change percent. Click minus to remove row NOTE: Only one retro funding per ePAF

Delete Confirmation

Delete current/selected rows from this page? The delete will occur when the transaction is saved.

Step	Action
12.	Press ok to confirm that you would like to delete row

ePAF (Electronic Personal Action Form) Training Guide

View Original Comp Data

Compensation Data

Employee Type: Exception Hourly

Bi-Weekly Rate: 2568.959750 Annual Rate: \$66,792.954

Plan: Salary Grade

Add Additional Components of Pay?

Compensation Rate: \$66,792.954

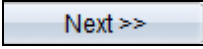
Begin Date: 07/01/2012

GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code	Distribution Type	Percent	Commitment Amount	Fund End Date
1 B106203	52129	B009900000	B00					Percent	20.000	\$11,119.926	
2 B106343	53106	B009900000	A00	S20100000013345		09/30/2012		Percent	20.000	\$1,100.983	
3 B106697	53106	B009900000	A00	S20110000015432		06/30/2013		Percent	60.000	\$33,359.777	

Add Date Range

<< Previous Next >>

Save for Later

Step	Action
13.	Change Percent row (must equal 100%) Example: 60 Click Tab
14.	Click the Next button. 

Position: 00017812 Senior Research Fellow [Additional Pay](#)

Department: B009900 Institute Community Inclusion

eForm ID: 16292

[View Original TL Data](#)

Time and Labor Data

Union Code: B43 Non-Unit Professional

Pay Group: UMB UMass Boston

Empl Class: 2 Professional

Workgroup: B_NUPROF Non Unit Professional

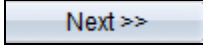
Taskgroup: UM_EXP Exception Taskgroup

Time and Labor Schedule

Schedule different from standard?

<< Previous Next >>

Save for Later

Step	Action
15.	If no changes needed Click the Next button. 

ePAF (Electronic Personal Action Form) Training Guide

Current Job Info

Name: David Temelini Empl ID: 10026610
 Empl Group: Benefited Professional Empl Rcd#: 0
 Empl Status: Active
 Position: 00017812 Senior Research Fellow [Job Data](#) [Additional Pay](#)
 Department: B009900 Institute Community Inclusion
 eForm ID: 16292

Actions & Action Reasons

Action Code	Action Description	Reason Code	Action Reason Description
1 DTA	Data Change	FCG	Funding Change

File Attachments


Upload	View	Description	Attachment Id
1 Upload	View		Delete

Add File Attachment

Comments

Your Comment:

<< Previous Submit Save for Later

Step	Action
16.	Notice that the Actions & Action Reason section has been updated. Action code Data Change - Reason code Funding Change
17.	Click the Submit button. 

5: Finalize Form

Using the eForm, please acknowledge any form messages, attach necessary files, and add any appropriate explanatory comment.

John Doe
Student Hours: Active
L600300
12682

Message


Submit this form? (24842, 112)
The form will be directed to the next approver, if any.


Yes No

Form Status

You have just SUBMITTED this form. This action passed the form to HCMU_GT_BUDGET_OF for further processing.

Process Visualizer




Step	Action
18.	Confirm that you are ready to submit this form. Click the Yes button. 

Empl Group: Benefited Professional Empl Rcd#: 0
 Empl Status: Active Personal Data [Job Data](#) [Additional Pay](#) [Leave Plans](#) [General Deductions](#)
 Position: 00017812 Senior Research Fellow
 Department: B009900 Institute Community Inclusion
 eForm ID: 16292

Form Status

You have just SUBMITTED this form. This action passed the form to HCMU_GT_BUDGET_OF for further processing.

Process Visualizer

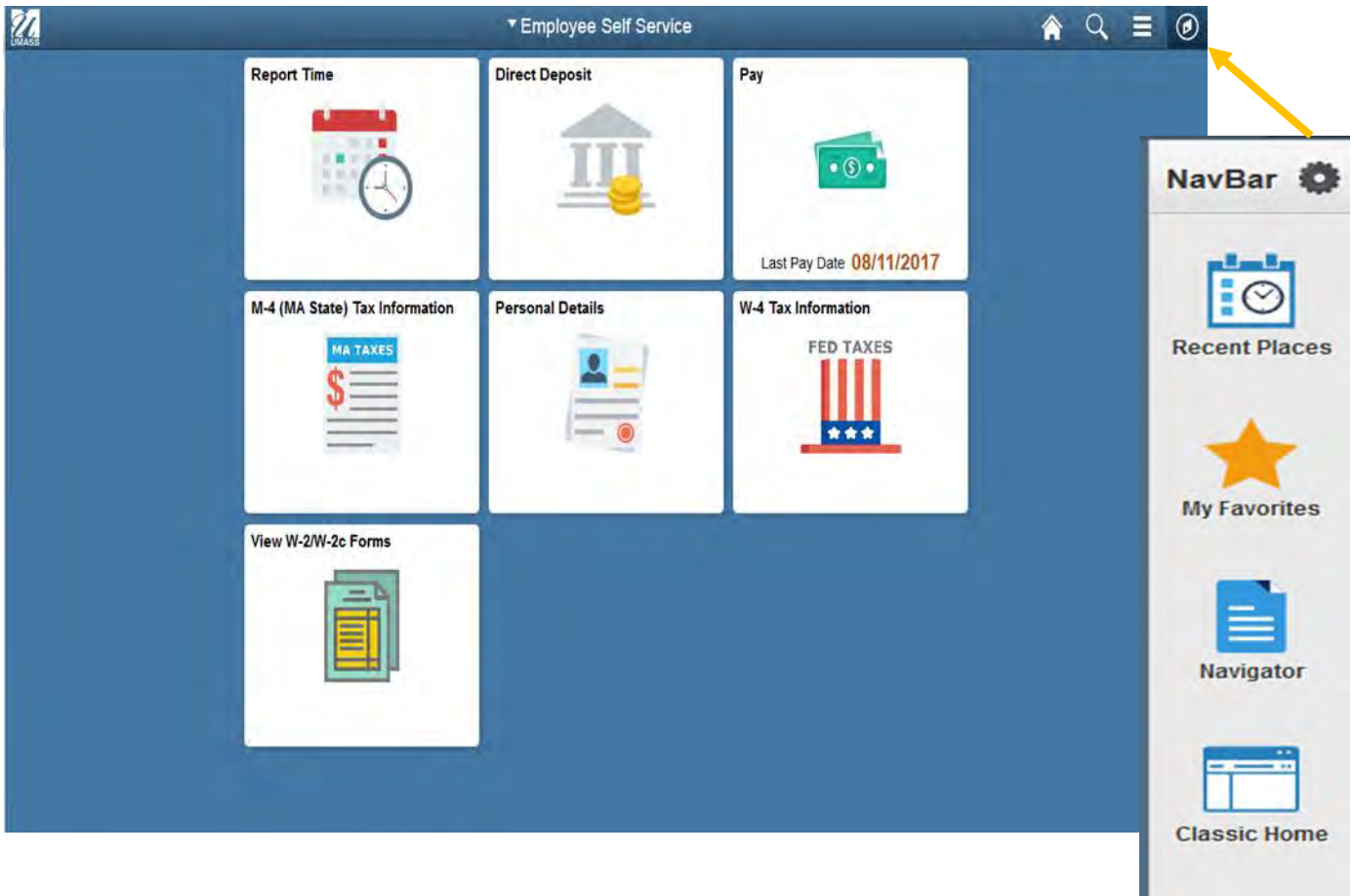


Step	Action
19.	The Form Status indicates that you have submitted this form.
20.	Congratulations! You have entered a funding swap. End of Procedure.


ePAF (Electronic Personal Action Form) Training Guide


Entering a Re-appointment/Change in Time/Funding Change (multiple actions)


Step	Action
1.	Begin by navigating to the NavBar , Click on Navigation , Click on ePAF Home Page . Click the Department Self Service link. Click on ewPAF Home Page .




Electronic Personnel Action Form (ePAF) Home Page

- 

My Worklist
Work the items that have been routed to you.
- 

Start a new ePAF
Start a new ePAF, which will then be routed to the appropriate approvers. ←
- 

Resubmit, Change, or Withdraw an ePAF
Make changes to an ePAF that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.
- 

View an ePAF
View a recently submitted ePAF, including information about its handling so far. ePAFs submitted in the last month are listed here. This is a read-only view.

Step	Action
2.	Click the Start a new ePAF link. Start a new ePAF

ePAF (Electronic Personal Action Form) Training Guide

Step	Action
3.	Click the Edit Existing Job link.

Start a New electronic Personnel Action Form (ePAF)

Hire an Employee

Use this form to hire a new employee into your department, or to add an additional job for an employee that already works in your department.

[Hire an Employee](#)

Edit Existing Job

Use this form to edit the job of an employee currently working in your department.

[Edit Existing Job](#) ←

Change Employment Status

Use this form to submit a termination, retirement, leave of absence or return from leave.

[Change Employment Status](#)

[Return to Electronic Personnel Action Form \(ePAF\) Home Page](#)

Step	Action
4.	Enter the desired information into the Last Name OR Empl ID field. Example " Smith ".
5.	Click the Search button. <div style="border: 1px solid black; display: inline-block; padding: 2px 10px; margin-top: 5px;">Search</div>

Add Search Component

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300):

Empl ID:	begins with	<input type="text"/>
Empl Rcd Nbr:	=	<input type="text"/>
Name:	begins with	<input type="text"/>
Last Name:	begins with	<input type="text"/>
Department:	begins with	<input type="text"/>
Employee Group:	begins with	<input type="text"/>

Case Sensitive

Search
Clear
Basic Search
Save Search Criteria

ePAF (Electronic Personal Action Form) Training Guide

[View Original Job Data](#)

Job Data

*Effective Date: End Date: End Job Automatically

*Employee Group:

*Is this a Positioned Job?

*Position Number: Lecturer I

Reports To Position Number: Chrm.Of Department U Of M

*Department: English

*Job Code: Lecturer I

*Full/Part Time

*Location Code: Wheatley Hall

*Regular/Temporary

*Academic or Calendar?

*Standard Hours: *FTE:

Mail Drop ID:

Step	Action
6.	Enter the Effective Date and change End Date Example: 09/01/2012 and 08/31/2013
7.	Enter Standard Hours . Once standard hours are entered FTE will auto populate.
8.	Click the Next button. <input type="button" value="Next >>"/>

Empl Status: Active [Job Data](#)
[Additional Pay](#)

Position: 00023523 Lecturer I

Department: B006400 English

eForm ID: 16295

[View Original Faculty Data](#)

Faculty Data

Lecturer

Tenure Status:

Tenure Track Start Date:

Tenure Home: English

Mandatory Review Dt:

FTE:

Step	Action
9.	Enter Faculty Tenure Data
10.	Click Next

Department: B006400 English

eForm ID: 16295

[View Original Comp Data](#)

Compensation Data

Employee Type:

Bi-Weekly Rate: Annual Rate: \$32,864.000

Plan: B40 Salary Grade: 01

Add Additional Components of Pay?

Compensation Rate: \$32,864.000

Begin Date:

GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code	Distribution Type	Percent	Commitment Amount	Fund End Date
119101640	Q	51121	B006900000	D00				Percent	100.000	\$27,356.571	

Step	Action
11.	Enter Bi-Weekly rate . Once entered Annual Rate will auto populate
12.	Enter GL Combination Code Click Tab
13.	Add/remove funding row using plus or minus if applicable. Change percentages if applicable.
14.	Click Next

ePAF (Electronic Personal Action Form) Training Guide

[View Original TL Data](#)

Time and Labor Data

*Union Code: MSP/FSU Faculty & Librarian

*Pay Group: UMass Boston

*Empl Class: Faculty-Academic Year

Workgroup: Academic Year Faculty

Taskgroup: Exception Taskgroup

Time and Labor Schedule

1,7

Schedule different from standard?

Schedule Description:

<< Previous Next >>

Save for Later

Step	Action
15.	If no changes needed Click the Next button. <input type="button" value="Next >>"/>

Empl Group: Faculty - Teaching Empl Rcd#: 0

Empl Status: Active [Job Data](#)

Position: 00023523 Lecturer I [Additional Pay](#)

Department: B006400 English

eForm ID: 16295

Actions & Action Reasons

Action Code	Action Description	Reason Code	Action Reason Description
1 DTA	Data Change	FCG	Funding Change
2 DTA	Data Change	RAP	Reappointment
3 DTA	Data Change	CIT	Change In Time

File Attachments

Upload	View	Description	Attachment Id
<input type="button" value="Upload"/>	<input type="button" value="View"/>	<input type="text"/>	<input type="button" value="Delete"/>

Comments

Your Comment:

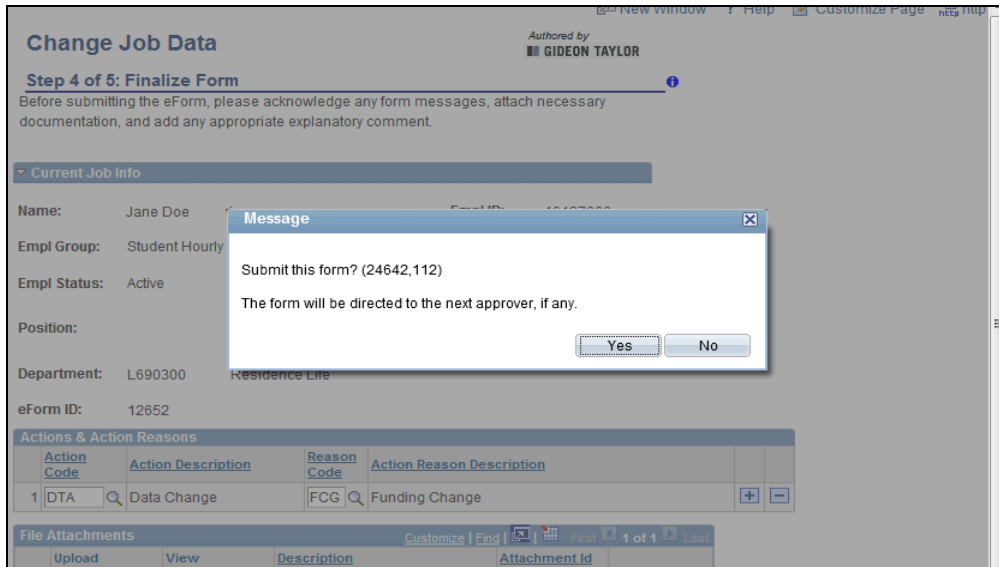
Comment History:


<< Previous Submit

Save for Later

Step	Action
16.	Enter Action and Reason Codes (if multiple actions done) Only one Action Code – Data Change and one Reason Code – Funding Change were present need to add other Action Reason Codes - Click plus sign Choose Action Code – Data Change and Reason Code Reappointment - Click plus sign Choose Action Code – Data Change and Reason Code Change in Time
17.	Click Submit

ePAF (Electronic Personal Action Form) Training Guide



Step	Action
18.	<p>Confirm that you are ready to submit this form.</p> <p>Click the Yes button.</p> 

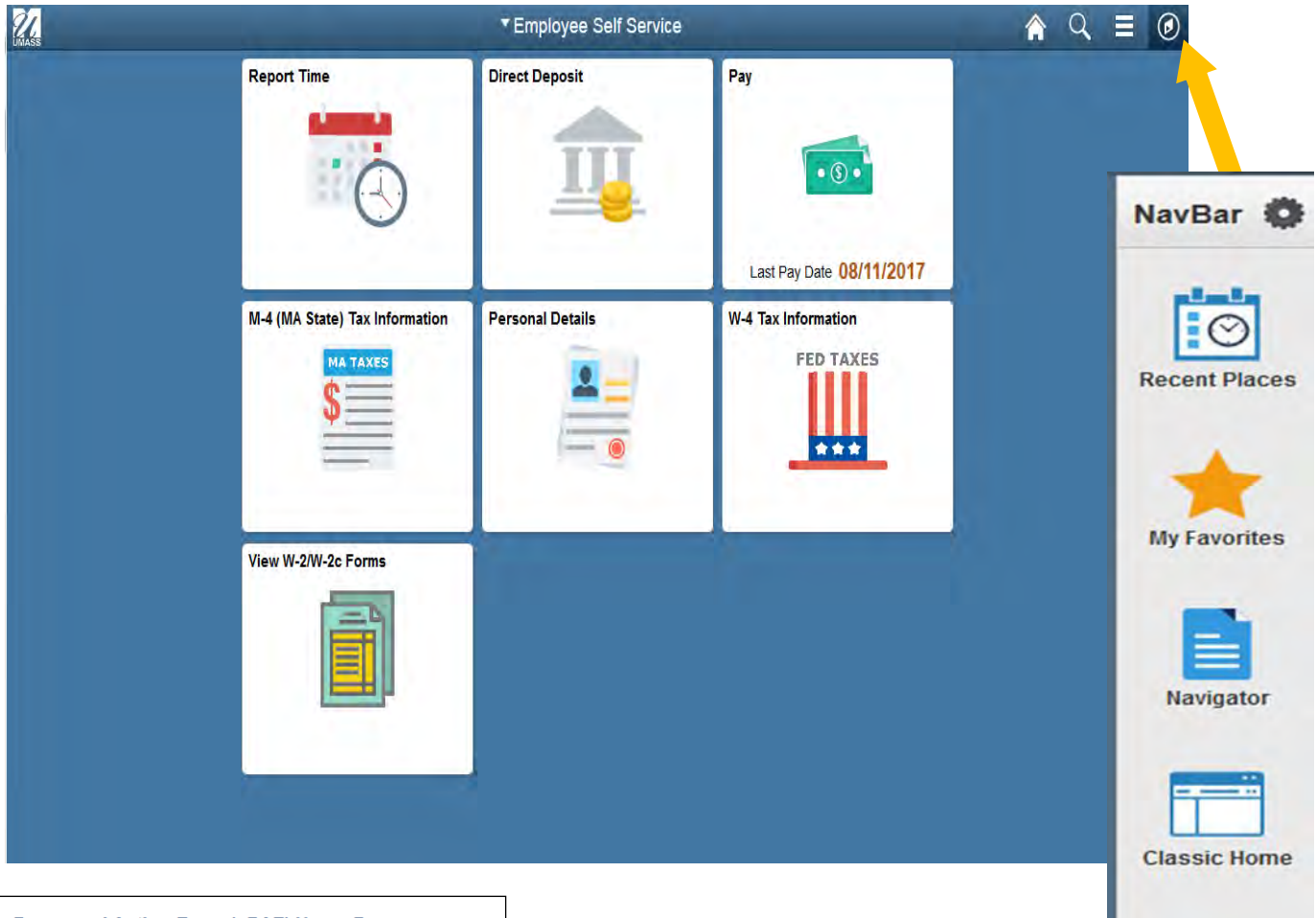


Step	Action
19.	The Form Status indicates that you have submitted this form.
20.	<p>Congratulations! You have entered a reappointment/change in time/funding change.</p> <p>End of Procedure.</p>


Updating Employee Status


Entering a Leave of Absence


Step	Action
1.	Begin by navigating to the NavBar , Click on Navigator , then ePAF Home Page . Click the Department Self Service link. Click ePAF Home Page .




Electronic Personnel Action Form (ePAF) Home Page

- 

My Worklist
Work the items that have been routed to you.
- 

Start a new ePAF
Start a new ePAF, which will then be routed to the appropriate approvers.
- 

Resubmit, Change, or Withdraw an ePAF
Make changes to an ePAF that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.
- 




View an ePAF
View a recently submitted ePAF, including information about its handling so far. ePAFs submitted in the last month are listed here. This is a read-only view.

Step	Action
2.	Click on Start a new ePAF .

ePAF (Electronic Personal Action Form) Training Guide

New Window

Start a New electronic Personnel Action Form (ePAF)

- 
Hire an Employee
 Use this form to hire a new employee into your department, or to add an additional job for an employee that already works in your department.
[Hire an Employee](#)
- 
Edit Existing Job
 Use this form to edit the job of an employee currently working in your department.
[Edit Existing Job](#)
- 
Change Employment Status
 Use this form to submit a termination, retirement, leave of absence or return from leave.
[Change Employment Status](#)

[Return to Electronic Personnel Action Form \(ePAF\) Home Page](#)

Step	Action
3.	To submit a termination, retirement, leave of absence, or return from leave, click the Change Employment Status link.

Add Search Component

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300):

Empl ID:

Empl Rcd Nbr:

Name:

Last Name:

Department:

Employee Group:

Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

4.	Enter the desired information into the Last Name OR Empl ID field. Example "Smith".
5.	Click the Search button.

ePAF (Electronic Personal Action Form) Training Guide

Name:	Empl ID: 10054190
Empl Group: Faculty - Teaching	Empl Rcd#: 0
Empl Status: Active	Personal Data Job Data Additional Pay Leave Plans General Deductions
Position: 00015215 Associate Professor	
Department: B006400 English	
eForm ID: 16294	

Form Data

*Effective Date: eForm ID: 16294

Action:

*Reason: Sabbatical

Expected Return Date:

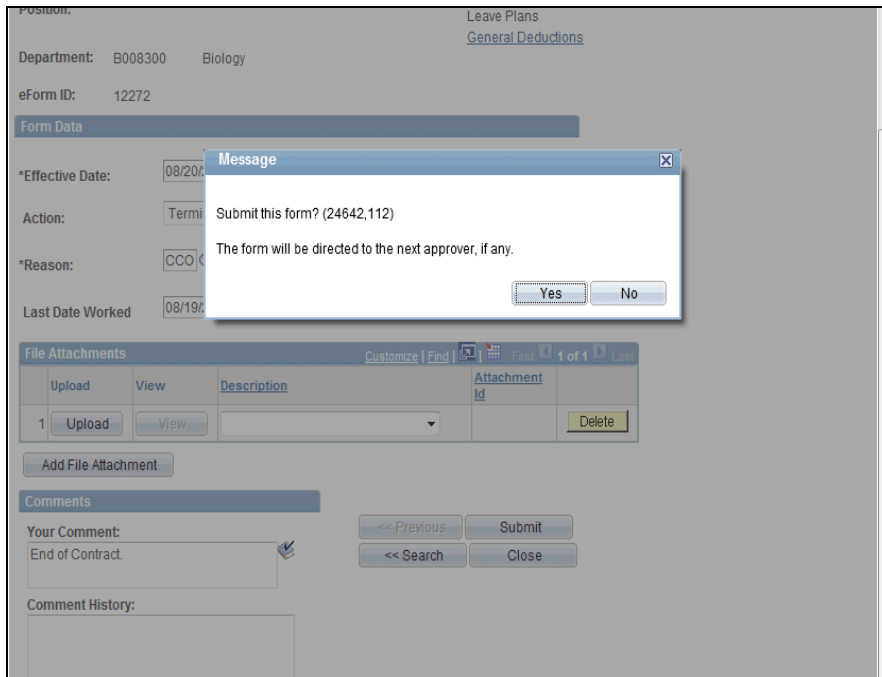
Upload	View	Description	Attachment Id
1	<input type="button" value="Upload"/>	<input type="button" value="View"/>	<input type="button" value="Delete"/>

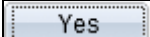
Comments

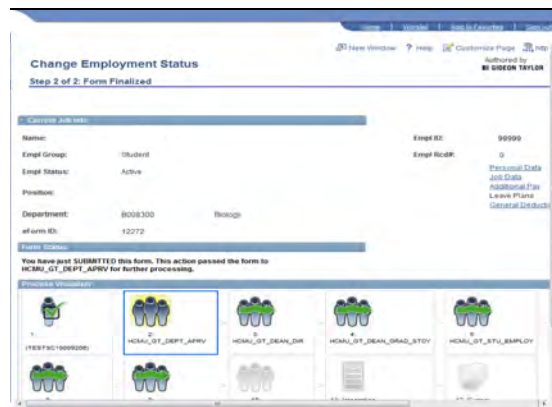
Your Comment:

Step	Action
6.	Click the Effective Date look up button. Example: 09/01/2012
7.	Click the Action list. <input style="width: 150px;" type="text" value=""/>
8.	The Action choices are Leave of Absence, Paid Leave of Absence, Retirement, Return from Leave, and Termination . If not sure of the action put a description in the comments section. Example: Leave of Absence
9.	Click the Reason look up button. Choose appropriate Reason code Example: Sabbatical
10.	Click the Effective Return Date look up button Example: 01/26/2013
Note:	Once the action of Termination is selected, the system will calculate the Last Date Worked based on the Effective Date of the transaction.
11.	Click the Submit button. <input style="width: 80px; height: 20px;" type="button" value="Submit"/>

ePAF (Electronic Personal Action Form) Training Guide



Step	Action
12.	Confirm that you are ready to submit this form and click the Yes button. 

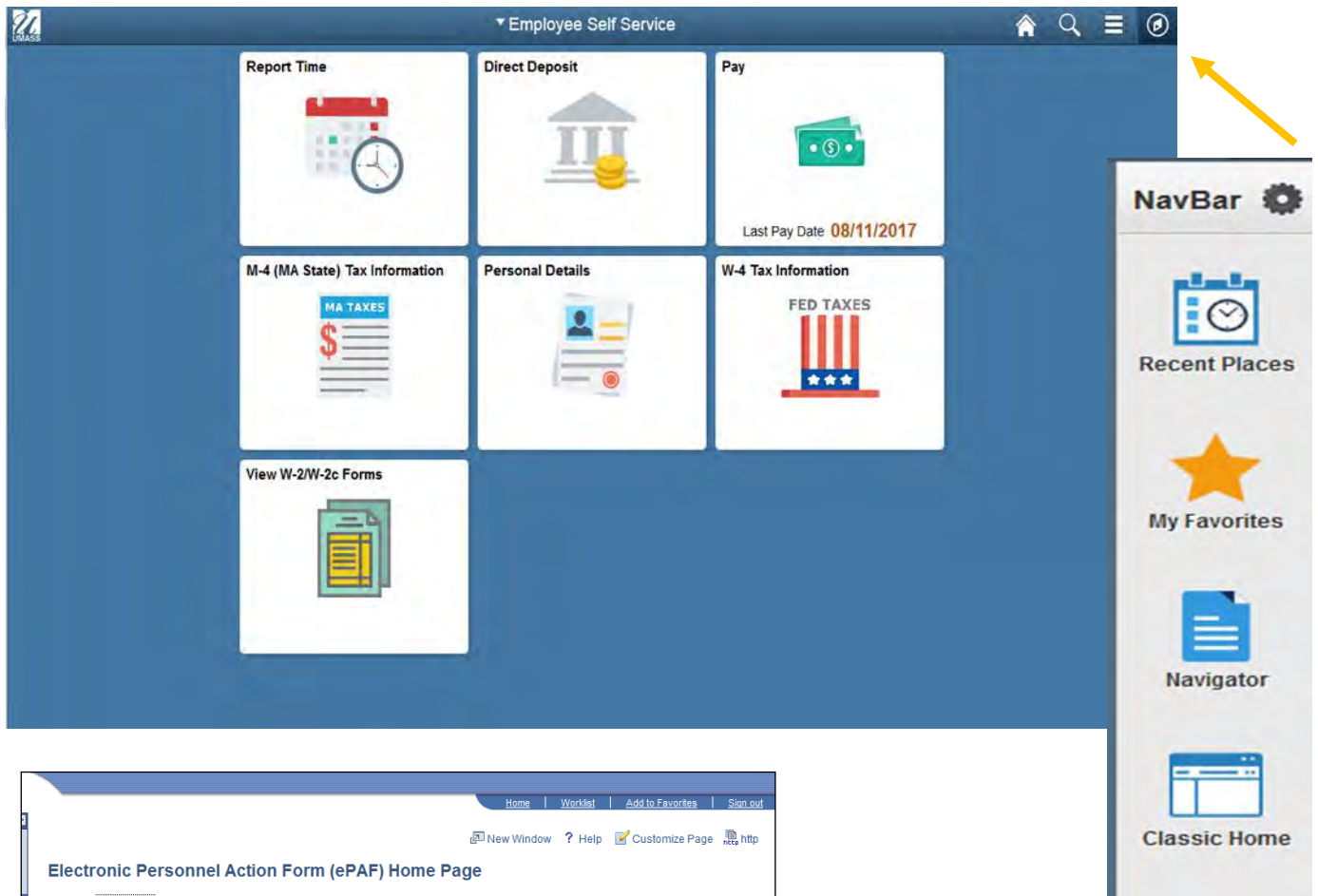


Step	Action
13.	The Form Status indicates that you have submitted this form.
14.	Congratulations! You have successfully submitted a termination. End of Procedure.

Managing ePAF Workflow (Initiators, Approvers, & HR Department)

Opening your Worklist

Step	Action
1.	Begin by navigating to the NavBar . Click on Navigator , Click on Department Self Service .
2.	Click the ePAF Home Page link.



3. Click on My Worklist

ePAF (Electronic Personal Action Form) Training Guide

Work List Filters: [dropdown] Feed [dropdown]

From	Date From	Work Item	Worked By Activity	Priority	Link
Test	08/02/2012	Notification Worklist	Notification	[dropdown]	HIRE:Jane Doe

Refresh

Step	Action
4.	This is your Worklist page. You currently have one item in your Worklist.
5.	If you want to open and view this item, click the HIRE:Jane Doe link. HIRE:Jane Doe

Author: GIDEON TAYLOR

Evaluate Hire

Step 1 of 4: Job Information

Review the form data below. If it is correct, choose Next to go to the next page.

To save your work and keep the form at your level, choose Save for Later.

eForm ID: 11698

Personal Info

Name: Jane Doe
Empl ID: NEW Empl Rcd#: [blank]

Applicant Data

Applicant ID Job Opening ID

Job Data

Effective Date: 08/02/2012

Employee Group: Non-Ben Part-Time Lecturers

Is this a Positioned Job? No

Supervisor ID: [blank]

Department: D101000 Chancellor's Office

Job Code: DA2109 Part-Time Lecturer Full/Part Time

Location Code: ADMIN Foster Administration Regular/Temporary

Standard Hours: 20.00 FTE: 0.500000

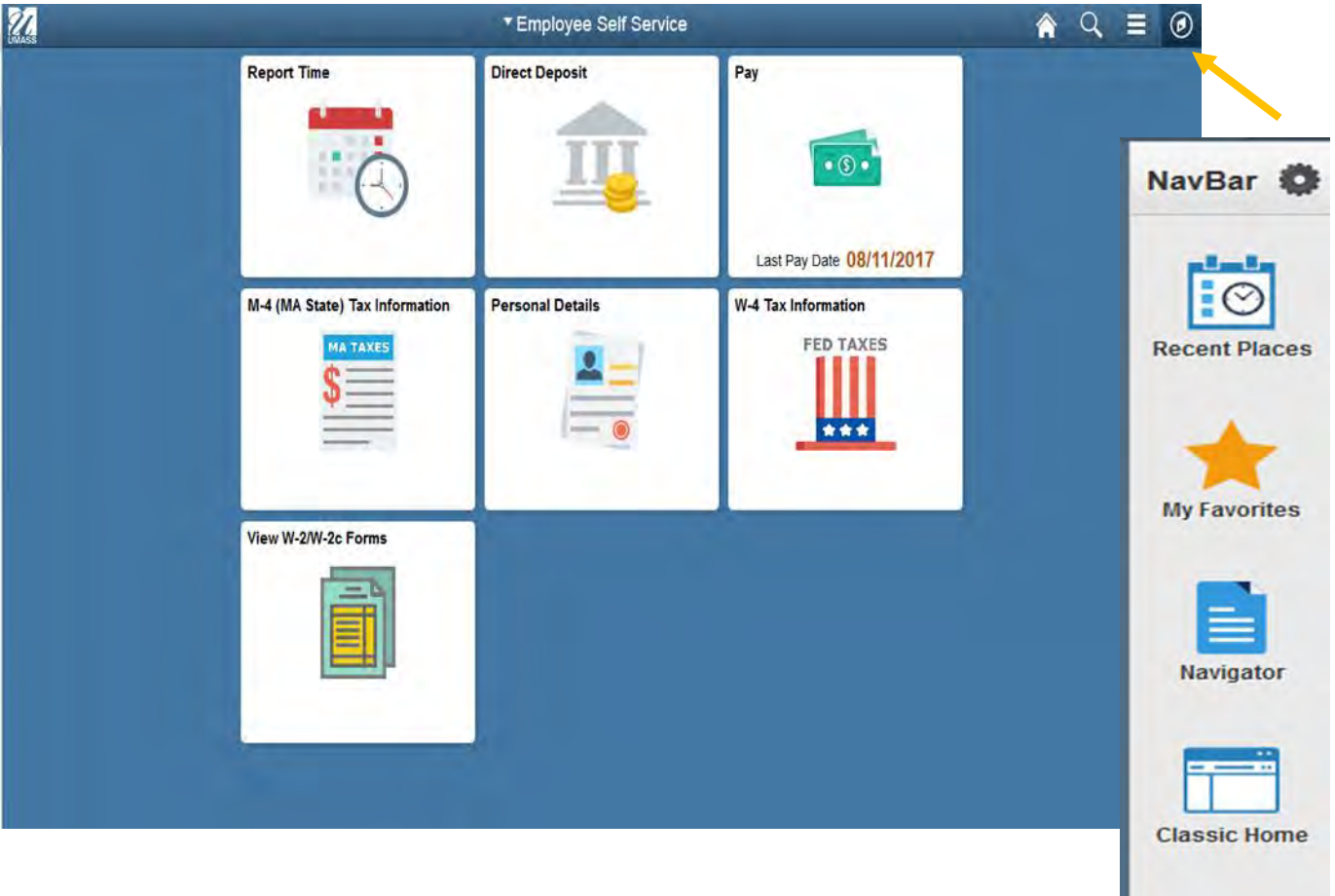
Mail Drop ID: [blank]

Step	Action
6.	You are now viewing the hire ePAF form for Jane Doe.
7.	If you want to return to your worklist, click the Worklist link. <i>Note:</i> Use the side bar menu to navigate back to your Worklist .

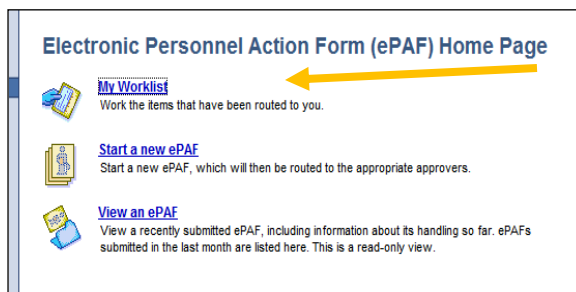
Step	Action
	<i>Note:</i> For the most current view, you will use the Refresh button to update your Worklist view.
8.	Congratulations! You have opened your Worklist. End of Procedure.

Approving an ePAF (Department level)

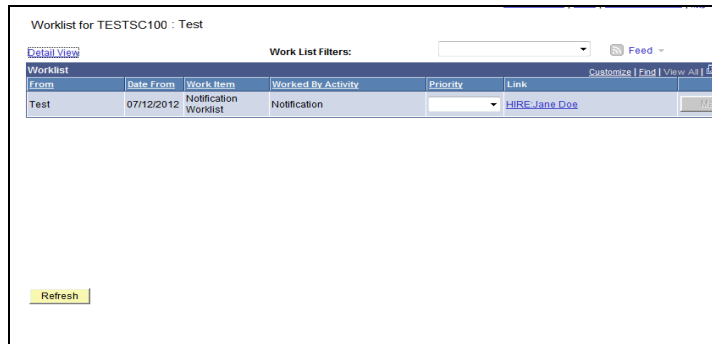
Step	Action
1.	Begin by navigating to the NavBar , click on Navigator . Click the Department Self Service link. Click the ePAF Home Page link.



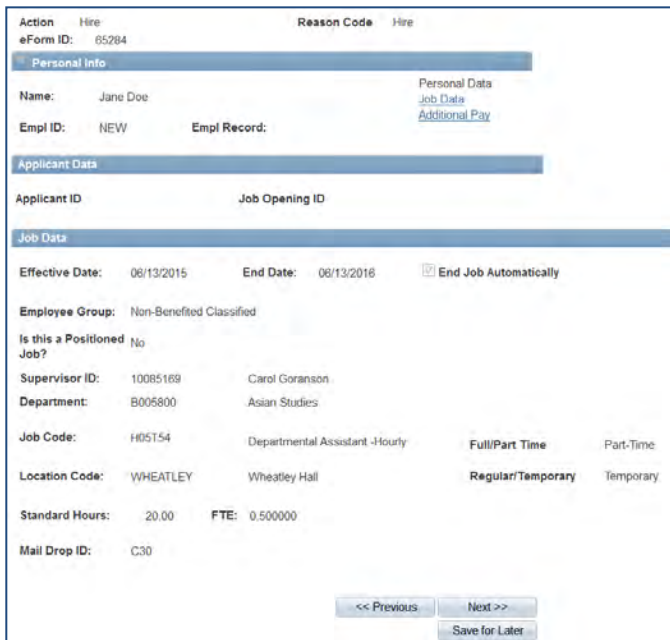
Step	Action
2.	Click the My Worklist link. My Worklist



ePAF (Electronic Personal Action Form) Training Guide



Step	Action
3.	<p>You have one item in your worklist. You want to review and approve Jane Doe's hire form.</p> <p>Click the HIRE:Jane Doe link.</p> <p>HIRE:Jane Doe</p>
4.	<p>The Evaluate Hire page contains personal info, applicant data, job data, and compensation data.</p>



Step	Action
5.	<p>Click the Next button.</p> <p>Next >></p>

ePAF (Electronic Personal Action Form) Training Guide

eForm ID: 65284

Personal Info

Name: Jane Doe Personal Data
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW Empl Record:

Compensation Data

Employee Type: Hourly

Hourly Rate: 24.000000 Annual Rate: \$24,960.000

Plan Salary Grade

Total Annual Rate \$24,960.000

Begin Date 06/13/2015

Changed	GL Combination Code	Fund Code	Department	Program Code	Project/Grant
1 <input checked="" type="checkbox"/>	B107992	51161	B006700000	A00	

Add Date Range

Step	Action
6.	Click the Next button. <input type="button" value="Next >>"/>



Evaluate Hire M GIDEON TAYLOR

Step 3 of 4: Finalize Form

Review the form data below. If it is correct, choose Approve to approve the form and forward it to the next approver, if any. To send the form back to the originator for correction or clarification, enter a comment and choose Reprocess Change.

To save your work and keep the form at your level, choose Save for Later.

eForm ID: 65284

Personal Info

Name: Jane Doe Personal Data
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW

Actions & Action Reasons

Action	Action Description	Reason Code	Action Reason Description
1 HR	Hire	HR	Hire

Action Hire Action Override Flag

Reason Code Hire

Form Messages

Message Text
Attach hire documentation

File Attachments

Upload	View	Description	Attachment Id
1 Upload	View		

Add File Attachment

Comments

Your Comment:

Step	Action
7.	Review the Evaluate Hire data. As an approver, you cannot make any changes to the data, but you can add comments and attachments. If it is correct, click the Approve button. Note: To send the form back to the originator for correction or clarification, enter a Comment and choose Reprocess Change <input type="button" value="Approve"/>
8.	Confirm that you want to approve this form. Click the Yes button. <input type="button" value="Yes"/>
9.	Your Form Status indicates that you have approved this form.

ePAF (Electronic Personal Action Form) Training Guide

Home | Worklist | Add to Favorites | Sign out

Name: Jane Doe
Empl ID: NEW

Personal Data
Job Data
Additional Pay

Form Status

eForm ID: 11340

You have just APPROVED this form. This action passed the form to HCMU_GT_HR_UPDATE for further processing.

Process Visualizer

1: TESTSC100
2: HCMU_GT_DEAN_DIR
3: HCMU_GT_EEO
4: HCMU_GT_DEAN_GRAD_STDY
5: HCMU_GT_STU_EMPLOY
6: HCMU
7: HCMU
8: HCMU_GT_CE_ADMIN
9: HCMU_GT_GRANTS
10: HCMU_GT_BUDGET_OFDC (6 hours 36 minutes)
11: HCMU_GT_HR_UPDATE
12: Integration Broker
13: HCMU

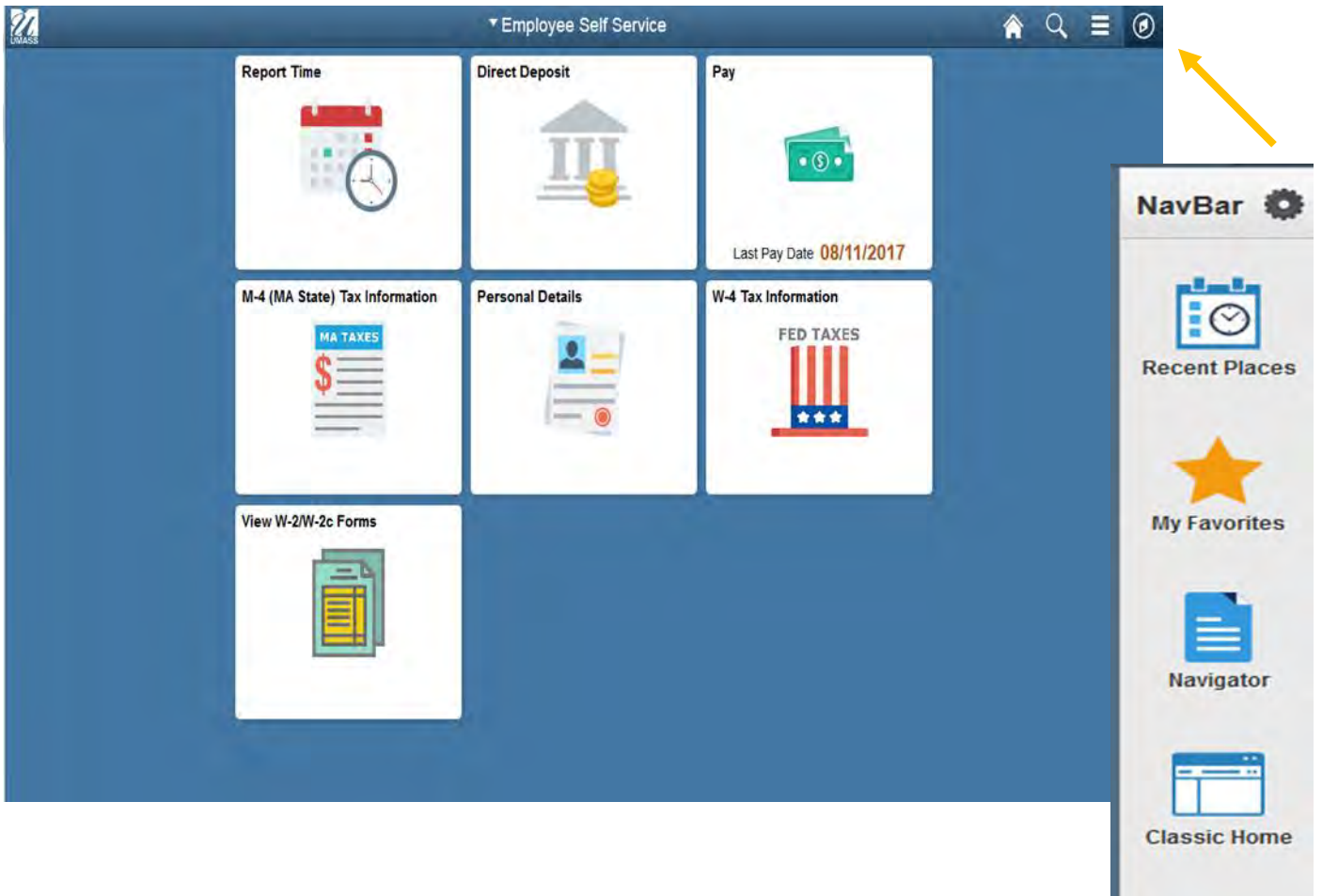
[Go To Worklist](#)
[View This Form](#)
Go To ePAF Home Page
[Close This Form](#)

Step	Action
10.	You want to return to your Worklist page. Click the Go To Worklist link. Go To Worklist
11.	You are back at your Worklist page. You currently have no items in your Worklist. Note: You can use the Refresh button at the bottom left of the page, to make sure you are viewing the most current information.
12.	Congratulations! You have approved an ePAF Form. End of Procedure.

Reprocessing an ePAF (Department Level)

Upon completion of this topic, you will be able to reprocess an ePAF form and send it back to the initiator for changes.


Step	Action
1.	Begin by navigating to the NavBar , then Navigator . Click the Department Self Service link.
2.	Click the ePAF Home Page link.



ePAF (Electronic Personal Action Form) Training Guide


ePAF (Electronic Personal Action Form) Training Guide

Electronic Personnel Action Form (ePAF) Home Page




[My Worklist](#)

Work the items that have been routed to you.



[Start a new ePAF](#)

Start a new ePAF, which will then be routed to the appropriate approvers.





[View an ePAF](#)


View a recently submitted ePAF, including information about its handling so far. ePAFs submitted in the last month are listed here. This is a read-only view.

Step	Action
3.	Click the My Worklist link. My Worklist

Worklist for TESTSC100: Test

[Detail View](#) Work List Filters:  Feed


Worklist [Customize](#) | [Find](#) | [View All](#) | 

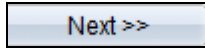
From	Date From	Work Item	Worked By Activity	Priority	Link
Test	07/12/2012	Notification Worklist	Notification	<input type="text"/>	HIRE:Jane Doe 

[Refresh](#)

Step	Action
4.	You have one item in your worklist. You want to review and reprocess Jane Doe's hire form. Click the HIRE:Jane Doe link. HIRE:Jane Doe
5.	The Evaluate Hire pages contain personal, job data, and compensation data.

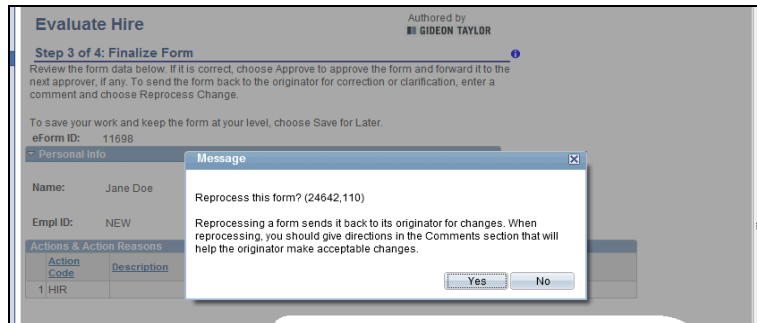
ePAF (Electronic Personal Action Form) Training Guide

Step	Action
6.	Click the Next button. 

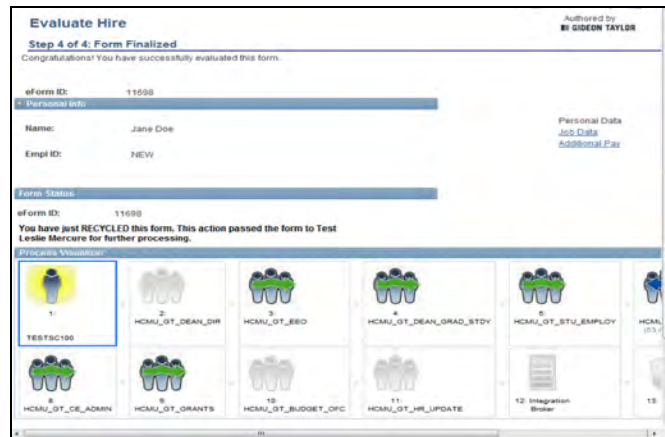
Step	Action
7.	Click the Next button. 

Step	Action
8.	Always be sure to give the initiator guidance on what changes you are looking for, by entering instructions into the Your Comments field.
9.	Click the Reprocess Chg button.

ePAF (Electronic Personal Action Form) Training Guide



Step	Action
10.	Confirm that you have given acceptable directions for the changes you desire, then click the Yes button.

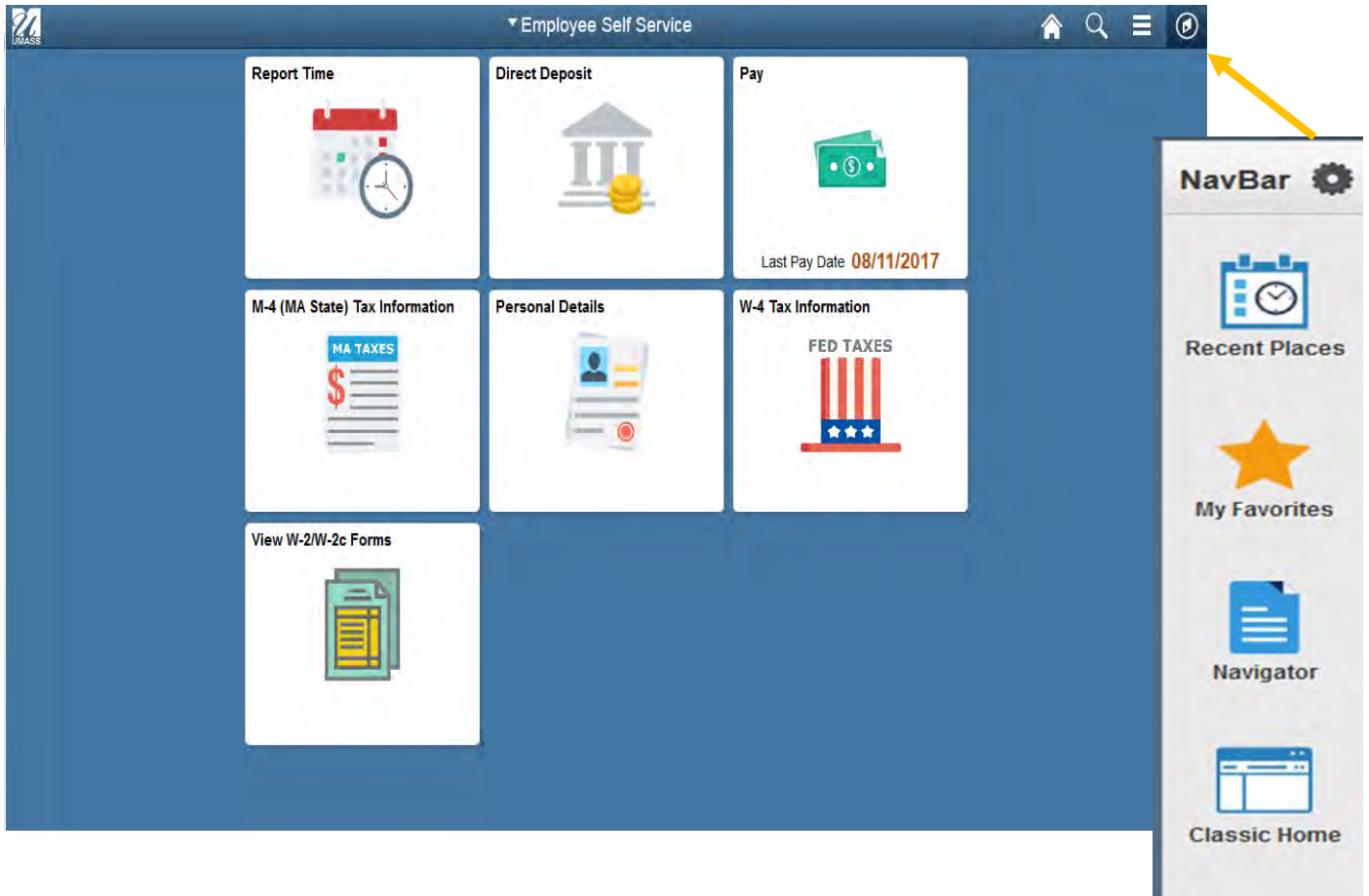


Step	Action
11.	The Form Status indicates that you have recycled/reprocessed this form and sent it back to the initiator for changes.
12.	Congratulations! You have reprocessed an ePAF Form. End of Procedure.

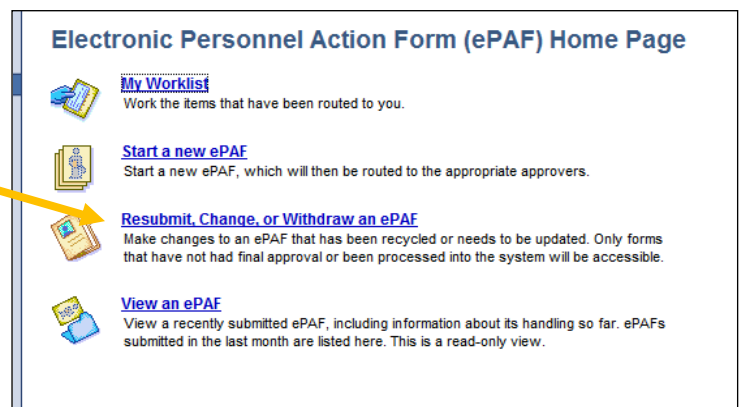
ePAF (Electronic Personal Action Form) Training Guide

Withdrawing an ePAF

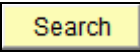
Step	Action
1.	Begin by navigating to the NavBar , then Navigator . Click the Department Self Service link.
2.	Click the ePAF Home Page link.

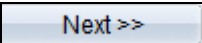


Step	Action
3.	You want to close (withdraw) an ePAF form that has already been submitted. Click the Resubmit, Change, or Withdraw an ePAF link. Resubmit, Change, or Withdraw an ePAF



ePAF (Electronic Personal Action Form) Training Guide

Step	Action
4.	You want to find an existing eForm by searching on the Last Name . Enter the desired information into the Last Name field. For this example, enter " Doe ".
5.	Click the Search button. 

Step	Action
6.	The Update Hire page will allow you to update the form and close it. Note: Only forms that have not had final approval or been processed into the system will be available for update.
7.	Click the Next button. 

ePAF (Electronic Personal Action Form) Training Guide

Action Hire Reason Code Hire
eForm ID: 65284

Personal Info

Name: Jane Doe [Personal Data](#)
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW Empl Record:

Applicant Data

Applicant ID Job Opening ID

Job Data

Effective Date: 06/13/2015 End Date: 06/13/2016 End Job Automatically

Employee Group: Non-Benefited Classified

Is this a Positioned Job? No

Supervisor ID: 10065169 Carol Goranson

Department: B005800 Asian Studies

Job Code: H05T54 Departmental Assistant -Hourly Full/Part Time Part-Time

Location Code: WHEATLEY Wheatley Hall Regular/Temporary Temporary

Standard Hours: 20.00 FTE: 0.500000

Mail Drop ID: C30

<< Previous Next >>
Save for Later

Step	Action
8.	Verify that this is the person you were searching for by viewing their Personal Information .

Home Logout Add to Favorites Logout

eForm ID: 11698

Personal Info

Name: Jane Doe [Personal Data](#)
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW Empl Record:

Applicant Data

Applicant ID Job Opening ID

Job Data

*Effective Date: 08/02/2012 IS

*Employee Group: Non-Ben Part-Time Lecturers

*Is this a Positioned Job? No

Supervisor ID:

*Department: 0101000 Chancellor's Office

*Job Code: 0A2109 Part-Time Lecturer Full/Part Time

*Location Code: ADMIN Foster Administration Regular/Temporary

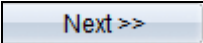
*Standard Hours: 20.00 *FTE: 0.500000

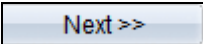
Mail Drop ID:

<< Previous Next >>
Save for Later

Step	Action
9.	Click the Next button. <input type="button" value="Next >>"/>

ePAF (Electronic Personal Action Form) Training Guide

Step	Action
10.	Click the Next button. 

Step	Action
11.	Click the Next button. 

ePAF (Electronic Personal Action Form) Training Guide

Update Hire Authored by GIDEON TAYLOR

Step 5 of 6: Finalize Form

Enter a comment if desired, and choose Submit to begin routing for this form.

eForm ID: 11698

Personal Info

Name: Jane Doe [Personal Data](#)
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW

Actions & Action Reasons

Action Code	Description	Reason Code	Action Reason Description
1 HIR		HIR	Hire

*Reason Code: Hire

Form Messages

Attach hire documentation

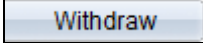
File Attachments

Upload	View	Description	Attachment Id
1 Upload	View	Other	TESTSC100 08-07-07.56.57

Comments

Your Comment:

Resubmit Withdraw
<< Previous Next >>
Save for Later

Step	Action
12.	It is important to document why you are closing this ePAF. You will enter your reason in the Your Comment field. For this example, enter " Applicant has withdrawn her application. "
13.	Click the Withdraw button. 

Update Hire Authored by GIDEON TAYLOR

Step 5 of 6: Finalize Form

Enter a comment if desired, and choose Submit to begin routing for this form.

eForm ID: 11698

Personal Info

Name: Jane Doe

Empl ID: NEW

Actions & Action Reasons

*Reason Code: Hire

Form Messages

Attach hire documentation

File Attachments

Comments

Your Comment: Applicant has withdrawn her application.


Resubmit Withdraw
<< Previous Next >>
Save for Later

Message

Are you sure you want to withdraw this form? (24642,107)

Withdrawing a form permanently ends form processing. The form will be archived.

Yes No

Step	Action
14.	If you are sure that you want to end processing and withdraw this form permanently, click the Yes button. 

Update Hire Authored by GIDEON TAYLOR

Step 6 of 6: Form Finalized

Congratulations, you have successfully updated this form!

eForm ID: 11698

Personal Info

Name: Jane Doe

Empl ID: NEW

Form Status

eForm ID: 11698
You have just **WITHDRAWN** this form. This permanently ends processing for this form.

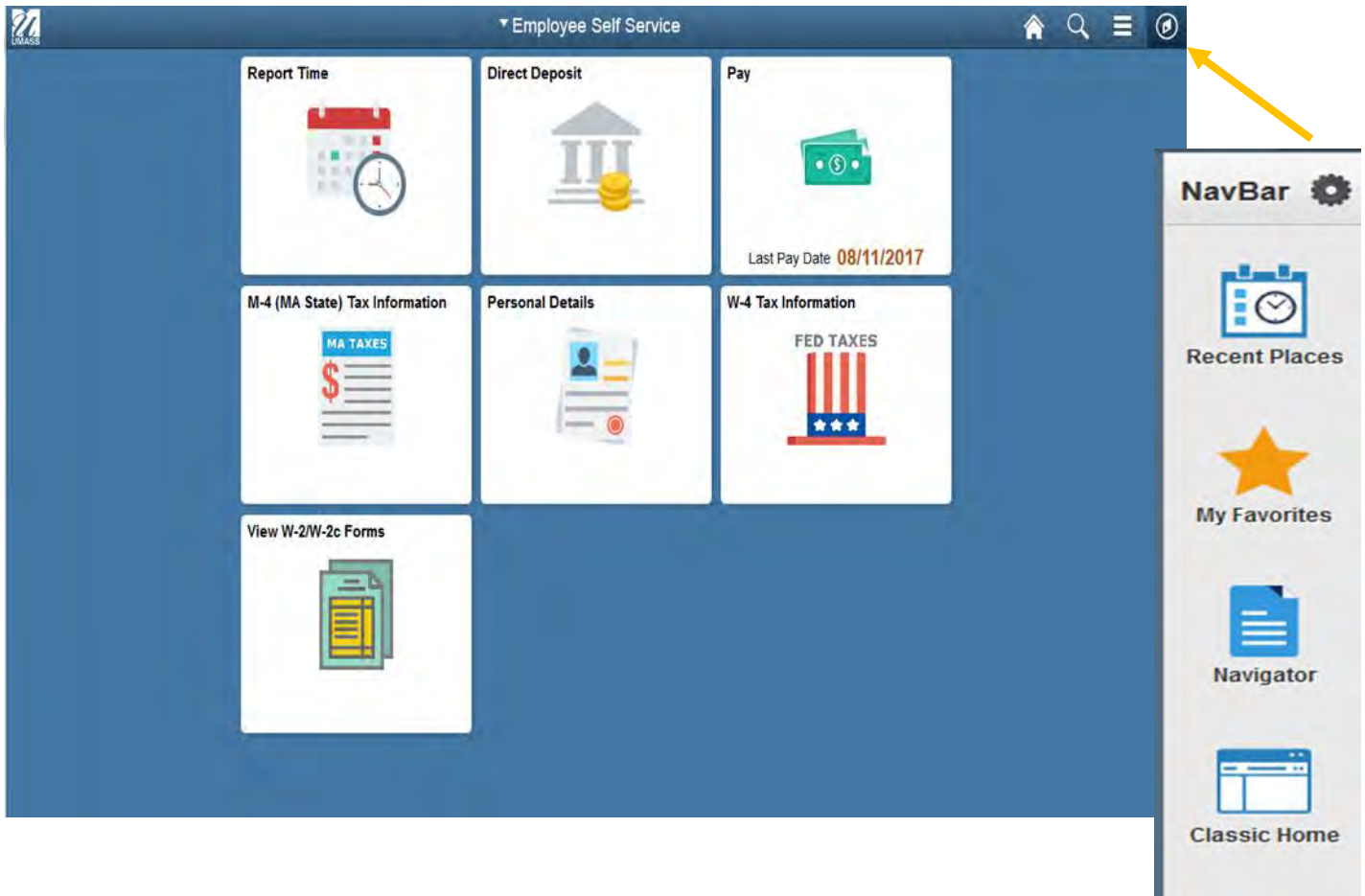
Process Visualizer

1 TESTSC100
2 HCMU_ST_DEAN_DIR
3 HCMU_ST_EEO
4 HCMU_ST_DEAN_GRAD_STOV
5 HCMU_ST_STU_EMPLOY
6 HCMU_ST_ADMIN
7 HCMU_ST_GRANTS
8 HCMU_ST_BUDGET_OFC
9 HCMU_ST_IR_UPDATE
10 Integration Broker


Step	Action
15.	The Form Status indicates that you have withdrawn this form.
16.	Congratulations! You have closed an ePAF form. End of Procedure.


Adding Attachments to an ePAF Form


Step	Action
1.	Begin by navigating to the NavBar . Click on Navigation , Click on Department Self Service . Click on ePAF Home Page .




Electronic Personnel Action Form (ePAF) Home Page

- 

[My Worklist](#)
Work the items that have been routed to you.
- 

[Start a new ePAF](#)
Start a new ePAF, which will then be routed to the appropriate approvers.
- 

[Resubmit, Change, or Withdraw an ePAF](#)
Make changes to an ePAF that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.
- 

[View an ePAF](#)
View a recently submitted ePAF, including information about its handling so far. ePAFs submitted in the last month are listed here. This is a read-only view.

Step	Action
2.	Click the My Worklist link.

ePAF (Electronic Personal Action Form) Training Guide

Worklist for TESTSC100 : Test

[Detail View](#) Work List Filters: [Feed](#)

From	Date From	Work Item	Worked By Activity	Priority	Link
Test	08/02/2012	Notification Worklist	Notification		HIRE:Jane Doe

[Refresh](#)

Step	Action
3.	You want to add an attachment to this eForm. Click the HIRE:Jane Doe link. HIRE:Jane Doe
4.	The Update Hire page will allow you to update the form and add an attachment. Note: Only forms that have not had final approval or been processed into the system will be available for update.

Update Hire Authored by
GIDEON TAYLOR

Step 1 of 6: Employee Name [?](#)

Indicate the type of employee you are hiring by choosing a value in the Empl Group field. For employee groups where Position Number is required, it will appear. Fill out the rest of the fields, and choose Next.

Clone eForm ID

Personal Info

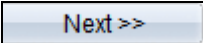
Empl ID: NEW *Hiring Campus: Univ of Mass Dartmouth

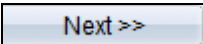
*First Name: Jane Middle: B.

*Last Name: Doe Suffix:

Step	Action
5.	Click the Next button. <input type="button" value="Next >>"/>

ePAF (Electronic Personal Action Form) Training Guide

Step	Action
6.	Click the Next button. 

Step	Action
7.	Click the Next button. 

ePAF (Electronic Personal Action Form) Training Guide

Update Hire Authorized by
GIDEON TAYLOR

Step 4 of 6: Time and Labor

Update the employee's Time and Labor and additional information as needed.

eForm ID: 11698

Personal Info

Name: Jane Doe [Personal Data](#)
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW Empl Rcd#: [Additional Pay](#)

Time and Labor Data

*Union Code: D80 AFT Faculty Federation

*Pay Group: UMD UMass Dartmouth

*Empl Class: 1 Faculty-Calendar Year

Workgroup: D_NBFAC Non Benefitted Faculty

Taskgroup: UM_EXP Exception Taskgroup

Time and Labor Schedule

Schedule different from standard?

Step	Action
8.	Click the Next button. <div style="text-align: center; border: 1px solid black; padding: 5px; width: fit-content; margin: 0 auto;"> <input style="width: 100px;" type="button" value=" Next >> "/> </div>

Update Hire Authorized by
GIDEON TAYLOR

Step 5 of 6: Finalize Form

Enter a comment if desired, and choose Submit to begin routing for this form.

eForm ID: 11698

Personal Info

Name: Jane Doe [Personal Data](#)
[Job Data](#)
[Additional Pay](#)

Empl ID: NEW

Actions & Action Reasons

Action Code	Description	Reason Code	Action Reason Description
1 HIR <input type="text"/>		HIR <input type="text"/>	Hire

*Reason Code: Hire

Form Messages

[Message Text](#)
Attach hire documentation

File Attachments

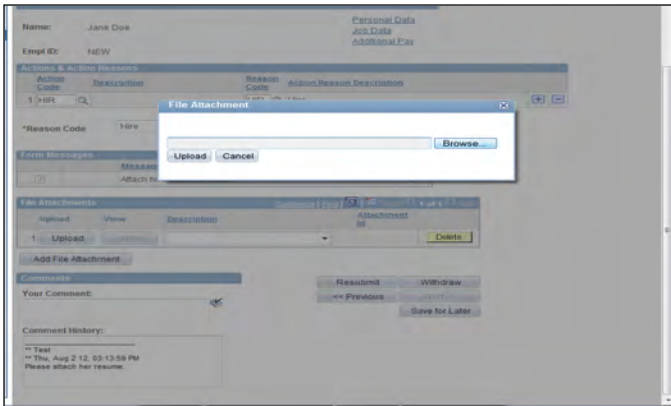
Upload	View	Description	Attachment Id
1 <input style="background-color: #e0e0e0;" type="button" value=" Upload "/>	<input style="background-color: #e0e0e0;" type="button" value=" View "/>		<input style="background-color: #e0e0e0;" type="button" value=" Delete "/>

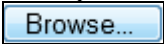
Comments

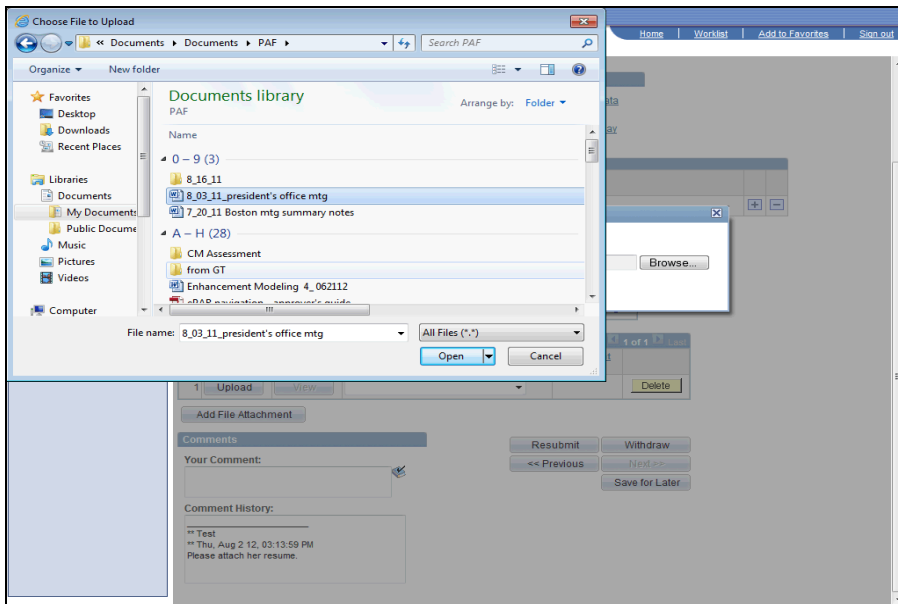
Your Comment:

Step	Action
9.	This is the file attach section. Click the Upload button. <div style="text-align: center; border: 1px solid black; padding: 5px; width: fit-content; margin: 0 auto;"> <input style="width: 80px;" type="button" value=" Upload "/> </div>

ePAF (Electronic Personal Action Form) Training Guide

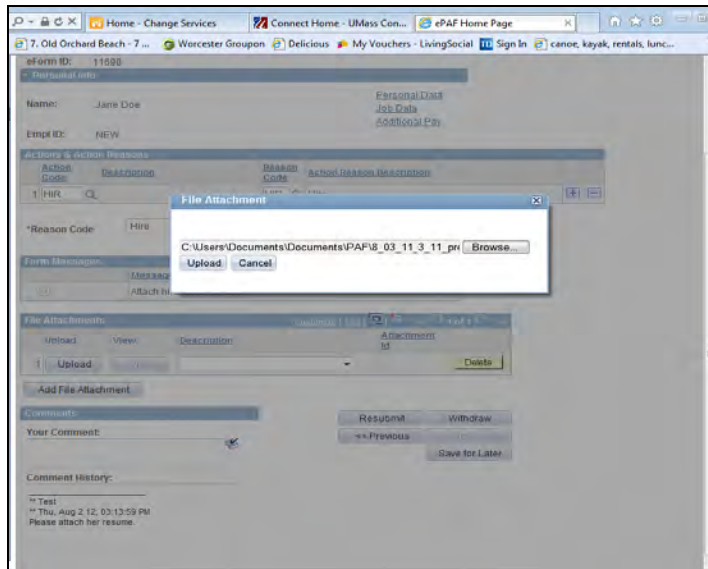


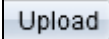
Step	Action
10.	To search for a desired file to upload. Click the Browse button.  NOTE: This can only be 30 characters in length

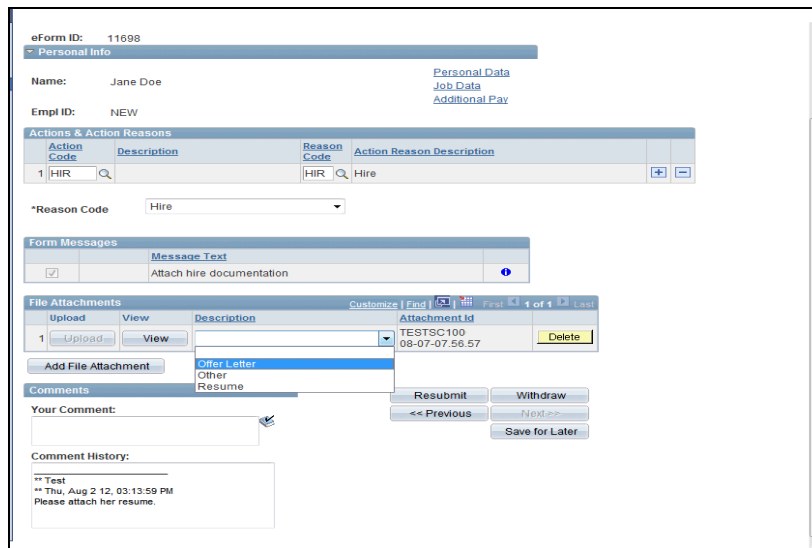



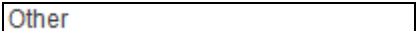
Step	Action
11.	Select the document you wish to attach and upload.

ePAF (Electronic Personal Action Form) Training Guide



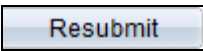

Step	Action
12.	Click the Upload button. 



Step	Action
13.	Click the Description list box. 
14.	For this example, click the Other list item. 

ePAF (Electronic Personal Action Form) Training Guide

The screenshot displays the ePAF form interface. At the top, the eForm ID is 11698. The 'Personal Info' section shows the name Jane Doe and Empl ID: NEW. Below this is the 'Actions & Action Reasons' table with one entry: Action Code HIR, Description Hire, Reason Code HIR, and Action Reason Description Hire. A 'Form Messages' section contains a message: 'Attach hire documentation'. The 'File Attachments' section shows one attachment with ID TESTSC100 and timestamp 08-07-07.56.57. At the bottom, there is a 'Comments' section with a text area and buttons for 'Resubmit', 'Withdraw', '<< Previous', 'Next >>', and 'Save for Later'. A 'Comment History' section shows a previous comment: '** Test Thu, Aug 2 12, 03:13:59 PM Please attach her resume.'

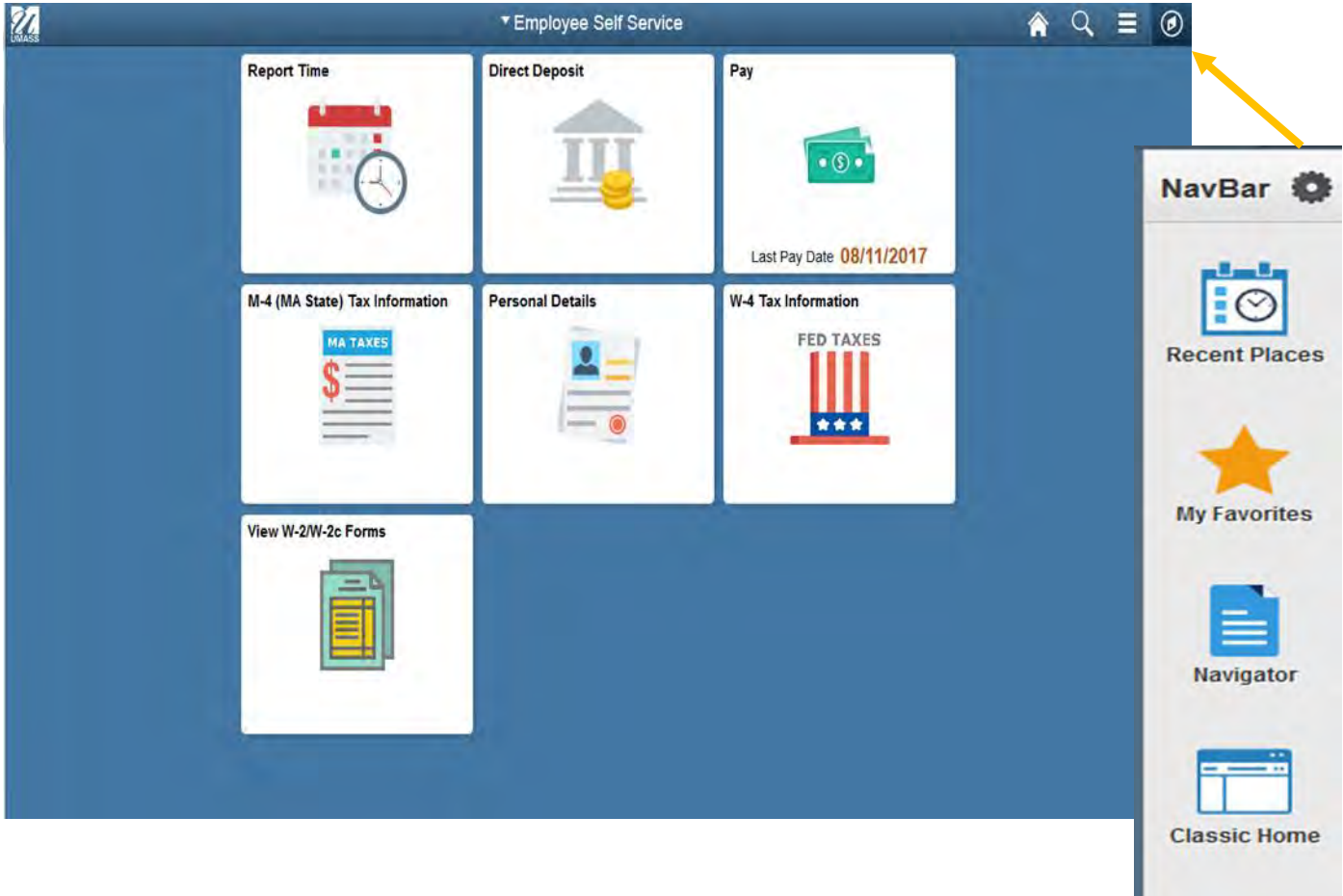
Step	Action
15.	To resubmit this eForm with the new attachment, click the Resubmit button. 
16.	If you are ready to resubmit this form with your changes, click the Yes button. 
17.	The Form Status indicates that you have resubmitted this form.
18.	Congratulations! You have added an attachment to an ePAF form. End of Procedure.

ePAF (Electronic Personal Action Form) Training Guide

Creating and Cloning an ePAF (Multiple employees the same position)


Upon completion of this topic, you will be able to create and clone an eForm.


Step	Action
1.	Begin by navigating to the NavBar . Click on Navigation , Click on Department Self Service . Click on ePAF Home Page .





Step	Action
2.	Click the Start a new ePAF link. Start a new ePAF

Electronic Personnel Action Form (ePAF) Home Page

- 

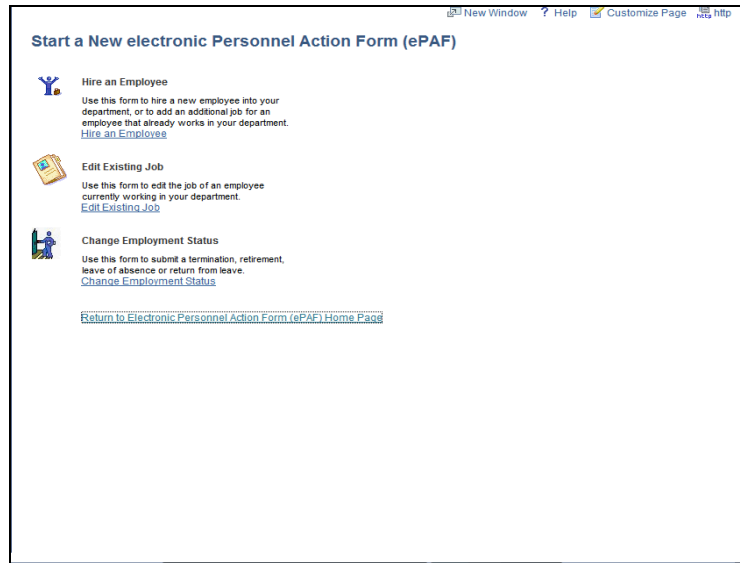
[My Worklist](#)
Work the items that have been routed to you.
- 

[Start a new ePAF](#)
Start a new ePAF, which will then be routed to the appropriate approvers.
- 

[Resubmit, Change, or Withdraw an ePAF](#)
Make changes to an ePAF that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.
- 

[View an ePAF](#)
View a recently submitted ePAF, including information about its handling so far. ePAFs submitted in the last month are listed here. This is a read-only view.

ePAF (Electronic Personal Action Form) Training Guide



Step	Action
3.	Click the Hire an Employee link. Hire an Employee



Step	Action
4.	You will use the Hire an Employee form to create an eForm for cloning.
5.	Click the Add New Employee button. Add New Employee

ePAF (Electronic Personal Action Form) Training Guide

Hire an Employee Authorized by
GIDEON TAYLOR

Step 2 of 6: Employee Name

Please fill in the fields below.

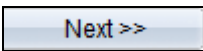
Clone eForm ID

Personal Info

Empl ID: NEW Hiring Campus: Univ of Mass Lowell

*First Name: Middle:

*Last Name: Suffix:

Step	Action
6.	Enter the eForm ID Example: 12683
7.	Enter the desired information into the First Name field. For this example, enter " Jane ". <i>Note:</i> This will be the information for the new employee you are hiring.
8.	Enter the desired information into the Last Name field. For this example, enter " Doe ".
9.	Click the Next button. 

ePAF (Electronic Personal Action Form) Training Guide

Authorized by
GIDEON TAYLOR

Hire an Employee

Step 3 of 6: Job Information

Indicate the type of employee you are hiring by choosing a value in the Empl Group field.

Fill in the remaining fields and choose "Next".

eForm ID: 12687

Personal Info

Name: Jane Doe Personal Data
Job Data
Additional Pay

Empl ID: NEW Empl Rcd#:

Applicant Data

Applicant ID: Job Opening ID:

Job Data

*Effective Date: 09/06/2012 End Date: End Job Automatically

*Employee Group: Clerical/Technical

*Is this a Positioned Job? No

Supervisor ID: 88888 John Smith

*Department: L100100 Office of Chancellor

*Job Code: C07X04 EDP Entry Operator I *Full/Part Time: Part-Time

*Location Code: ALLEN Allen House *Regular/Temporary: Temporar

*Standard Hours: 37.50 *FTE: 1.000000

Mail Drop ID:

Step	Action
10.	Notice your Job Data is populated from your cloned eform ID that you previously selected. <i>Note:</i> You may continue to complete this eForm for Jane Doe.
11.	<i>Note:</i> If you had previously entered a bi-weekly rate on the original eForm , when you clone this eForm the bi-weekly rate will be zeroed out and will need to be re-entered for subsequent eForms .
12.	Congratulations! You have created and cloned an eForm. End of Procedure.

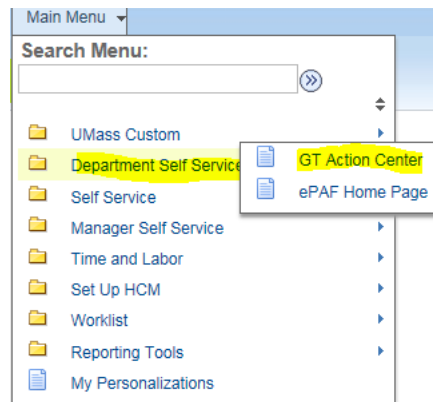
ePAF Enhancements

We are pleased to announce several ePAF enhancements that have been completed. These changes are in response to feedback from users and are intended to streamline reviewing and approving ePAF forms. The “worklist” will remain available to you for ePAF Approvals; however we hope you find these enhancements to be intuitive and make reviewing and approving ePAF’s much easier.

The attached document illustrates each of the changes and what the new screens will look like. Also, a brief explanation of the changes can be seen below

What’s New?

- **Action Center** – Allows you to quickly review and approve open forms. This is a high level view and only a few key fields are displayed. *We strongly encourage that the entire form is reviewed prior to approving.* You may easily access the entire form directly from the action center by clicking on Department Self Service > GT Action Center.






- **Single Page View** – The ePAF form is now available as a single page which will make reviewing key information much easier.
- **Skip and Stamp** – Those approvers who may have two or more approval steps for an ePAF form will no longer need to approve more than once. The system will skip further approvals and provide a time/date stamp for all steps.
- **Proxy Capability** – Approvers who have the need to delegate their approval. In order to proxy to another user you will need to contact HR who will work with you on this access.

If you have any questions or issues please feel free to email HRDirect@umb.edu.

Action Center –

This feature will be available for ePaf approvers only. Although, if you prefer, you can still view transactions through your Worklist, the new action center provides a way to look at and approve all of your transactions at one time, rather than one transaction at a time. **We strongly encourage that the entire form is reviewed prior to approving.** Below is an example of how transactions will appear in the action center.

In the action Center, you can:

-  Bulk approve transactions
-  Filter to only look at certain transactions at one time (new hires, job changes, terminations, etc.) or filter by date
-  Drill further into a transaction for more information before deciding if you wish to approve.

Filter List

Form Type

Start Date

Apply Filter

Last Name

End Date

Clear

Forms

3 of 3 Filtered 3 of 3 Displayed 0 of 3 Selected

Actions

Refresh [Select All](#) [Clear Selections](#) Action: [Set Action on Selected eForms](#) Submit All

Forms Needing Action Find First 1-3 of 3 Last

107262 Job Change
Employee Group: Professional (W60) Non Unit

Effdt:	2018-08-27	Action:	Pay Rate Change
Employee:	Logano,Joey	Reason:	Adjustment
Employee ID:	10200814		

	Department	Job Code	Std Hrs	Biweekly Comp	Annual Comp	End Dt
New	Neurobiology	Research Associate I	40	2000	52000	
Old	Neurobiology	Research Associate I	40	2500	65000	

[Form: Logano, Joey](#)
More Info

Action
 Submit

107268 Hire
Employee Group: Professional (W60) Non Unit

Effdt:	2018-05-15	End Date:	(blank)
Employee:	Truex, Martin	Biweekly Comp:	2692.2076
Employee ID:	NEW	Annual Comp:	69997.398
Action:	Hire	Std Hours:	40
Job Code	Research Associate Ii	Department:	Neurobiology

[Form: Truex, Martin](#)
More Info

Action
 Submit

107273 Hire
Employee Group: UMCH Professional

Effdt:	2018-06-20	End Date:	(blank)
Employee:	Hamlin, Denny	Biweekly Comp:	1730.76
Employee ID:	NEW	Annual Comp:	44999.76
Action:	Hire	Std Hours:	40
Job Code	Coord, Admin Ii	Department:	Neurobiology

[Form: Hamlin, Denny](#)
More Info

Action
 Submit

Submit All

ePAF (Electronic Personal Action Form) Training Guide

Single-Page View –

Currently, when you log in to a transaction, the form appears on several pages. With the new, single-page view, the entire transaction will appear on one page. This will make the viewing and approval process much faster and easier.

See below an example of the new, single-page view. In our current ePaf system, this same transaction would appear on 5 separate pages (hires currently appear on 9 separate pages):

Action Hire Reason Code Hire

eForm ID: 107268

Personal Info

Name: Martin Truex Personal Data
Empl ID: NEW Job Data Additional Pay

Applicant Data

Applicant ID Job Opening ID

Job Data

Effective Date: 05/15/2016

Employee Group: Professional (W60) Non Unit

Is this a Positioned Job? Yes

Position Number: 00011134 Research Associate II

Supervisor ID: 10012359 Tara Keegan

Override Position Fields

Department: W404500 Neurobiology

Job Code: MR0006 Research Associate II Full/Part Time Full-Time

Location Code: MED SCHOOL Medical School Building Regular/Temporary Regular

Standard Hours: 40.00 FTE: 1.000000

Mail Drop ID:

Compensation Data

Employee Type: Exception Hourly

Bi-Weekly Rate: 2692.207600 Annual Rate: \$60,997.398

Plan W60 Salary Grade 44

Add Additional Components of Pay?

Total Annual Rate \$60,997.398

Begin Date 05/15/2016

Changed	GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code	Distribution Type	Percent	Commitment Amount	Fund End Date	Key Value
1	W100025	52030	W100000000	F00					Percent	34.000	\$3,072.963		
2	W109962	51254	W600100000	F40	M01000203800000		06/30/2049		Percent	33.000	\$106,611.421		
3	W115643	53106	W404500007	B03	S6110000010617		08/31/2016		Percent	33.000	\$6,917.051		

Time and Labor Data

Union Code: W60 Non-Unit Professional

Pay Group: UMW UMass Worcester

Empl Class: 2 Professional

Workgroup: W_PROF Professional

Taskgroup: UM_EXP Exception Taskgroup

Time and Labor Schedule

Schedule different from standard?

Actions & Action Reasons

Action	Action Description	Reason Code	Action Reason Description
1	Hire	HIR	Hire

Action Hire Reason Code Hire Action Override Flag

Form Messages

Attach hire documentation

File Attachments

Upload	View	Description	Attachment Id
1	Upload	View	Delete

Add File Attachment

Comments

Your Comment:

Comment History:

Approve

Reprocess Chg

Save for Later