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

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

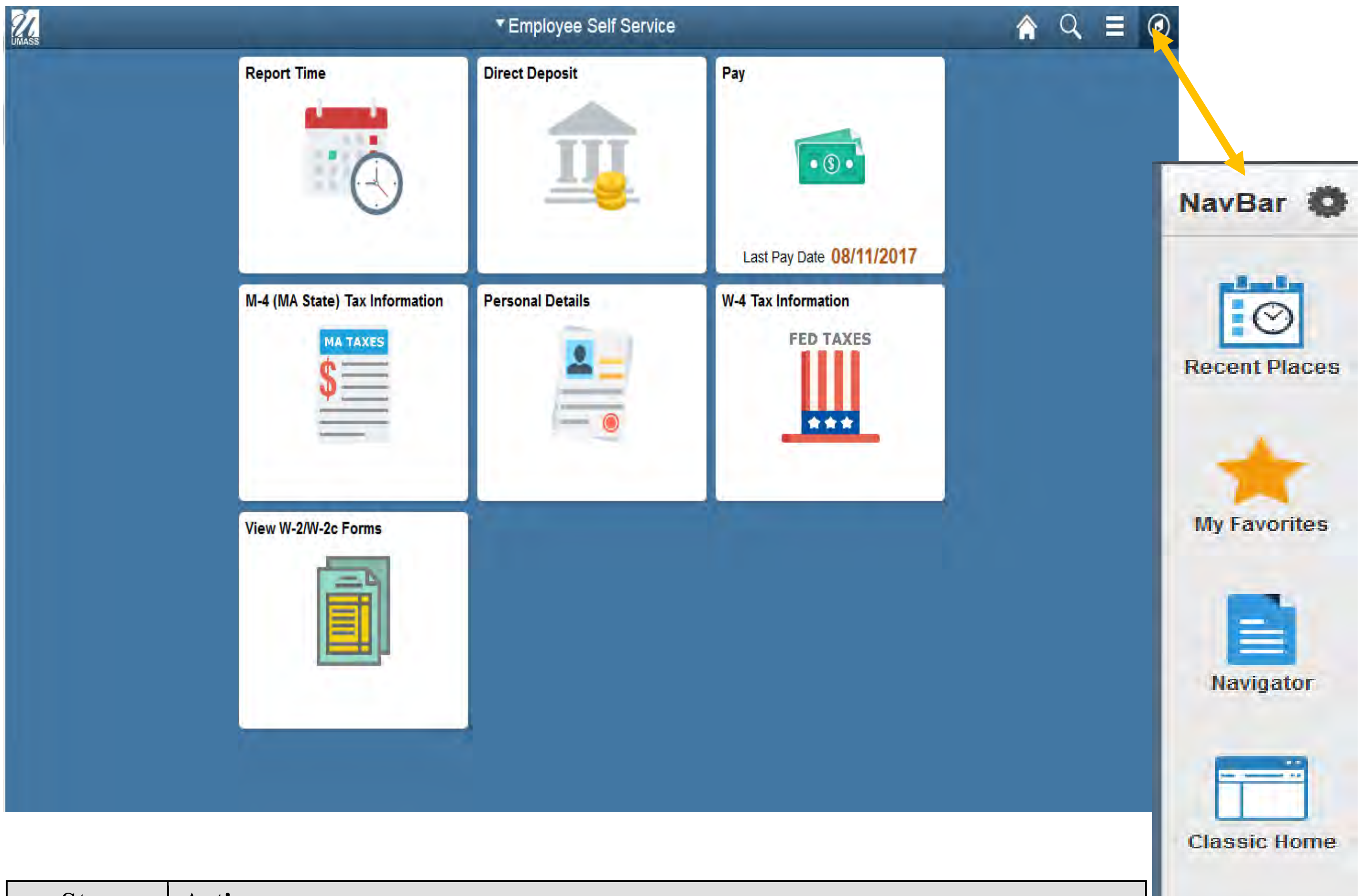
Adding an Benefitted employee into a position

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

Key Information:

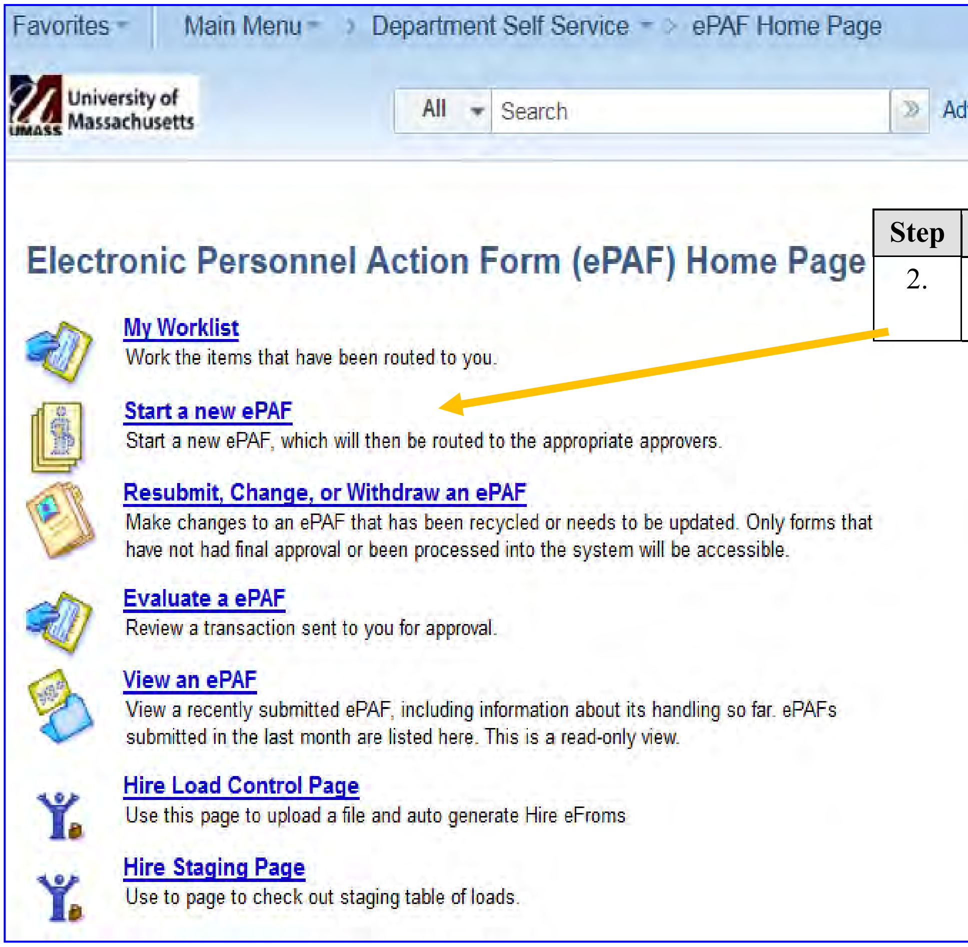
Employee Group: Faculty-Teaching

Is this a Positioned Job?: Yes



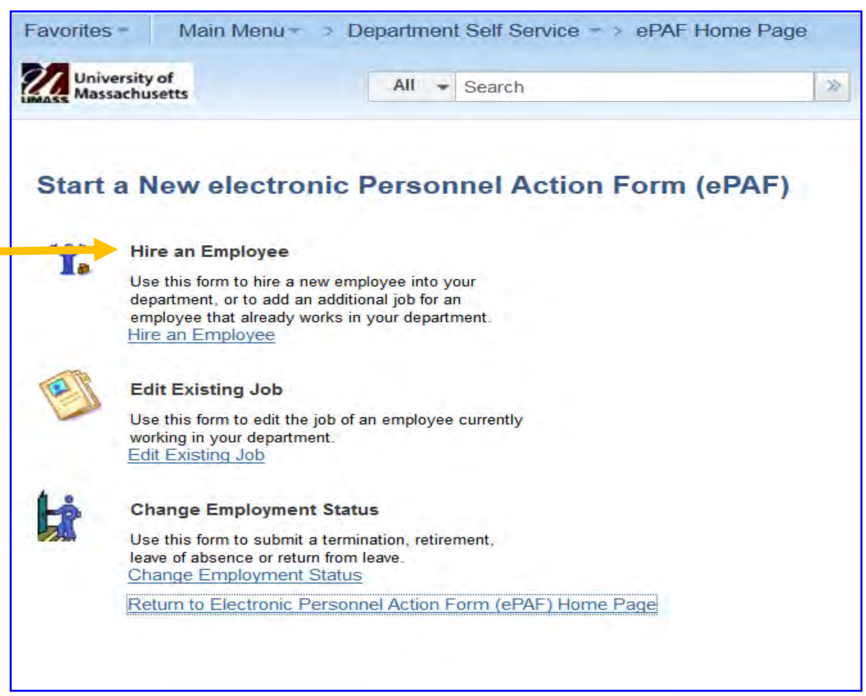
Step	Action
1.	Begin by navigating to the **NavBar**. Click on **Navigator**, Click on **Department Self Service**.

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



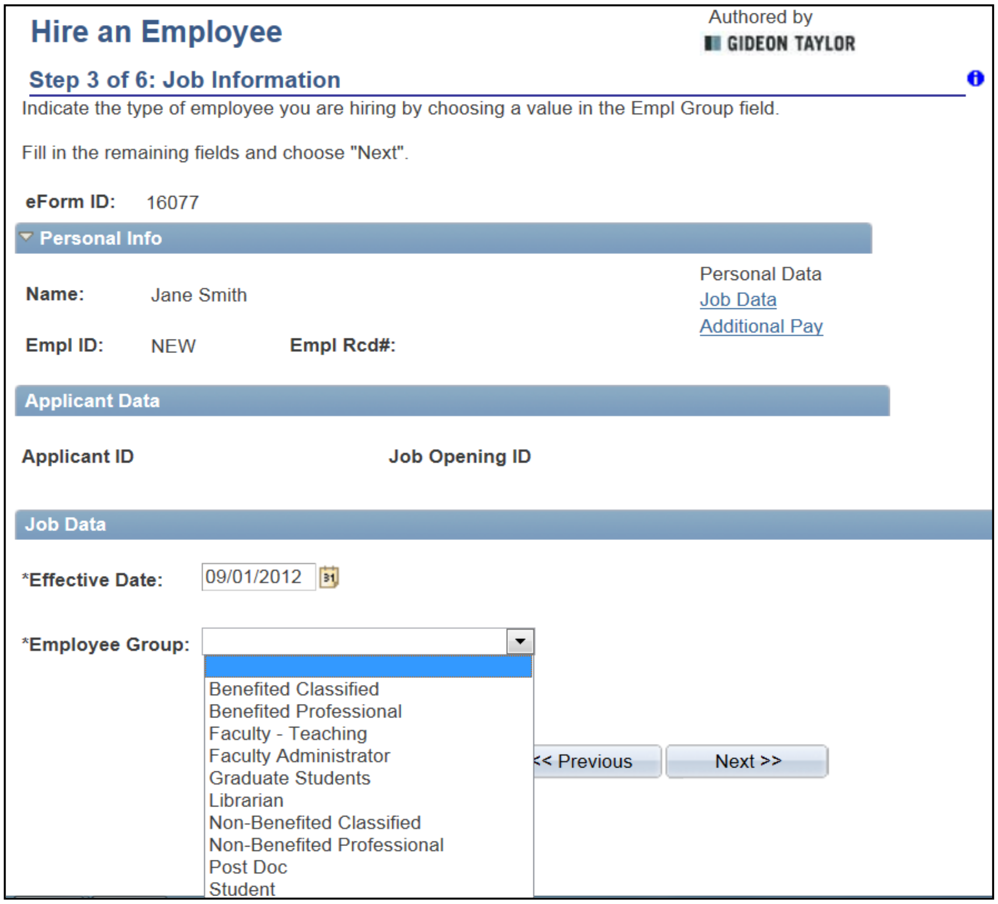
Step	Action
2.	Click the **Start a new ePAF** link. Start a new ePAF

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

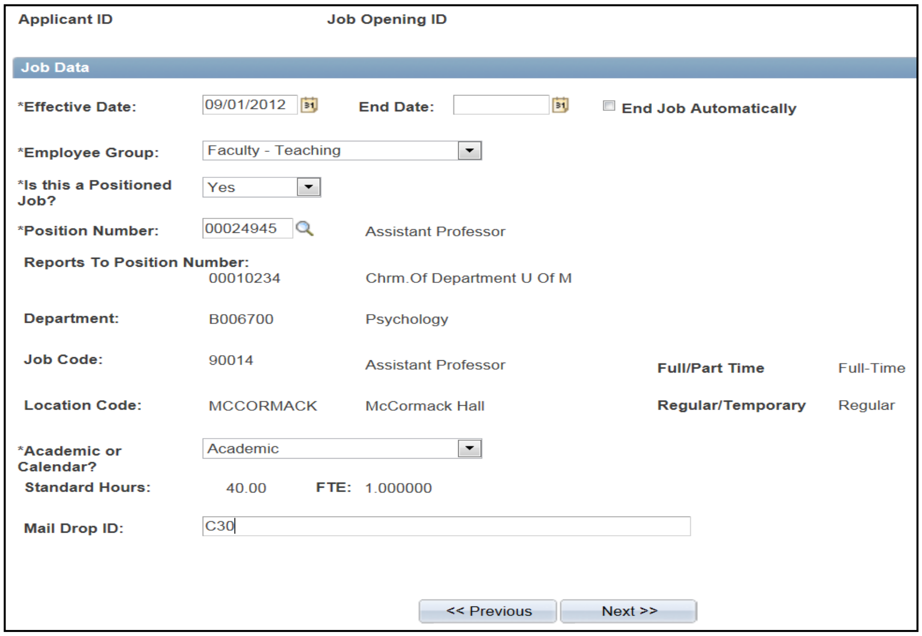


Step	Action
4.	Click the **Add New Employee** button. Add New Employee

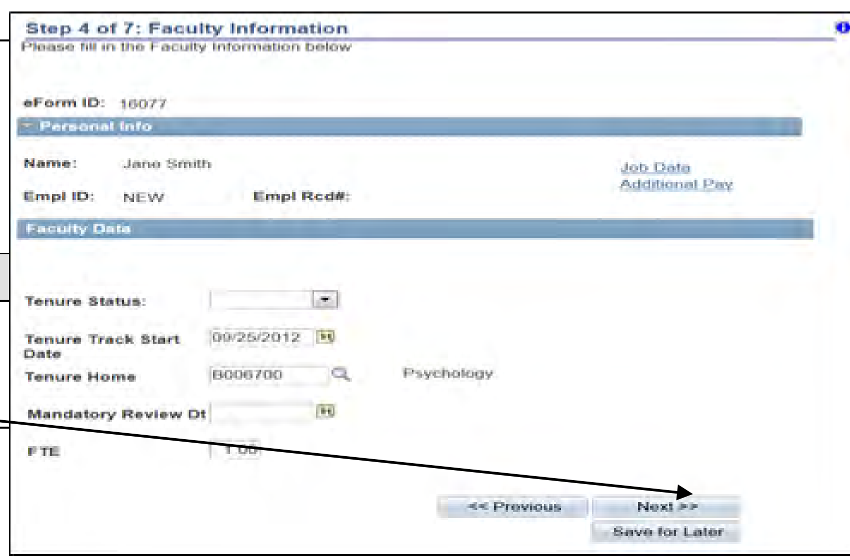
Step	Action
Note:	If you wanted to clone a previous eForm and use it as a template for multiple hires of the same type, you would enter the **Clone eForm ID** here (or you could search for the **Clone eForm ID** if you did not know it).
5.	Enter the desired information into the **First Name** field. 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. Next >>



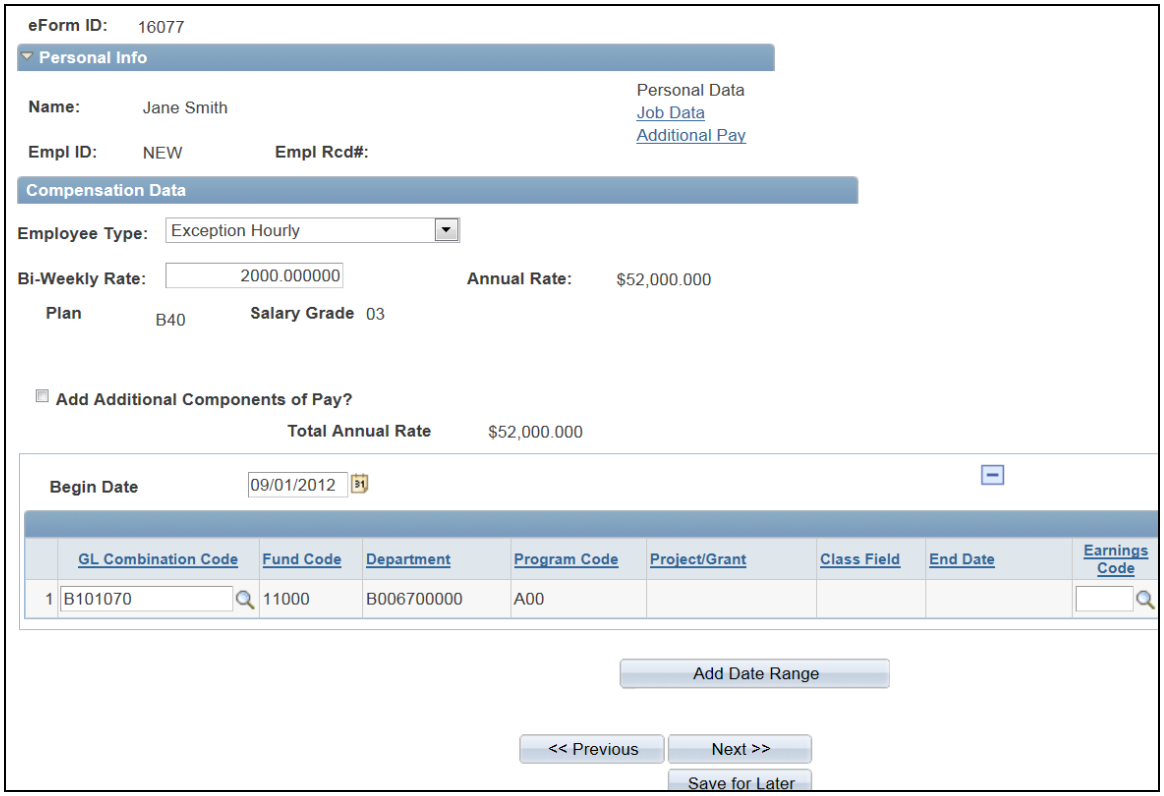
Step	Action
9.	Click the **Effective Date** calendar button.
10.	Choose the **Effective Date**. Example: 09/01/2012
11.	Click the **Employee Group** list.
12.	Choose the Employee Group Example: Faculty Teaching
Note:	The eForm ID has now been assigned to this form. Please take a moment and write this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



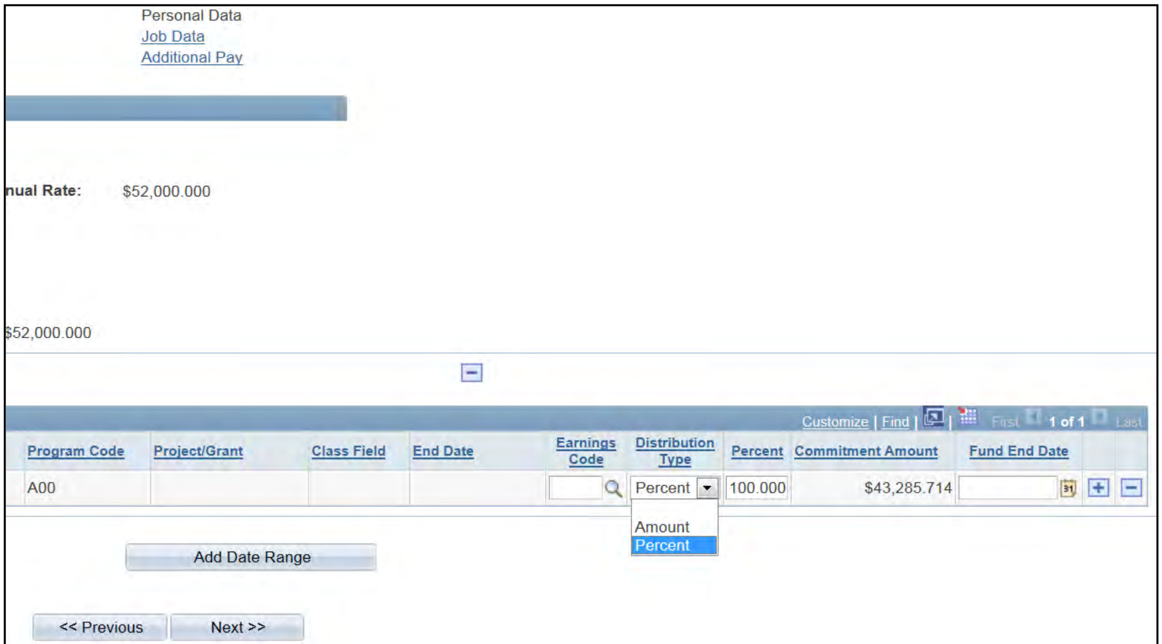
Step	Action
13.	Click the **Is this a Positioned Job?** Choose Yes or No Example: Benefited position we will choose Yes
14.	Enter Position Number. Do Not Search **If you do not know the position number contact the Office of Budget and Financial Planning.**
Note:	Once Position number is entered the following 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. Next >>



Step	Action
Note	Complete the **Faculty Tenure Data** section then click the **Next** button. Next >>

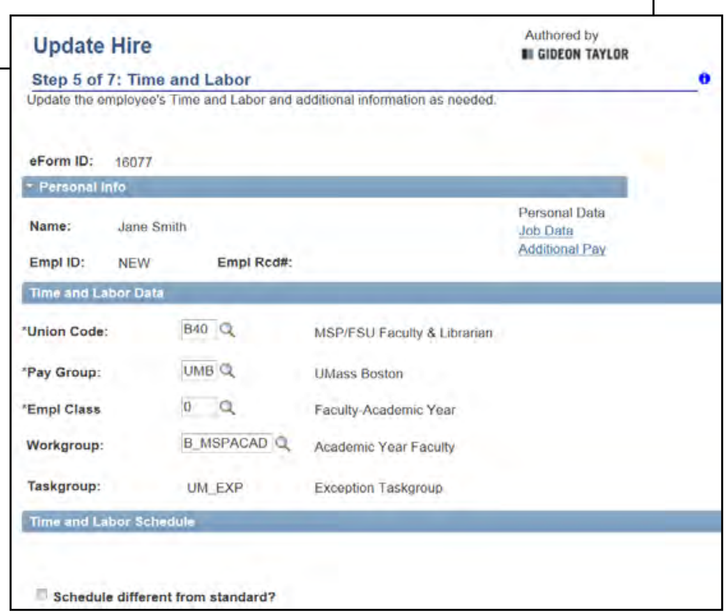


Step	Action
18.	Enter the desired information into the **Bi-Weekly Rate** field. Example: "**2000**".
Note:	Notice that the **Begin Date** defaults to the hire date. This date should not be changed. Once you have entered Bi-Weekly rate Annual Rate will auto populate.
19.	Enter the **GL Combination Code.** 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.

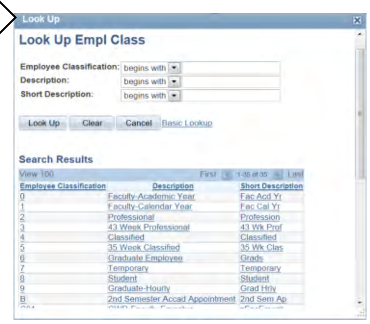


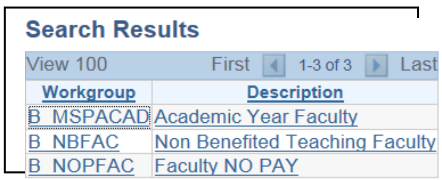
Step	Action
21.	Click the **Distribution Type** list.
22.	Click the **Percent (always for benefitted positions)**
24.	The **Percent** field amount cannot exceed 100%, but you may have multiple rows that add up to 100%. For this example, enter **"100"**. Click Tab
25.	The **Commitment Amount** will auto 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. Next >>

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

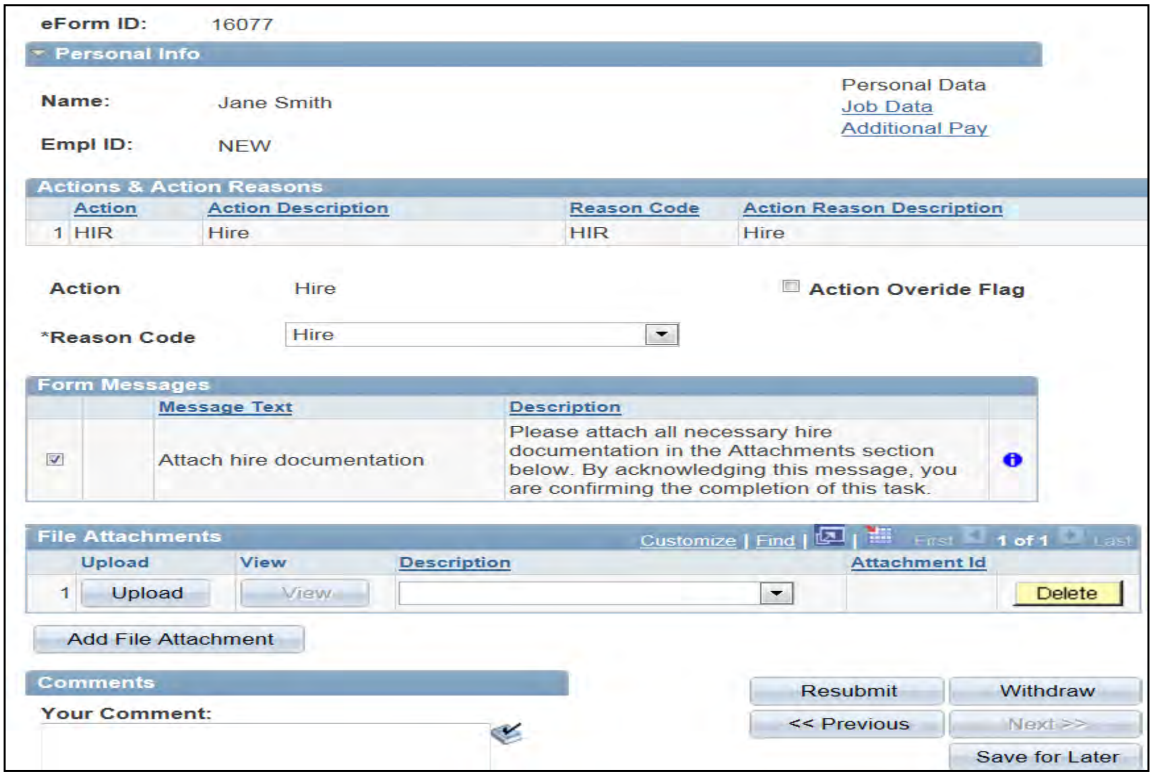


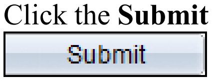
Step	Action
Note:	The **Time and Labor Data** page allows human resources to establish a person into the appropriate groups necessary for reporting time.
28.	Click the **Empl Class** look up button. click on appropriate choice Example: Faculty-Academic Year
29.	Click the **Workgroup** look up button.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

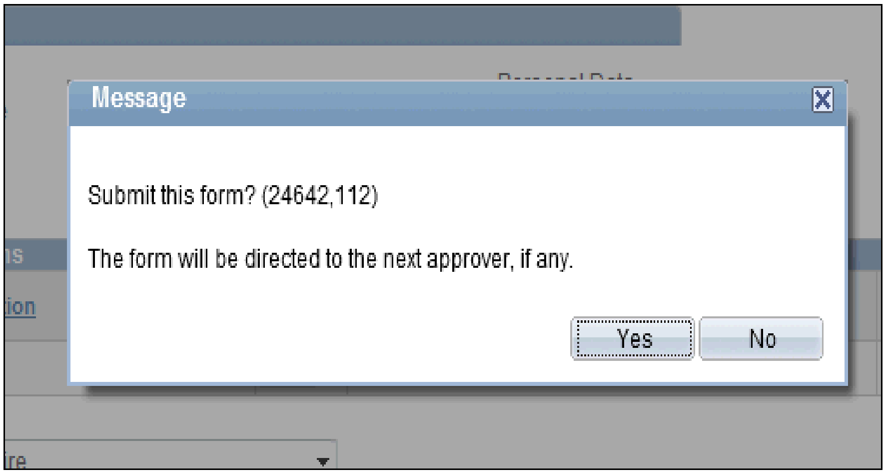


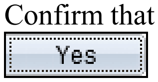


Step	Action
Note:	**Schedule different from standard** Schedule different from standard? Leave unchecked. If different, attach or send to Human Resources a "Schedule Form ".
30.	Click the **Next** button. Next >>



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**. 
Note:	For attaching documents please reference the ***Attaching a Document*** section of the training guide
32.	If needed, you may add comments.
33.	Click the **Submit** button. 

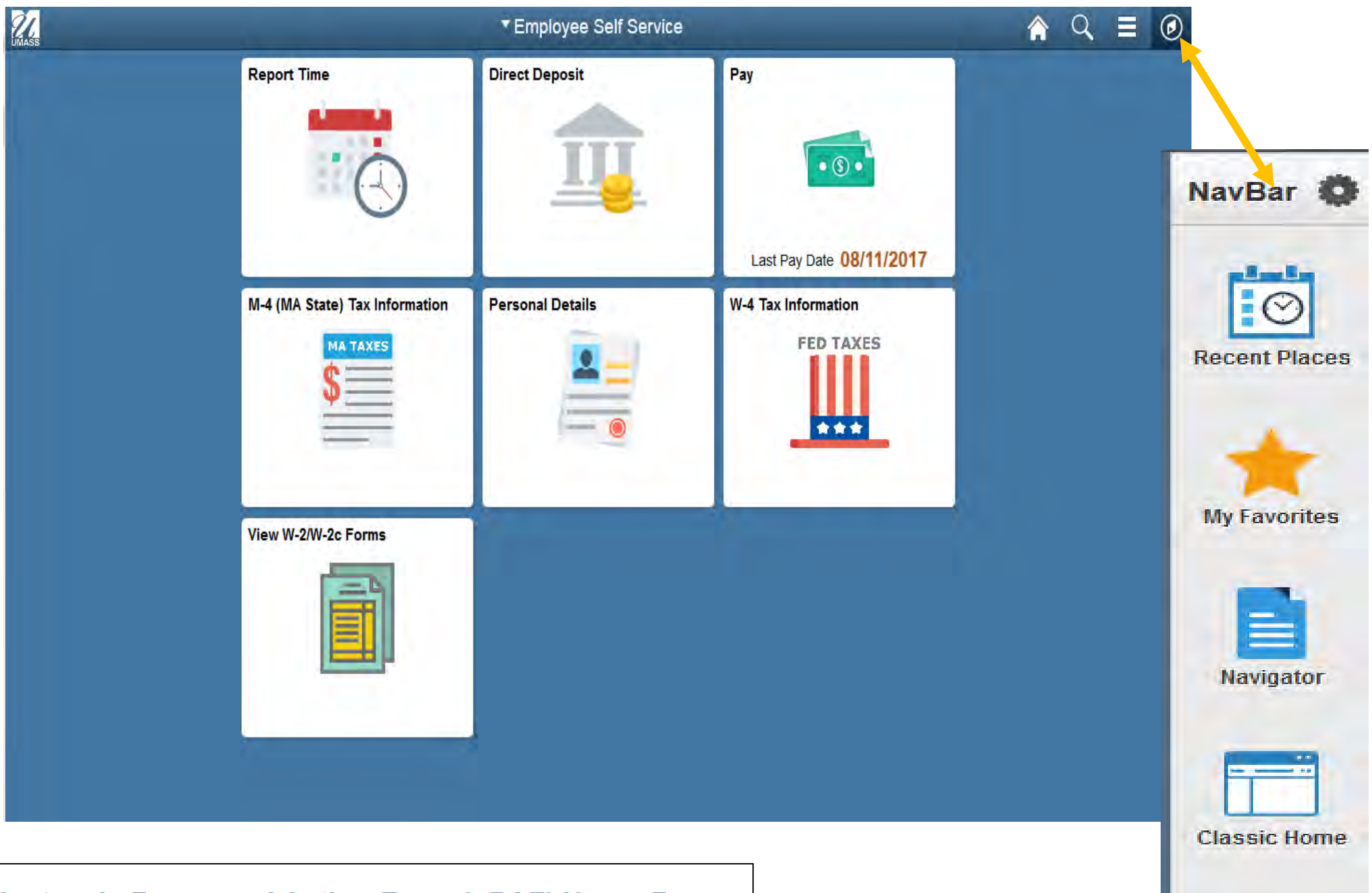


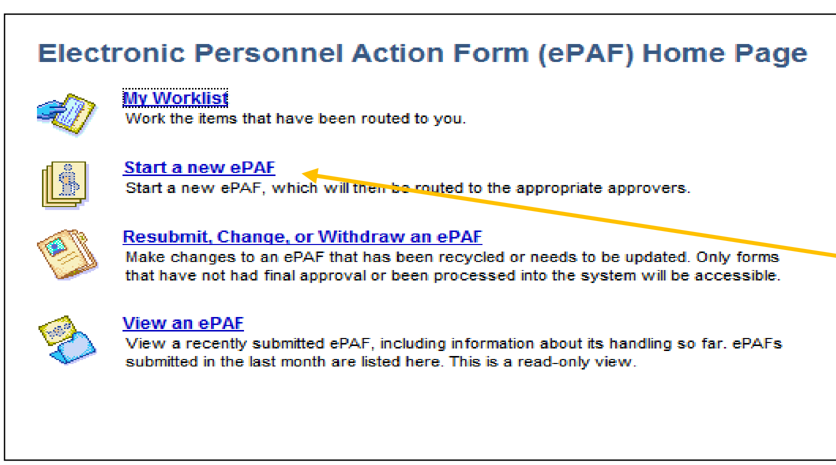
Step	Action
34.	Confirm that you are ready to submit this form, and click the **Yes** button. 

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.**

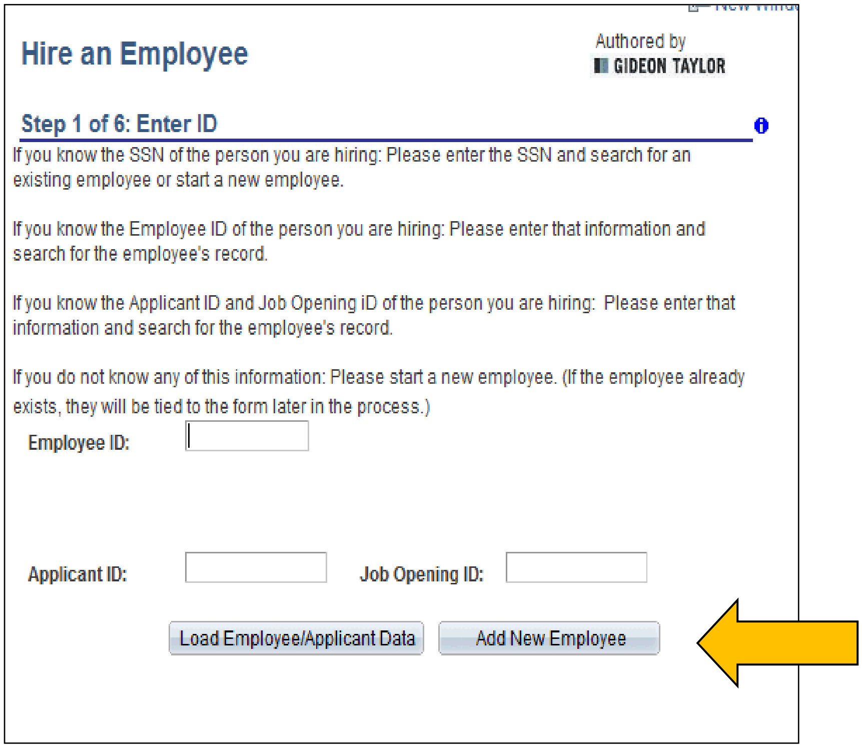
Adding a Non-Benefitted or Graduate Student Employee into a Job

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.

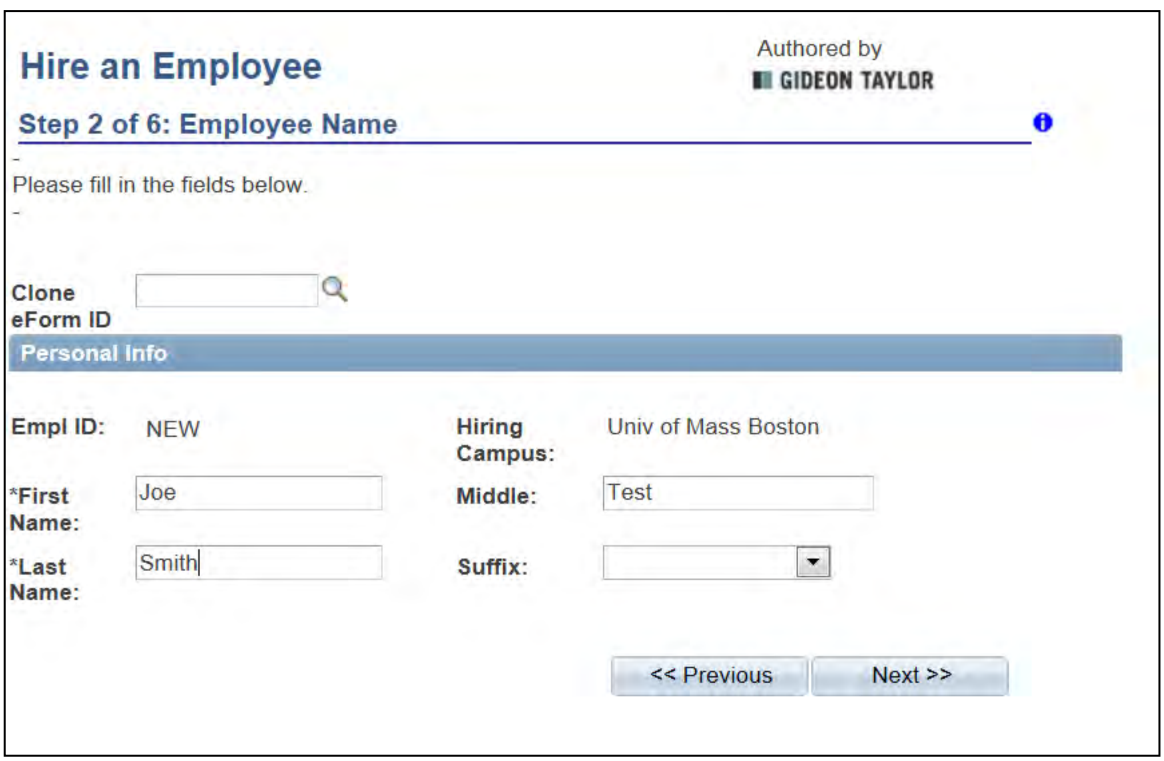




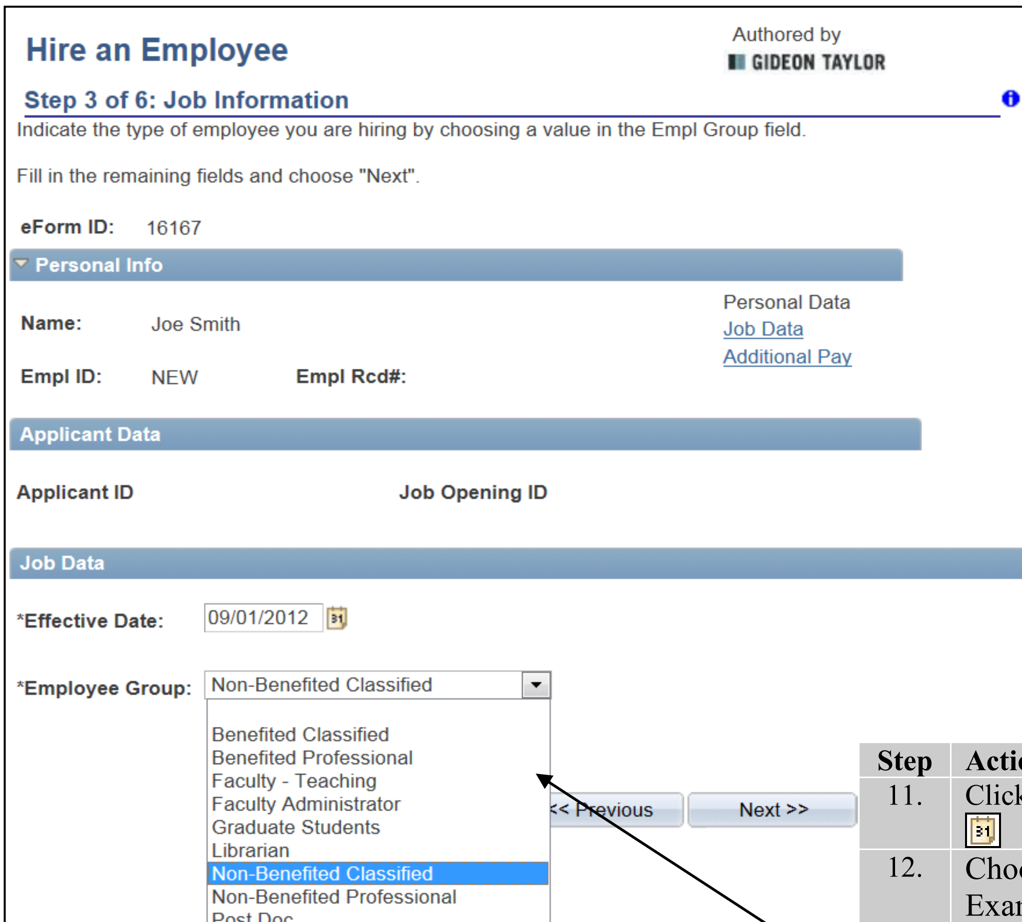
4.	Click the **Start a new ePAF** link. Start a new ePAF
5.	Click the **Hire an Employee** link. Hire an Employee



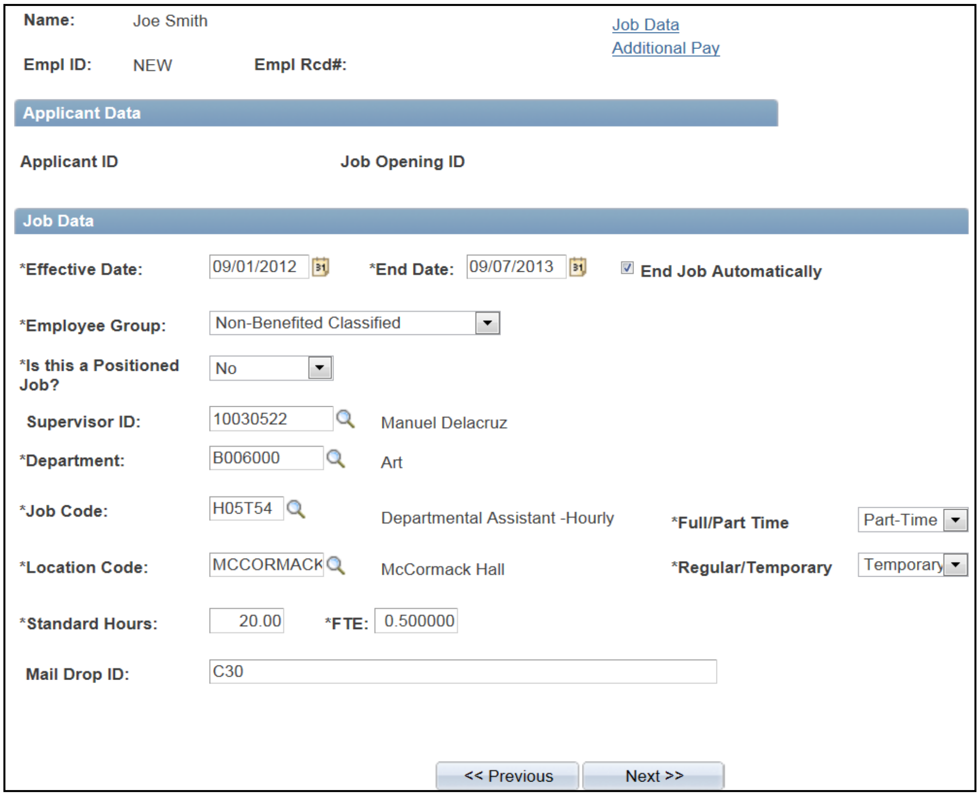
Step	Action
6.	Click the **Add New Employee** button. Add New Employee



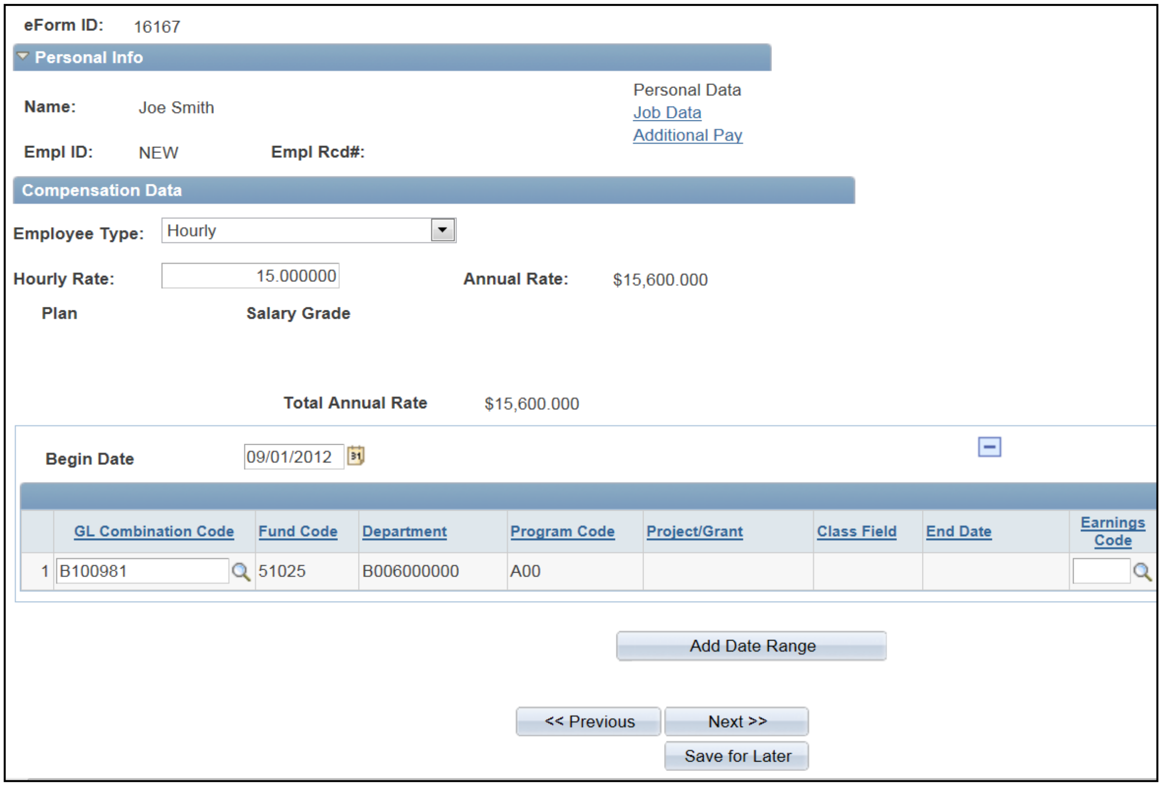
Step	Action
7.	Enter the desired information into the **First Name** field. Enter "**Joe**".
8.	Enter the desired information into the **Middle** field. Enter "**Test**".
9.	Enter the desired information into the **Last Name** field. Enter "**Smith**".
10.	Click the **Next** button. Next >>



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

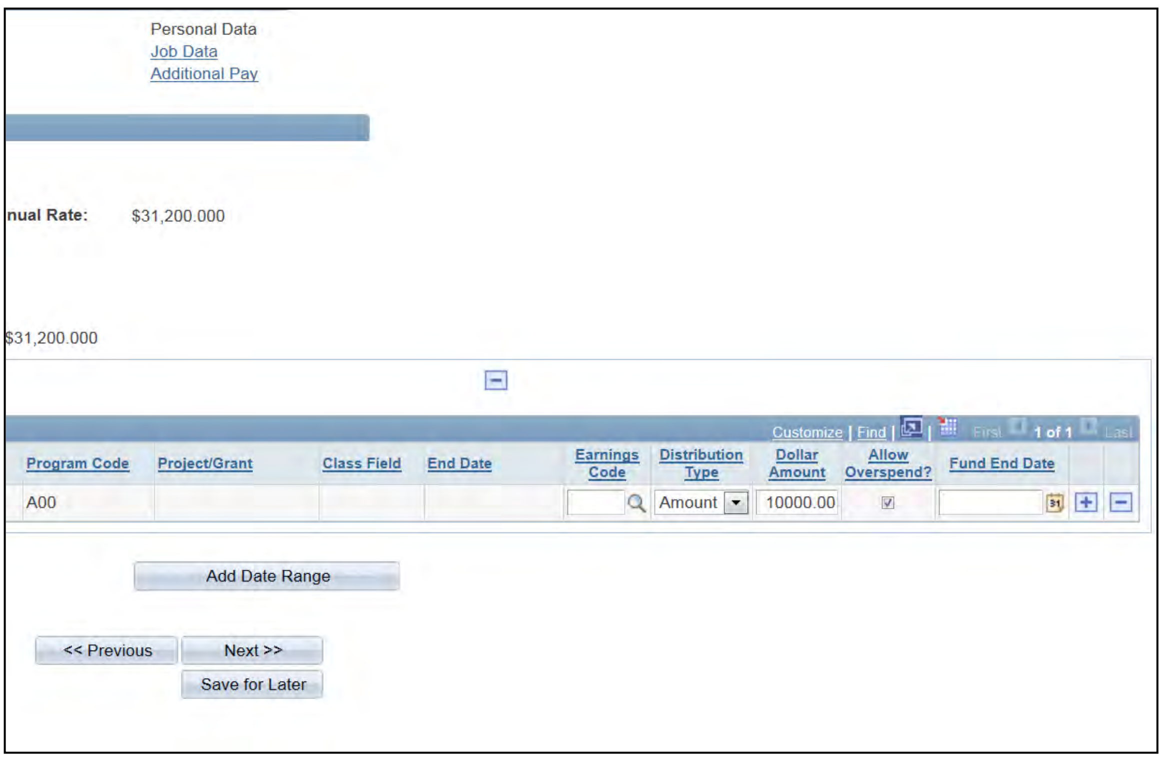

Name: Joe Smith
Empl ID: NEW Empl Rcd#:
Job Data
Additional Pay
Applicant Data
Applicant ID Job Opening ID
Job Data
*Effective Date: 09/01/2012 *End Date: 09/07/2013 End Job Automatically
*Employee Group: Non-Benefited Classified
*Is this a Positioned Job? No
Supervisor ID: 10030522 Manuel Delacruz
*Department: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

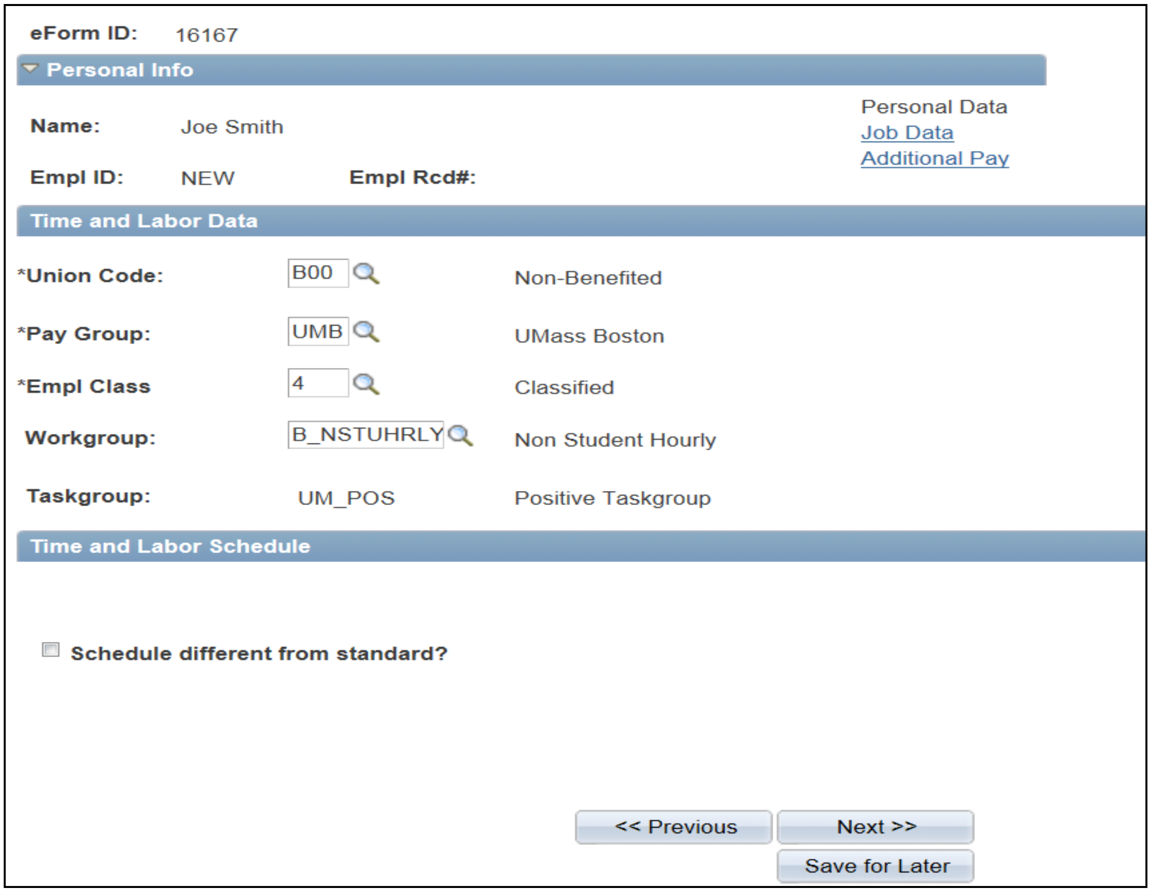
Step	Action
15.	Click the **Is this a Positioned Job?** This field will always state **“NO”**
16.	Enter the desired information into the **Supervisor ID** field of an active employee. Example: "10030522". ***Note:*** You can also use the **Supervisor ID** look up button to search for this value.
17.	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.
21.	Click the **Regular/Temporary** list.
22.	Change **Standard Hours** if applicable. Once you tab FTE will auto populate.
23.	Enter Mail Drop ID
24.	Click the **Next** button. Next >>



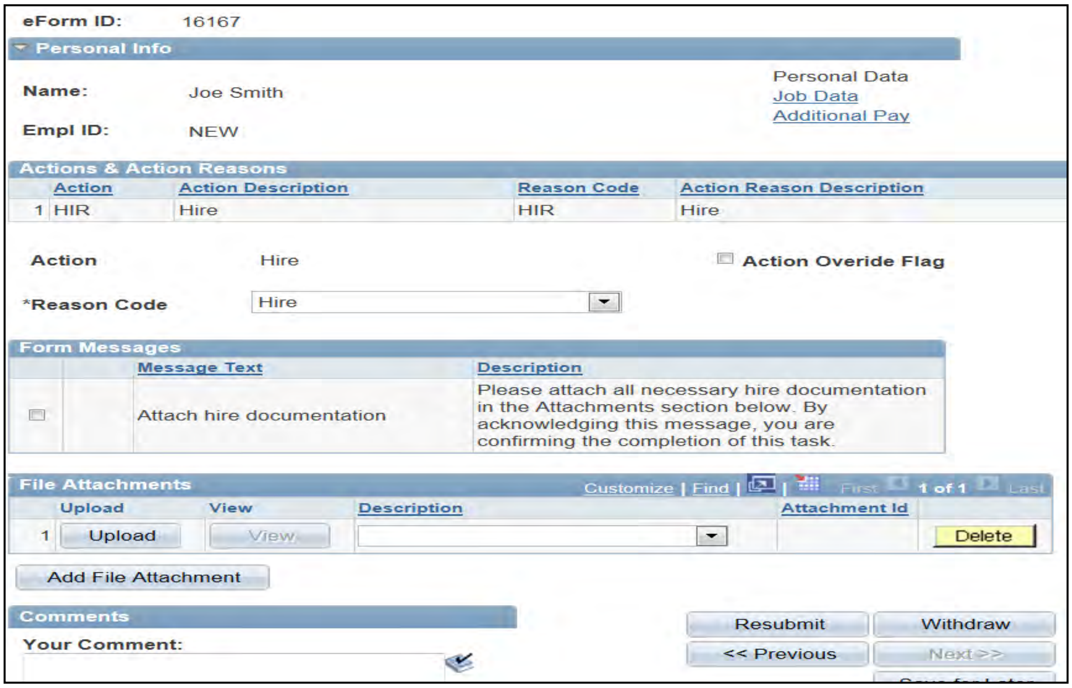
Step	Action
25.	Enter the desired information into the **Hourly Rate** field. Example: "15".
Note:	Notice that the **Begin Date** defaults to the hire date. This date should not be changed. Once you have entered hourly rate annual rate will auto populate.
26.	Enter the **GL Combination Code.** Do not 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.

Step	Action
28.	Click the **Distribution Type** list. 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. Next >>



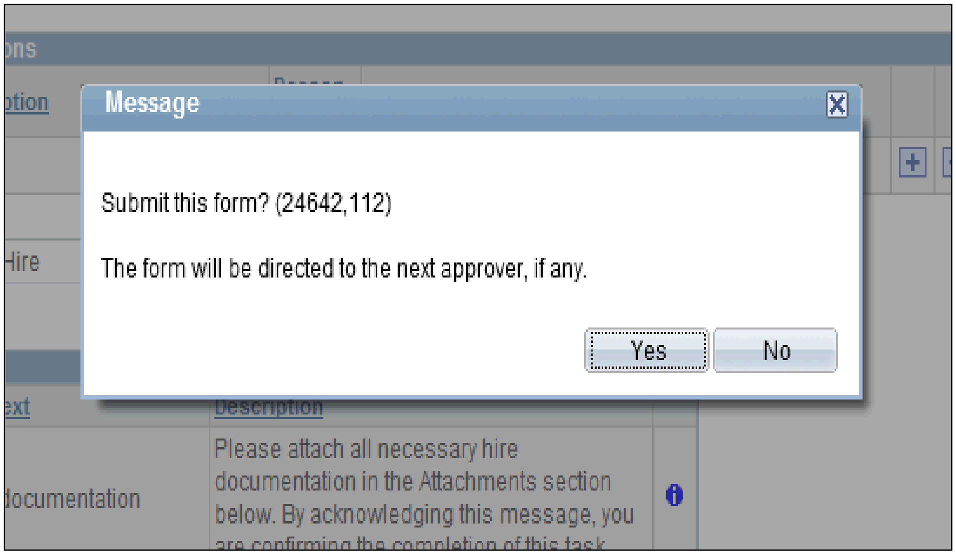


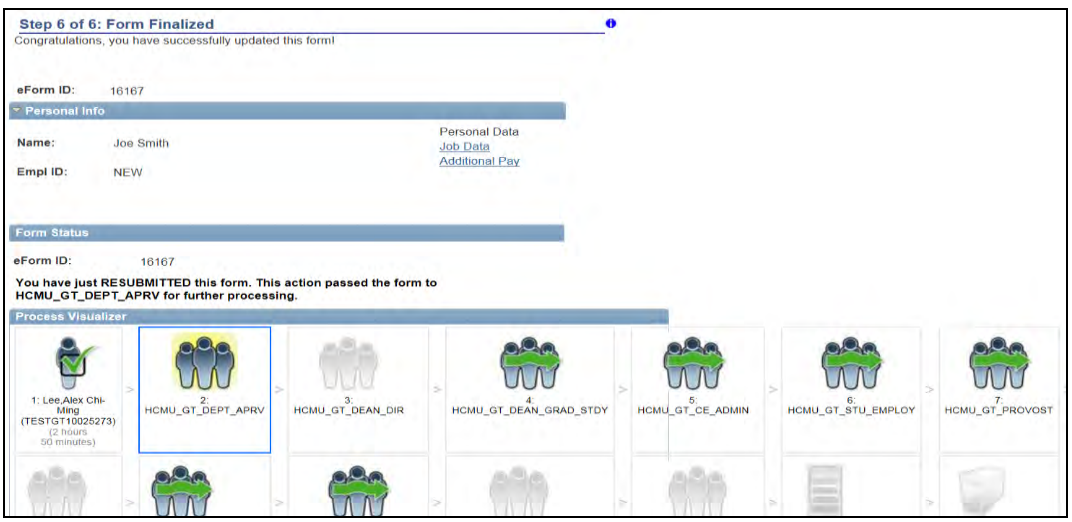
Step	Action
34.	The **Time and Labor Data** page allows human resources to establish a person into the appropriate groups necessary for reporting time.
35.	Click the **Workgroup** look up button. click on appropriate choice Example: Non Student Hourly
Note:	**Schedule different from standard.** If schedule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



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. ☐
Note:	For attaching documents please reference the Attaching a Document section of the training guide
38.	Comments, if needed.
39.	Click the **Submit** button. Submit

Step	Action
40.	Verify that you are ready to submit this form and click **Yes.** Yes



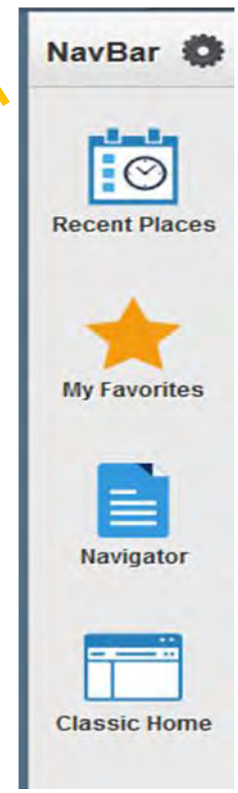


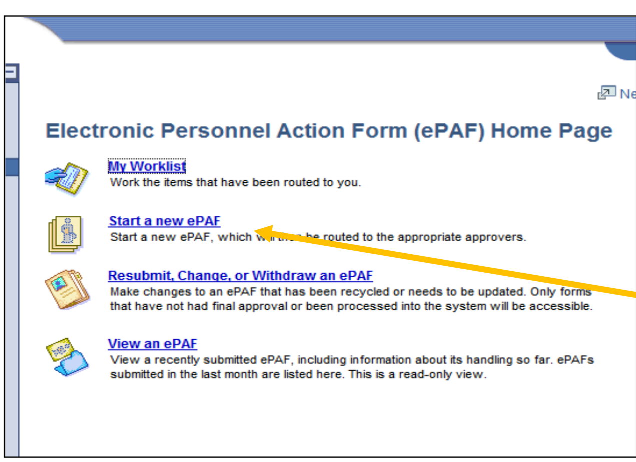
Step	Action
41.	The **Form Status** indicates that you have submitted this form. The form is now routed to the next level approver.
42.	**Congratulations! You have added a non-benefited employee into a position.** **End of Procedure.**

Hiring Student Employees

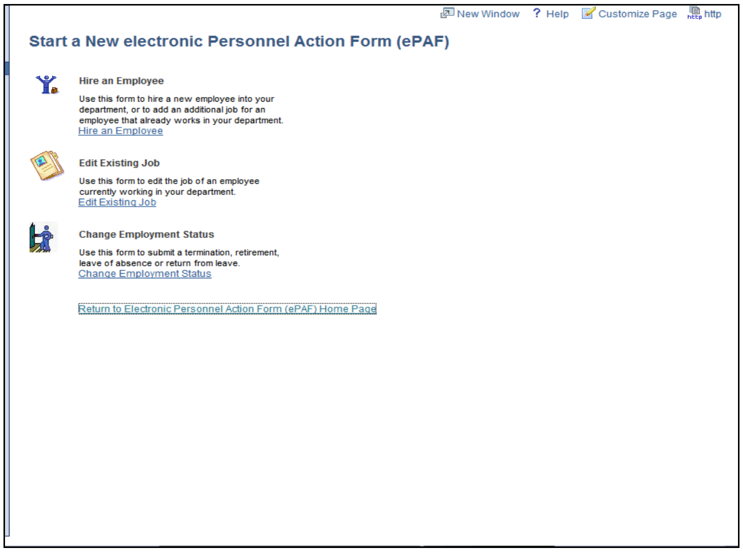
Upon completion of this topic, you will be able to hire a Student for work study

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.



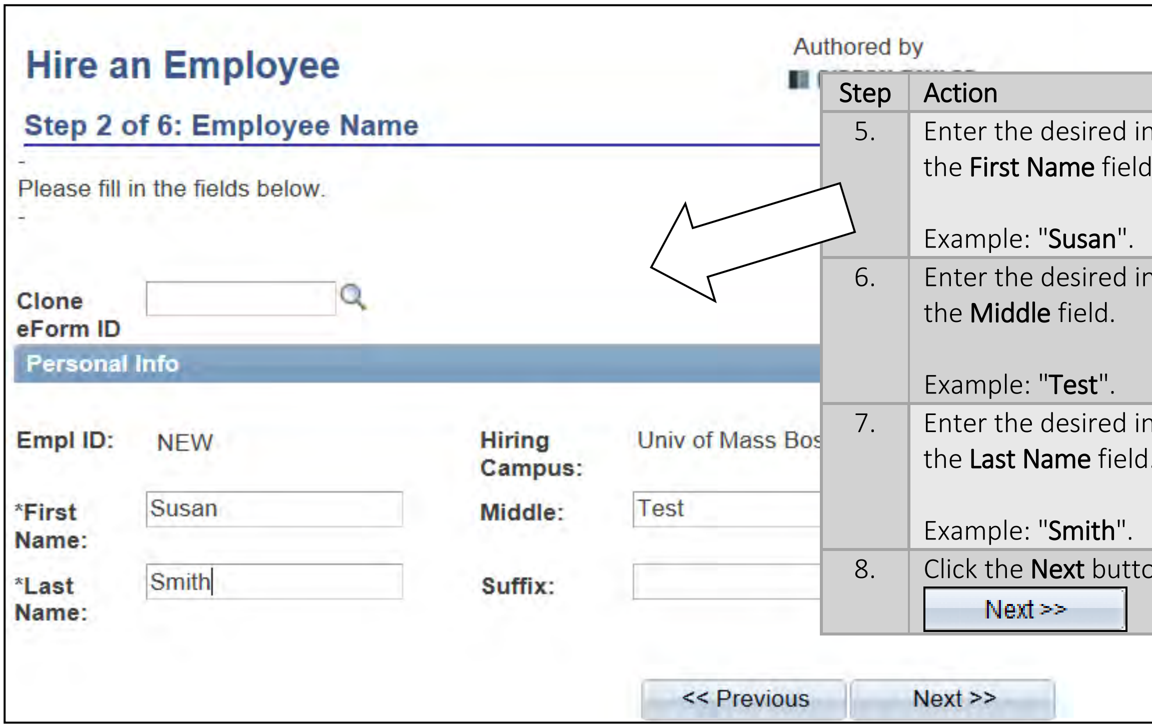


Step	Action
1.	This is the **ePAF Home Page**, a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
2.	Click the **Start a new ePAF** link. Start a new ePAF

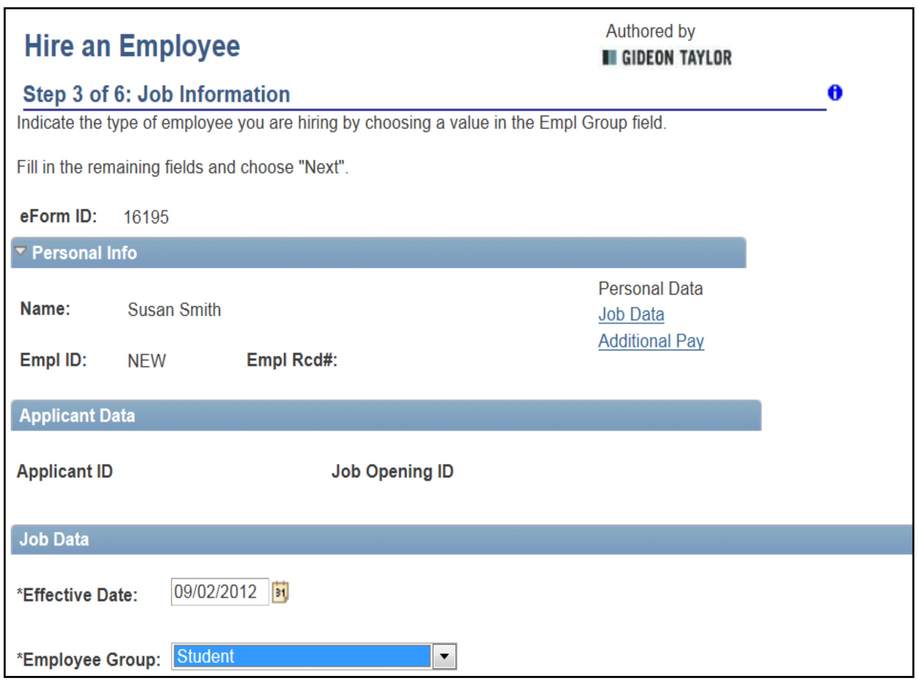


Step	Action
3.	Click the **Hire an Employee** link. Hire an Employee

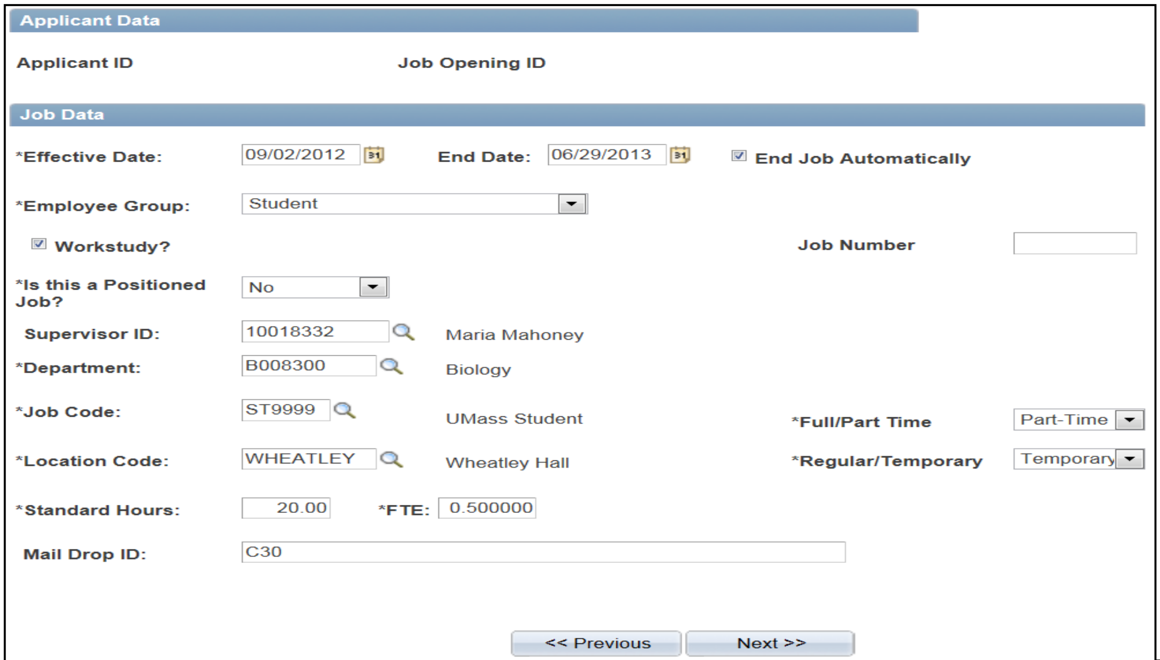
Step	Action
4.	Click the **Add New Employee** button. Add New Employee



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. Next >>



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


Applicant Data

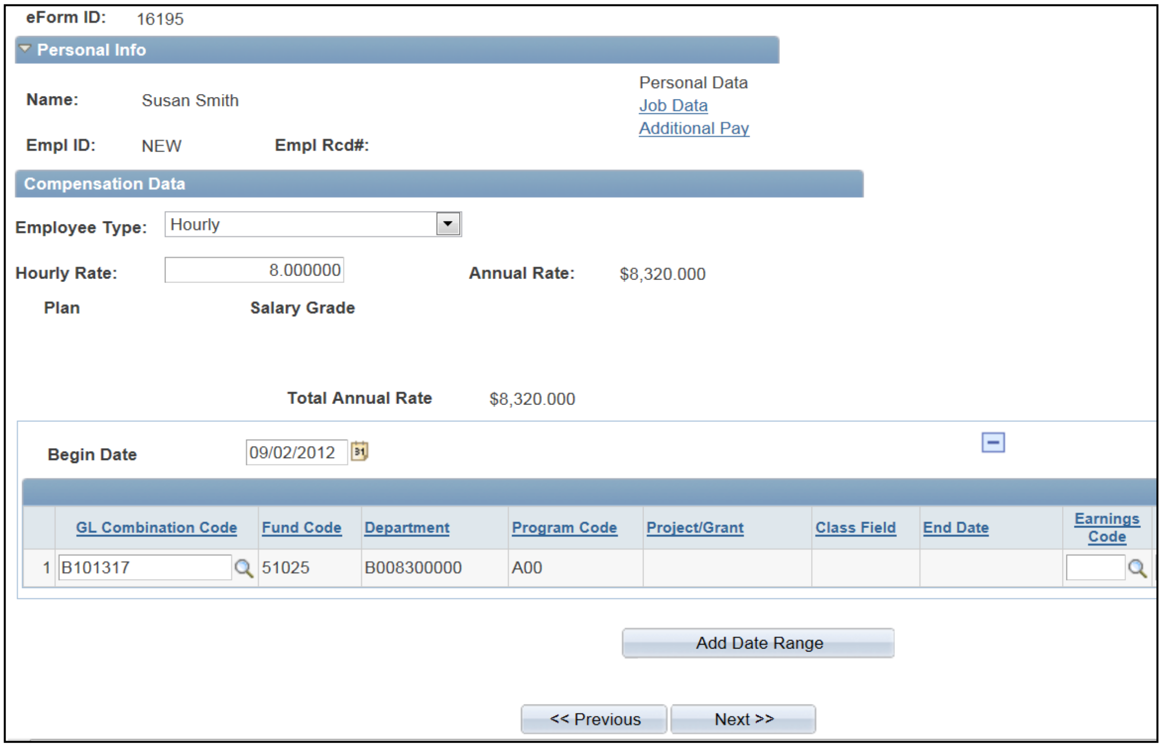
Applicant ID | Job Opening ID

Job Data

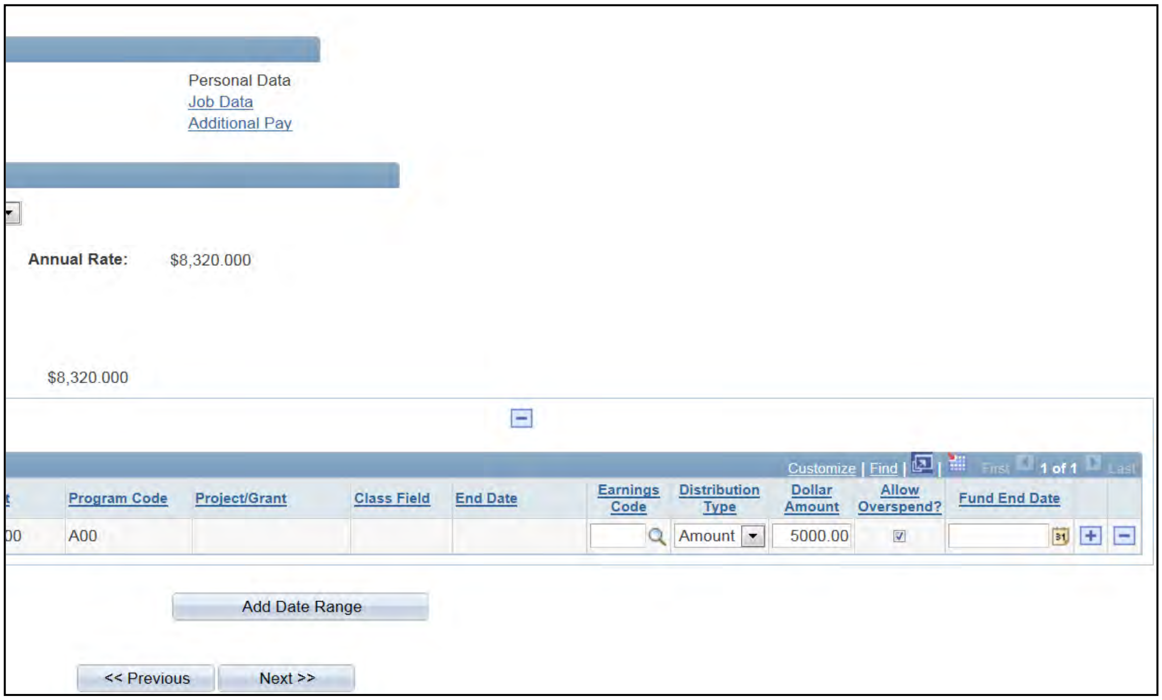
*Effective Date: 09/02/2012 | End Date: 06/29/2013 | End Job Automatically
*Employee Group: Student
Workstudy? | Job Number
*Is this a Positioned Job? No
Supervisor ID: 10018332 Maria Mahoney
*Department: B008300 Biology
*Job Code: ST9999 UMass Student | *Full/Part Time Part-Time
*Location Code: WHEATLEY Wheatley Hall | *Regular/Temporary Temporary
*Standard Hours: 20.00 | *FTE: 0.500000
Mail Drop ID: C30

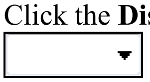
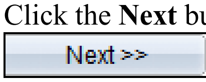
<< Previous | Next >>

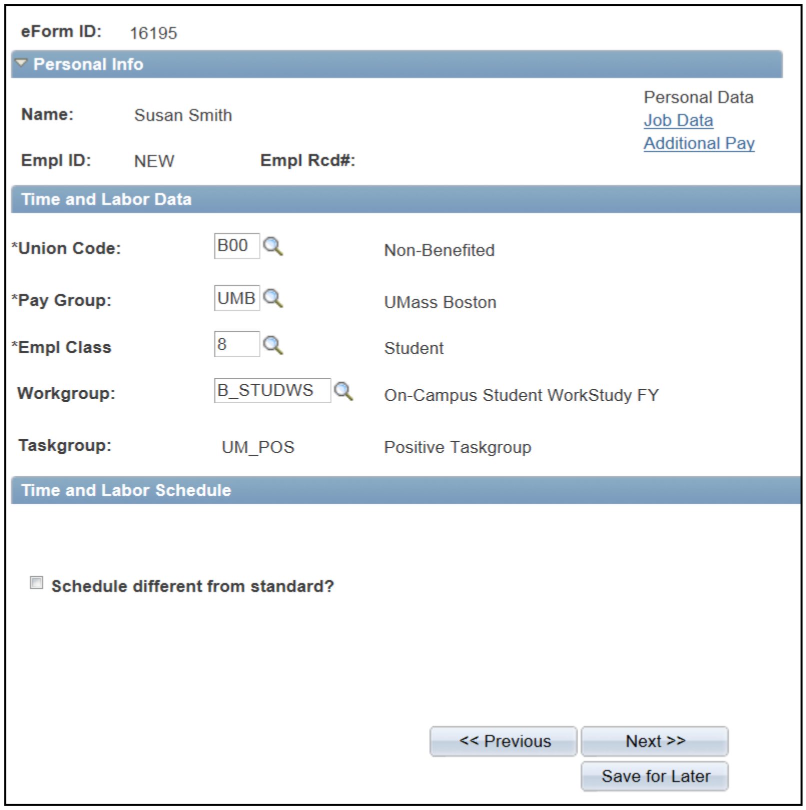
Step	Action
11.	For Workstudy students always choose an **End Date.** Click **End Job Automatically** For Non Workstudy students no **End Date** is required
12.	Only click **Workstudy** box if it is a workstudy student
13.	Always leave **Job Number** blank
14.	Click the **Is this a Positioned Job?** Always choose **No**
15.	Enter the desired information into the **Supervisor ID** field. Example: "10018332". ***Note:*** 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. For students always choose **Part Time**
19.	Click the **Regular/Temporary** list. 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. Next >>



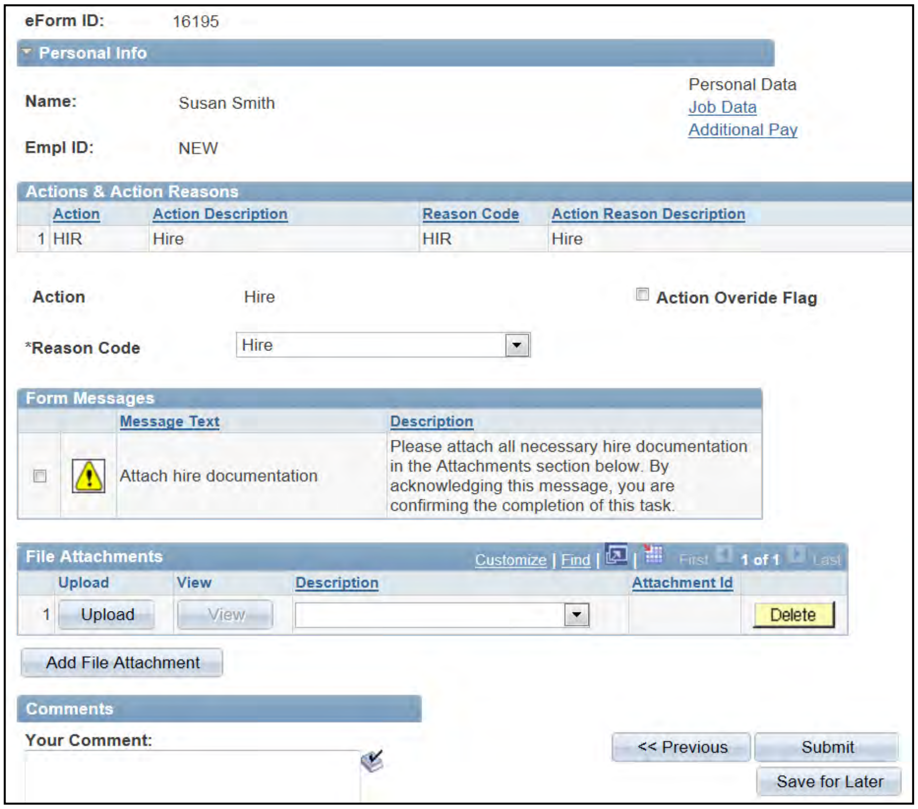
Step	Action
23.	The **Employee Type** defaults to Hourly do not change
24.	Enter the desired information into the **Hourly Rate** field. Example: "8". Annual Rate will auto populate
Note:	Notice that the **Begin Date** defaults to the hire date. Please do not change this date.
25.	Enter the **GL Combination 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.

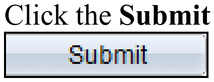


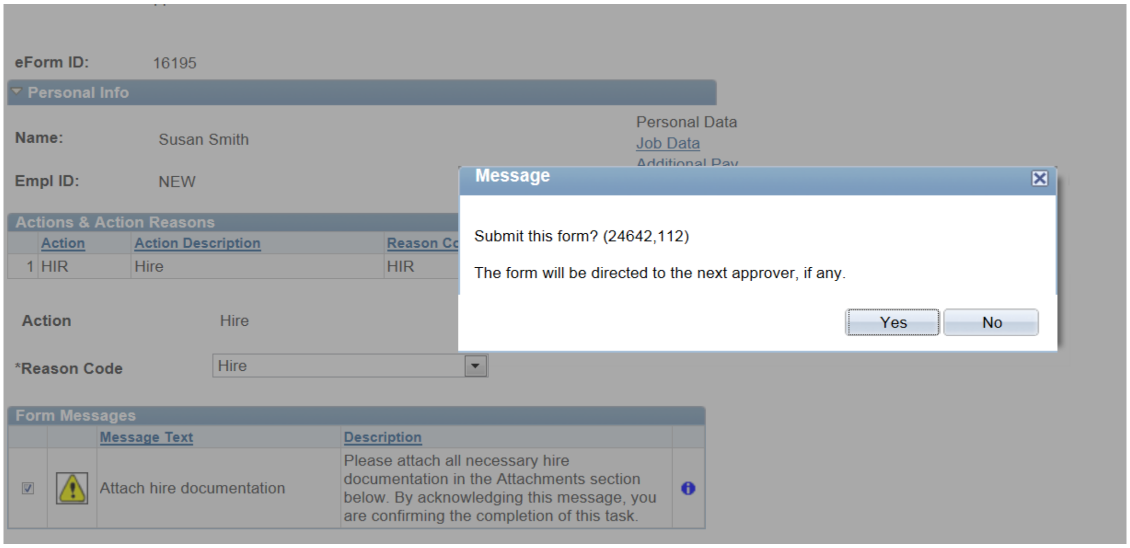
Step	Action
27.	Click the **Distribution Type** list.  Note: For students always choose **Amount**
28.	Enter the desired information into the **Dollar Amount** field. Example:"**5000**" For Workstudy students **Dollar Amount** should always be the amount the student was awarded by financial aid
29.	Always click the **Allow Overspend**
30.	Always leave the **Fund End Date** blank
31.	Click the **Next** button. 



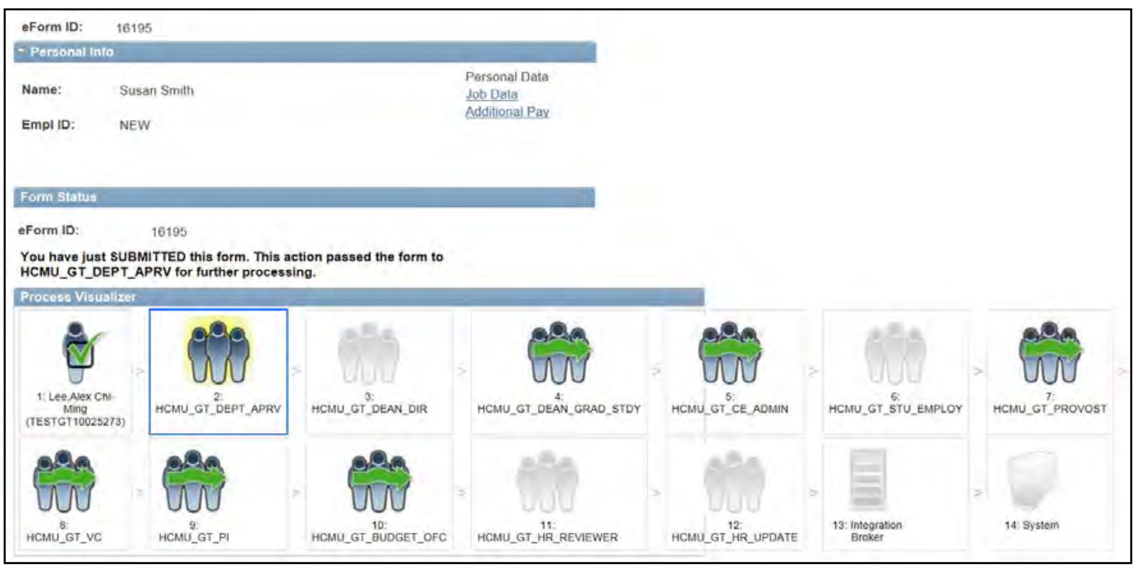
Step	Action
32.	The **Time and Labor Data** page allows Human Resources to establish a person into the appropriate groups necessary for reporting time.
33.	Never choose **Schedule different from standard**. ☐ Schedule different from standard?
Note:	Based on the employee group that you have chosen Union Code, Pay Group, Emp Class will auto populate
34.	Click the **Workgroup** look up button.
35.	Click the **B_STUDWS** link. ***Note:*** 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**. ☐ Schedule different from standard?
37.	Click the **Next** button. Next >>



Step	Action
38.	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. 
Note:	Comments – when entering comments please reference new business process
39.	Click the **Submit** button. 



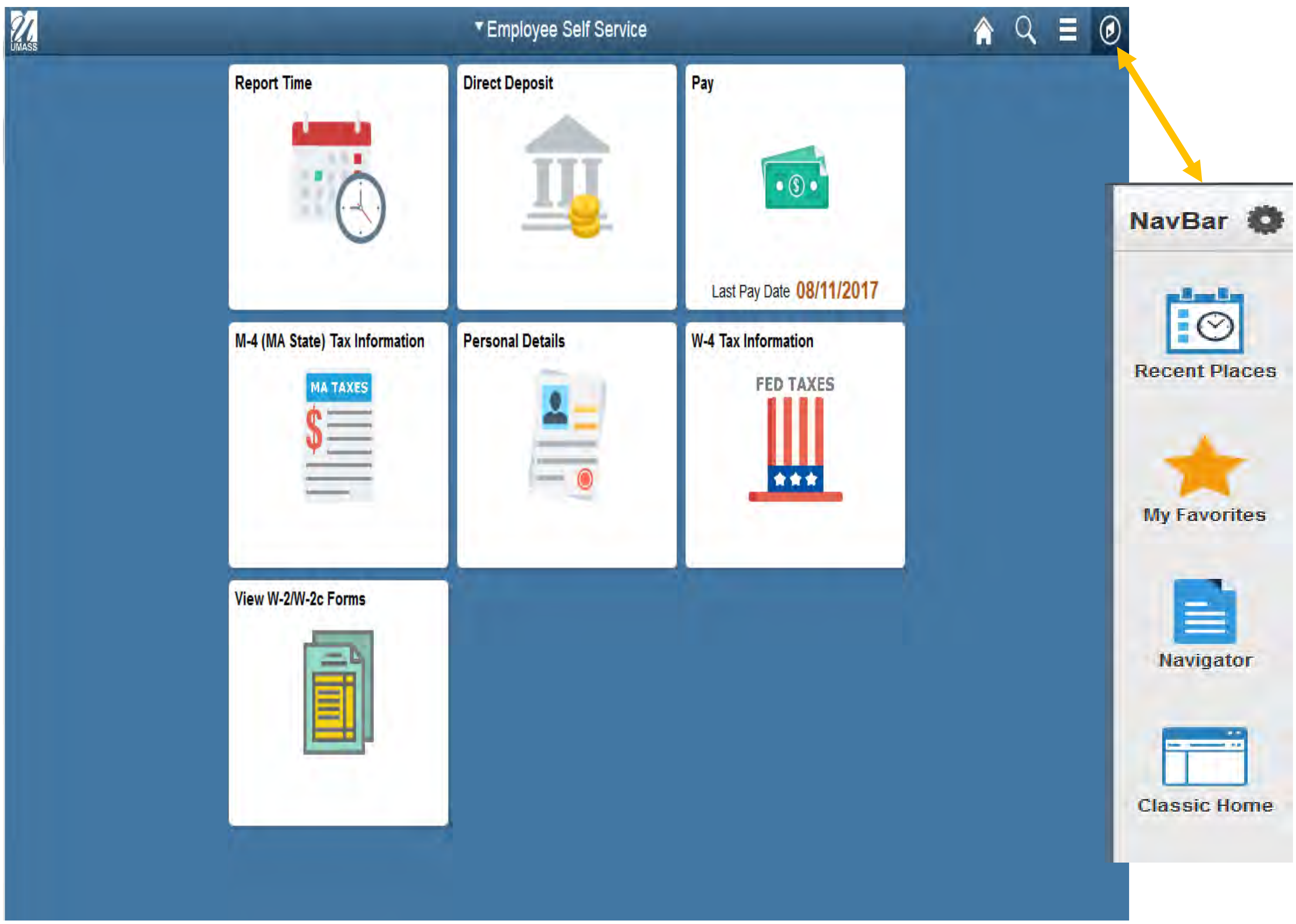
40.	Verify that you are ready to submit this form and click **Yes.** 



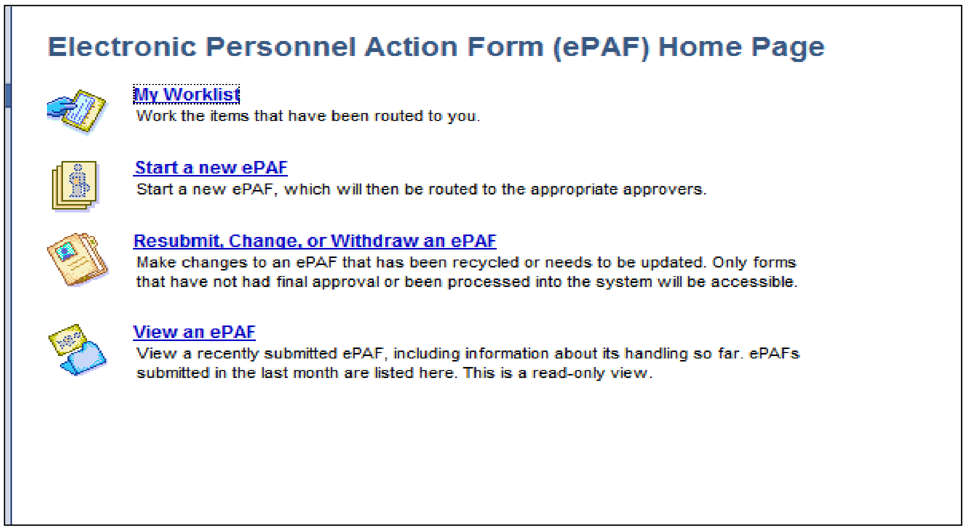
Step	Action
41.	The **Form Status** indicates that you have submitted this form. The form is now routed to the next level approver.
42.	**Congratulations! You have hired a student for workstudy.** **End of Procedure.**

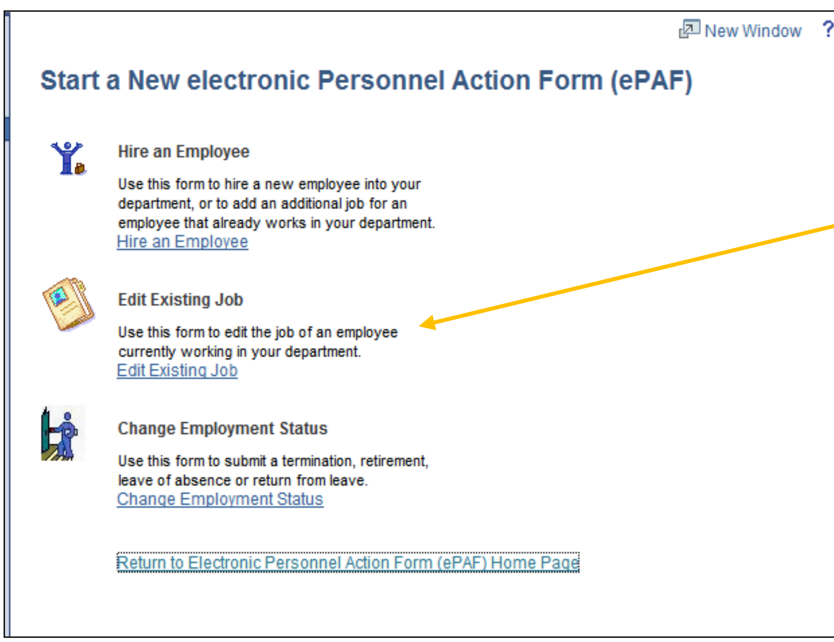
Entering a Rehire

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.

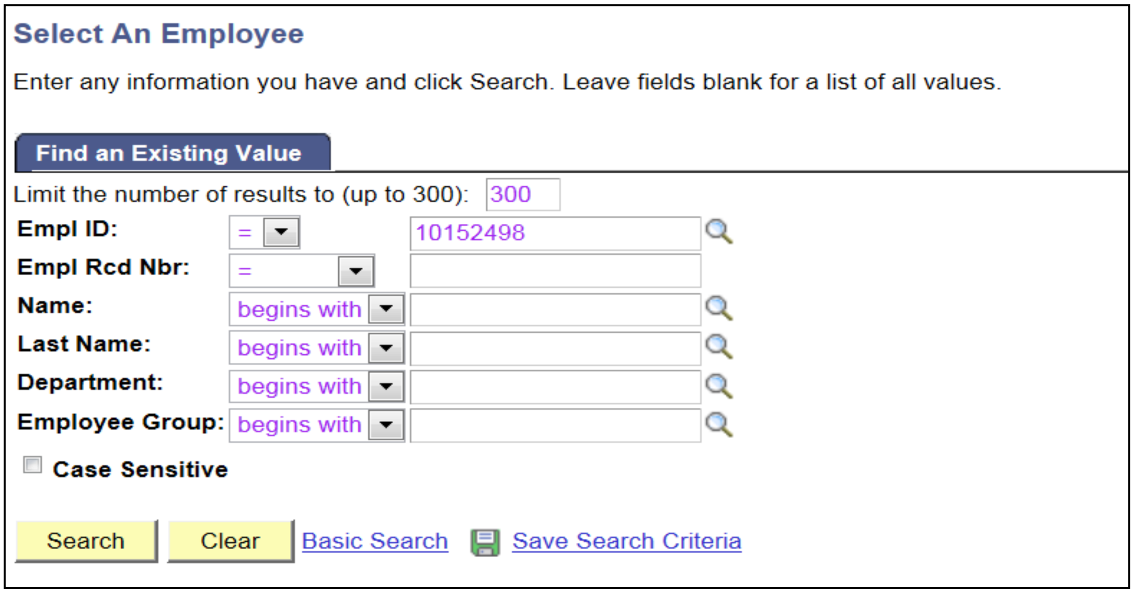


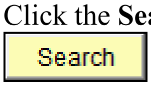
Step	Action
4.	This is the **ePAF Home Page**, a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
5.	Click the **Start a new ePAF** link. Start a new ePAF

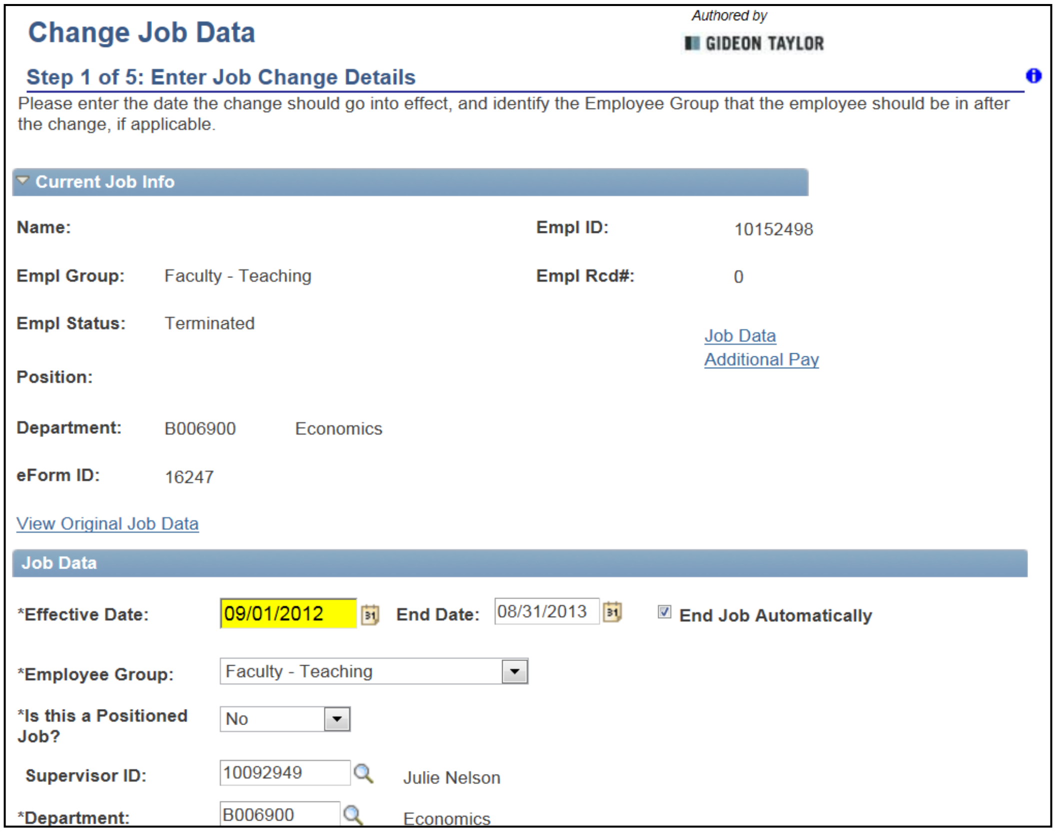




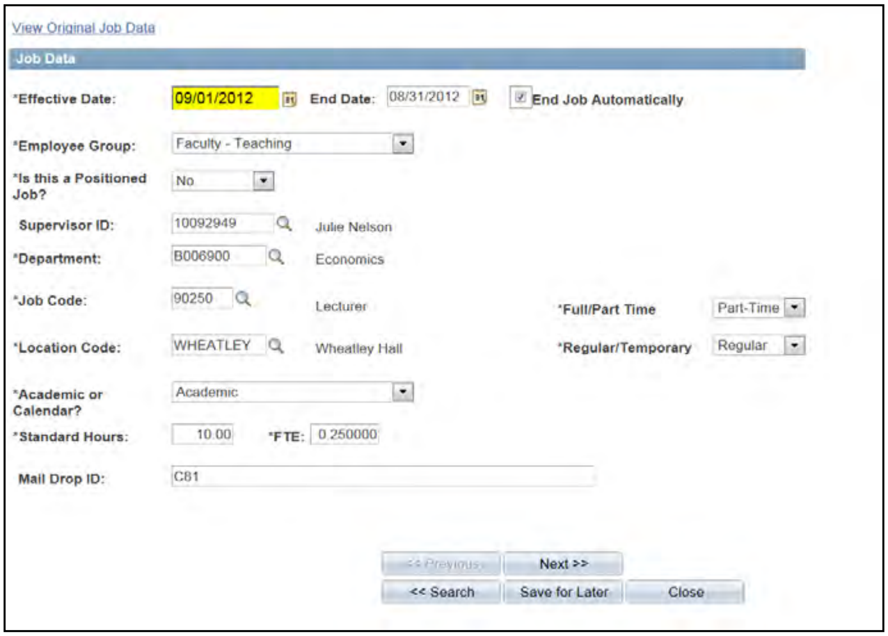
Step	Action
6.	Click the **Edit Existing Job** link. Edit Existing Job



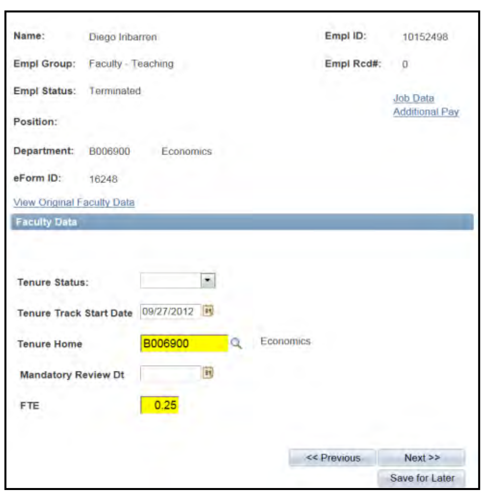
Step	Action
7.	Enter the desired information into the **Last Name** OR **Empl ID** field. Example "**10152498**".
8.	Click the **Search** button. 



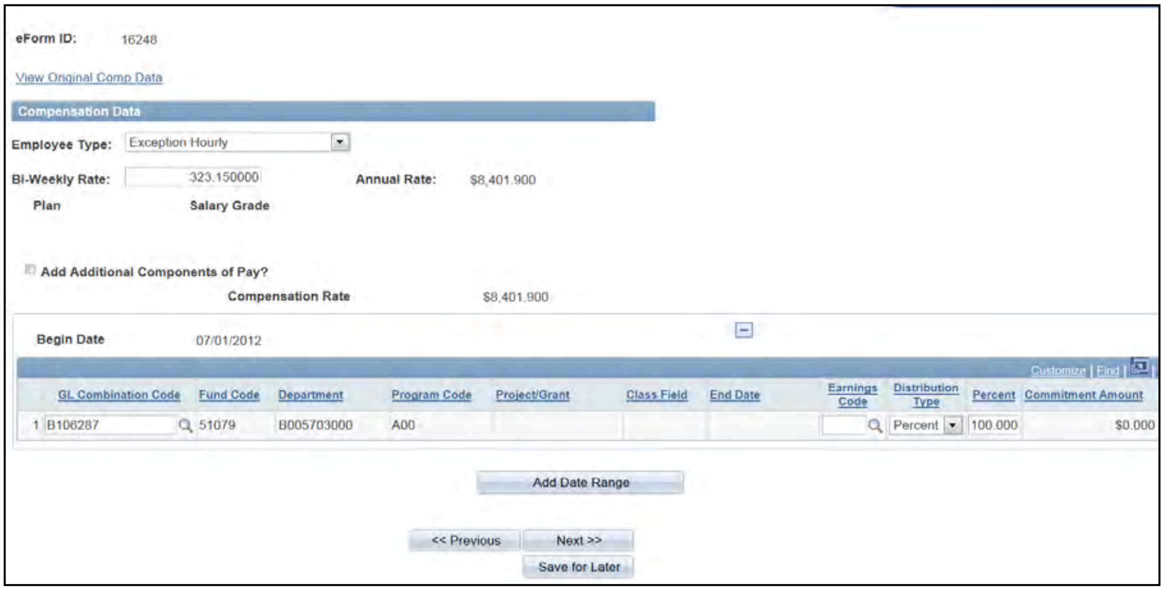
Step	Action
9.	The **Change Job Data** form is used to edit the information of an existing employee.
10.	Click the **Effective Date** look up button. Choose the effective date Example: 09/01/2012
11.	Click the End Date to change End Date Example: 08/31/2012
12.	Click the End Job Automatically



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

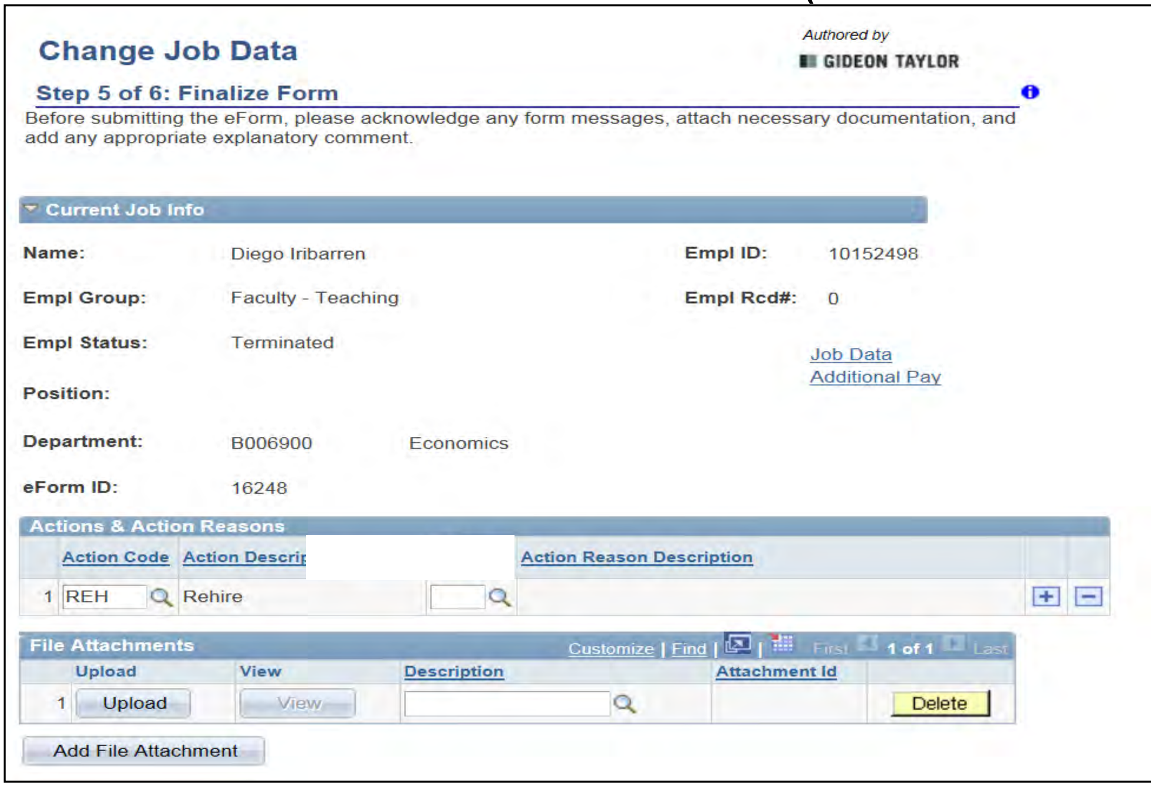


Step	Action
13.	Enter the Faculty Tenure Data
14.	Click Next

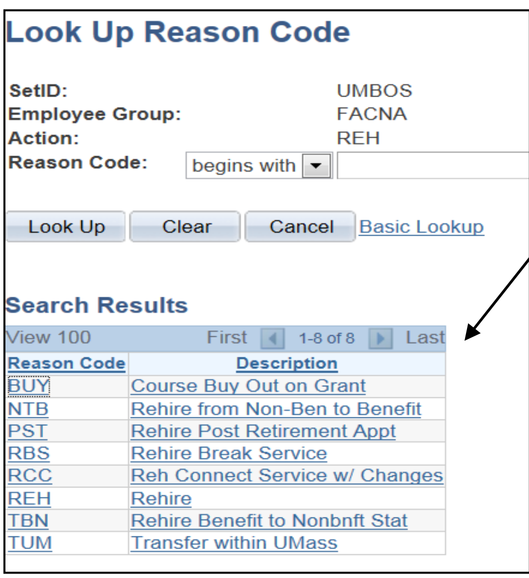


Step	Action
Note:	You may make changes to any of the open areas, if needed. Example: we have accepted the previous **Compensation Date** with no changes for the rehire.
15.	Click the **Next** button. Next >>

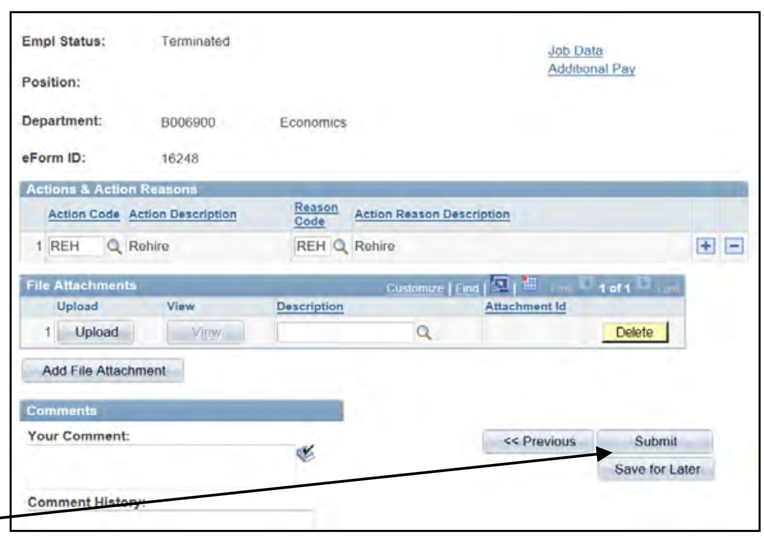
Step	Action
Note:	You may make changes to any of the open areas, if needed. Example: we have accepted the previous **Time and Labor Data** with no changes for the rehire.
16.	Click the **Next** button. Next >>



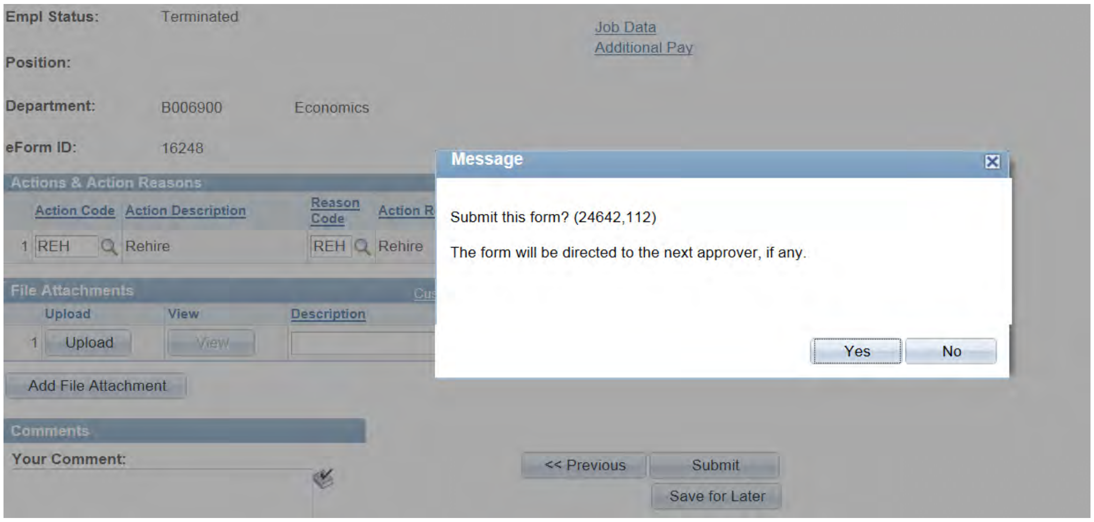
Step	Action – Change Job Data – Finalize Form
Note:	Notice that the **Action Code** section is notated as **Rehire**. By Clicking the search icon you may change Action and Reason Code if it is not identified correctly Note: Action code always defaults to CCA (Concurrent Appointment)



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



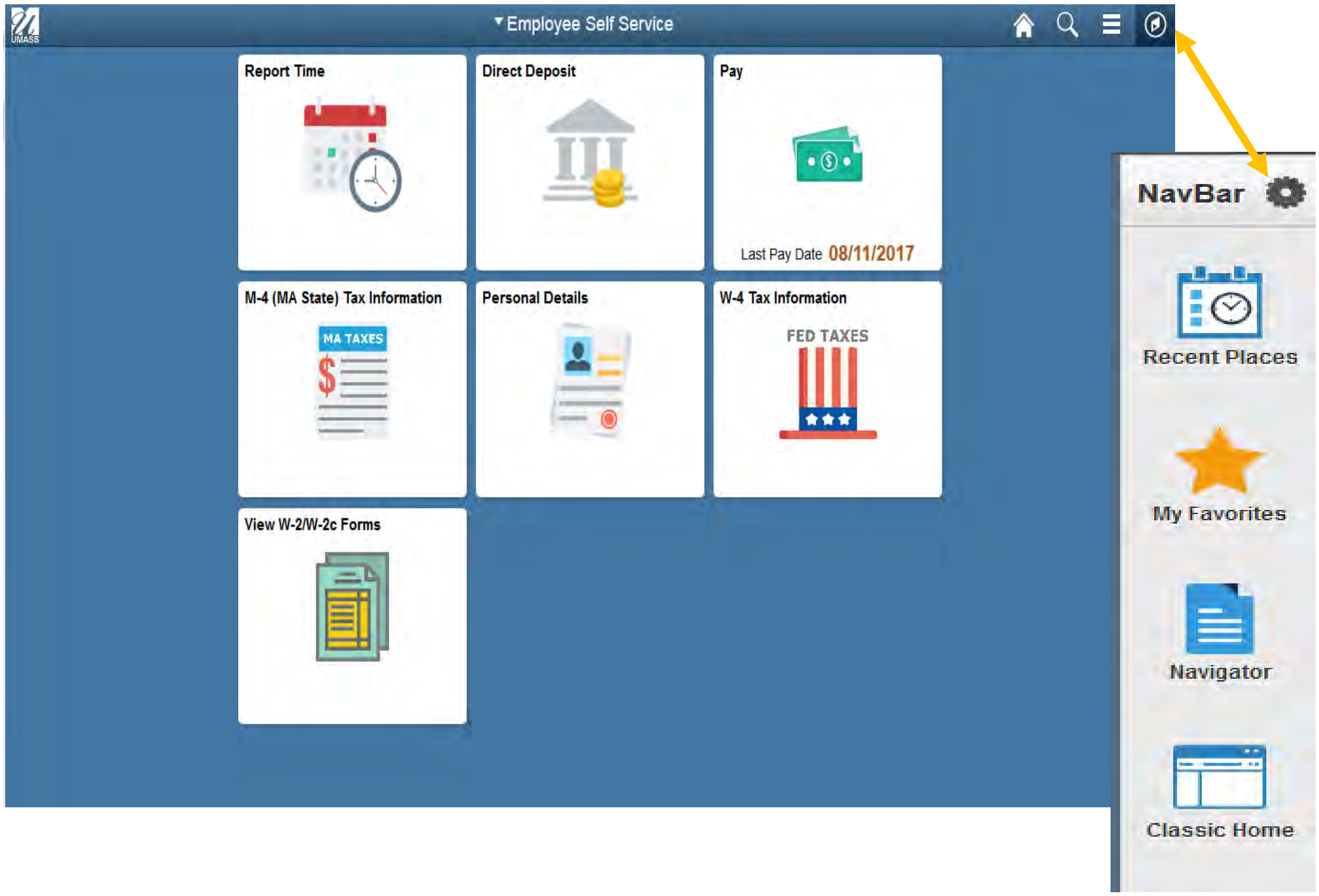
Step	Action
19.	Click the Submit button. Submit



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

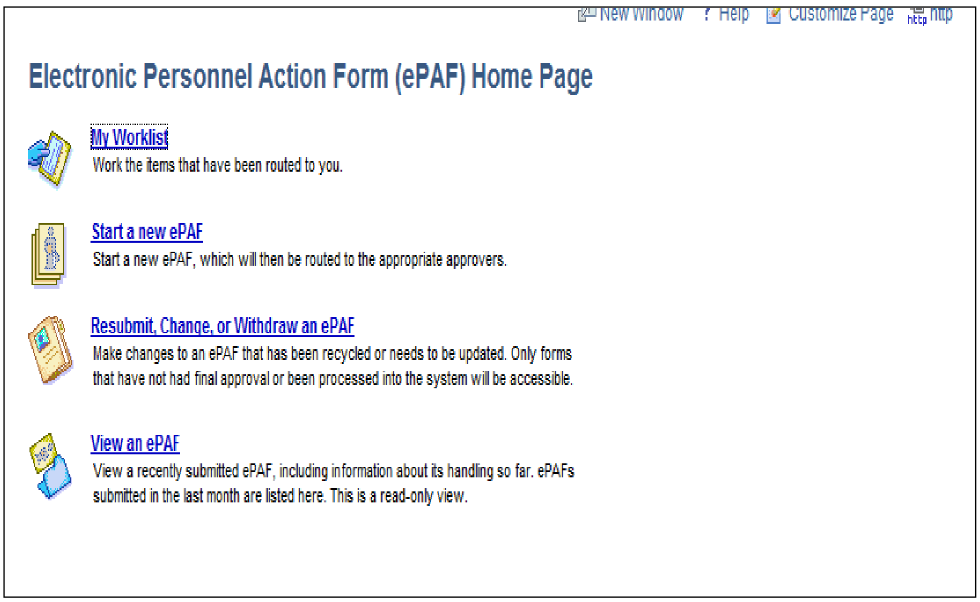
Step	Action
21.	The **Form Status** indicates that you have submitted this form.
22.	**Congratulations! You have entered a rehire.** **End of Procedure.**

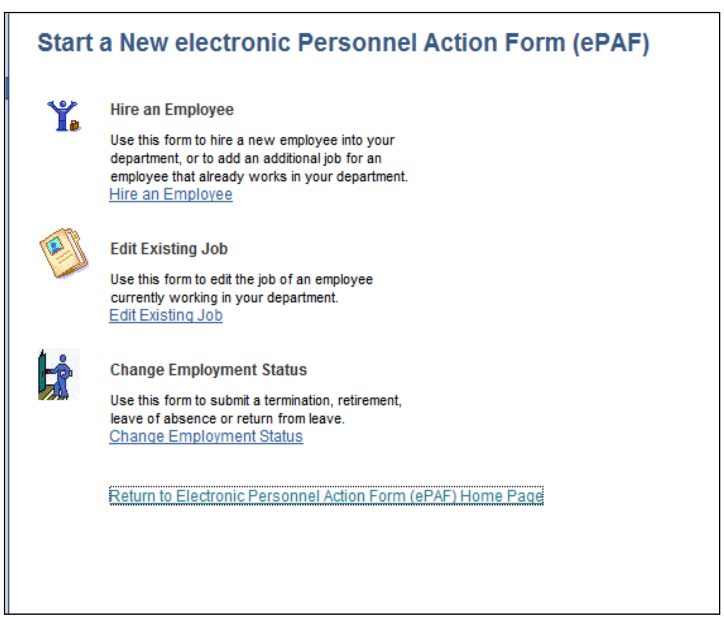
Entering a Funding Swap (Change in funds)



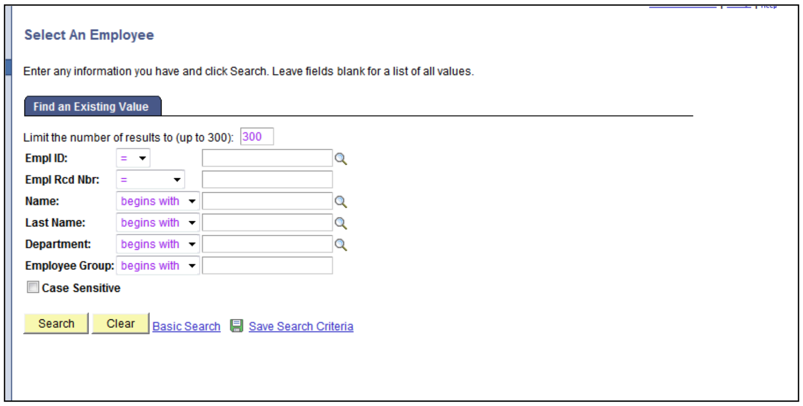
Step	Action
1.	Begin by navigating to the **NavBar**. Click **Navigation**, Click on **Department Self Service**.
2.	Click the **ePAF Home Page** link.

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

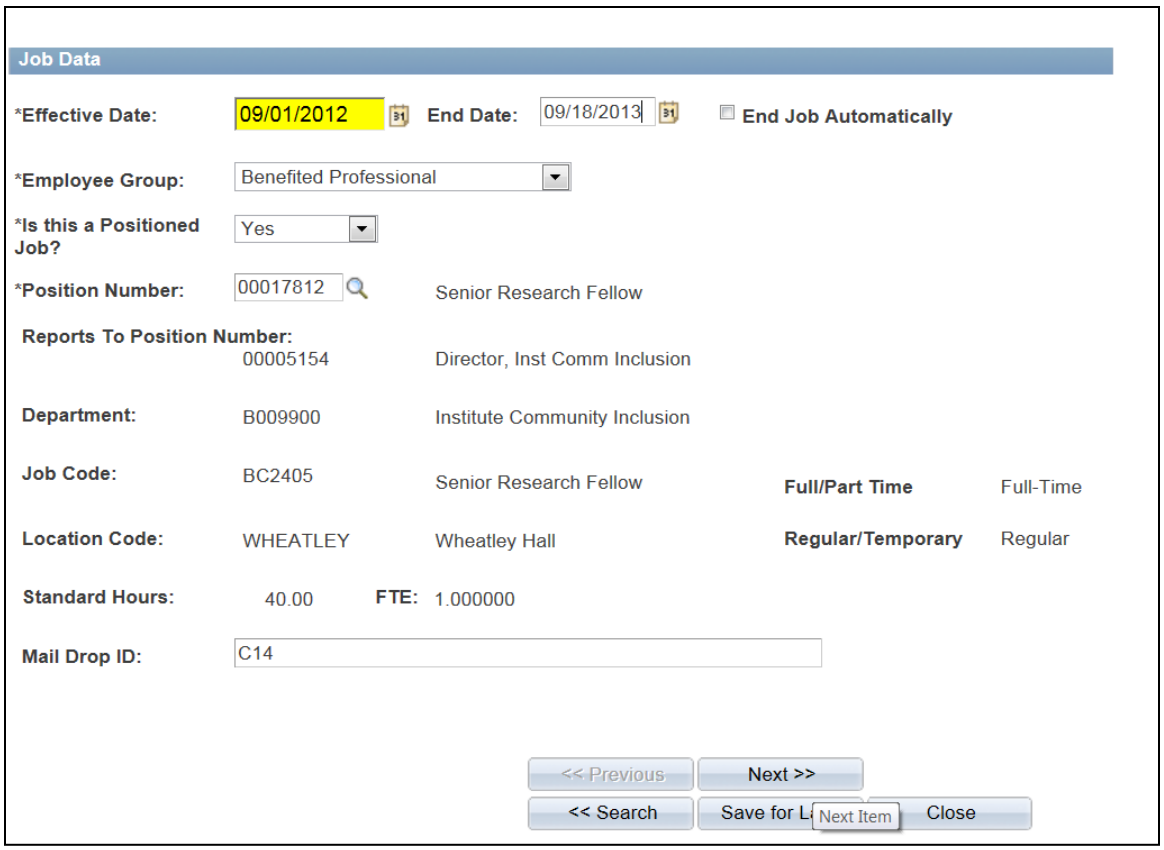




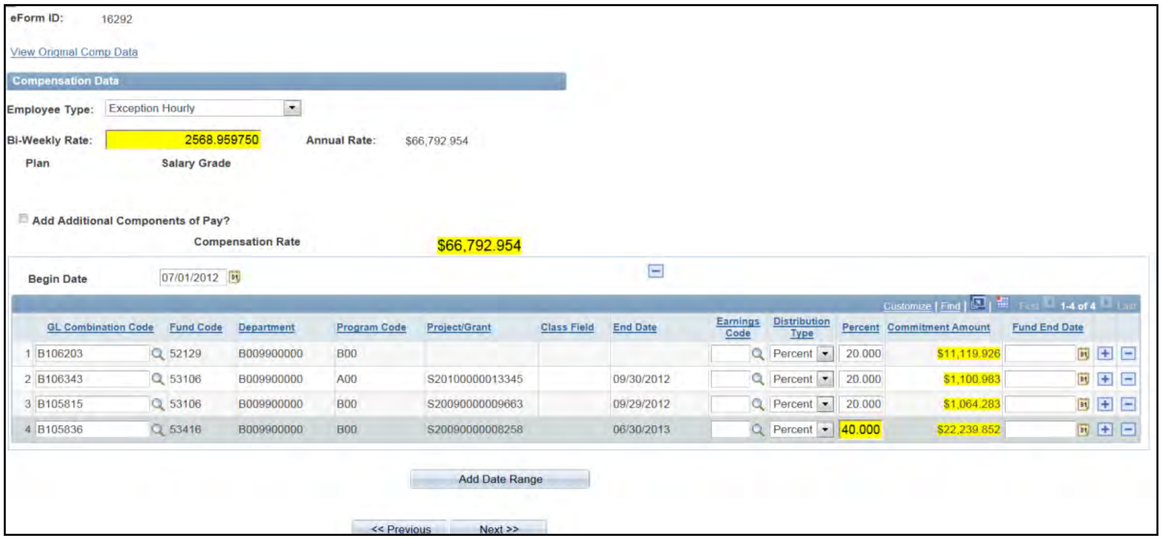
Step	Action
5.	Click the **Edit Existing Job** link. Edit Existing Job



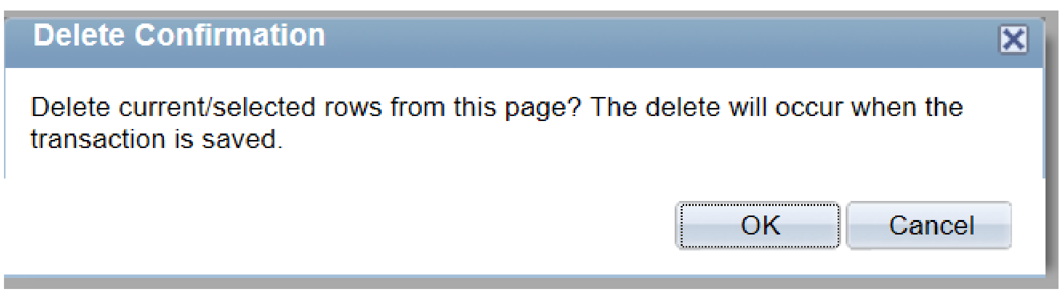
Step	Action
6.	Enter the desired information into the **Last Name or Emp ID** field. For this example, enter "**Jones**".
7.	Click the **Search** button. Search



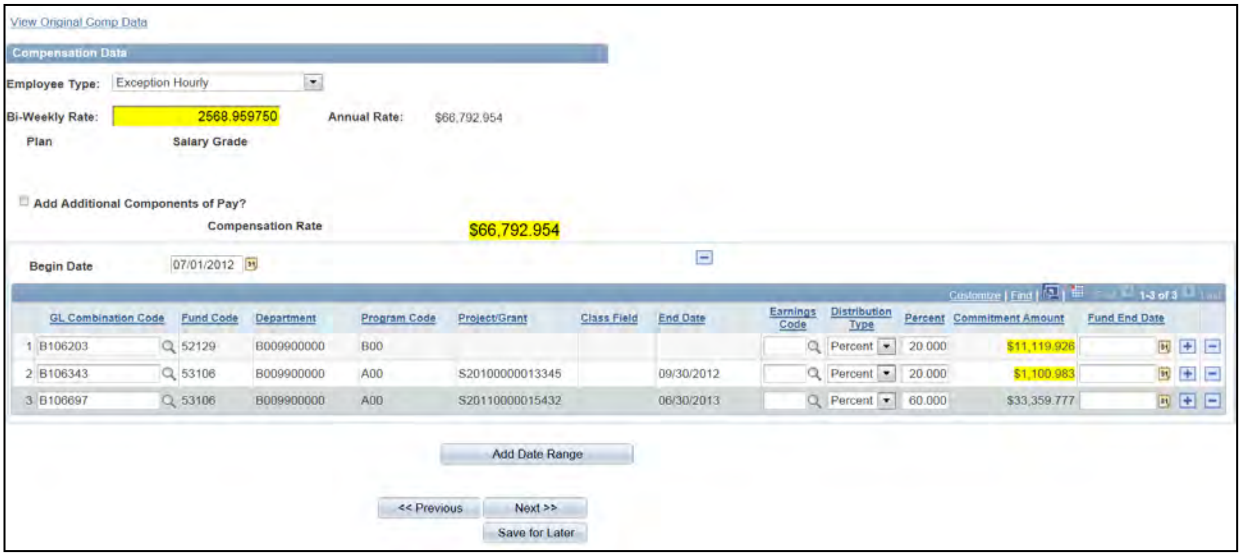
Step	Action
8.	Click the **Effective Date** button. Choose effective date Example: 09/01/2012
9.	Click the End Date button. Choose End Date
10.	Click Next



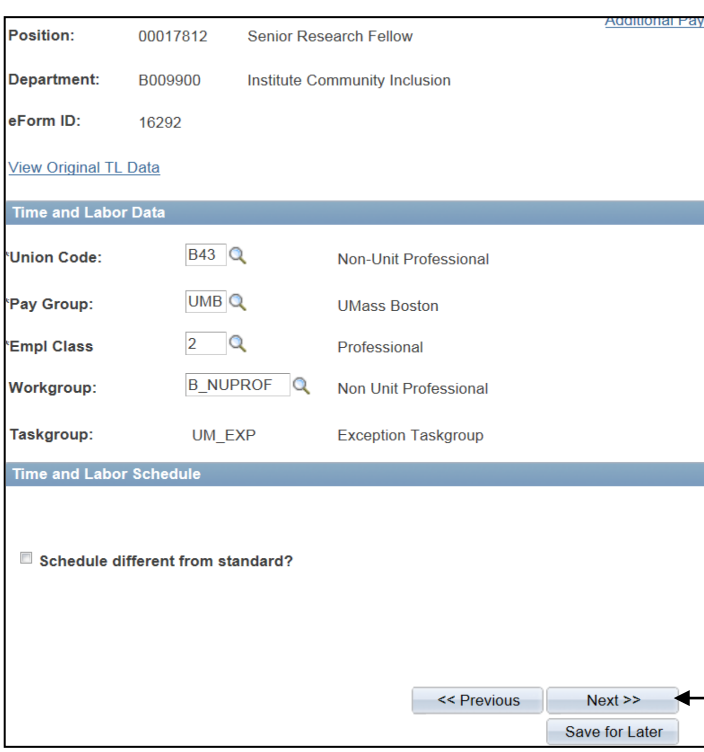
Step	Action
11.	Example: remove a funding source and change percent. Click minus to remove row **NOTE: Only one retro funding per ePAF**



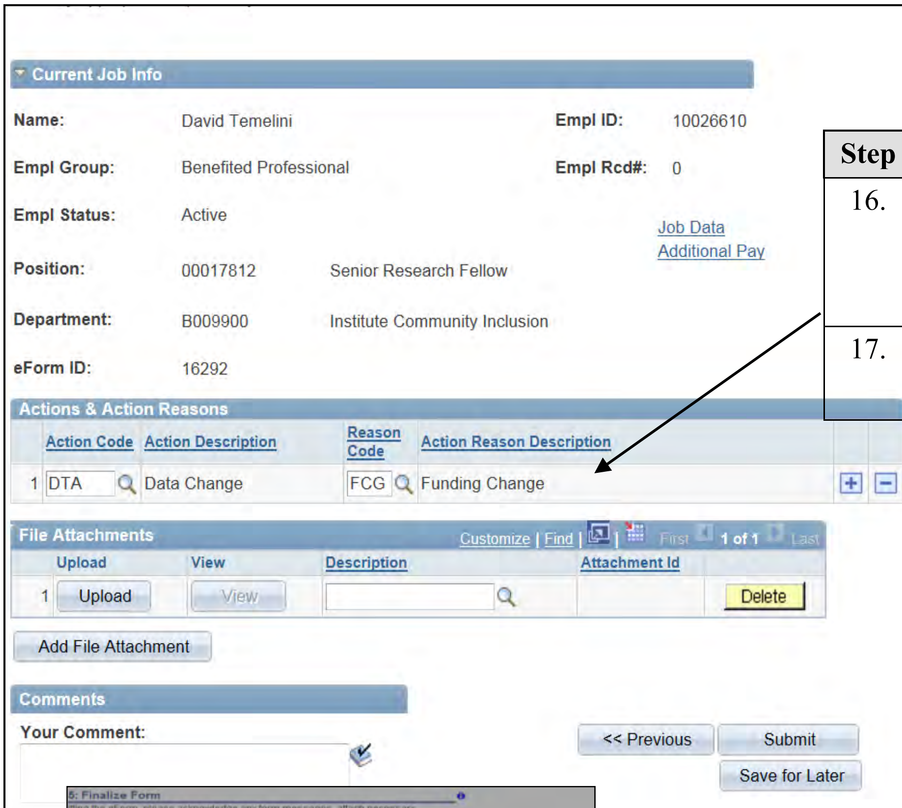
Step	Action
12.	Press ok to confirm that you would like to delete row



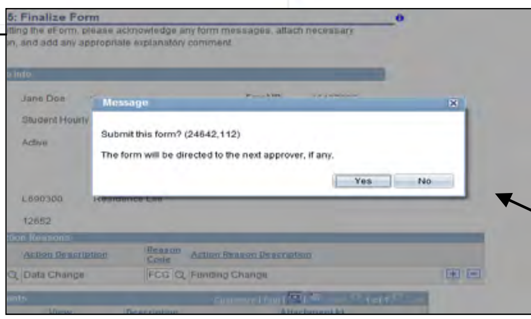
Step	Action
13.	Change Percent row (must equal 100%) Example: 60 Click Tab
14.	Click the **Next** button. Next >>



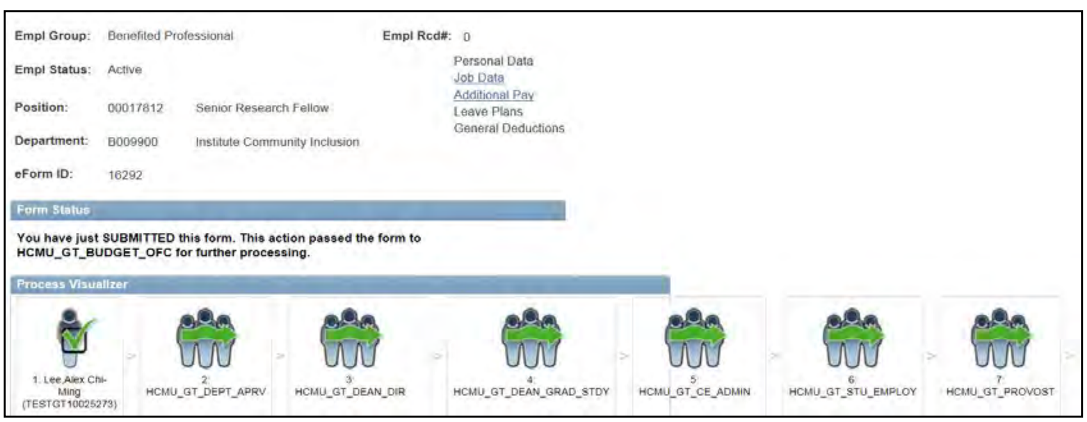
Step	Action
15.	If no changes needed Click the **Next** button. Next >>



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. Submit



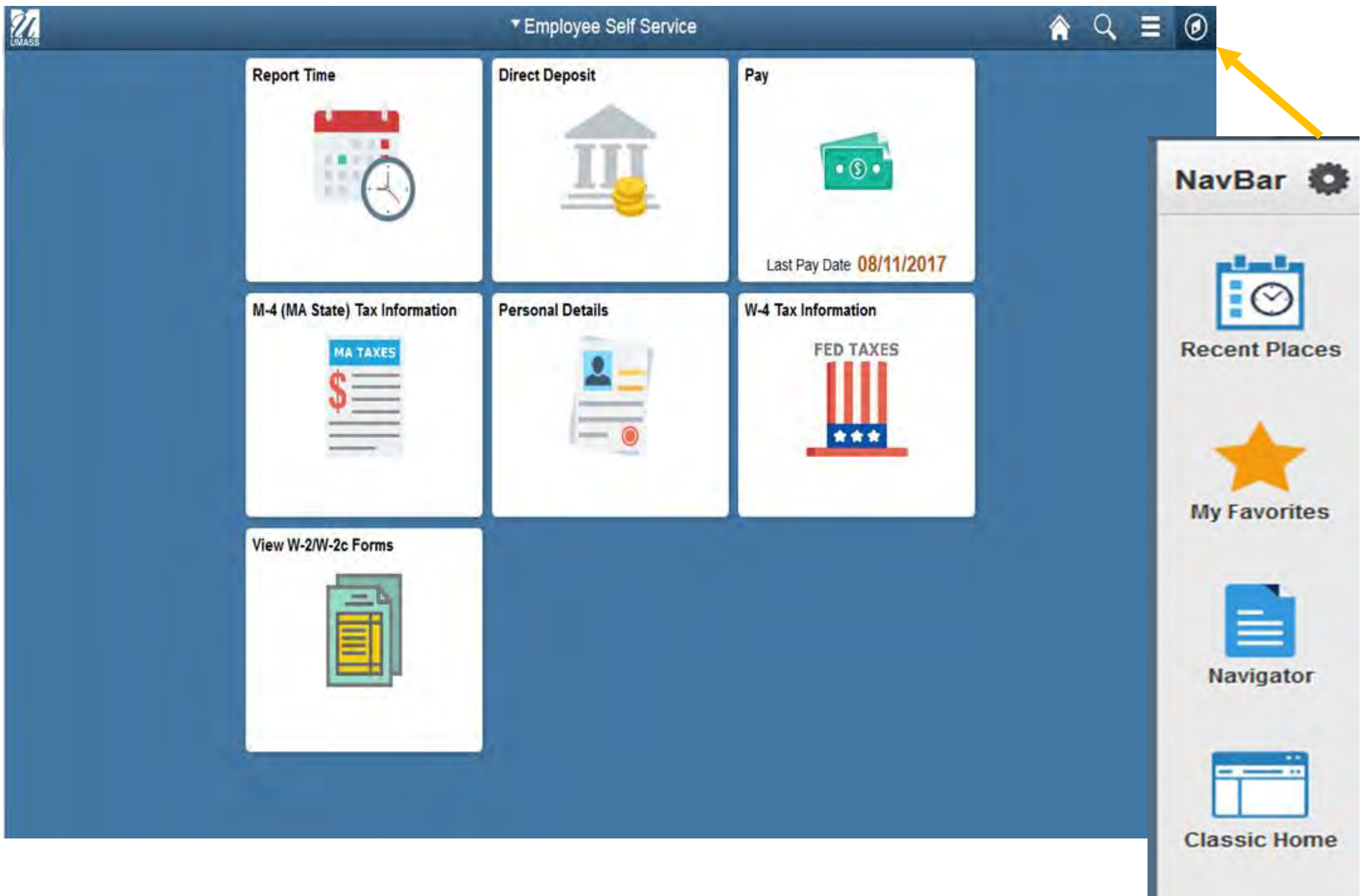
Step	Action
18.	Confirm that you are ready to submit this form. Click the **Yes** button. Yes

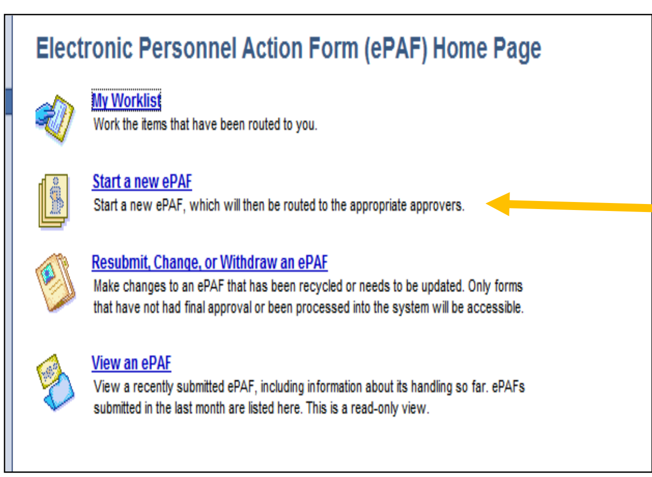


Step	Action
19.	The **Form Status** indicates that you have submitted this form.
20.	**Congratulations! You have entered a funding swap.** **End of Procedure.**

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

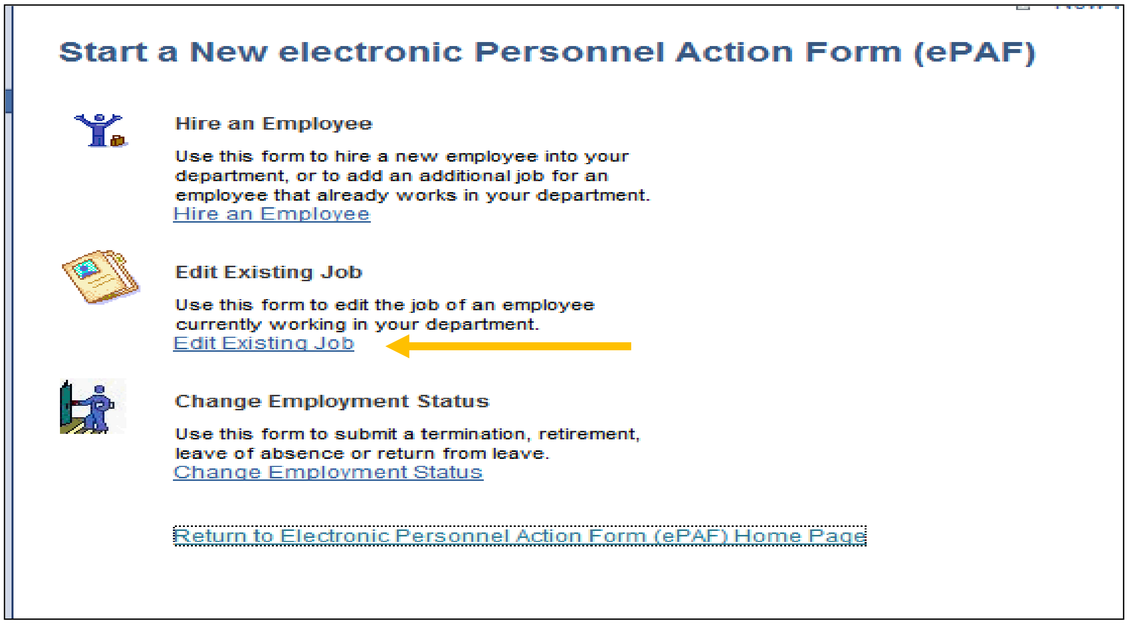
Step	Action
1.	Begin by navigating to the **NavBar**, Click on **Navigation**, Click on **ePAF Home Page**. Click the **Department Self Service** link. Click on ewPAF **Home Page**.



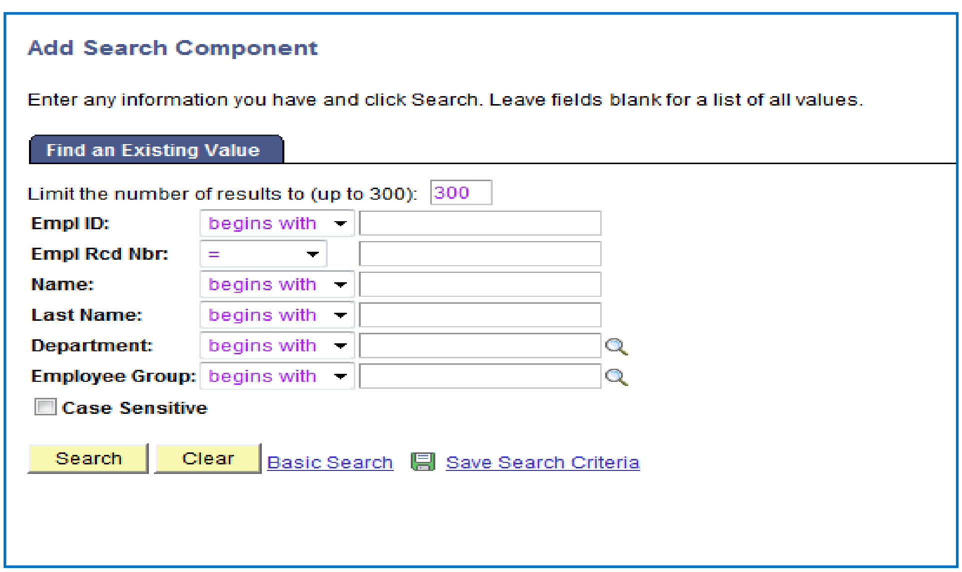


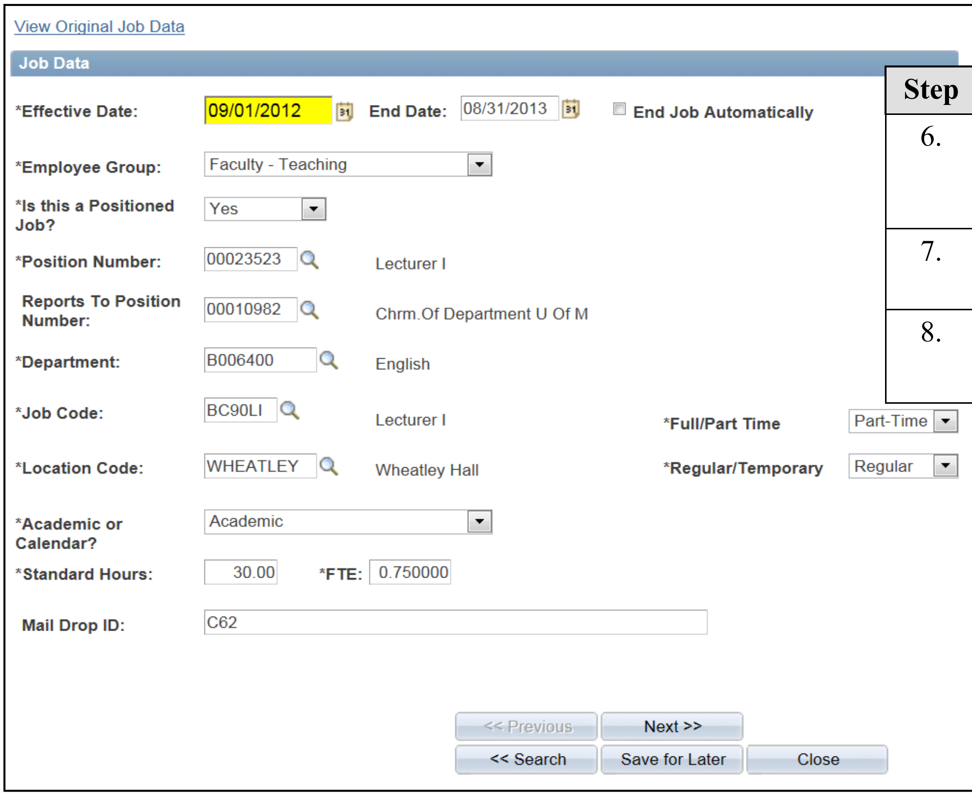
Step	Action
2.	Click the **Start a new ePAF** link. Start a new ePAF

Step	Action
3.	Click the Edit Existing Job link.

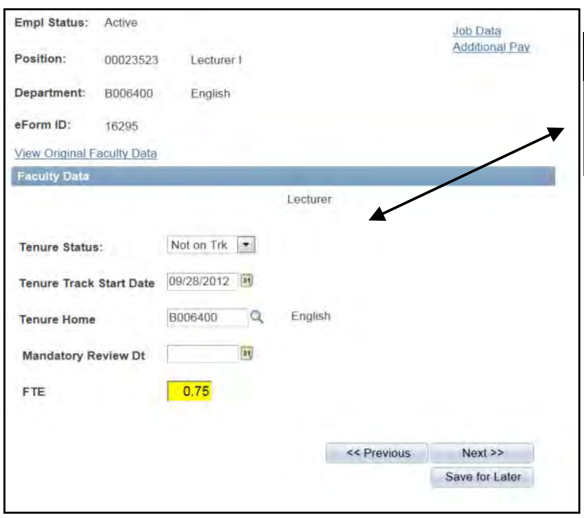


Step	Action
4.	Enter the desired information into the **Last Name** OR **Empl ID** field. Example "**Smith**".
5.	Click the **Search** button. Search

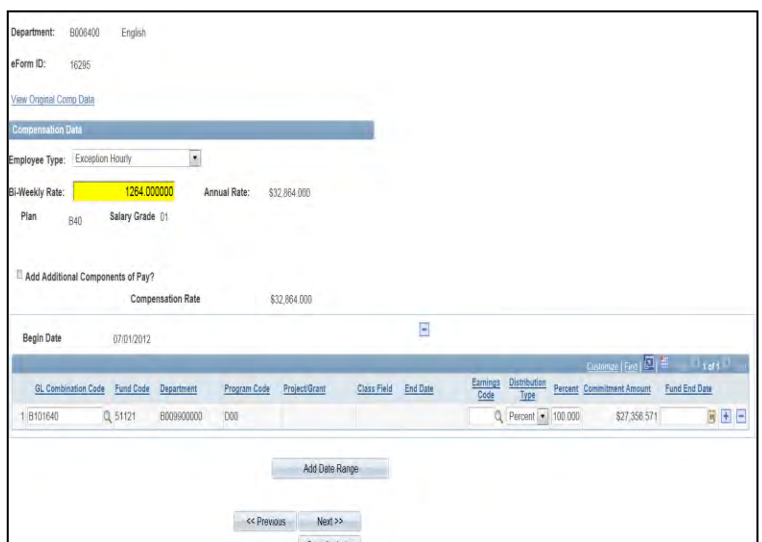




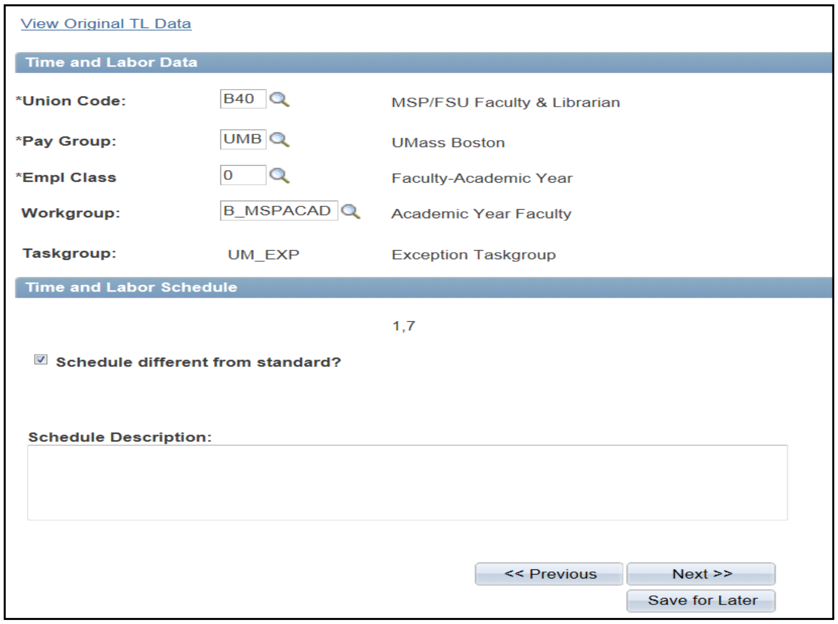
Step	Action
6.	Enter the **Effective Date** and change **End Date** Example: 090/01/2012 and 08/31/2013
7.	Enter **Standard Hours.** Once standard hours are entered FTE will auto populate.
8.	Click the **Next** button. Next >>



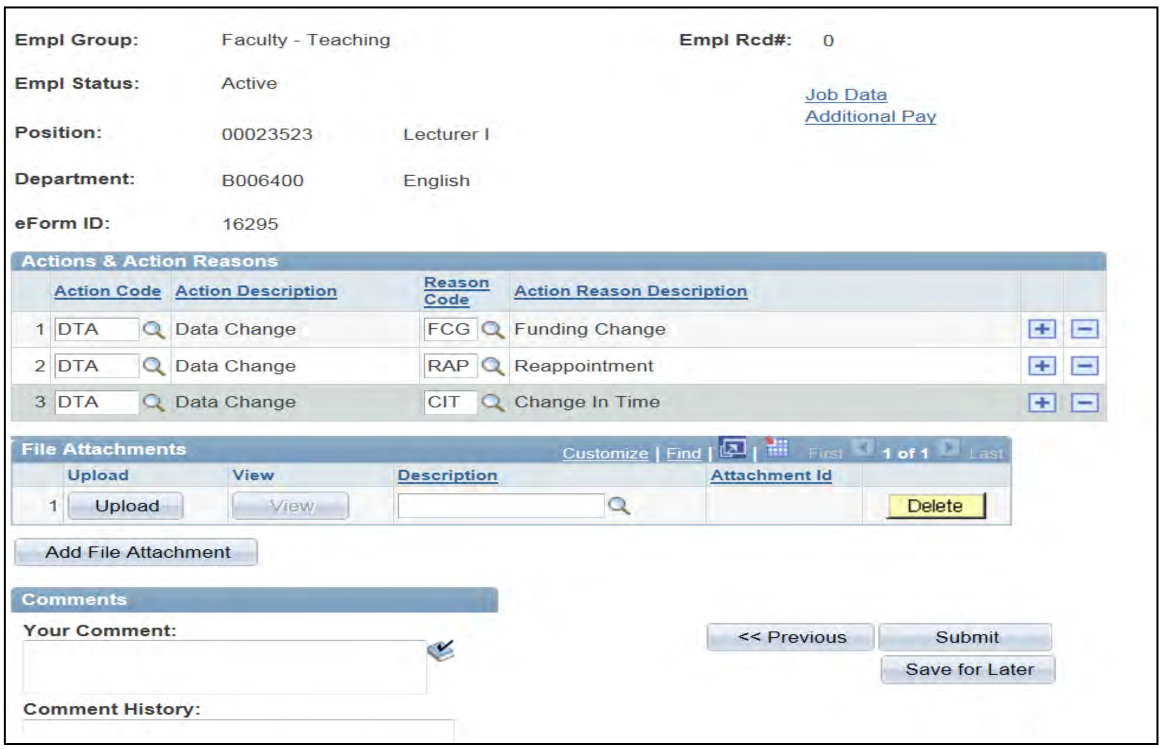
Step	Action
9.	Enter Faculty Tenure Data
10.	Click Next



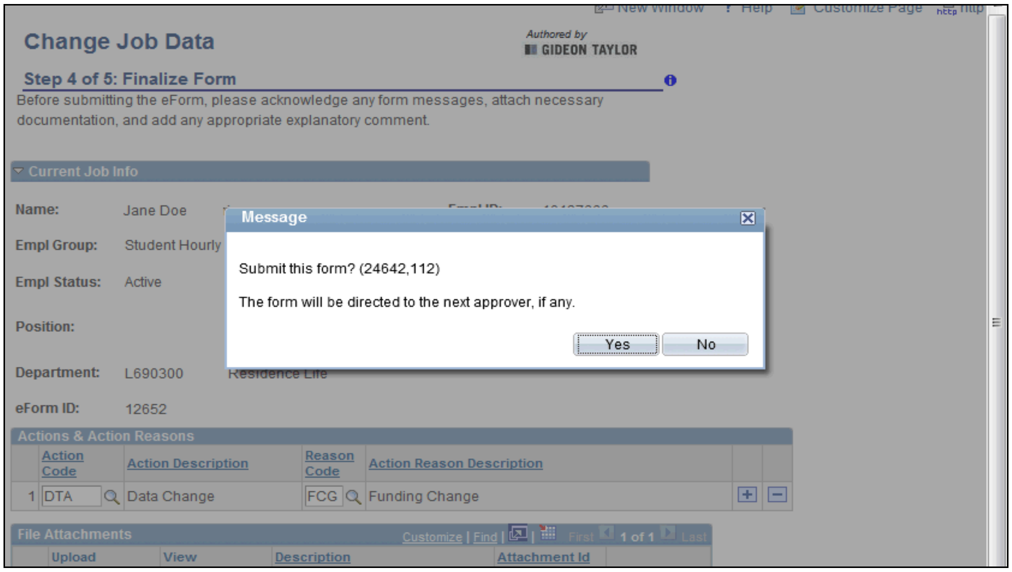
Step	Action
11.	Enter **Bi-Weekly** rate. Once entered **Annual Rate** will auto populate
12.	Enter **GL Combination Code** Click Tab
13.	Add/remove funding row using plus or minus if applicable. Change percentages if applicable.
14.	Click Next



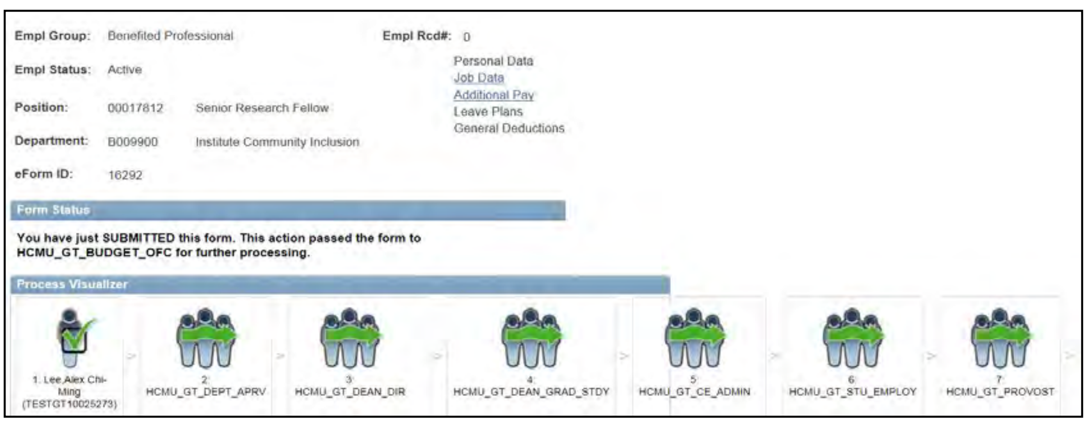
Step	Action
15.	If no changes needed Click the **Next** button. Next >>



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



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

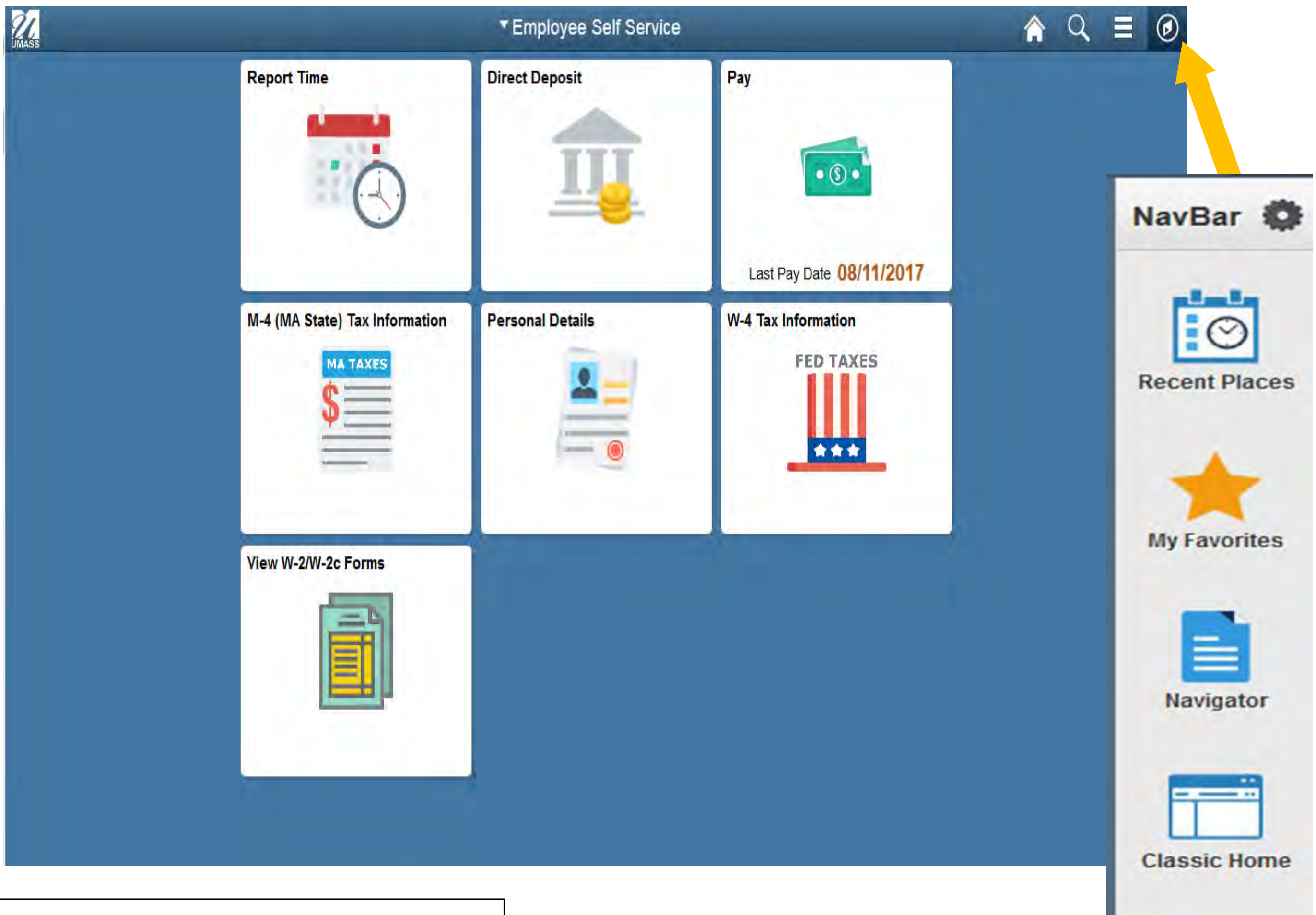


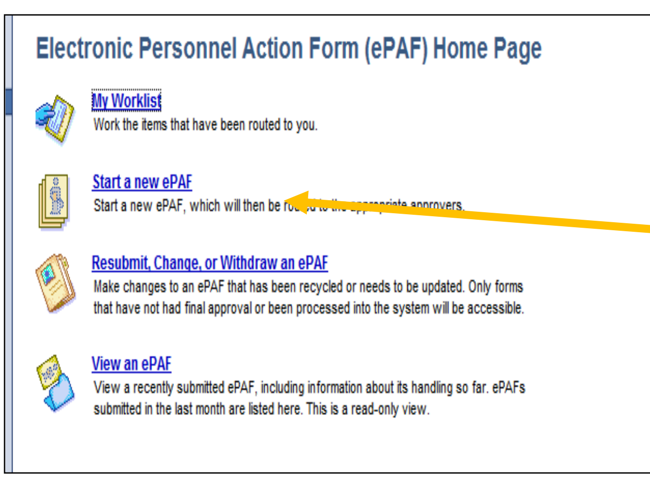
Step	Action
19.	The **Form Status** indicates that you have submitted this form.
20.	**Congratulations! You have entered a reappointment/change in time/funding change.** **End of Procedure.**

Updating Employee Status

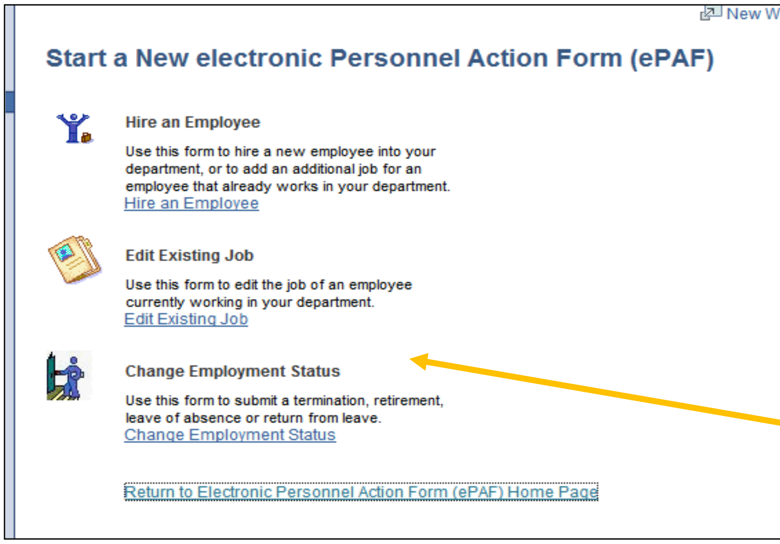
Entering a Leave of Absence

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.

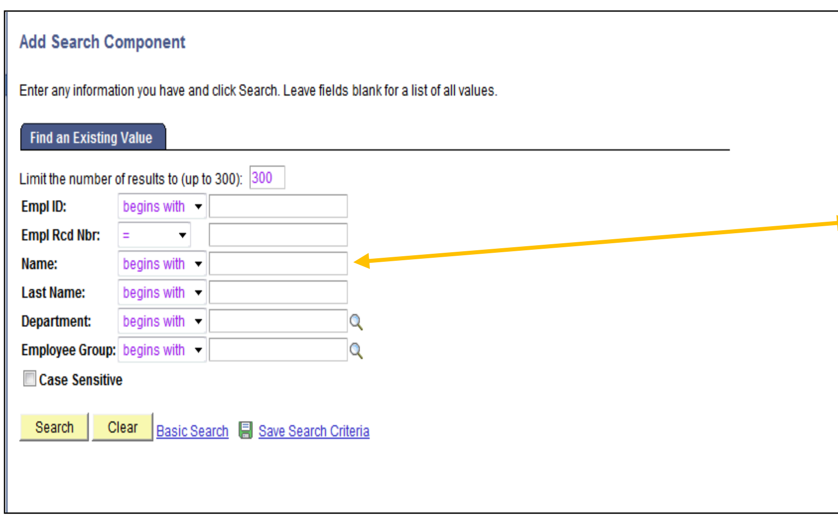




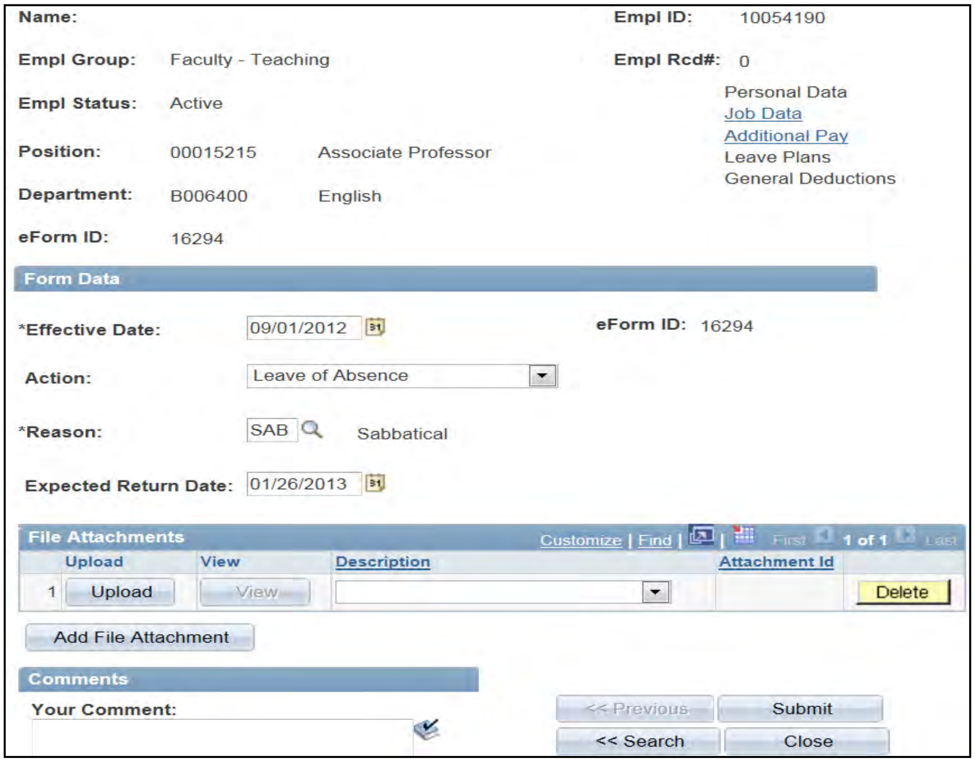
Step	Action
2.	Click on **Start a new ePAF.**



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



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


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: 09/01/2012
eForm ID: 16294
Action: Leave of Absence
*Reason: SAB Sabbatical
Expected Return Date: 01/26/2013

File Attachments — Customize | Find | First 1 of 1 Last

Upload	View	Description	Attachment Id	
1 Upload	View			Delete

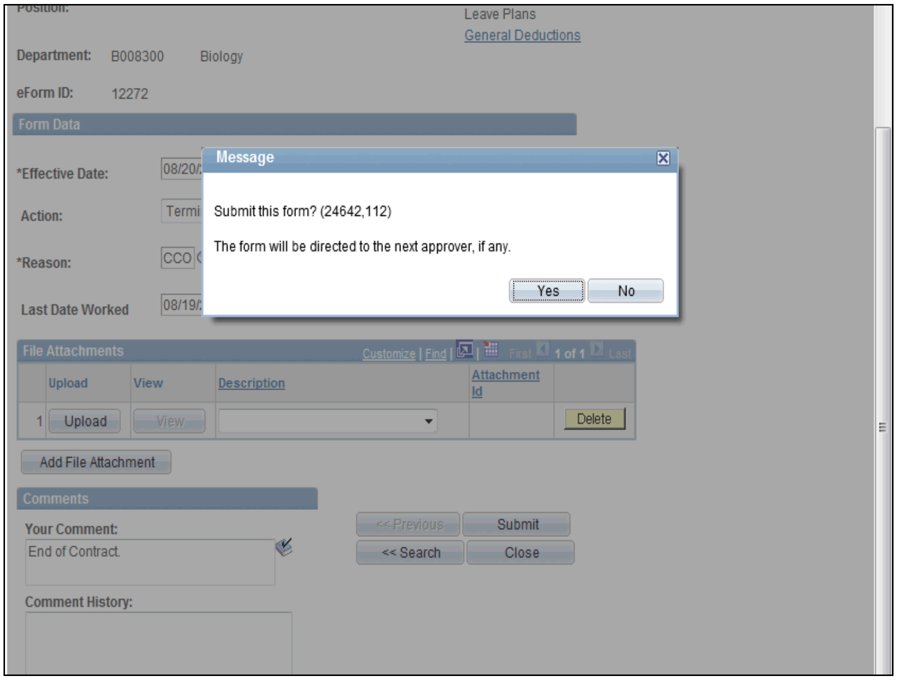
Add File Attachment

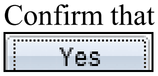
Comments

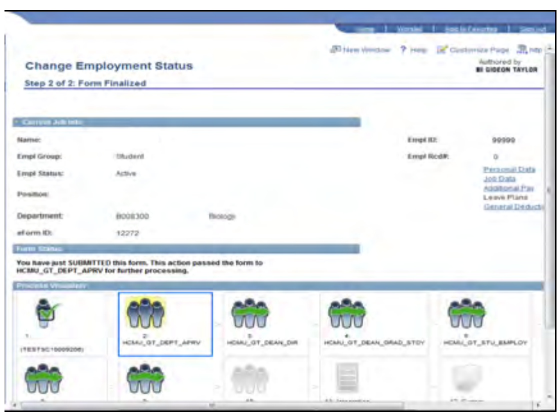
Your Comment:

<< Previous | Submit | << Search | Close

Step	Action
6.	Click the **Effective Date** look up button. Example: 09/01/2012
7.	Click the **Action** list.
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. Submit



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

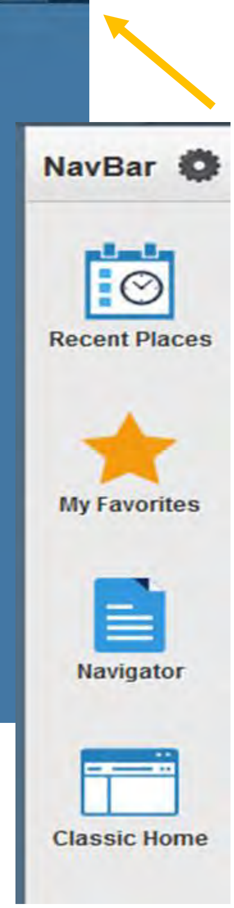


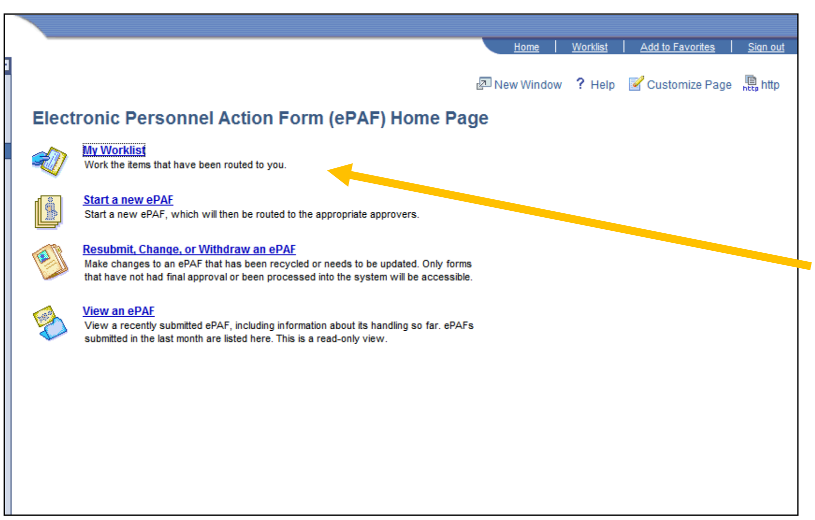
Step	Action
13.	The **Form Status** indicates that you have submitted this form.
14.	**Congratulations! You have successfully submitted a termination.** **End of Procedure.**

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

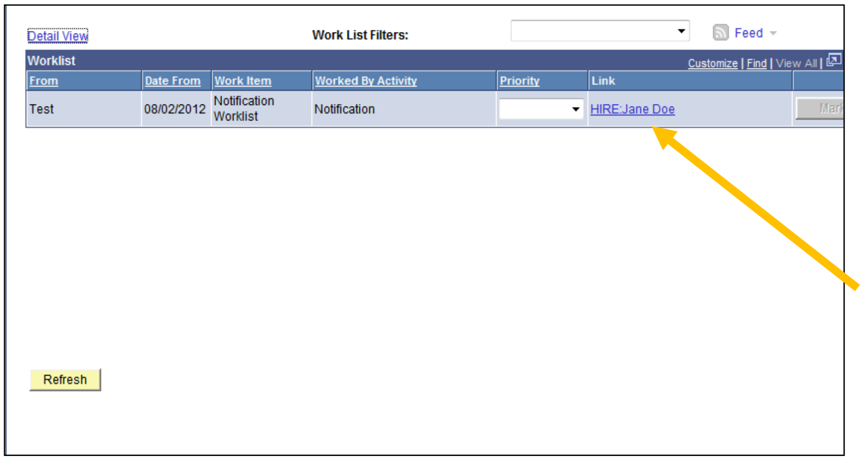
Opening your Worklist

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

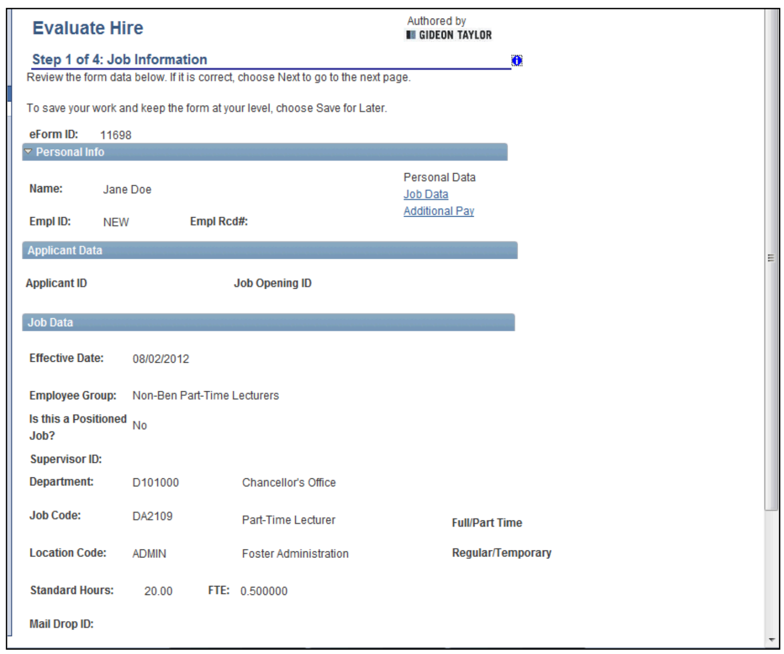




3.	Click on **My Worklist**



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

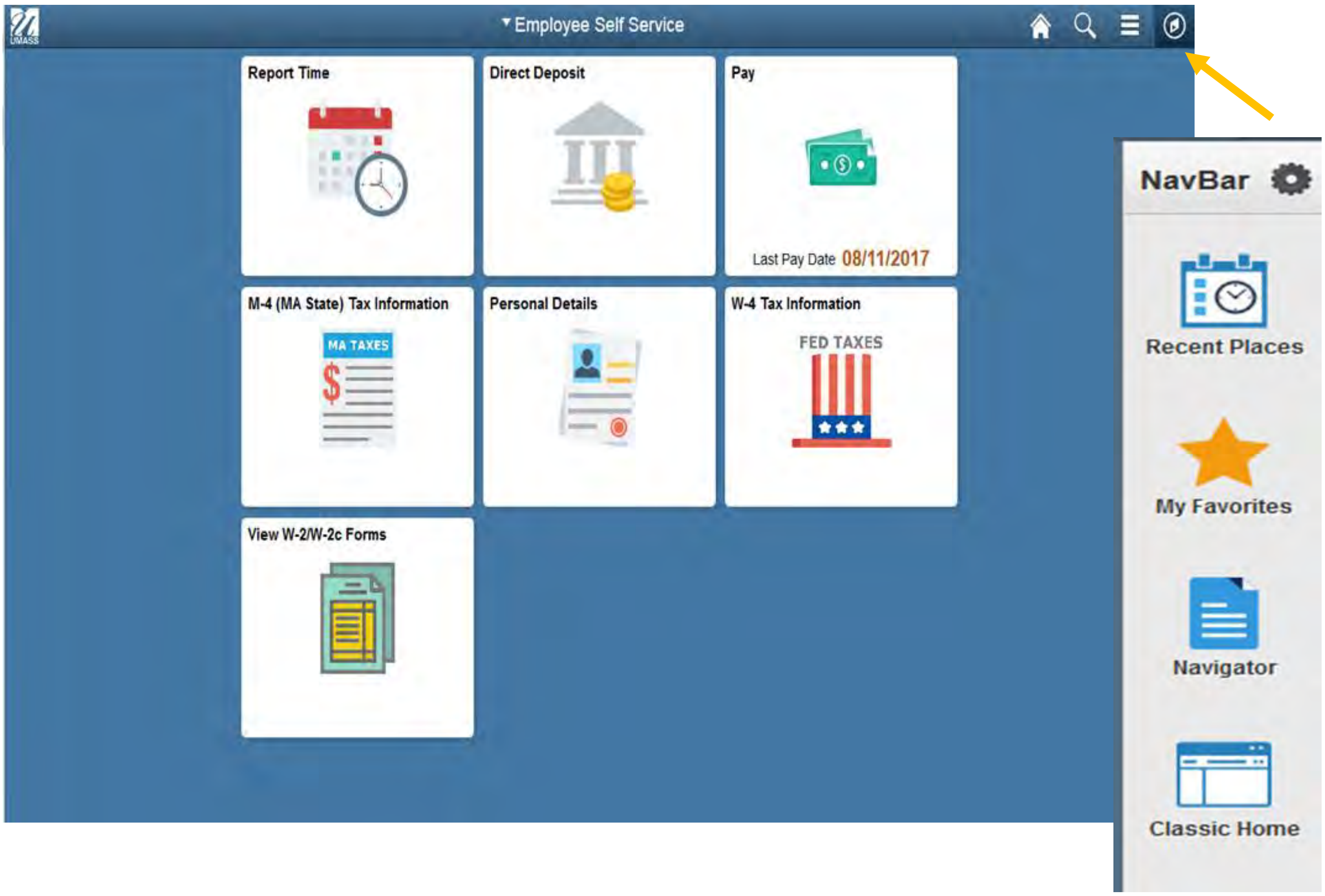


Step	Action
6.	You are now viewing the hire ePAF form for Jane Doe.
7.	If you want to return to your worklist, click the **Worklist** link. ***Note:*** Use the side bar menu to navigate back to your **Worklist**.

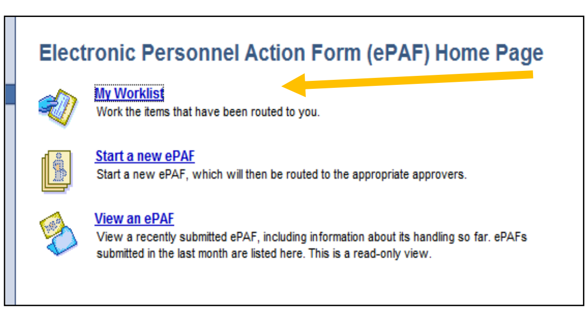
Step	Action
	Note: For the most current view, you will use the **Refresh** button to update your **Worklist** view.
8.	**Congratulations! You have opened your Worklist.** **End of Procedure.**

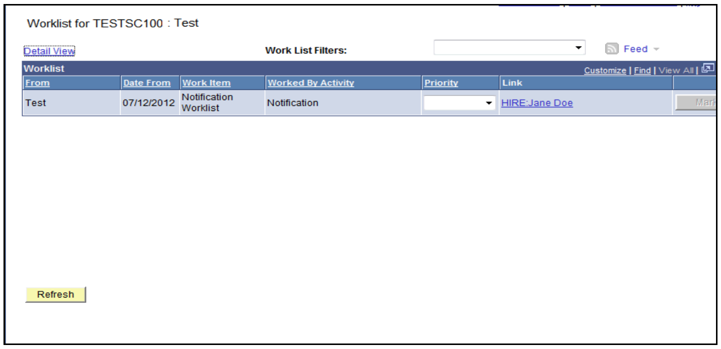
Approving an ePAF (Department level)

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

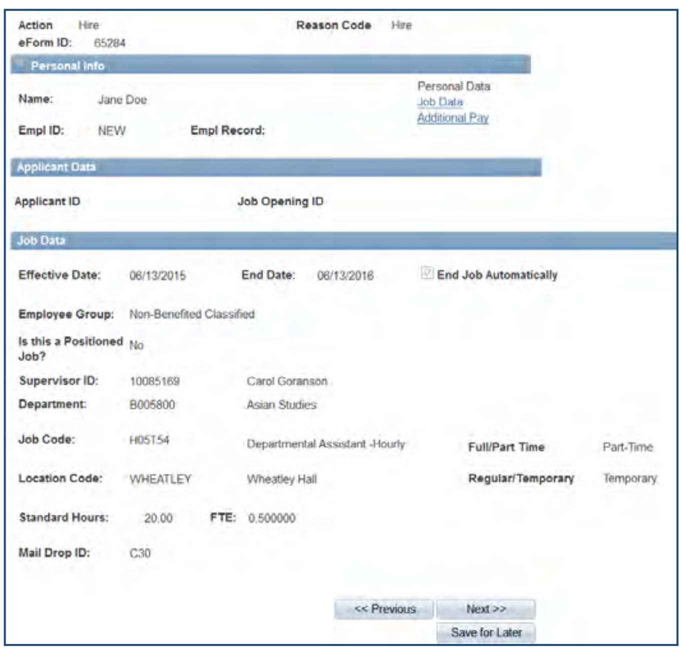


Step	Action
2.	Click the **My Worklist** link. My Worklist

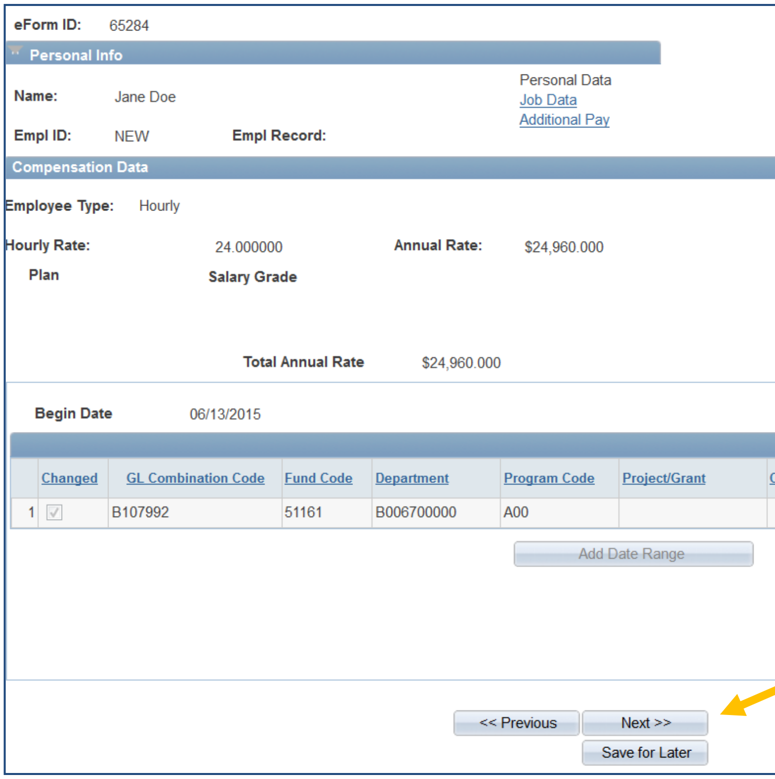




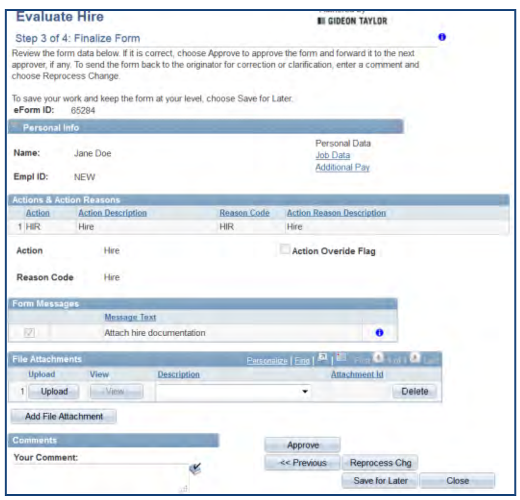
Step	Action
3.	You have one item in your worklist. You want to review and approve Jane Doe's hire form. Click the **HIRE:Jane Doe** link. HIRE:Jane Doe
4.	The **Evaluate Hire** page contains personal info, applicant data, job data, and compensation data.



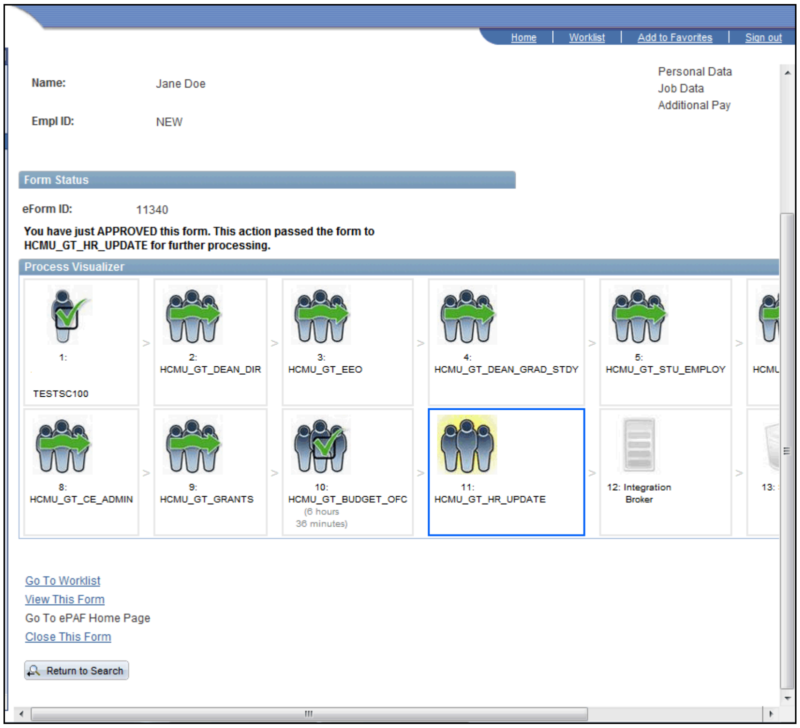
Step	Action
5.	Click the **Next** button. Next >>



Step	Action
6.	Click the **Next** button. Next >>



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**. Approve
8.	Confirm that you want to approve this form. Click the **Yes** button. Yes
9.	Your **Form Status** indicates that you have approved this form.

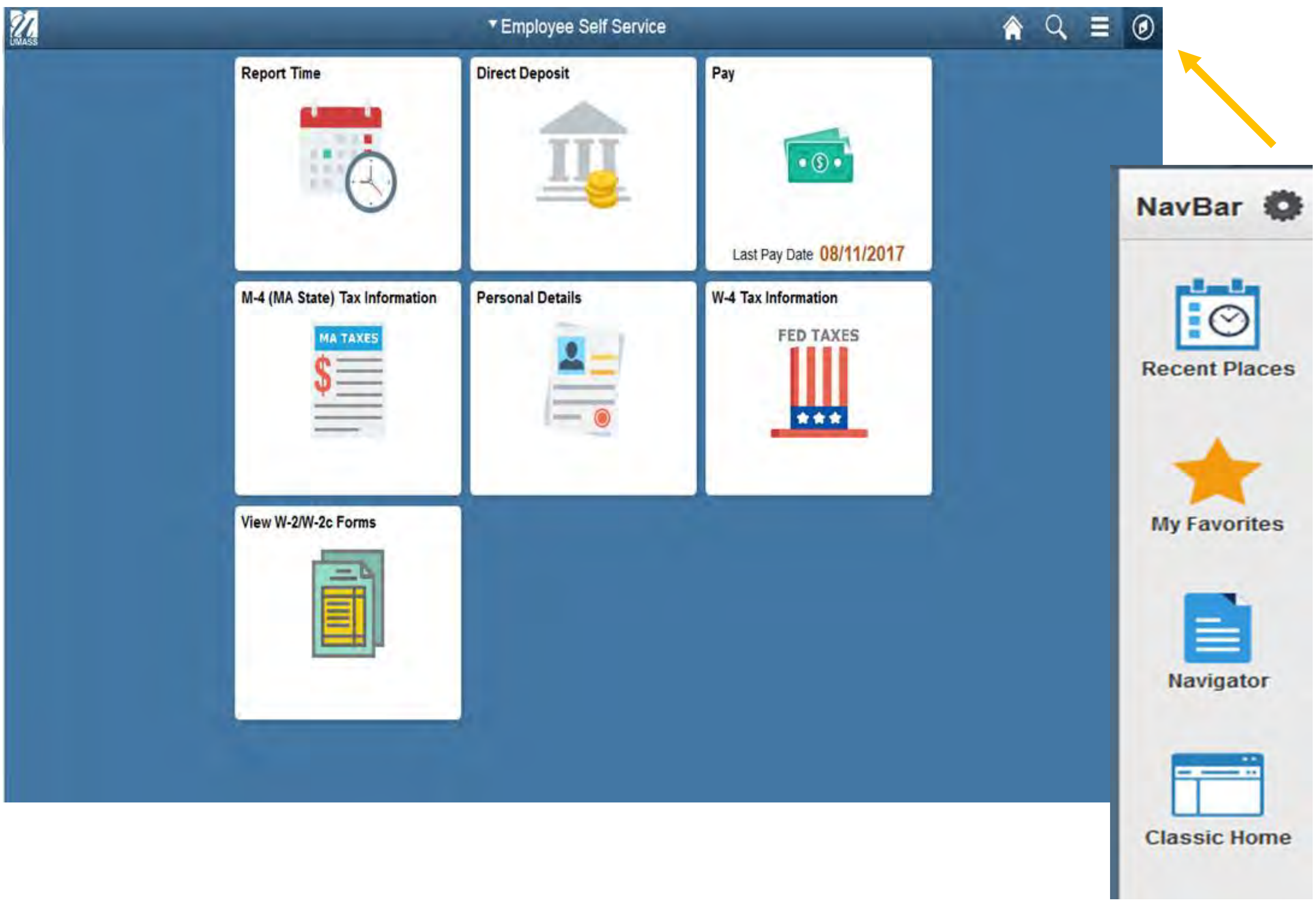


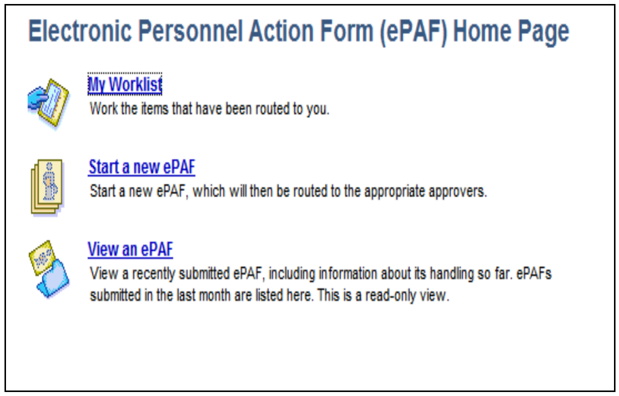
Step	Action
10.	You want to return to your **Worklist** page. Click the **Go To Worklist** link. Go To Worklist
11.	You are back at your **Worklist** page. You currently have no items in your Worklist. ***Note:*** You can use the **Refresh** button at the bottom left of the page, to make sure you are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

Reprocessing an ePAF (Department Level)

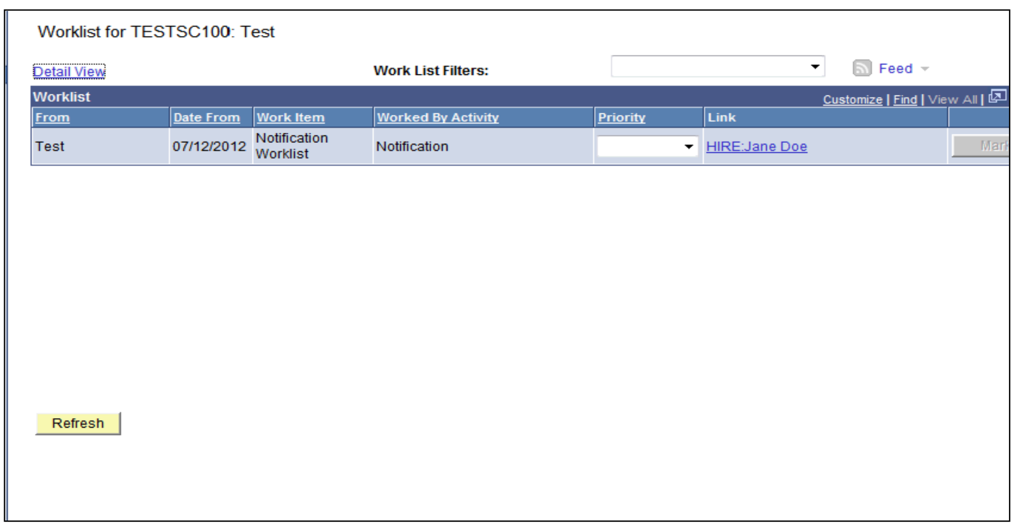
Upon completion of this topic, you will be able to reprocess an ePAF form and send it back to the initiator for changes.

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

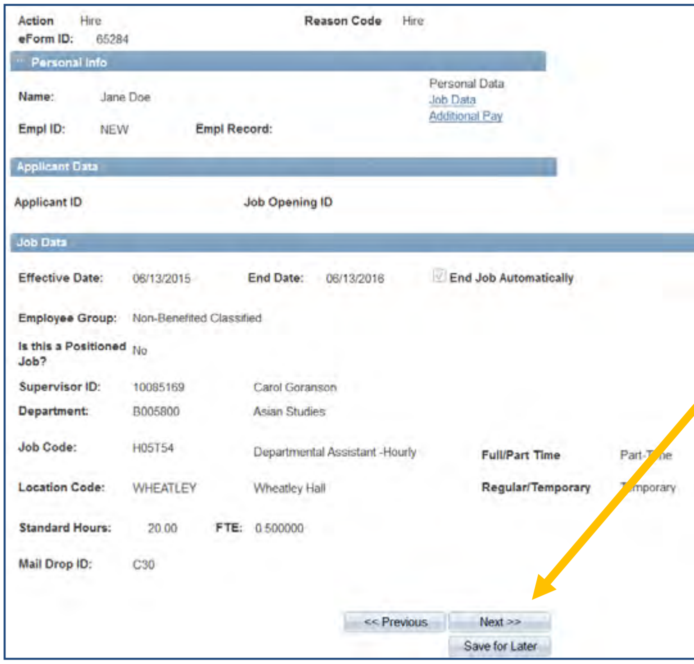




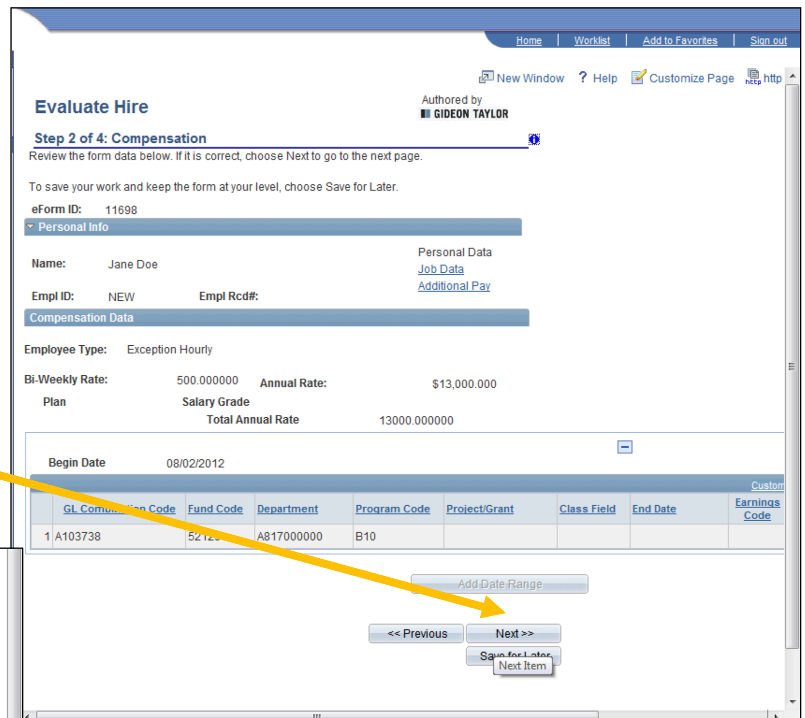
Step	Action
3.	Click the **My Worklist** link. My Worklist



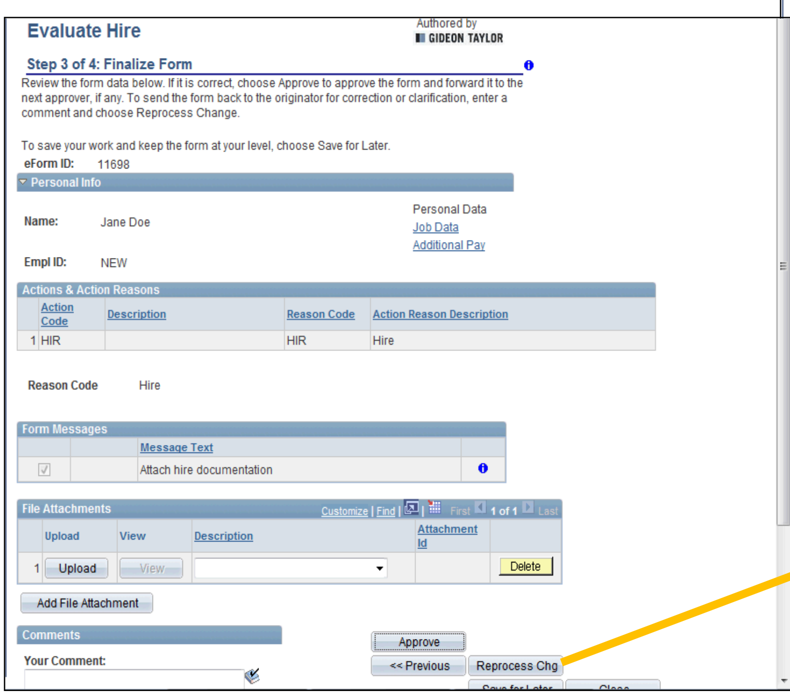
Step	Action
4.	You have one item in your worklist. You want to review and reprocess Jane Doe's hire form. Click the **HIRE:Jane Doe** link. HIRE:Jane Doe
5.	The **Evaluate Hire** pages contain personal, job data, and compensation data.



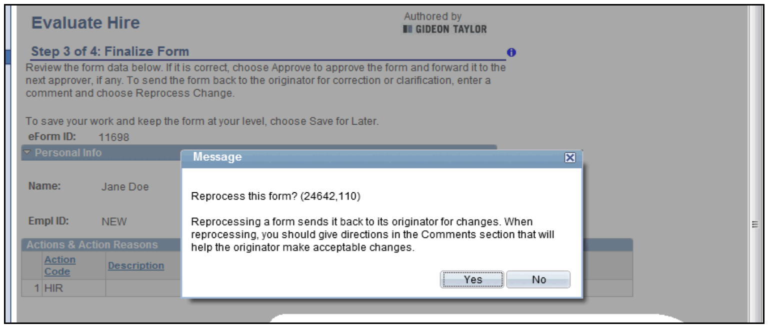
Step	Action
6.	Click the **Next** button. Next >>



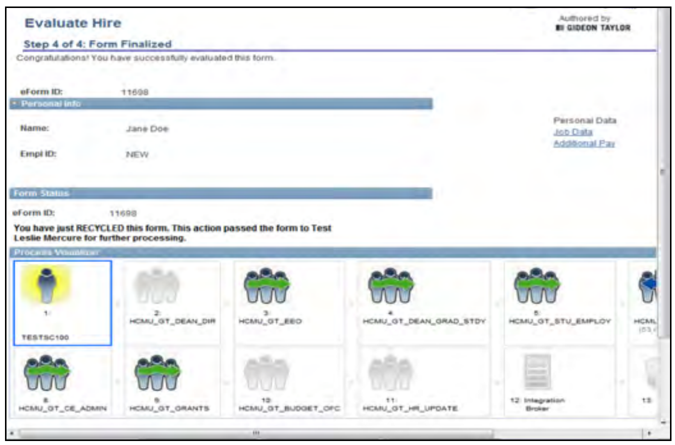
Step	Action
7.	Click the **Next** button. Next >>



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.



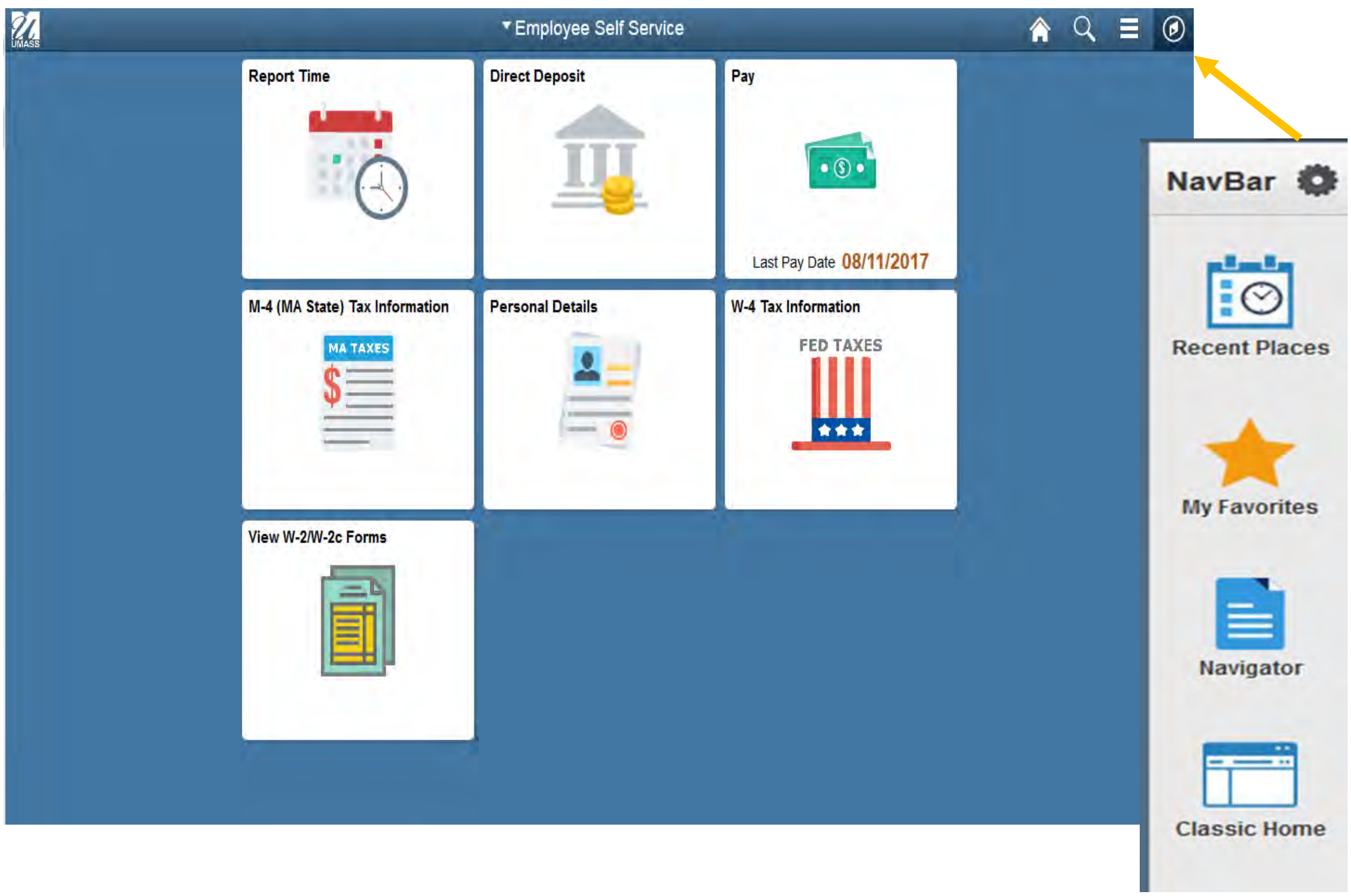
Step	Action
10.	Confirm that you have given acceptable directions for the changes you desire, then click the **Yes** button. 



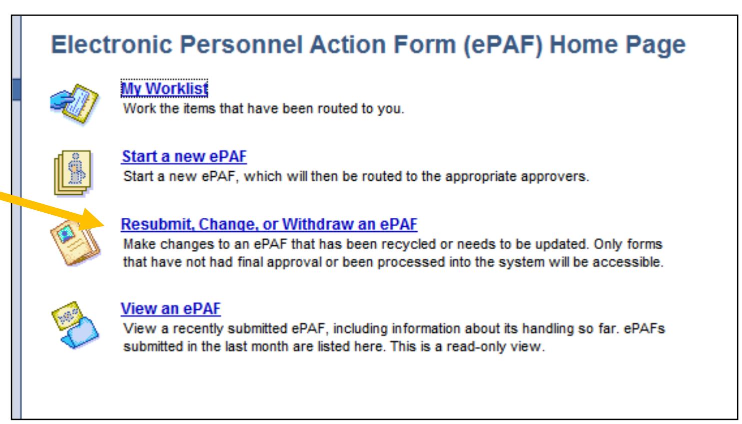
Step	Action
11.	The **Form Status** indicates that you have recycled/reprocessed this form and sent it back to the initiator for changes.
12.	**Congratulations! You have reprocessed an ePAF Form.** **End of Procedure.**

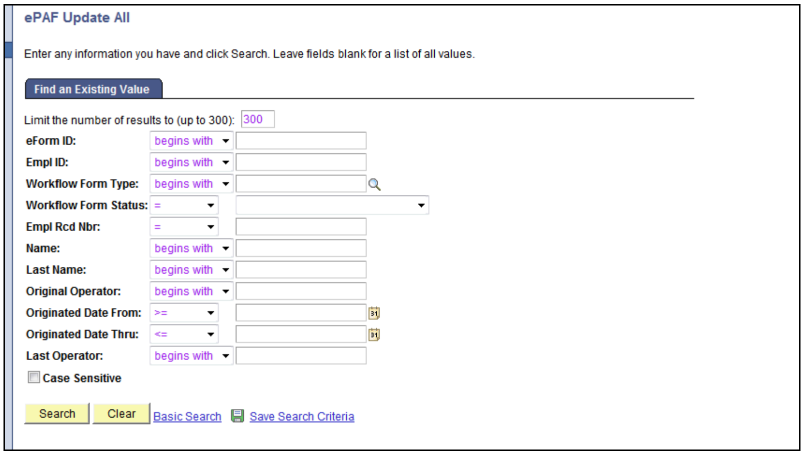
Withdrawing an ePAF

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

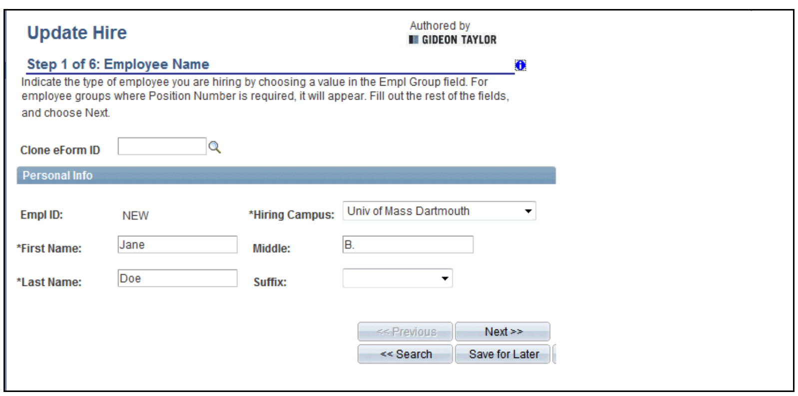


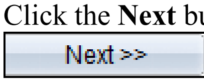
Step	Action
3.	You want to close (withdraw) an ePAF form that has already been submitted. Click the **Resubmit, Change, or Withdraw an ePAF** link. Resubmit, Change, or Withdraw an ePAF

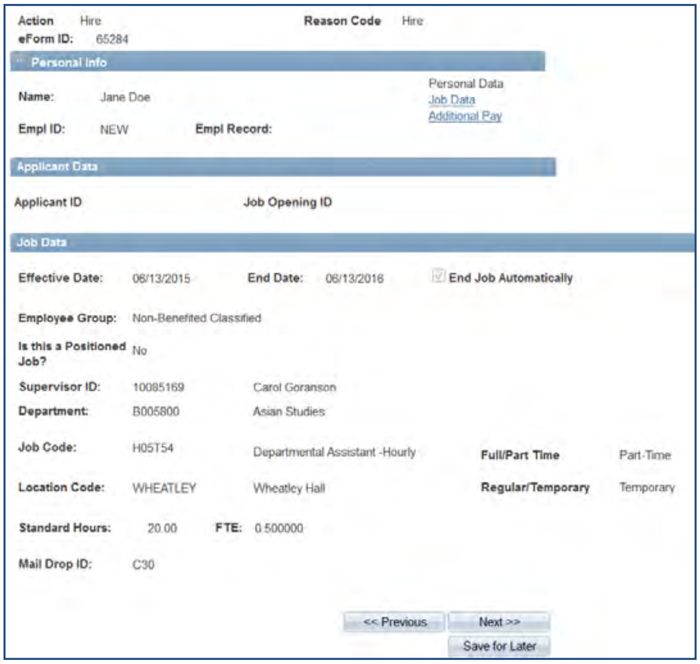




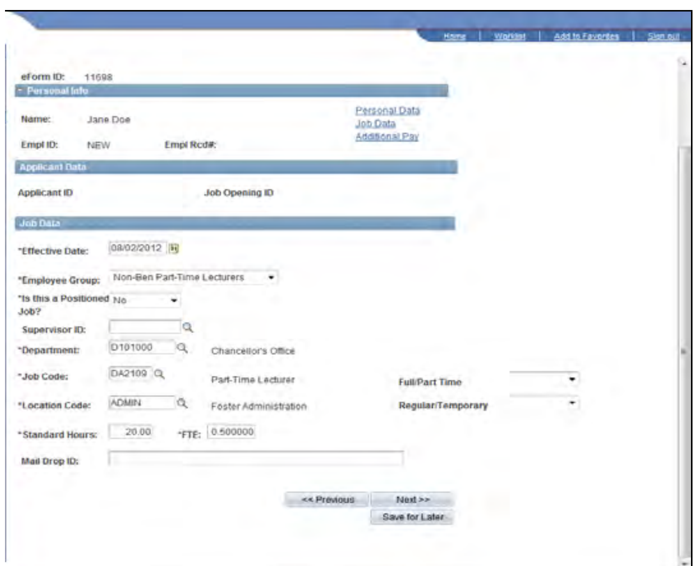
Step	Action
4.	You want to find an existing eForm by searching on the **Last Name**. Enter the desired information into the **Last Name** field. For this example, enter "**Doe**".
5.	Click the **Search** button. 

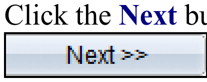


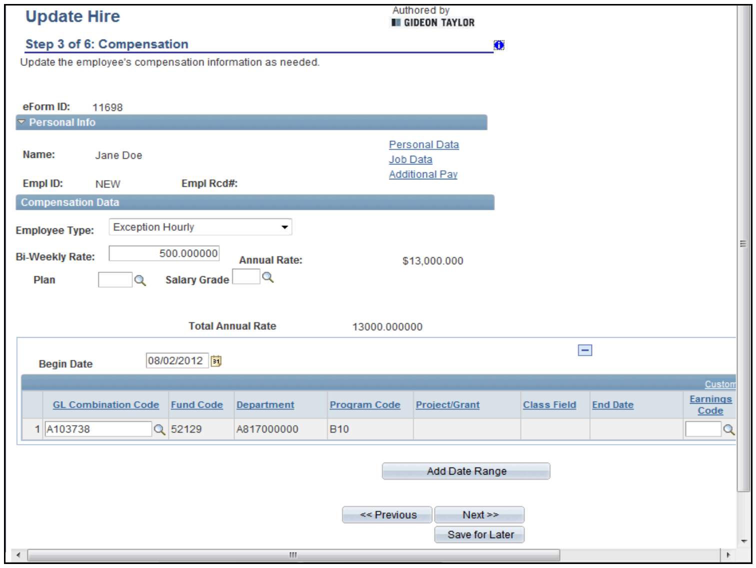
Step	Action
6.	The **Update Hire** page will allow you to update the form and close it. ***Note:* Only forms that have not had final approval or been processed into the system will be available for update.**
7.	Click the **Next** button. 



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

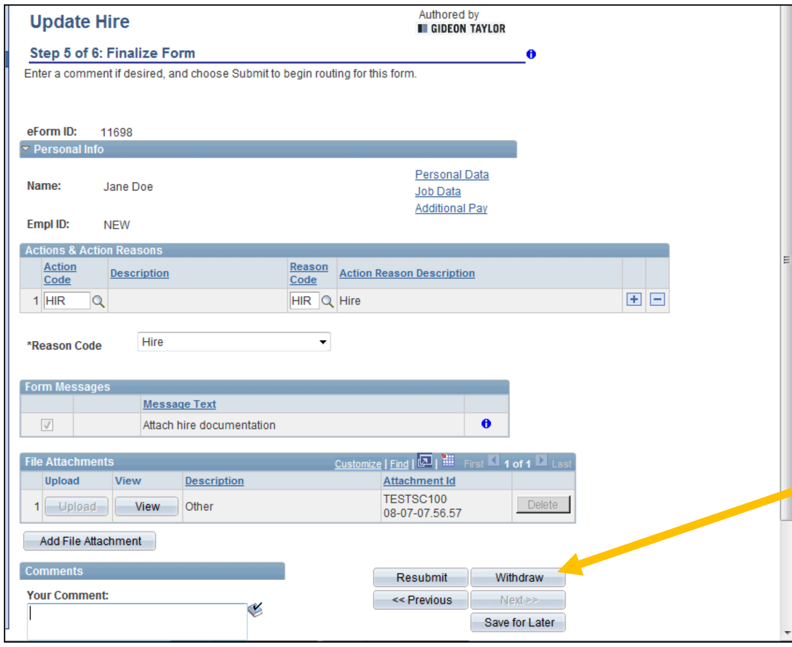


Step	Action
9.	Click the **Next** button. 

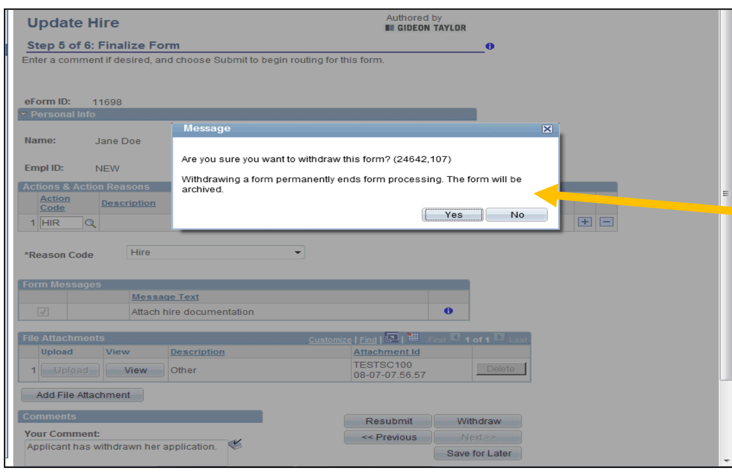


Step	Action
10.	Click the **Next** button. Next >>

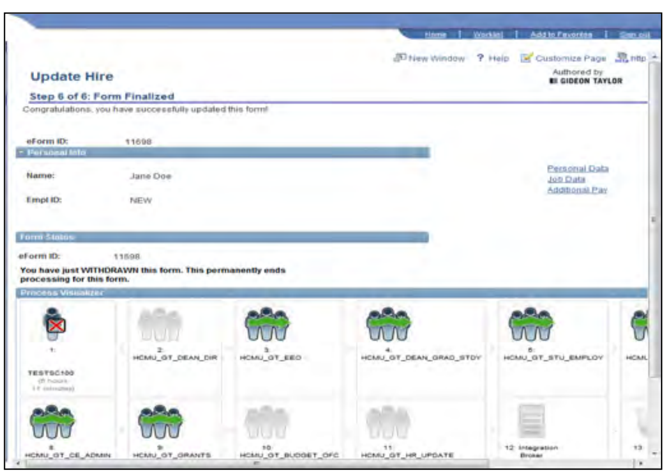
Step	Action
11.	Click the **Next** button. Next >>



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. Withdraw



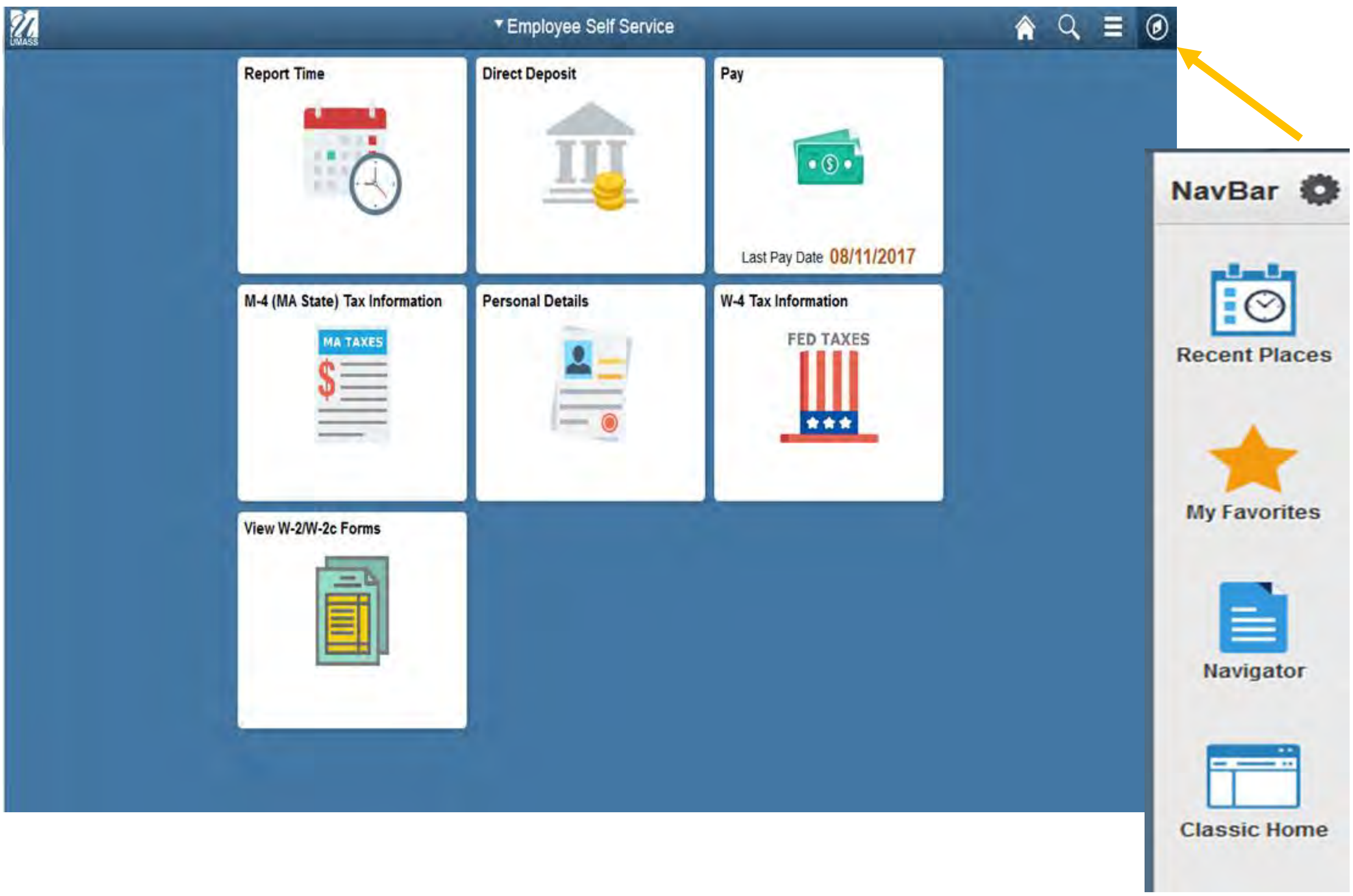
Step	Action
14.	If you are sure that you want to end processing and withdraw this form permanently, click the **Yes** button. Yes

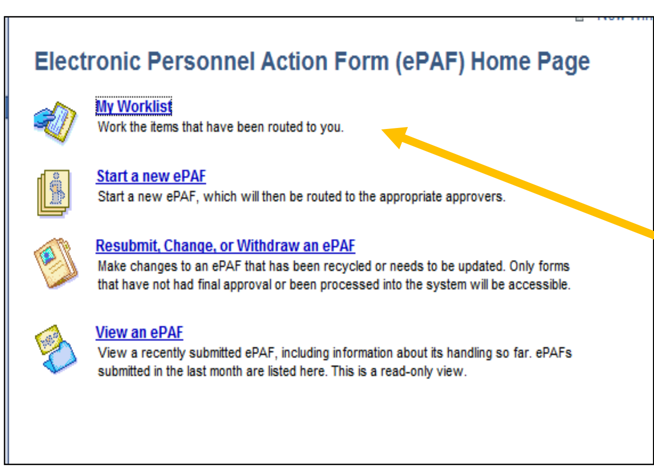


Step	Action
15.	The **Form Status** indicates that you have withdrawn this form.
16.	**Congratulations! You have closed an ePAF form.** **End of Procedure.**

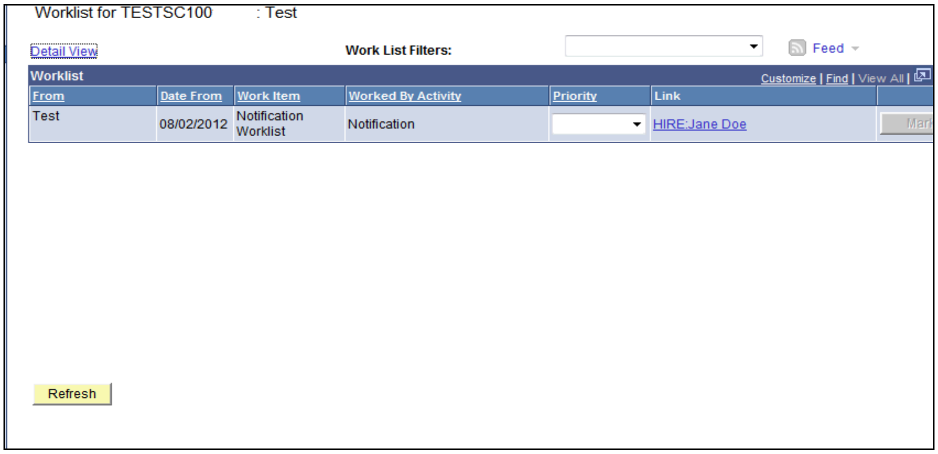
Adding Attachments to an ePAF Form

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

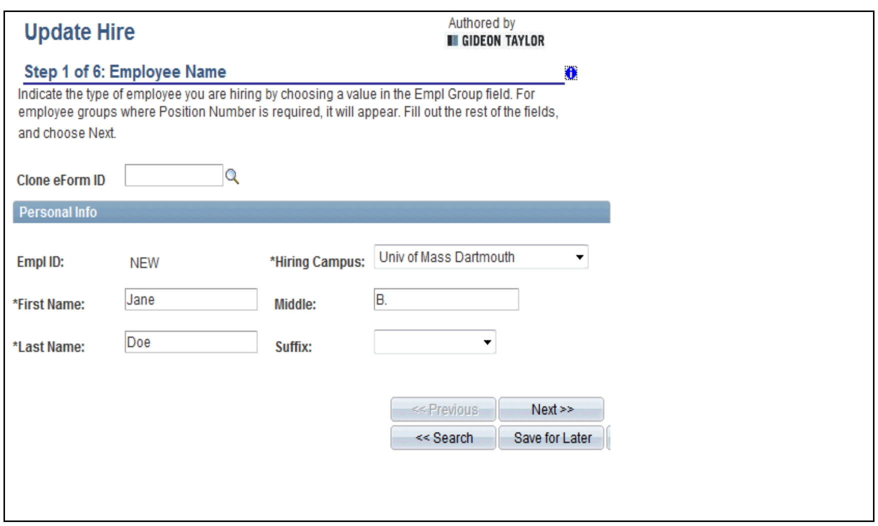




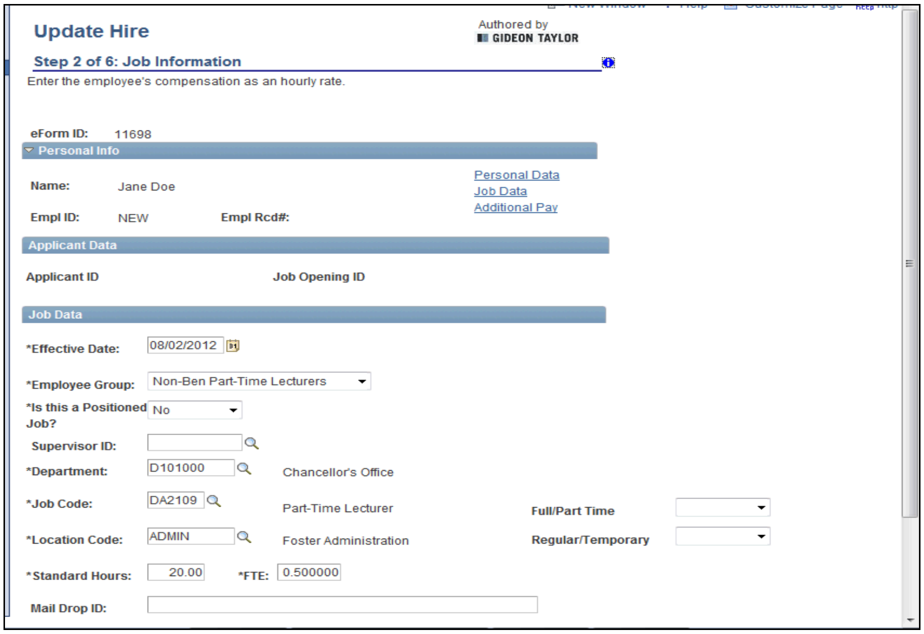
Step	Action
2.	Click the **My Worklist** link.



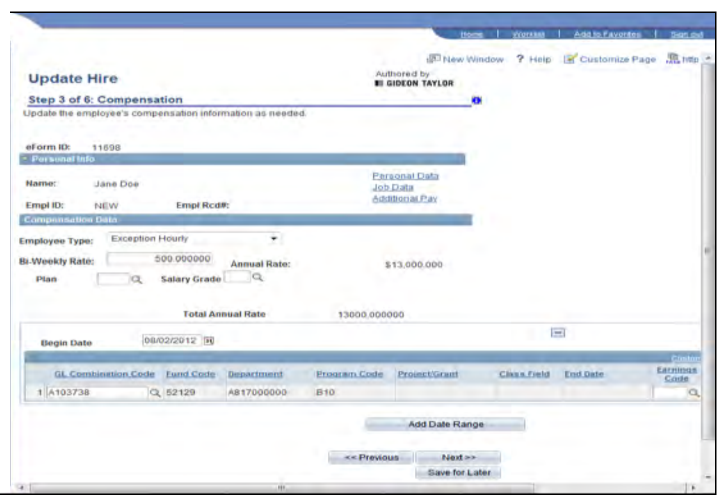
Step	Action
3.	You want to add an attachment to this eForm. Click the **HIRE:Jane Doe** link. HIRE:Jane Doe
4.	The **Update Hire** page will allow you to update the form and add an attachment. ***Note:* Only forms that have not had final approval or been processed into the system will be available for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



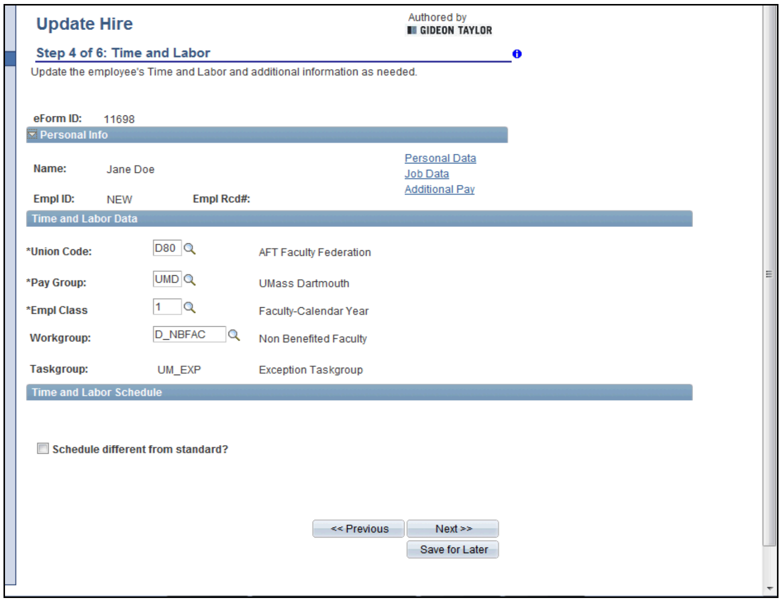
Step	Action
5.	Click the **Next** button. Next >>



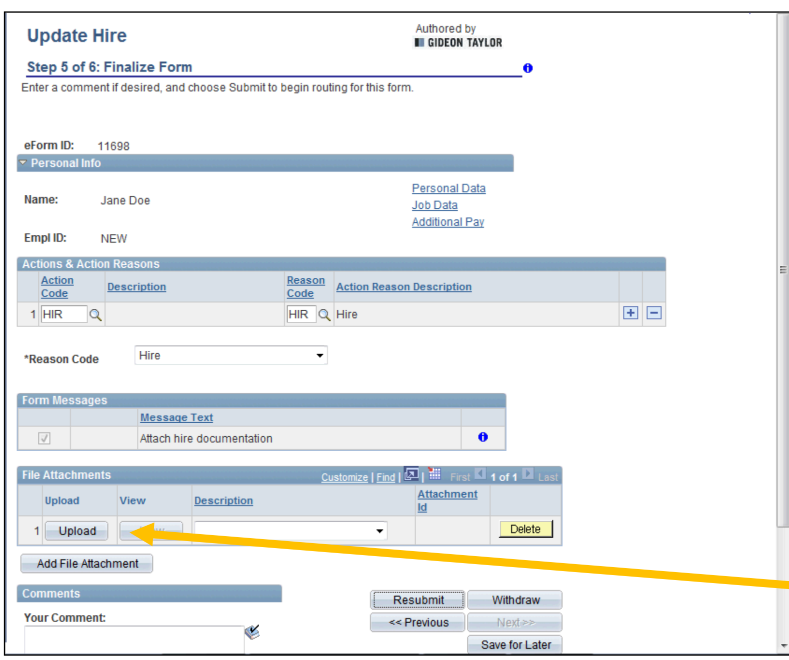
Step	Action
6.	Click the **Next** button. Next >>



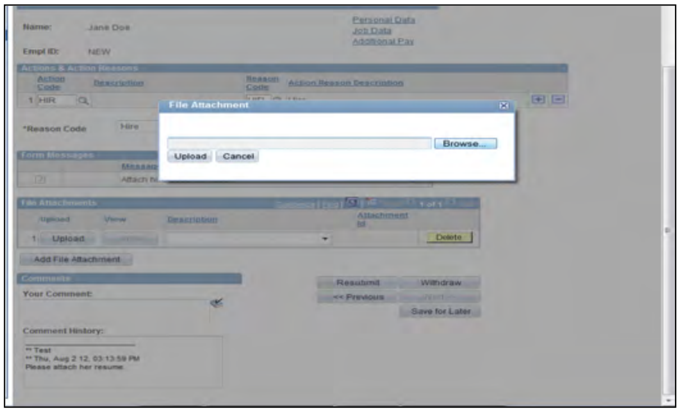
Step	Action
7.	Click the **Next** button. Next >>



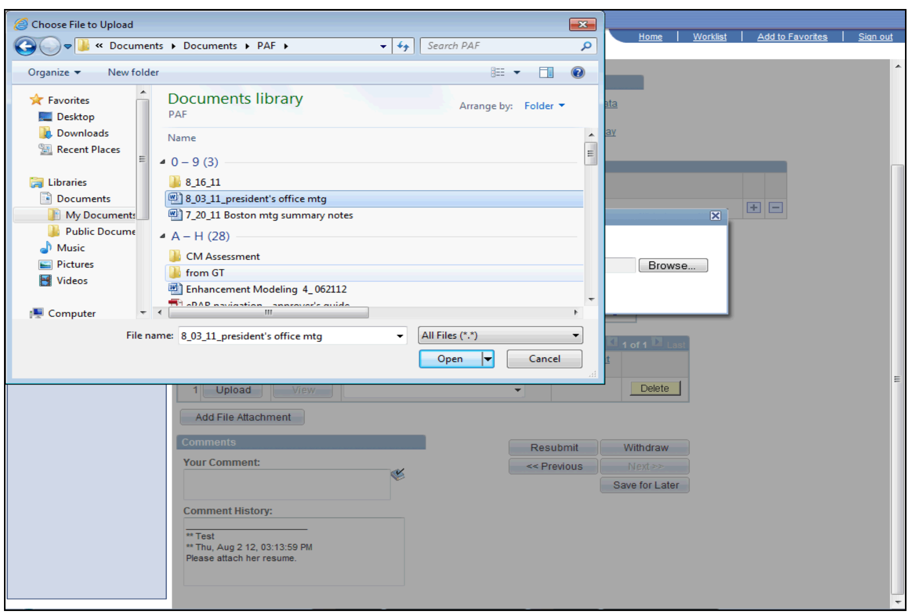
Step	Action
8.	Click the **Next** button. Next >>



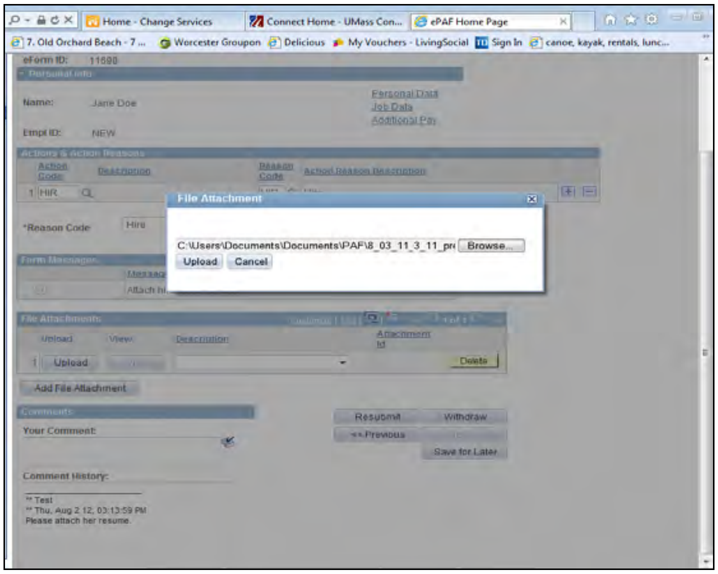
Step	Action
9.	This is the file attach section. Click the **Upload** button. Upload



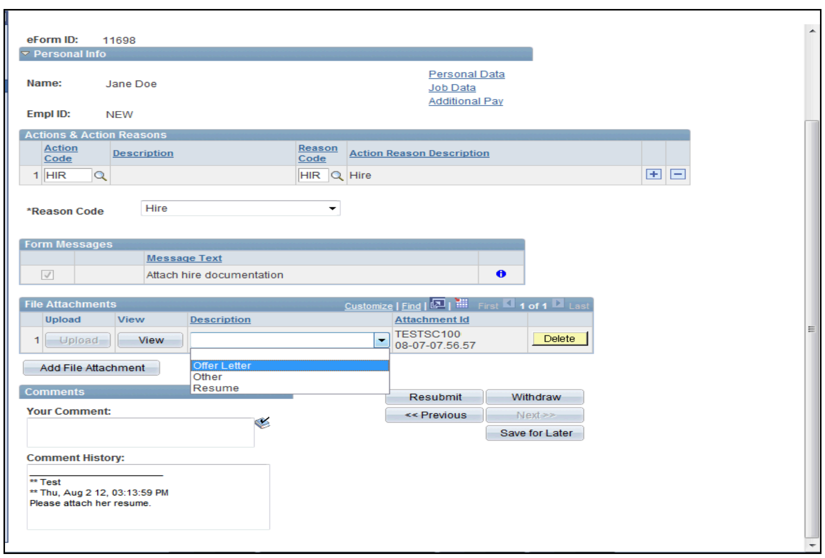
Step	Action
10.	To search for a desiresd file to upload. Click the **Browse** button.  **NOTE: This can only be 30 characters in length**



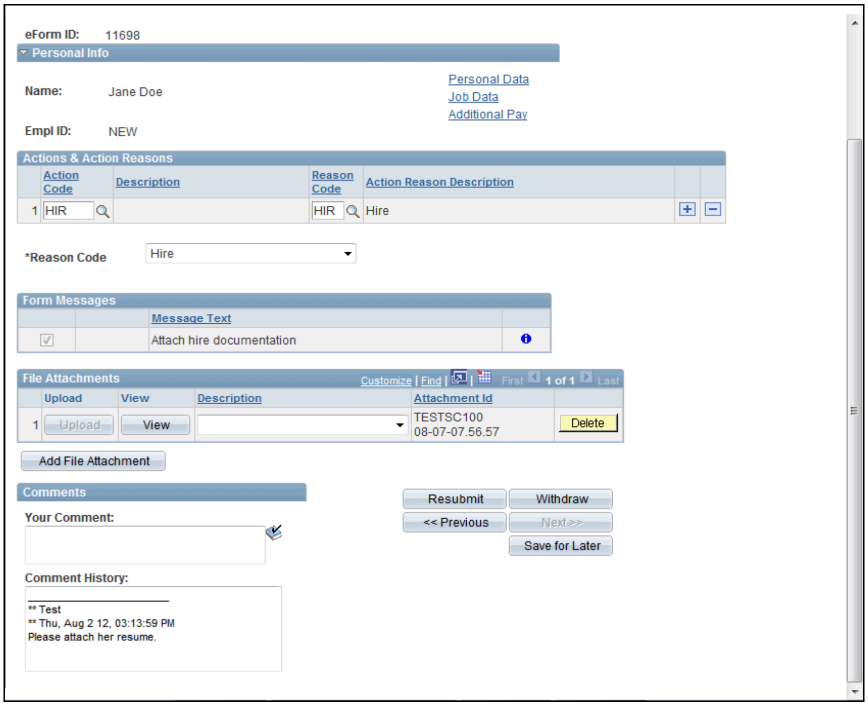
Step	Action
11.	Select the document you wish to attach and upload.



Step	Action
12.	Click the **Upload** button. Upload



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

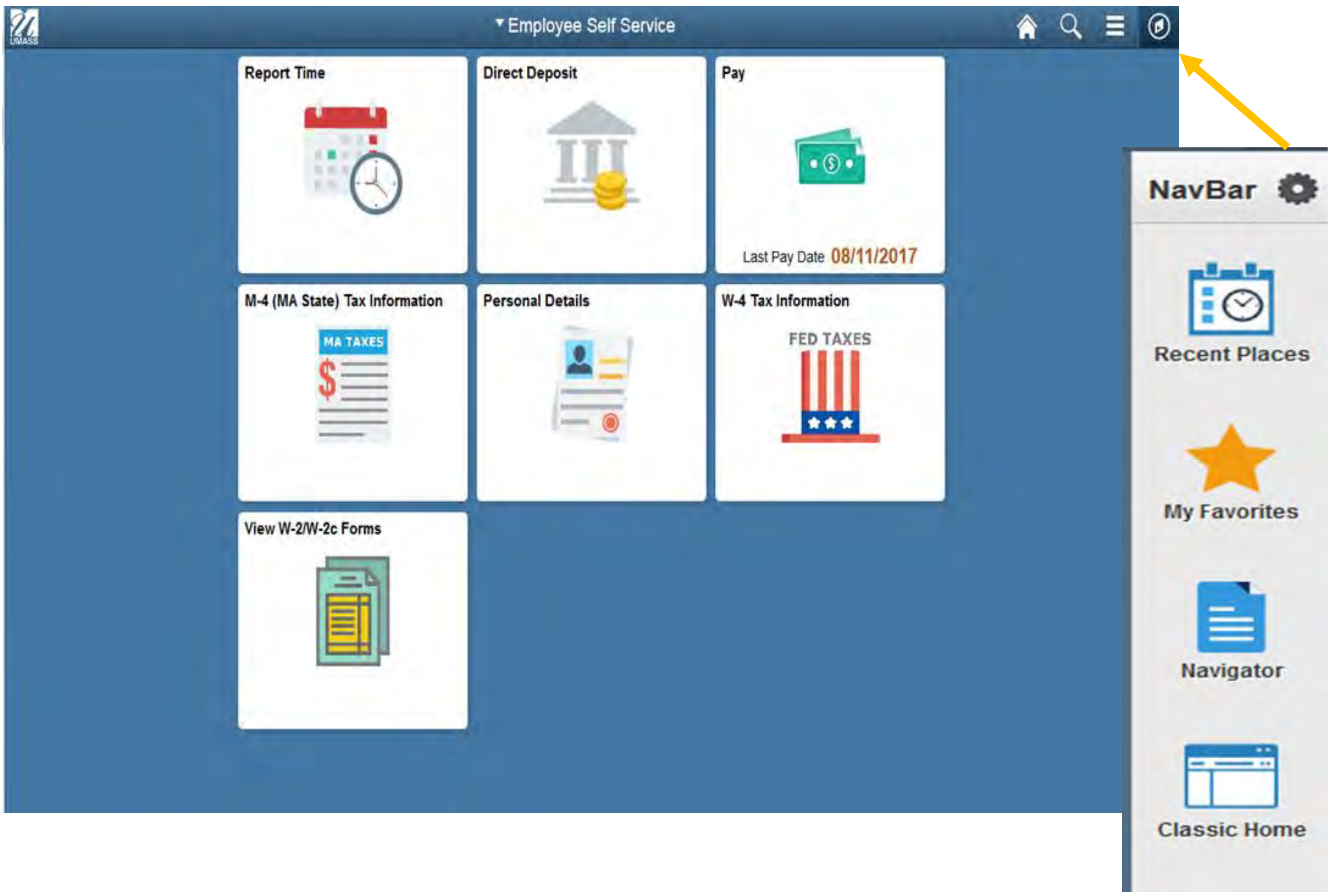


Step	Action
15.	To resubmit this eForm with the new attachment, click the **Resubmit** button. Resubmit
16.	If you are ready to resubmit this form with your changes, click the **Yes** button. Yes
17.	The **Form Status** indicates that you have resubmitted this form.
18.	**Congratulations! You have added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

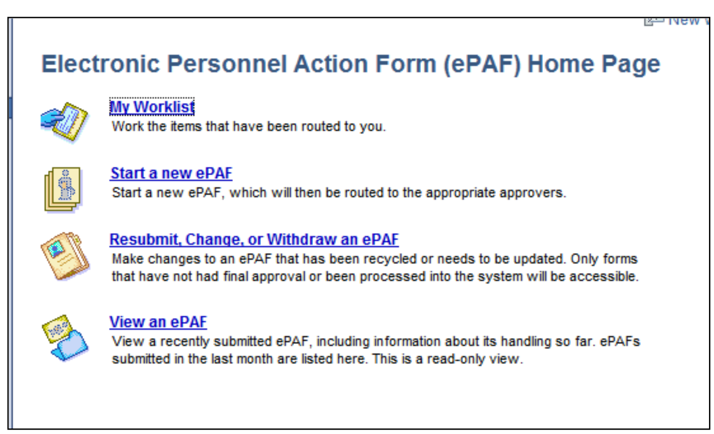
Creating and Cloning an ePAF
(Multiple employees the same position)

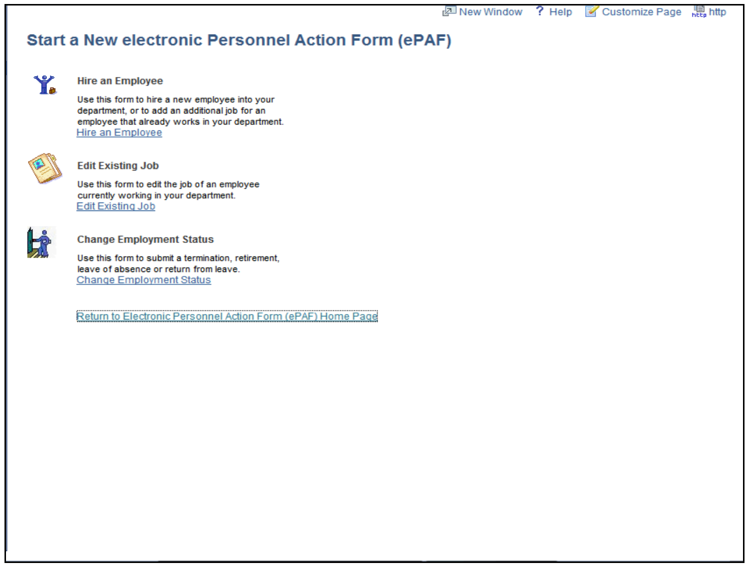
Upon completion of this topic, you will be able to create and clone an eForm.

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



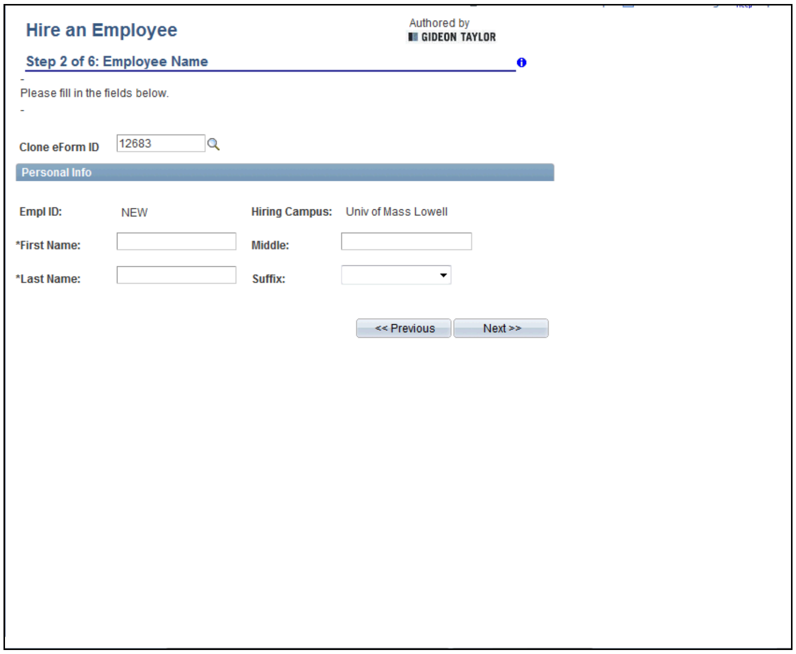
Step	Action
2.	Click the **Start a new ePAF** link. Start a new ePAF

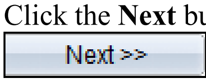


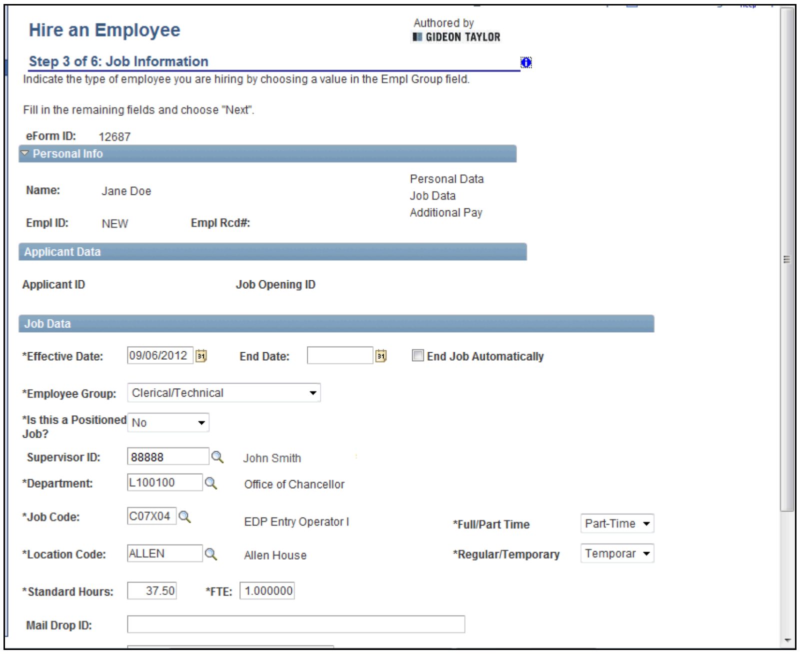


Step	Action
3.	Click the **Hire an Employee** link. Hire an Employee

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



Step	Action
6.	Enter the eForm ID Example: 12683
7.	Enter the desired information into the **First Name** field. For this example, enter "**Jane**". ***Note:*** 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. 



Step	Action
10.	Notice your **Job Data** is populated from your cloned **eform ID** that you previously selected. ***Note:*** You may continue to complete this **eForm** for Jane Doe.
11.	***Note:*** 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.**

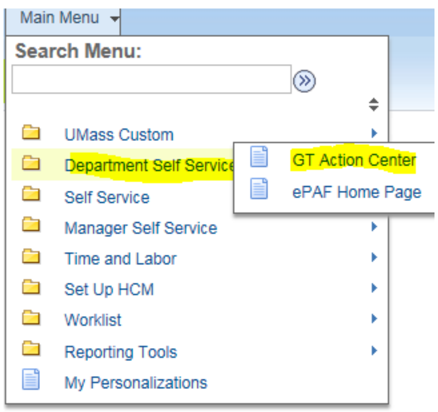
ePAF Enhancements

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.

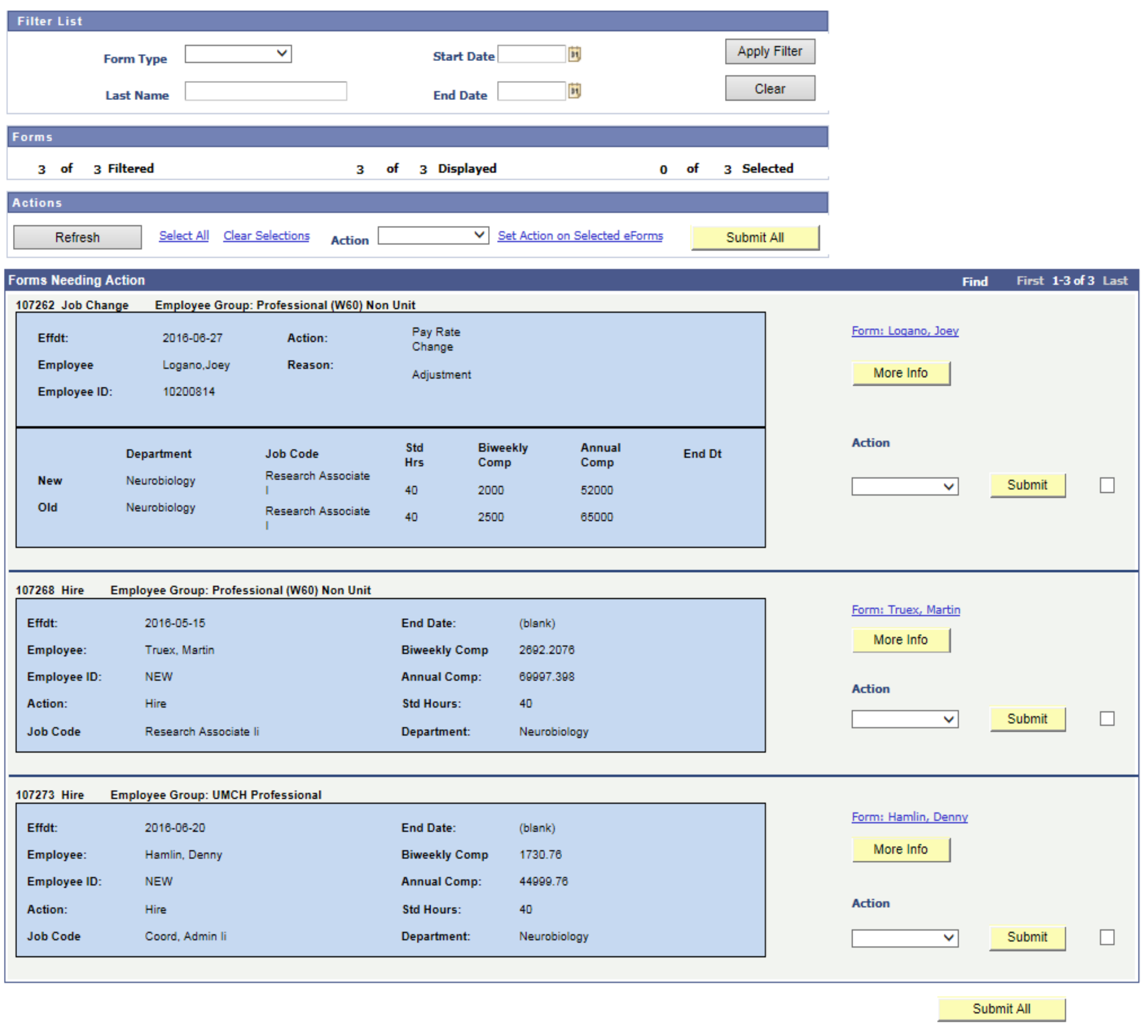
- **Proxy Capability** – Approvers who have the need to delegate their approval. In order to proxy to another user you will need to contact HR who will work with you on this access.

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:	2016-06-27	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:	2016-05-15	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

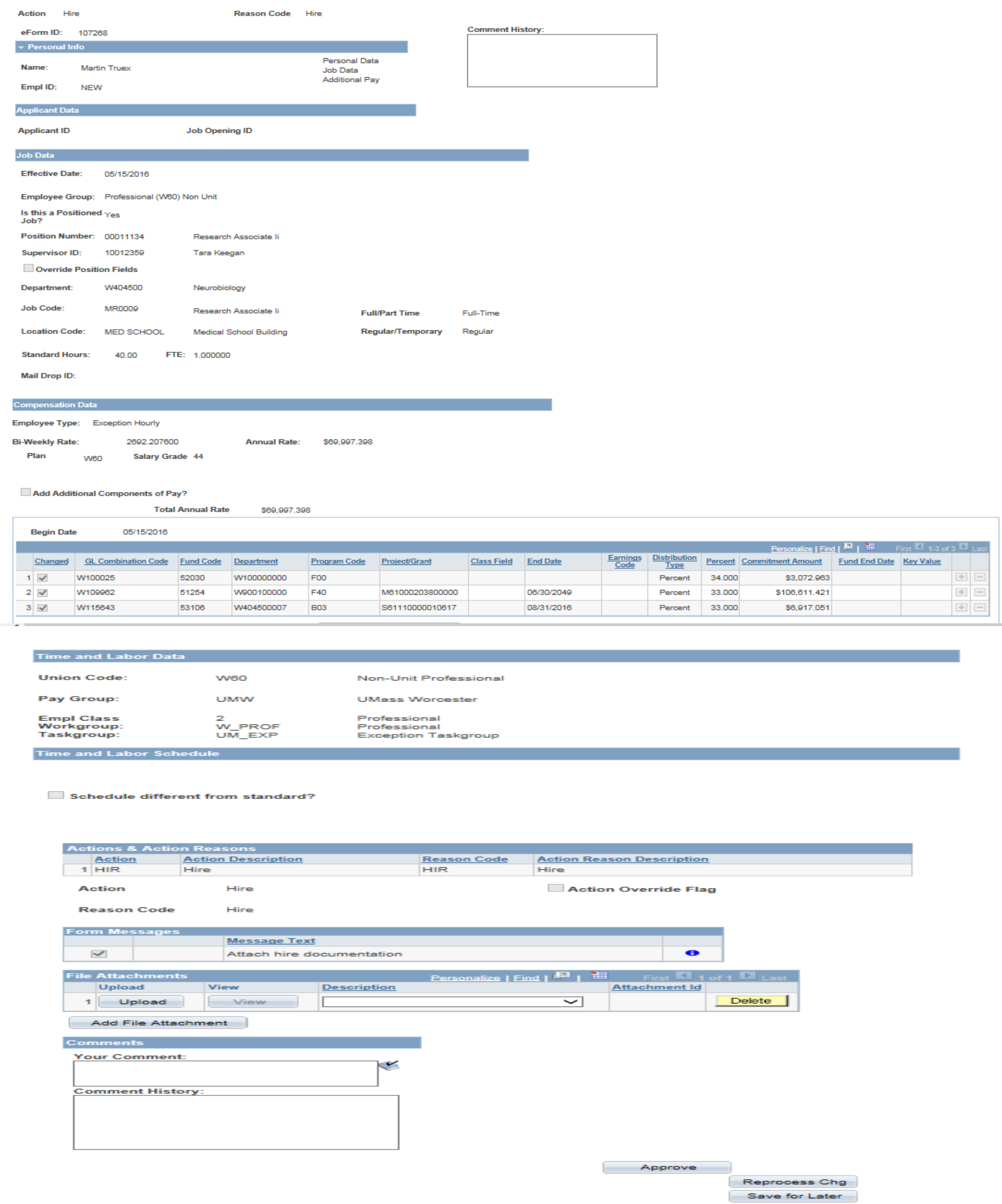
Effdt:	2016-06-20	End Date:	(blank)
Employee:	Hamlin, Denny	Biweekly Comp	1730.76
Employee ID:	NEW	Annual Comp:	44999.76
Action:	Hire	Std Hours:	40
Job Code	Coord, Admin Ii	Department:	Neurobiology

Form: Hamlin, Denny | More Info | Action | Submit

Submit All

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

Comment History:

Personal Info

Name: Martin Truex
Empl ID: NEW

Personal Data
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: MR0009 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: $69,997.398
Plan W60   Salary Grade 44

Add Additional Components of Pay?
Total Annual Rate $69,997.398

Begin Date 05/15/2016

Personalize | Find | First 1-3 of 3 Last

	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	W900100000	F40	M61000203800000		06/30/2049		Percent	33.000	$106,611.421		
3	✓	W115643	53106	W404500007	B03	S61110000010617		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	HIR	Hire	HIR	Hire

Action Hire   Action Override Flag
Reason Code Hire

Form Messages

		Message Text	
✓		Attach hire documentation	

File Attachments   Personalize | Find | First 1 of 1 Last

	Upload	View	Description	Attachment Id	
1	Upload	View			Delete

Add File Attachment

Comments

Your Comment:

Comment History:

Approve
Reprocess Chg
Save for Later