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

Go to www.umb.edu/hr

Click on the HR Direct Logo

Step II

3. Enter your username (first name.lastname)

4. Enter your password (password is your 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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>Navbar</strong>. Click on <strong>Navigator</strong>, Click on <strong>Department Self Service</strong>.</td>
</tr>
</tbody>
</table>
For this example, you are hiring a benefitted employee into position.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Start a new ePAF</strong> link.</td>
</tr>
<tr>
<td></td>
<td>[Start a new ePAF]</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Hire an Employee</strong> link.</td>
</tr>
<tr>
<td></td>
<td>[Hire an Employee]</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Add New Employee</strong> button.</td>
</tr>
</tbody>
</table>

**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:**

- [Load Employee/Applicant Data]
- [Add New Employee]

**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).

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 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 |
<p>| 8.   | Click the <strong>Next</strong> button. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>Click the <strong>Effective Date</strong> calendar button.</td>
</tr>
</tbody>
</table>
| 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 |
### ePAF (Electronic Personal Action Form) Training Guide

#### Step 13
Click the **Is this a Positioned Job?** Choose Yes or No
Example: Benefited position we will choose Yes

#### Step 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

#### Step 15
Click the **Academic or Calendar?** (we were asked to choose this based on the employee group chosen Faculty-Teaching)
Example: Academic

#### Step 16
Enter Mail Drop ID
Example: C30

#### Step 17
Click the **Next** button.

---

### Faculty Tenure Data

Note: Complete the **Faculty Tenure Data** section then click the **Next** button.
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.

This will take you to the Update Hire Time and Labor page.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note:</td>
<td>The <strong>Time and Labor Data</strong> page allows human resources to establish a person into the appropriate groups necessary for reporting time.</td>
</tr>
</tbody>
</table>
| 28. | Click the **Empl Class** look up button. ![Click on appropriate choice](image1.png)  
Example: Faculty-Academic Year |
| 29. | Click the **Workgroup** look up button. ![Click on appropriate choice](image2.png)  
Example: Academic Year Faculty |

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| Note: | **Schedule different from standard**  
Leave unchecked. If different, attach or send to Human Resources a “Schedule Form “. |
| 30. | Click the **Next** button. ![Next button](image3.png) |
### 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.
### ePAF (Electronic Personal Action Form) Training Guide

#### Step 34

**Action**

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

#### Step 35

**Action (Form Finalized)**

The **Form Status** indicates that you have submitted this form. The form is now routed to the next level approver.

#### Step 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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Begin by navigating to the <strong>NavBar</strong>. Click on <strong>Department Self Service</strong>.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>ePAF Home Page</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>This is the <strong>ePAF Home Page</strong>, 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.</td>
</tr>
</tbody>
</table>

[Diagram of ePAF Home Page]

4. Click the **Start a new ePAF** link.  
   [Start a new ePAF]

5. Click the **Hire an Employee** link.  
   [Hire an Employee]
Step 6: Click the Add New Employee button.

**Add New Employee**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Enter the desired information into the <strong>First Name</strong> field. Enter &quot;Joe&quot;.</td>
</tr>
<tr>
<td>8.</td>
<td>Enter the desired information into the <strong>Middle</strong> field. Enter &quot;Test&quot;.</td>
</tr>
<tr>
<td>9.</td>
<td>Enter the desired information into the <strong>Last Name</strong> field. Enter &quot;Smith&quot;.</td>
</tr>
<tr>
<td>10.</td>
<td>Click the <strong>Next</strong> button.</td>
</tr>
</tbody>
</table>

**Step 11**: Click the **Effective Date** calendar button.

**Step 12**: Choose the Effective Date. Example: 09/01/2012

**Step 13**: Click the **Employee Group** drop down list.

**Step 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
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.
### Step 25. Action

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.

### Step 26. Action

Enter the **GL Combination Code**. Do not search to 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).

### Step 27. Action

Leave the **Earnings Code** blank.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>28.</td>
<td>Click the <strong>Distribution Type</strong> list. If Hourly (add amount), If salaried (add percentage)</td>
</tr>
<tr>
<td>29.</td>
<td>Click the <strong>Percent or Amount</strong> list item. Example: Amount</td>
</tr>
<tr>
<td>30.</td>
<td>Please enter the commitment amount. For this example, enter &quot;$10,000&quot;. Click Tab Note: Multiple accounts must use percentage equal to 100%</td>
</tr>
<tr>
<td>31.</td>
<td>Click Allow Overspend (Amount only)</td>
</tr>
<tr>
<td>32.</td>
<td>Leave the <strong>Fund End Date</strong> blank Note: To add additional rows, use the plus sign. To delete rows, use the minus sign.</td>
</tr>
<tr>
<td>33.</td>
<td>Click the <strong>Next</strong> button.</td>
</tr>
</tbody>
</table>

---

Note: The screenshot shows the ePAF interface with a section on annual rate and a table with columns for Program Code, Project/Grant, Class Field, End Date, Earnings Code, Distribution Type, Dollar Amount, Allow Overspend, and Fund End Date. Users can add date ranges using the available options.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>34.</td>
<td>The <strong>Time and Labor Data</strong> page allows human resources to establish a person into the appropriate groups necessary for reporting time.</td>
</tr>
</tbody>
</table>
| 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. |
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.

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>NavBar</strong>. Click on <strong>Navigator</strong>, Click on <strong>Department Self Service</strong>.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>ePAF Home Page</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>This is the <strong>ePAF Home Page</strong>, 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.</td>
</tr>
</tbody>
</table>

---

**Step**

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.
### ePAF (Electronic Personal Action Form)
#### Training Guide

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Click the <strong>Hire an Employee</strong> link.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Hire an Employee" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Click the <strong>Add New Employee</strong> button.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Add New Employee" /></td>
</tr>
</tbody>
</table>
### Hire an Employee

**Step 2 of 6: Employee Name**
- Please fill in the fields below.

<table>
<thead>
<tr>
<th>Clone eForm ID</th>
<th></th>
</tr>
</thead>
</table>

**Personal Info**

<table>
<thead>
<tr>
<th>Empl ID</th>
<th>NEW</th>
</tr>
</thead>
<tbody>
<tr>
<td>*First Name:</td>
<td>Susan</td>
</tr>
<tr>
<td>*Last Name:</td>
<td>Smith</td>
</tr>
</tbody>
</table>

**Hiring Campus:**
- Univ of Mass Bos

---

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 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. |

---

### 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:** 16196

**Personal Info**
- Name: Susan Smith

**Empl ID:** NEW

**Emp Group:**
- Student

**Applicant Data**
- Applicant ID:  
- Job Opening ID:  

**Job Data**
- *Effective Date:* 09/02/2012

**Note:** For students the effective date must be a Sunday

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 9. | Click the **Effective Date** calendar look up button.  
Example: 09/02/2012 |
| 10. | Click the **Employee Group** list. Only choose Student |

---
17. For students the **Job Code** will always be **ST9999**.

18. Click the **Full/Part Time** list. **Part Time** For students always choose **Part Time**

19. Click the **Regular/Temporary** list. **Temporary** 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.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>23.</td>
<td>The <strong>Employee Type</strong> defaults to Hourly do not change</td>
</tr>
</tbody>
</table>
| 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.
    | ![Dropdown 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.
    | ![Next Button]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>32.</td>
<td>The <strong>Time and Labor Data</strong> page allows Human Resources to establish a person into the appropriate groups necessary for reporting time.</td>
</tr>
<tr>
<td>33.</td>
<td>Never choose <strong>Schedule different from standard</strong>.</td>
</tr>
<tr>
<td></td>
<td><img src="image1" alt="Schedule different from standard" /></td>
</tr>
<tr>
<td>Note:</td>
<td>Based on the employee group that you have chosen Union Code, Pay Group, Emp Class will auto populate</td>
</tr>
<tr>
<td>34.</td>
<td>Click the <strong>Workgroup</strong> look up button.</td>
</tr>
<tr>
<td>35.</td>
<td>Click the <strong>B_STUDWS</strong> link.</td>
</tr>
<tr>
<td></td>
<td><em>Note</em>: For Workstudy students always choose <strong>B_STUDWS</strong>. For non workstudy students choose <strong>B_STUDHRLY</strong>.</td>
</tr>
<tr>
<td>Note:</td>
<td>Based on the <strong>Workgroup</strong> chosen <strong>Taskgroup</strong> will auto populate</td>
</tr>
<tr>
<td>36.</td>
<td>Never choose <strong>Schedule different from standard</strong>.</td>
</tr>
<tr>
<td></td>
<td><img src="image2" alt="Schedule different from standard" /></td>
</tr>
<tr>
<td>37.</td>
<td>Click the <strong>Next</strong> button.</td>
</tr>
</tbody>
</table>
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.

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

<table>
<thead>
<tr>
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</tr>
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<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>NavBar</strong>. Click on <strong>Navigator</strong>, Click on <strong>Department Self Service</strong>.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>ePAF Home Page</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>This is the <strong>ePAF Home Page</strong>, 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.</td>
</tr>
</tbody>
</table>
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.

Electronic Personnel Action Form (ePAF) Home Page

- **My Worklist**
  - Work the items that have been routed to you.
- **Start a New Job**
  - 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.

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 a job for 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](#)

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

[Edit Existing Job](#)
### 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):** 300
- **Empl ID:**
  - **=**
  - 10152498
- **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]

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Enter the desired information into the <strong>Last Name OR Empl ID</strong> field. Example <strong>&quot;10152498&quot;</strong>.</td>
</tr>
<tr>
<td>8.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>Enter the Faculty Tenure Data</td>
</tr>
<tr>
<td>14.</td>
<td>Click Next</td>
</tr>
</tbody>
</table>
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.

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.
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)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>17.</td>
<td>Click the search button for the Reason Code</td>
</tr>
<tr>
<td>18.</td>
<td>Select appropriate Reason Code</td>
</tr>
</tbody>
</table>

Step | Action
---|---
19. | Click the Submit button.
20. Confirm that you are ready to submit this form and click the **Yes** button.

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)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>NavBar</strong>. Click <strong>Navigation</strong>, Click on <strong>Department Self Service</strong>.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>ePAF Home Page</strong> link.</td>
</tr>
</tbody>
</table>
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 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](#)

---

5. Click the **Edit Existing Job** link.
**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.
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 11
Example: remove a funding source and change percent. Click minus to remove row

**NOTE:** Only one retro funding per ePAF

### Step 12
Press ok to confirm that you would like to delete row
### Step 13
Change Percent row (must equal 100%)
Example: 60
Click Tab

### Step 14
Click the Next button.

### Step 15
If no changes needed Click the Next button.
16. Notice that the **Actions & Action Reason** section has been updated. Action code **Data Change** - Reason code **Funding Change**

17. Click the **Submit** button.

---

18. Confirm that you are ready to submit this form.

Click the **Yes** button.

---

19. The **Form Status** indicates that you have submitted this form.

20. Congratulations! You have entered a funding swap.

End of Procedure.
Enter a Re-appointment/Change in Time/Funding Change (multiple actions)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>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.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the Start a new ePAF link.</td>
</tr>
</tbody>
</table>

**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 resubmitted 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.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Click the Edit Existing Job link.</td>
</tr>
<tr>
<td>4.</td>
<td>Enter the desired information into the <strong>Last Name OR Empl ID</strong> field. Example &quot;<strong>Smith</strong>&quot;.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
</tbody>
</table>
### ePAF (Electronic Personal Action Form)
#### Training Guide

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| **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**. |

#### Job Data

| **Effective Date:** | 09/01/2012 |
| **End Date:** | 08/31/2013 |
| **Standard Hours:** | 30.00 |

#### Faculty Tenure Data

| **Tenure Status:** | Not on Title |
| **Tenure Track Start Date:** | 09/03/2012 |
| **Mandatory Review Date:** | |
| **FTE:** | 0.76 |

#### Compensation Data

| **Bi-Weekly Rate:** | 1240.00 |
| **Annual Rate:** | 63,440.00 |

---

**Step**

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.  

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the NavBar, Click on Navigator, then ePAF Home Page. Click the Department Self Service link. Click ePAF Home Page.</td>
</tr>
</tbody>
</table>

[Image of the ePAF Home Page]

**Electronic Personnel Action Form (ePAF) Home Page**

- **Start a new ePAF**: Start a new ePAF, which will then be routed to the appropriate managers.
- **Resubmit, Change, or Withdraw an ePAF**: Make changes to an ePAF that has been submitted 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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click on <strong>Start a new ePAF</strong>.</td>
</tr>
</tbody>
</table>
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.
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.
### ePAF (Electronic Personal Action Form) Training Guide

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

![Image of ePAF form with Yes button highlighted](image1)

**Step 13.** The **Form Status** indicates that you have submitted this form.

![Image of ePAF form with Form Status highlighted](image2)

**Step 14.** Congratulations! You have successfully submitted a termination.

*End of Procedure.*

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>Confirm that you are ready to submit this form and click the <strong>Yes</strong> button.</td>
</tr>
<tr>
<td>13.</td>
<td>The <strong>Form Status</strong> indicates that you have submitted this form.</td>
</tr>
</tbody>
</table>
Managing ePAF Workflow (Initiators, Approvers, & HR Department)

Opening your Worklist

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>NavBar</strong>. Click on <strong>Navigator</strong>, Click on <strong>Department Self Service</strong>.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>ePAF Home Page</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>Click on <strong>My Worklist</strong></td>
</tr>
</tbody>
</table>
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.

**Note:** Use the side bar menu to navigate back to your Worklist.

**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.
### Approving an ePAF (Department level)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>NavBar</strong>, click on <strong>Navigator</strong>. Click the <strong>Department Self Service</strong> link. Click the <strong>ePAF Home Page</strong> link.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>My Worklist</strong> link.</td>
</tr>
</tbody>
</table>

![Image of NavBar and My Worklist](image_url)

**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 approver.
- **View an ePAF**
- View a recently submitted ePAF, including information about its handling as far as ePAFs submitted in the last month are listed here. This is a read-only view.
### ePAF (Electronic Personal Action Form)
#### Training Guide

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 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. |

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 5.   | **Click the Next** button.  

[Next >>](#) |
6. Click the **Next** button.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Review the <strong>Evaluate Hire</strong> 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 <strong>Approve</strong> button. <strong>Note</strong>: To send the form back to the originator for correction or clarification, enter a <strong>Comment</strong> and choose <strong>Reprocess Change</strong>.</td>
</tr>
<tr>
<td>8.</td>
<td>Confirm that you want to approve this form. Click the <strong>Yes</strong> button.</td>
</tr>
<tr>
<td>9.</td>
<td>Your <strong>Form Status</strong> indicates that you have approved this form.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 10.  | You want to return to your **Worklist** page.  
     | Click the **Go To Worklist** link.  
     | ![Go To Worklist](image) |
| 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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>NavBar</strong>, then <strong>Navigator</strong>. Click the <strong>Department Self Service</strong> link.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>ePAF Home Page</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>My Worklist</strong> link.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>You have one item in your worklist. You want to review and reprocess Jane Doe's hire form. Click the <strong>HIRE: Jane Doe</strong> link.</td>
</tr>
<tr>
<td>5.</td>
<td>The <strong>Evaluate Hire</strong> pages contain personal, job data, and compensation data.</td>
</tr>
</tbody>
</table>
Step | Action
---|---
6. | Click the **Next** button.

7. | Click the **Next** button.

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.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Confirm that you have given acceptable directions for the changes you desire, then click the <strong>Yes</strong> button.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td>The <strong>Form Status</strong> indicates that you have recycled/reprocessed this form and sent it back to the initiator for changes.</td>
</tr>
</tbody>
</table>
| 12.  | **Congratulations! You have reprocessed an ePAF Form.**  
**End of Procedure.** |
Withdrawing an ePAF

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>NavBar</strong>, then <strong>Navigator</strong>. Click the <strong>Department Self Service</strong> link.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>ePAF Home Page</strong> link.</td>
</tr>
</tbody>
</table>

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

**Electronic Personnel Action Form (ePAF) Home Page**

- **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. 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.

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

### Step 9
Click the **Next** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Click the <strong>Next</strong> button.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td>Click the <strong>Next</strong> button.</td>
</tr>
</tbody>
</table>
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.
14. | If you are sure that you want to end processing and withdraw this form permanently, click the **Yes** button.
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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>NavBar.</strong> Click on <strong>Navigation</strong>, Click on <strong>Department Self Service.</strong> Click on <strong>ePAF Home Page.</strong></td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>My Worklist</strong> link.</td>
</tr>
</tbody>
</table>
3. You want to add an attachment to this eForm. Click the HIRE: Jane Doe link.

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.

5. Click the Next button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>Click the <strong>Next</strong> button.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Click the <strong>Next</strong> button.</td>
</tr>
</tbody>
</table>
Step 8. Click the Next button.

Step 9. This is the file attach section. Click the Upload button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>To search for a desired file to upload. Click the <strong>Browse</strong> button.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE:</strong> This can only be 30 characters in length</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td>Select the document you wish to attach and upload.</td>
</tr>
</tbody>
</table>
### ePAF (Electronic Personal Action Form)
#### Training Guide

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

---

#### Step 13
**Action**: Click the **Description** list box.

---

#### Step 14
**Action**: For this example, click the **Other** list item.
To resubmit this eForm with the new attachment, click the **Resubmit** button.

If you are ready to resubmit this form with your changes, click the **Yes** button.

The **Form Status** indicates that you have resubmitted this form.

**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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>NavBar</strong>. Click on <strong>Navigation</strong>, Click on <strong>Department Self Service</strong>. Click on <strong>ePAF Home Page</strong>.</td>
</tr>
</tbody>
</table>

2. Click the **Start a new ePAF** link.  
   ![Employee Self Service](image)

   **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.
   - **Read, Fill, Change, or Withdraw an ePAF**: Make changes to an ePAF that has been received 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.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Click the <strong>Hire an Employee</strong> link.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Hire an Employee" /></td>
</tr>
<tr>
<td>4.</td>
<td>You will use the <strong>Hire an Employee</strong> form to create an eForm for cloning.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Add New Employee</strong> button.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Add New Employee" /></td>
</tr>
</tbody>
</table>
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.
   
   Next >>
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.**
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.
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):