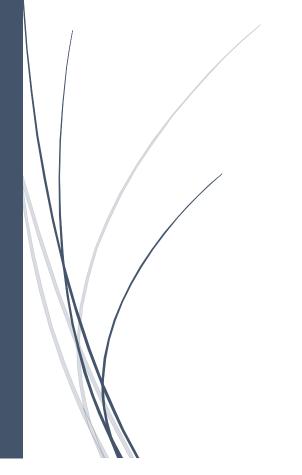
Electronic Personnel Action Form (ePAF) Training



University of Massachusetts Boston Human Resources Department

Table of Contents

ePAF Automated Forms

Hire an Employee Form	
Adding a benefited employee into a position	2
Adding a non-benefited employee into a job	15
Hiring student employees	
Edit Existing Job Form	
Entering a rehire	39
Entering a funding swap	49
Entering a re-appointment/change in time/funding change	58
Change Employment Status Form	
Entering a leave of absence	66
Managing ePAF	
Opening your worklist	71
Approving an ePAF form	77
Reprocessing an ePAF	83
Withdrawing an ePAF	
Adding attachments to an ePAF form	
Creating and cloning an eForm.	

ePAF Automated Forms

Automated Forms

ePAF (electronic personnel action forms) 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.

Adding a Person (Initiator)

Upon completion of this section, you will be able to:

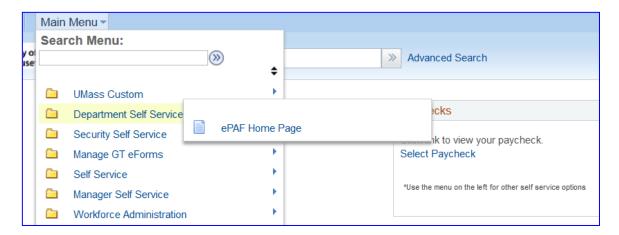
- Add an employee into a benefitted position
- Add an employee into a non-benefitted position
- Hire a student employee

Adding an Benefitted employee into a position

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

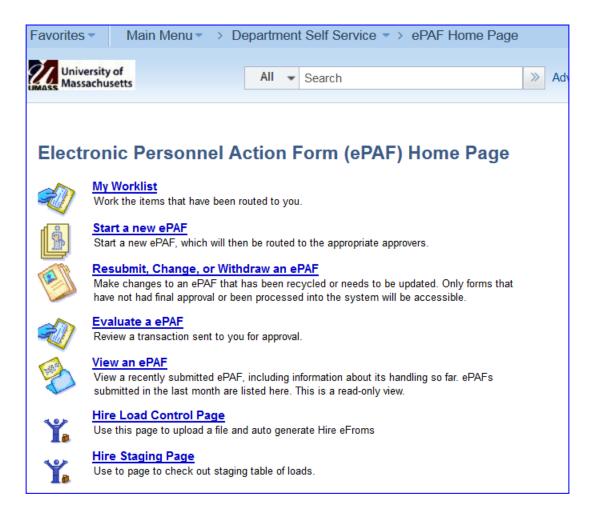
Key Information:

Employee Group: Faculty-Teaching

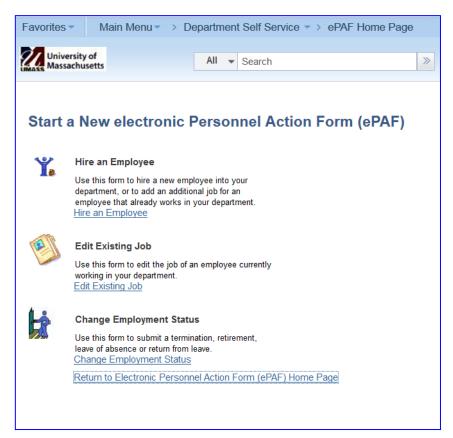


Is this a Positioned Job?: Yes

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

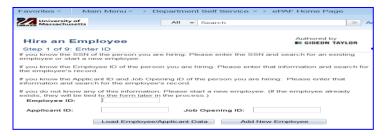


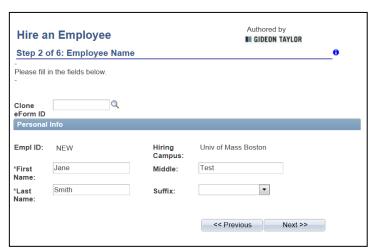
Step	Action
4.	Click the Start a new ePAF link. Start a new ePAF



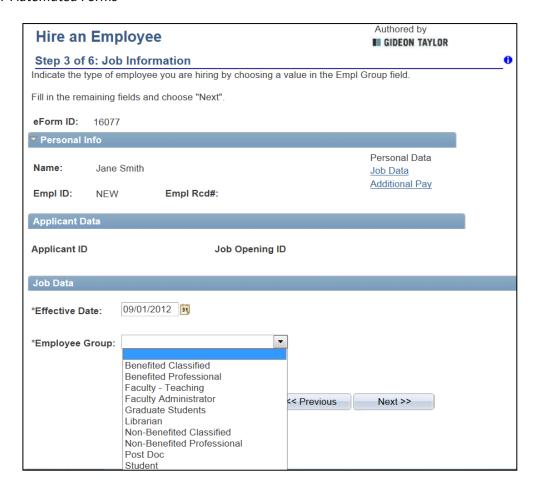
Step	Action
5.	For this example, you are hiring a benefitted employee into position.
	Click the Hire an Employee link. Hire an Employee

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

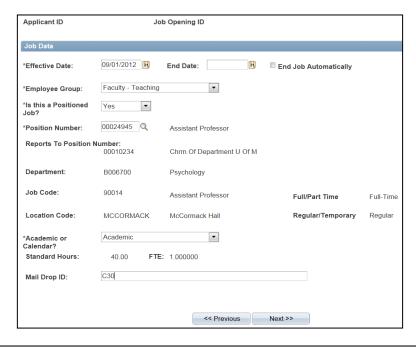




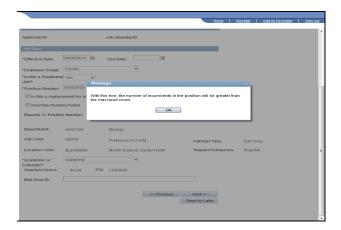
Step	Action
Note:	If you wanted to clone a previous eForm and use it as a template for multiple hires of the same type, you would enter the Clone eForm ID here (or you could search for the Clone eForm ID if you did not know it).
7.	Enter the desired information into the First Name field.
	Example: Jane
8.	Enter the desired information into the Middle field.
	Example: Test
9.	Enter the desired information into the Last Name field.
	Example: Smith
10.	Click the Next button. Next >>

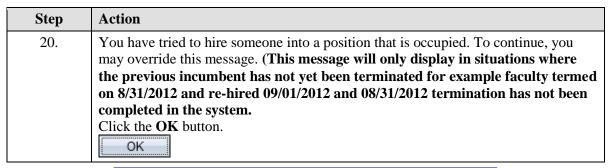


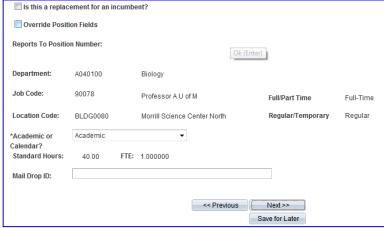
Step	Action
11.	Click the Effective Date calendar button.
12.	Choose the Effective Date . Example: 09/01/2012
13.	Click the Employee Group list.
14.	Choose the Employee Group Example: Faculty Teaching
Note:	The eForm ID has now been assigned to this form. Please take a moment and write this number down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



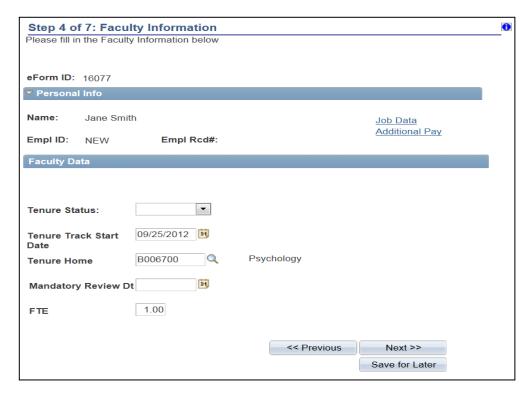
Step	Action
15.	Click the Is this a Positioned Job? Choose Yes or No Example: Benefited position we will choose Yes
16.	Enter Position Number. Do Not Search If you do not know the position number please contact Human Resources.
Note:	Once Position number is entered the following fields will Auto Populate: Reports to Department Job Code Location Code Full/Part Time Regular/Temporary Standard Hours FTE
17.	Click the Academic or Calendar? (we were asked to choose this based on the employee group chosen Faculty-Teaching) Example: Academic
18.	Enter Mail Drop ID Example: C30
19.	Click the Next button. Next >>



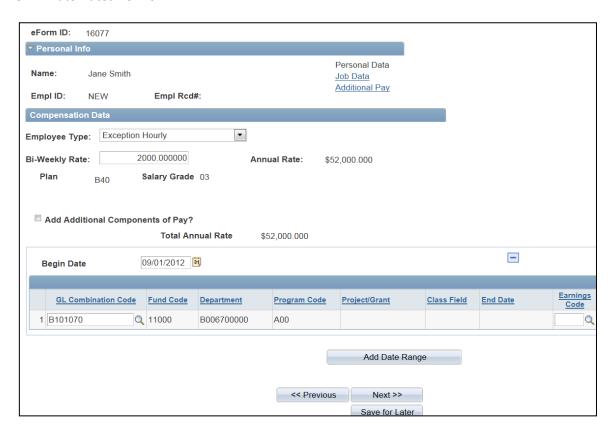




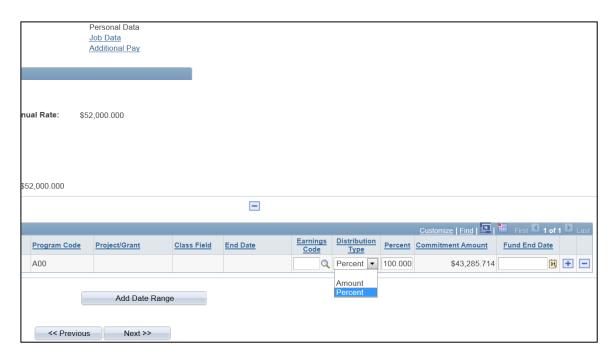
Step	Action
21.	Click the Is this a replacement for an incumbent?
	Is this a replacement for an incumbent?
22.	Click the Next button. Next >>



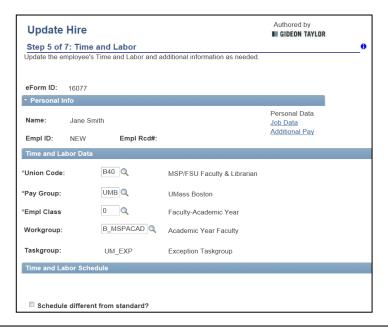
Step	Action
Note:	The Faculty Tenure Data section will be completed by the provost office. Please skip this section.
23.	Click the Next button. Next >>



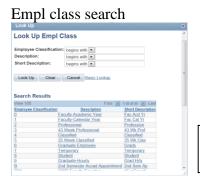
Step	Action
24.	Enter the desired information into the Bi-Weekly Rate field.
	Example: "2000".
Note:	Notice that the Begin Date defaults to the hire date. This date should not be changed.
	Once you have entered Bi-Weekly rate Annual Rate will auto populate.
25.	Enter the GL Combination Code. Do not search
	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)
26.	Leave the Earnings Code blank.

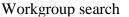


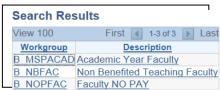
Step	Action
27.	Click the Distribution Type list.
28.	Click the Percent or Amount list item.
	Example: Percent
29.	The Percent field amount cannot exceed 100%, but you may have multiple rows
	that add up to 100%.
	For this example, enter "100".
	Click Tab
30.	The Commitment Amount will auto populate and is a calculated amount
31.	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
32.	Click the Next button.
	Next >>



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





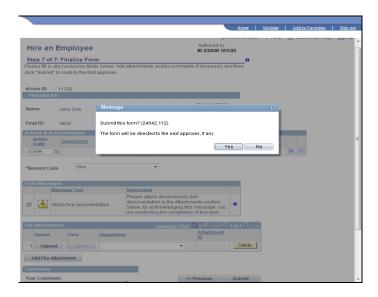


Note: Anytime you click on the look up Icon you will have to push the Look up button again in order for choices to appear.

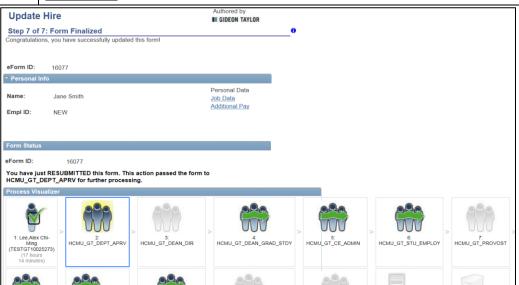
Step	Action
Note:	Schedule different from standard Schedule different from standard? Use this if you have an employee who has a schedule different than standard. A comment field will appear in which you can enter the different schedule.
35.	Click the Next button. Next >>



Step	Action
Note:	Action Hire – Reason Code Hire
36.	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
37.	Comments. Please refer to the new business process for adding comments.
38.	Click the Submit button. Submit



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



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

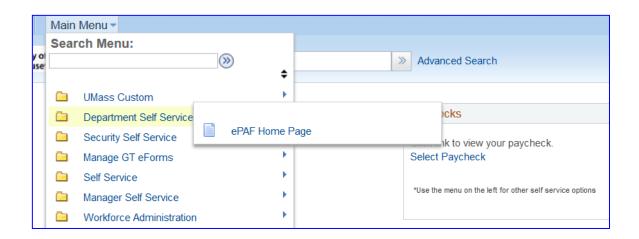
Adding an Non-Benefitted employee into a Job

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

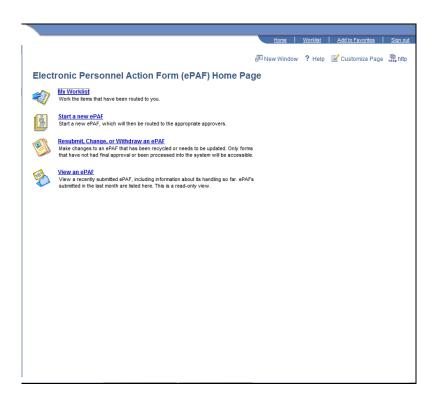
Key Information:

Employee Group: Classified

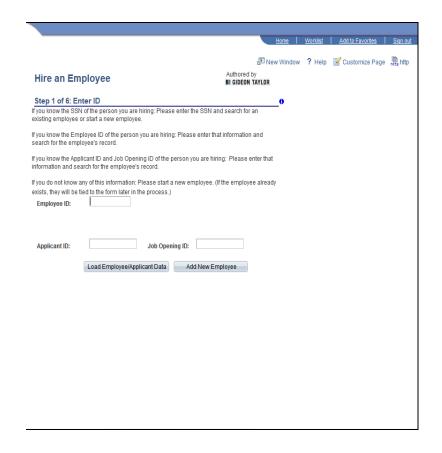
Is this a Positioned Job?: No



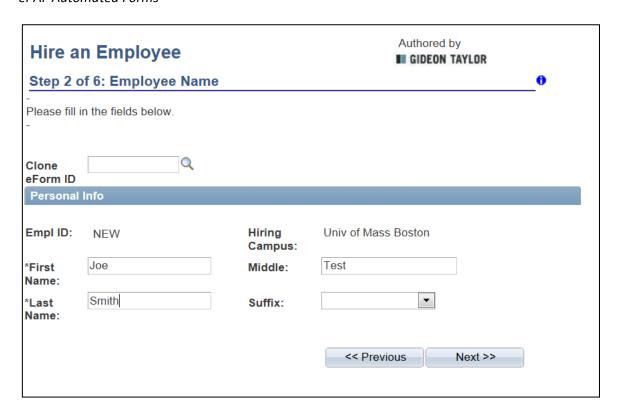
	Action
Step	
1.	Begin by navigating to the ePAF Home Page .
	Click the Department Self Service link. Department Self Service
2.	Click the ePAF Home Page link. ePAF Home Page



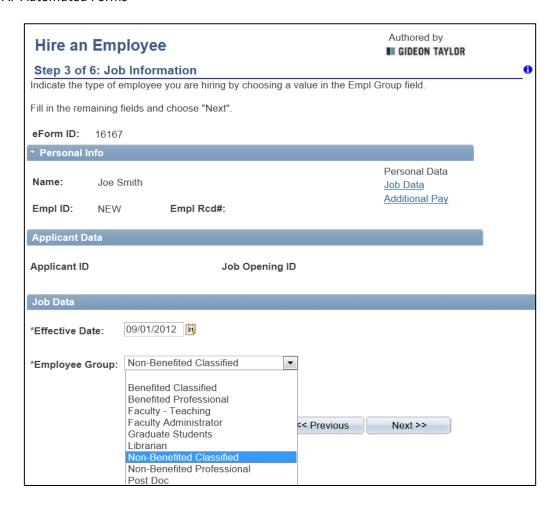
Step	Action
3.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the Start a new ePAF link. Start a new ePAF
5.	Click the Hire an Employee link. Hire an Employee



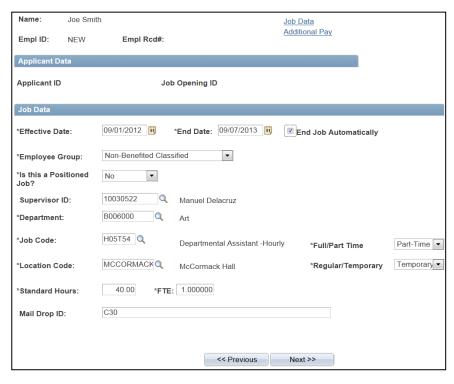
Step	Action
6.	Click the Add New Employee button.
	Add New Employee



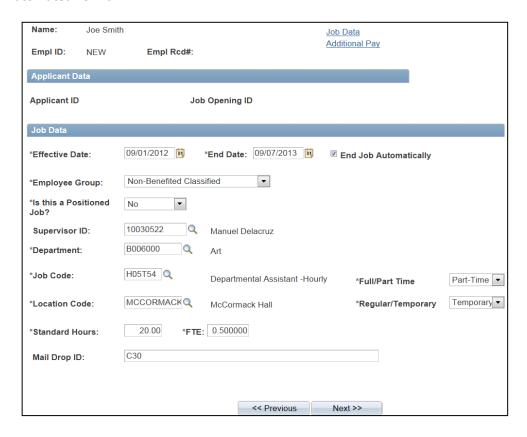
Step	Action
Note:	If you wanted to clone a previous eForm and use it as a template for multiple hires of the same type, you would enter the Clone eForm ID here (or you could search for the Clone eForm ID if you did not know it). Clone eForm ID will be explained later in the training guide.
7.	Enter the 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 >>



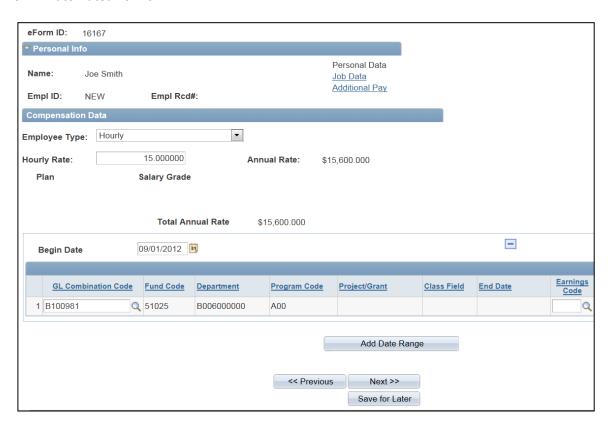
Step	Action
11.	Click the Effective Date calendar button.
12.	Choose the Effective Date. Example: 09/01/2012
13.	Click the Employee Group list.
14.	Choose the Employee Group Example: Non-Benefitted Classified
Note:	The eForm ID has now been assigned to this form. Please take a moment and write this number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



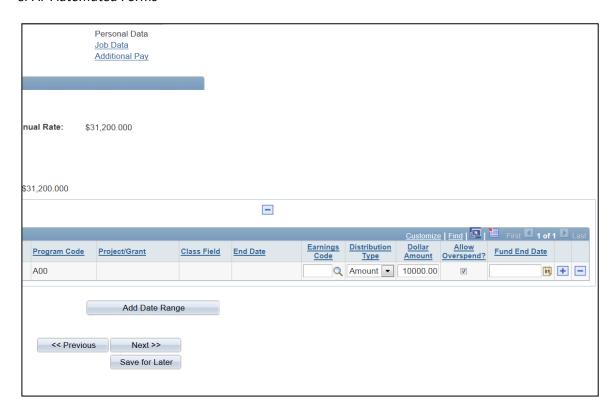
Step	Action
15.	Click the Is this a Positioned Job?
	Example: Since we chose non-benefitted employee we will select No
16.	Enter the desired information into the Supervisor ID field. Example: "10030522". Note: You can also use the Supervisor ID look up button to search for this value.
17.	Enter the desired 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



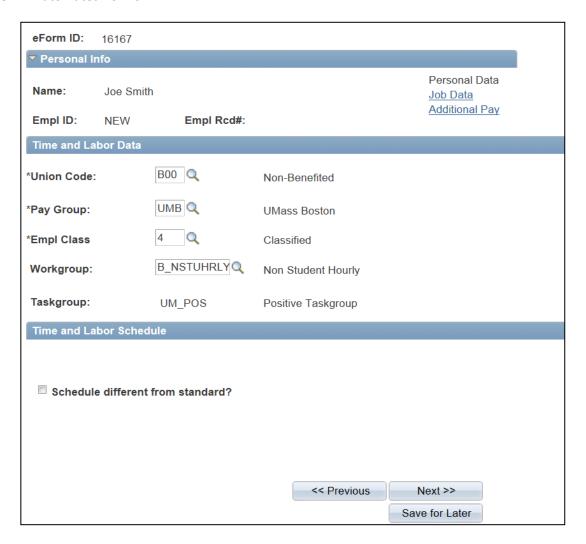
Step	Action
20.	Click the Full/Part Time list.
21.	Example: Part-Time Click the Regular/Temporary list. Example: Temporary
22.	Change Standard Hours if applicable. Once you tab FTE will auto populate. Example "20"
23.	Enter Mail Drop ID Example: C30
24.	Click the Next button. Next >>



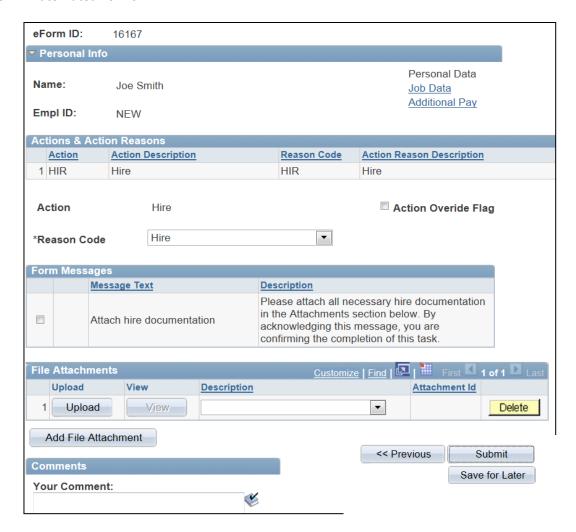
Step	Action
25.	Enter the desired information into the Hourly Rate field.
	Example: "15".
Note:	Notice that the Begin Date defaults to the hire date. This date should not be changed.
	Once you have entered hourly rate annual rate will auto populate.
26.	Enter the GL Combination Code. Do not search
	Click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



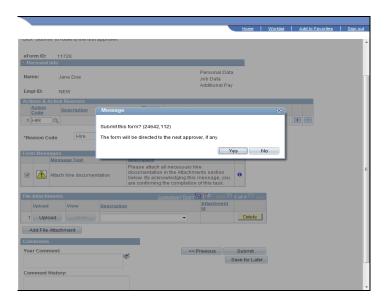
Step	Action
28.	Click the Distribution Type list.
29.	Click the Percent or Amount list item.
	Example: Amount
30.	Please enter the commitment amount.
	For this example, enter "10,000". Click Tab
31.	Click Allow Overspend
32.	Leave the Fund End Date blank
Note:	To add additional rows, use the plus sign. To delete rows, use the minus sign.
33.	Click the Next button. Next >>



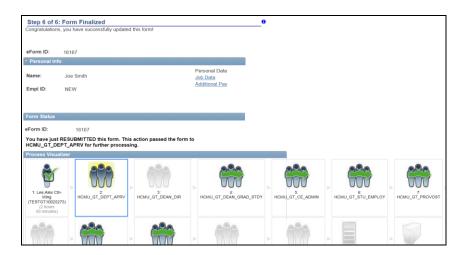
Step	Action
34.	The Time and Labor Data page allows human resources to establish a person into the appropriate groups necessary for reporting time.
35.	Click the Workgroup look up button. Click on appropriate choice Example: Non Student Hourly
Note:	Schedule different from standard. If schedule is different than standard please click. A comment box will appear and you can make note of the different schedule. 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 – for writing comments please reference new business process
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 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

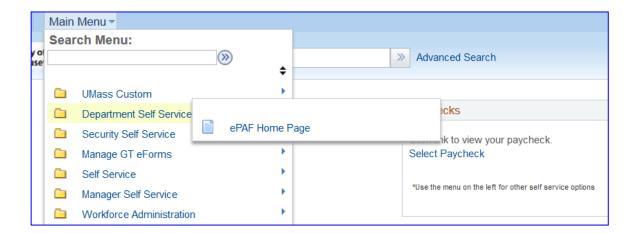
Key Information:

Employee Group: Student

Is this a Positioned Job?: No

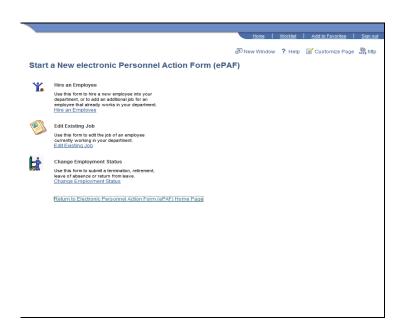
Step	Action
1.	Begin by navigating to the ePAF Home Page .
	Click the Department Self Service link. Department Self Service

Step	Action
2.	Click the ePAF Home Page link.
	ePAF Home Page

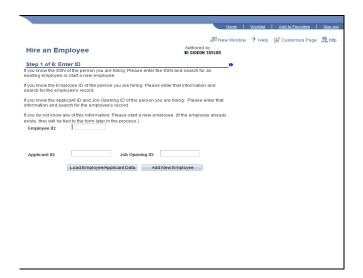




Step	Action
3.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the Start a new ePAF link. Start a new ePAF

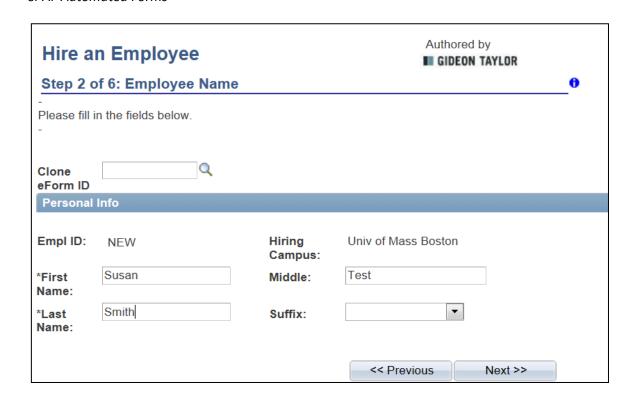


Step	Action
5.	Click the Hire an Employee link.
	Hire an Employee

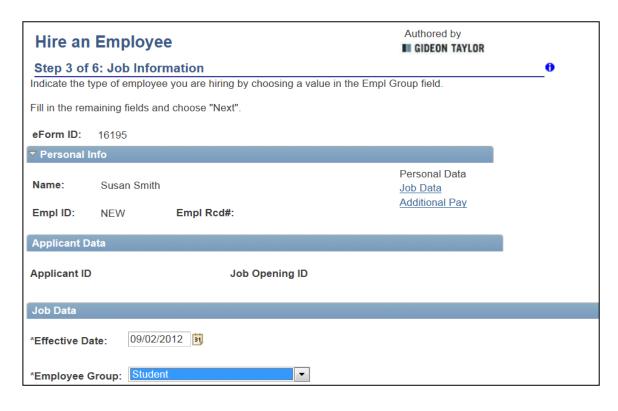


Step	Action
6.	Click the Add New Employee button.
	Add New Employee

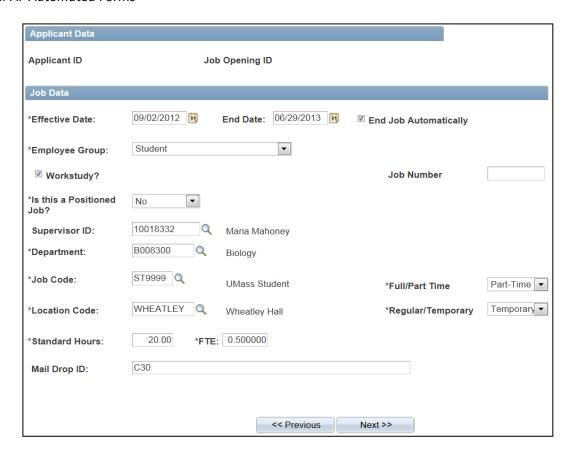
Training Guide



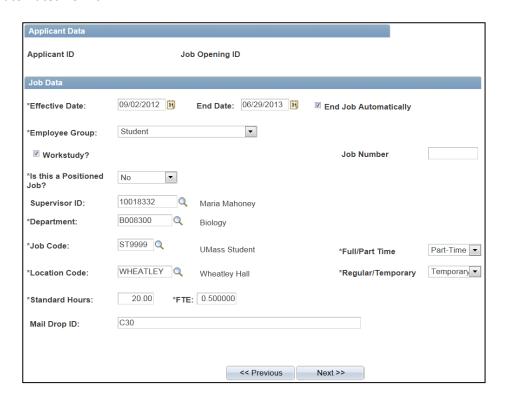
Step	Action
7.	Enter the desired information into the First Name field.
	Example: "Susan".
8.	Enter the desired information into the Middle field.
	Example: "Test".
9.	Enter the desired information into the Last Name field.
	Example: "Smith".
10.	Click the Next button. Next >>



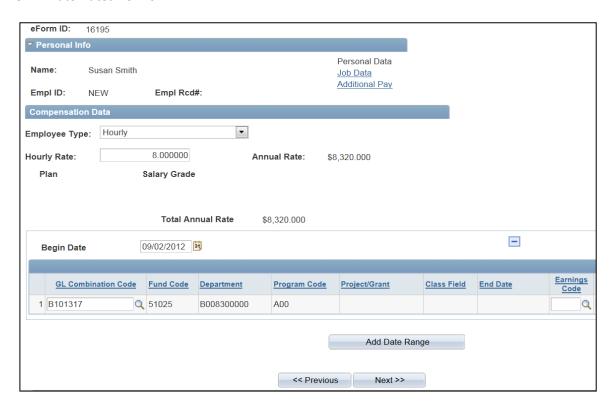
Step	Action
11.	Click the Effective Date calendar look up button. Example: 09/02/2012
Note:	For students the effective date must be a Sunday
12.	Click the Employee Group list. Only choose Student



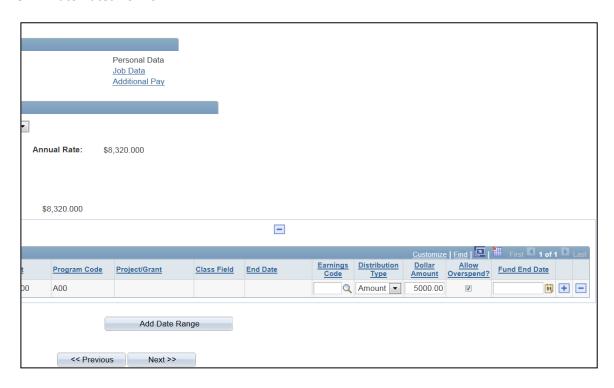
Step	Action
13.	For Workstudy students always choose an End Date . Click End Job Automatically
	For Non Workstudy students no End Date is required
14.	Only click Workstudy box if it is a workstudy student
15.	Always leave Job Number blank
16.	Click the Is this a Positioned Job? Always choose No
17.	Enter the desired information into the Supervisor ID field. Example: "10018332". Note: You may also use the Supervisor ID look up button.
	Note: You may also use the Supervisor ID look up button.
18.	Click the Department look up button. Choose the appropriate Department
	Location Code will auto populate



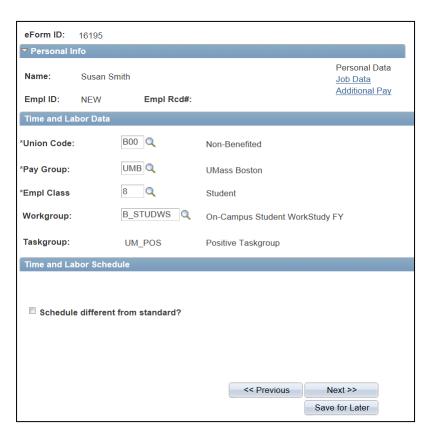
Step	Action
19.	For students the Job Code will always be ST9999 .
20.	Click the Full/Part Time list. For students always choose Part Time
21.	Click the Regular/Temporary list. For students always choose Temporary
22.	Standard Hours Please note that the system will auto populate to 40 Standards Hours and 1.0 FTE This must be changed. For Students enter 20 Standards Hours and it will auto populate to .5 FTE
23.	Enter Mail Drop ID
	Example: C30
24.	Click the Next button. Next >>



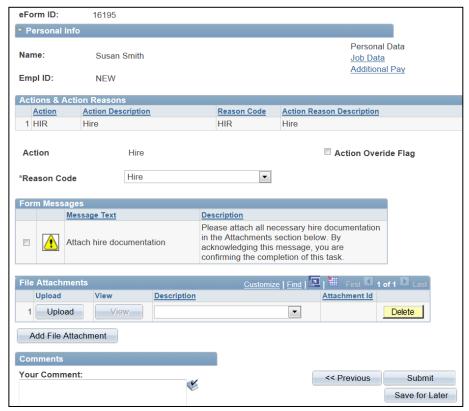
Step	Action
25.	The Employee Type defaults to Hourly do not change
26.	Enter the desired information into the Hourly Rate field. Example: "8". Annual Rate will auto populate
Note:	Notice that the Begin Date defaults to the hire date. Please do not change this date.
27.	Enter the GL Combination Code Example: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



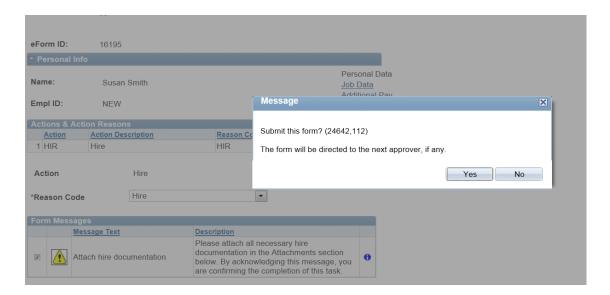
Step	Action
29.	Click the Distribution Type list.
	Note: For students always choose Amount
30.	Enter the desired information into the Dollar Amount field. Example:"5000" For Workstudy students Dollar Amount should always be the amount the student was awarded by financial aid
31.	Always click the Allow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



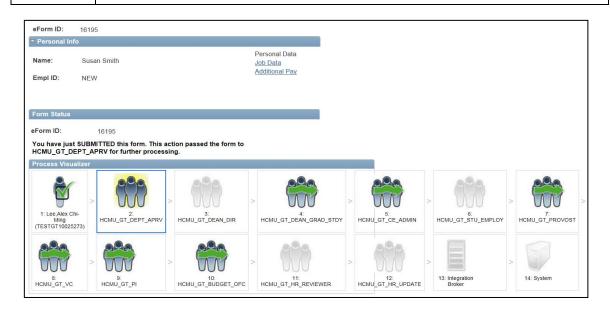
Step	Action
34.	The Time and Labor Data page allows Human Resources to establish a person into the appropriate groups necessary for reporting time.
35.	Never choose Schedule different from standard. Schedule different from standard?
Note:	Based on the employee group that you have chosen Union Code, Pay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



Step	Action
40.	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
41.	Click the Submit button. Submit



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



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

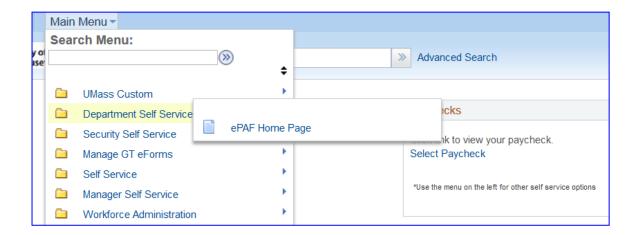
Entering a Rehire

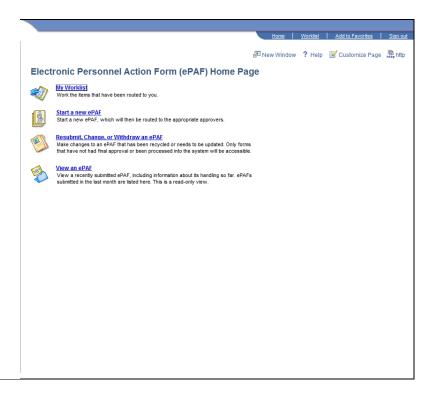
Upon completion of this topic, you will be able to enter a rehire.

Note:

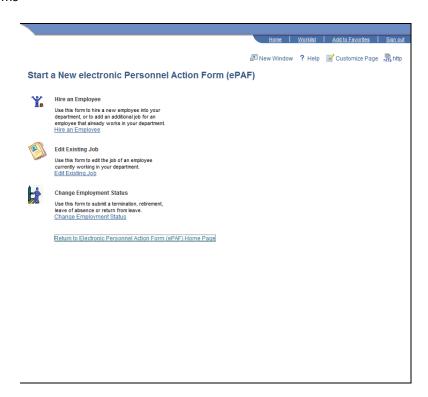
For a rehire with more than a 2 year break in service please use Hire an Employee Link For a rehire within your college/department you should use the Edit Existing Job Link

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



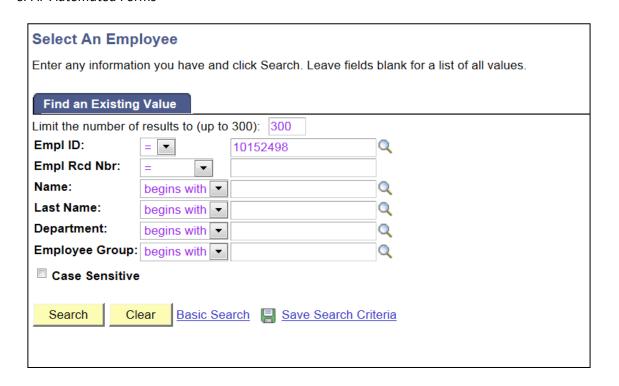


Step	Action
3.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the Start a new ePAF link. Start a new ePAF

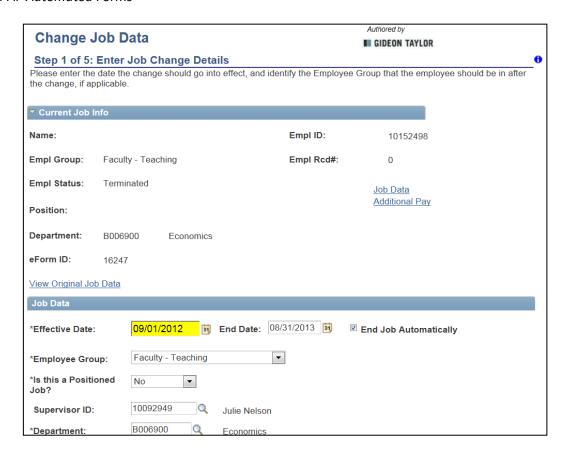


Step	Action
5.	Click the Edit Existing Job link.
	Edit Existing Job

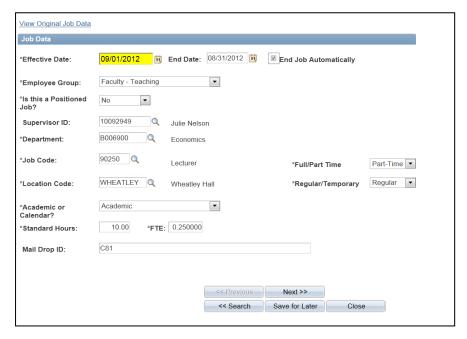
Training Guide



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



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



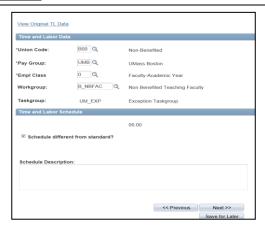
Step	Action
Note:	You may make changes to any of the open areas or make no changes
	Example: Effective Date and End Date changed
	Click the Next button.



Step	Action
12.	Faculty Tenure Data changes made by Provost office. Skip this section
13.	Click Next



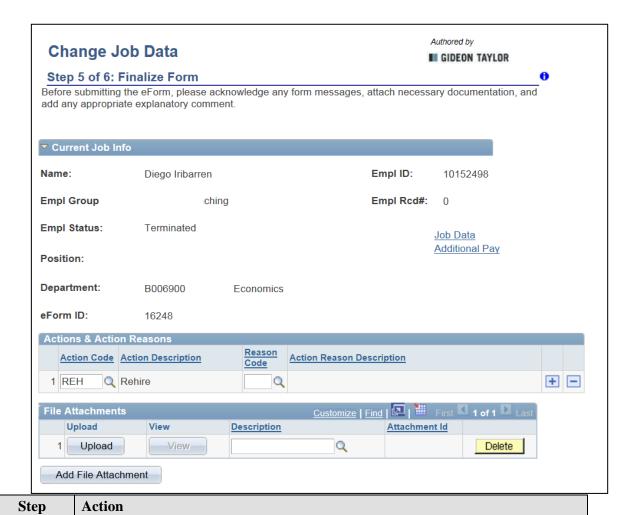
Step	Action
Note:	You may make changes to any of the open areas. Example: we have accepted the previous Compensation Date with no changes for the rehire.
14.	Click the Next button. Next >>



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

Note:

Training Guide



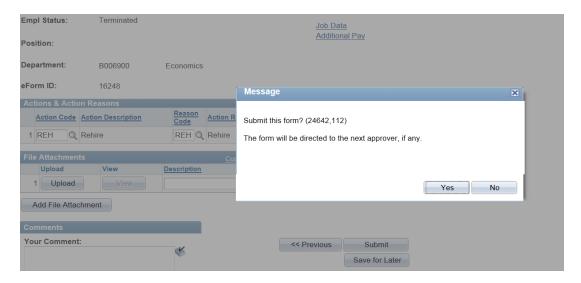
Notice that the **Action Code** section is notated as **Rehire**. By Clicking the search icon you may change Action and Reason Code if it is not identified correctly

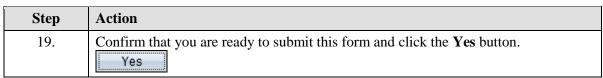
ePAF Automated Forms Look Up Reason Code SetID: **UMBOS** Employee Group: **FACNA** Action: REH Reason Code: begins with ▼ Look Up Clear Cancel Basic Lookup Search Results View 100 First 1-8 of 8 Last Reason Code Description BUY Course Buy Out on Grant Rehire from Non-Ben to Benefit NTB **PST** Rehire Post Retirement Appt RBS Rehire Break Service RCC Reh Connect Service w/ Changes REH Rehire <u>TBN</u> Rehire Benefit to Nonbnft Stat TUM Transfer within UMass

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



Step	Action
18.	Click the Submit button. Submit





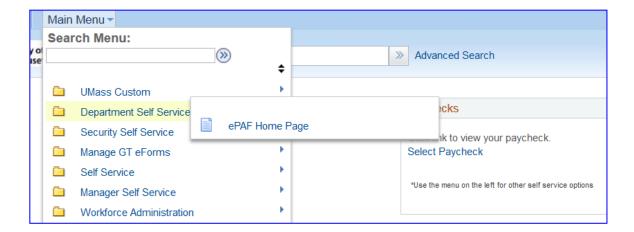


Step	Action
20.	The Form Status indicates that you have submitted this form.
21.	Congratulations! You have entered a rehire. End of Procedure.

Entering a Funding Swap

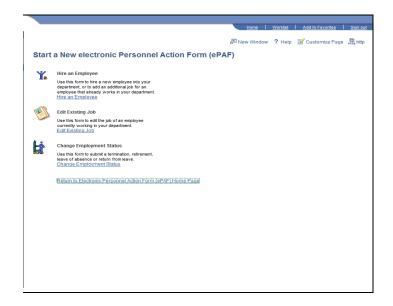
Upon completion of this topic, you will be able to enter a funding swap.

Step	Action
1.	Begin by navigating to the ePAF Home Page .
	Click the Department Self Service link. Department Self Service
2.	Click the ePAF Home Page link. EPAF Home Page

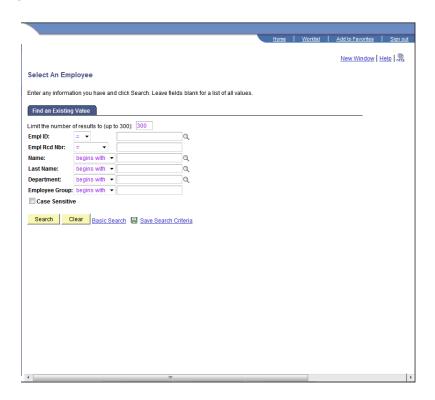




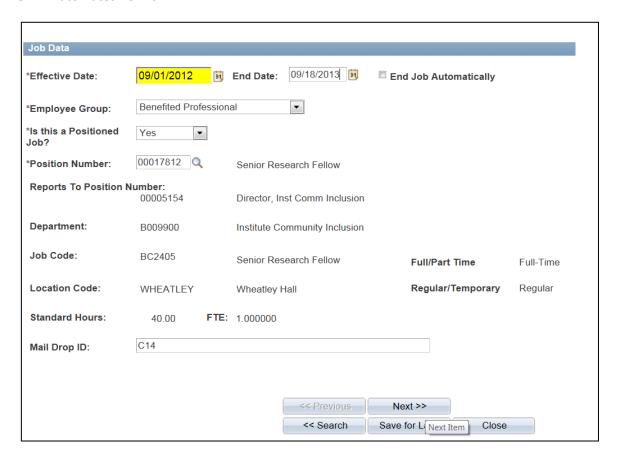
Step	Action
3.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the Start a new ePAF link. Start a new ePAF



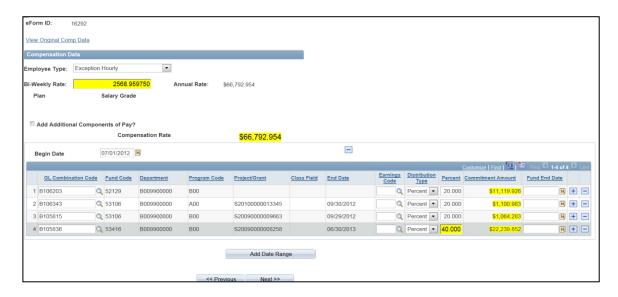
Step	Action
5.	Click the Edit Existing Job link.
	Edit Existing Job



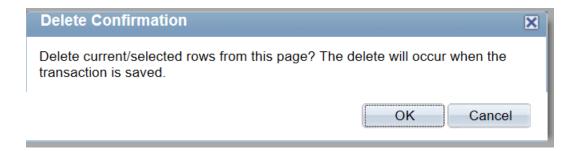
Step	Action
6.	Enter the desired information into the Last Name or Emp ID field.
	For this example, enter "Jones".
7.	Click the Search button. Search



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

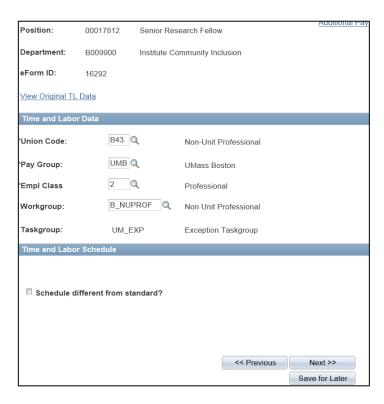


Step	Action
12.	Press ok to confirm that you would like to delete row

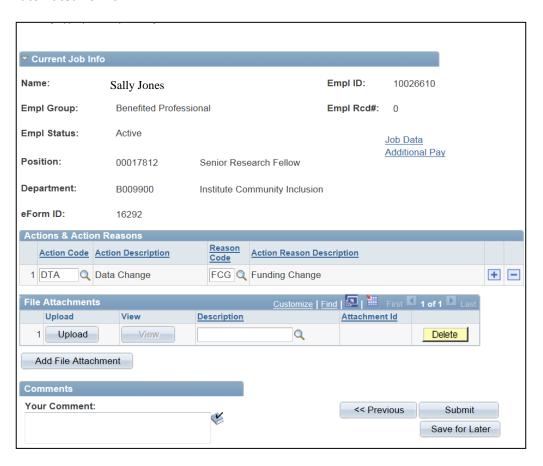
Training Guide



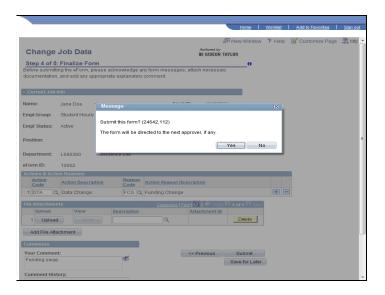
Step	Action
13.	Change Percent row
	Example: 60 Click Tab
14.	Click the Next button. Next >>



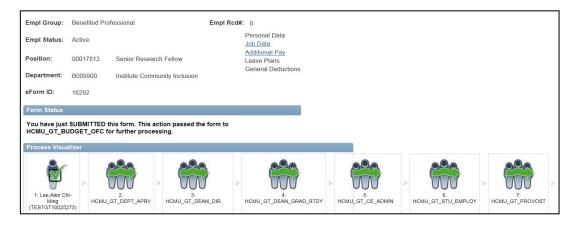
Step	Action
15.	If no changes needed Click the Next button. Next >>



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



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

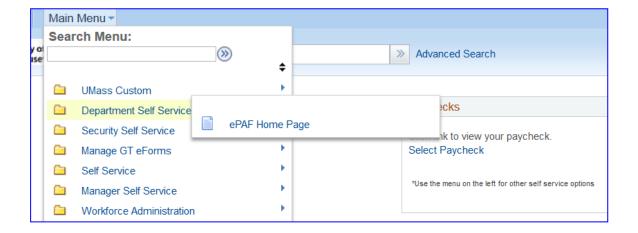


Step	Action
19.	The Form Status indicates that you have submitted this form.
20.	Congratulations! You have entered a funding swap. End of Procedure.

Entering a Re-appointment/Change in Time/Funding Change

Upon completion of this topic, you will be able to enter a re-appointment, change in time, and funding change.

Step	Action
1.	Begin by navigating to the ePAF Home Page .
	Click the Department Self Service link. Department Self Service
2.	Click the ePAF Home Page link. EPAF Home Page



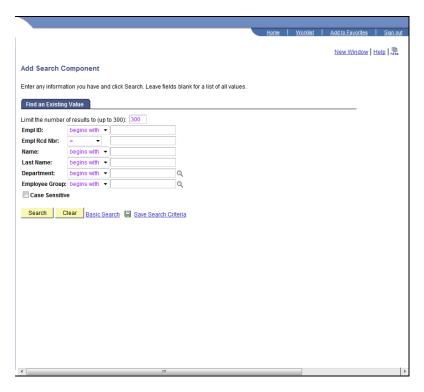


Step	Action
3.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the Start a new ePAF link. Start a new ePAF

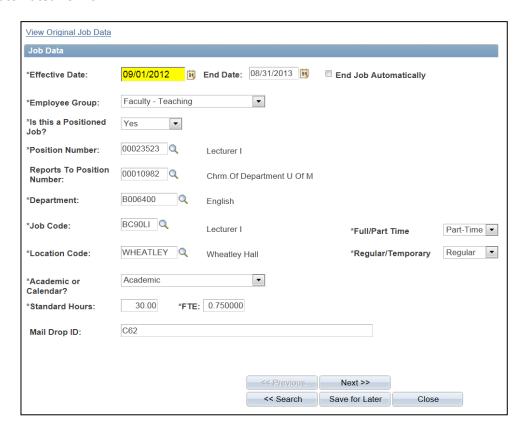


Step	Action
5.	Click the Edit Existing Job link.
	Edit Existing Job

Training Guide



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



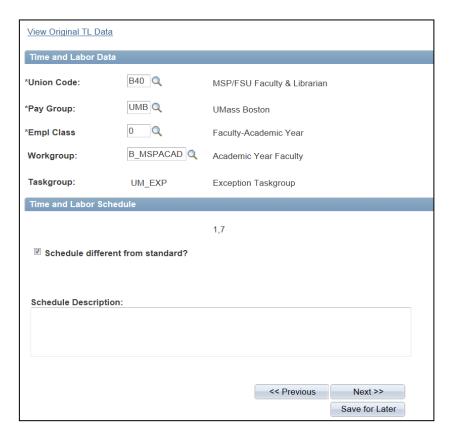
Step	Action
8.	Enter the Effective Date and change End Date
	Example: 090/01/2012 and 08/31/2013
9.	Enter Standard Hours. Once standard hours are entered FTE will auto populate.
10.	Click the Next button. Next >>



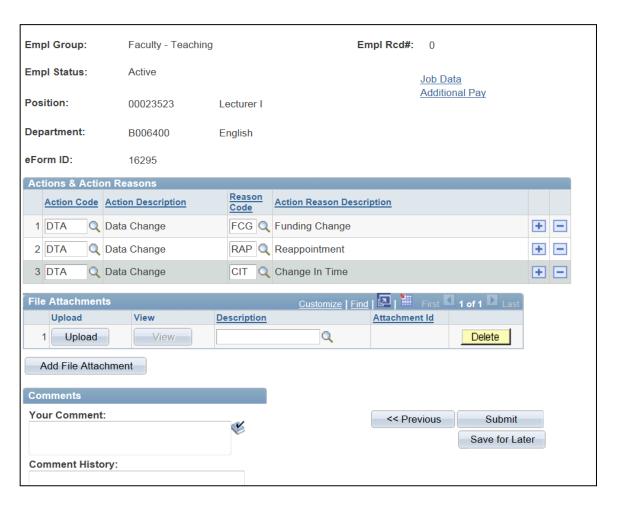
Step	Action
11.	Faculty Tenure Data changes made by Provost office. Skip this section
12.	Click Next



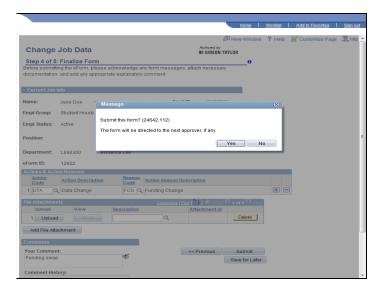
Step	Action
13.	Enter Bi-Weekly rate. Once entered Annual Rate will auto populate
14.	Enter GL Combination Code Click Tab
15.	Add/remove funding row using plus or minus if applicable. Change percentages if applicable.
16.	Click Next



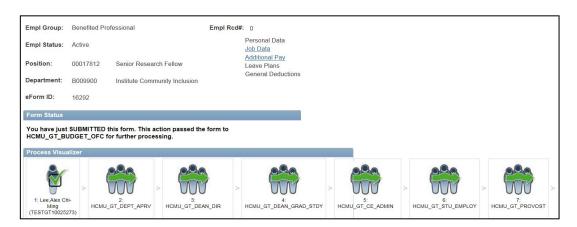
Step	Action
17.	If no changes needed Click the Next button. Next >>



Step	Action
18.	Enter Action and Reason Codes.
	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
19.	Click Submit



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



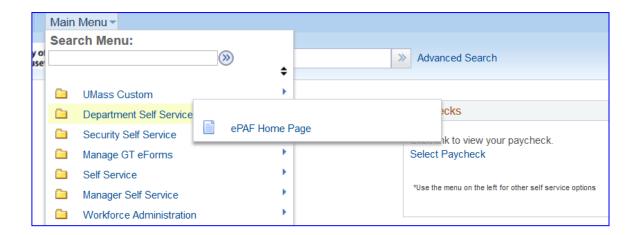
Step	Action
21.	The Form Status indicates that you have submitted this form.
22.	Congratulations! You have entered a reappointment/change in time/funding change. End of Procedure.

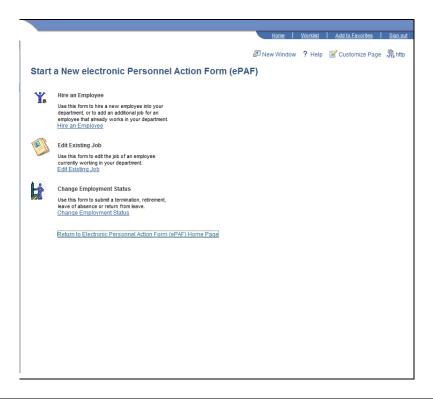
Updating Employee Status

Entering a Leave of Absence

Upon completion of this section, you will be able to enter a leave of absence

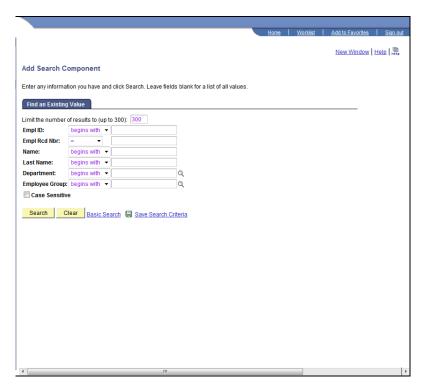
Step	Action
23.	Begin by navigating to the ePAF Home Page .
	Click the Department Self Service link. Department Self Service
24.	Click the ePAF Home Page link. ePAF Home Page
25.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF,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



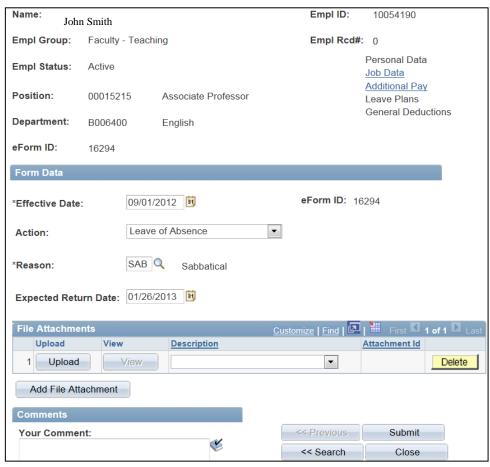


Step	Action
27.	To submit a termination, retirement, leave of absence, or return from leave, click the Change Employment Status link.
	Change Employment Status

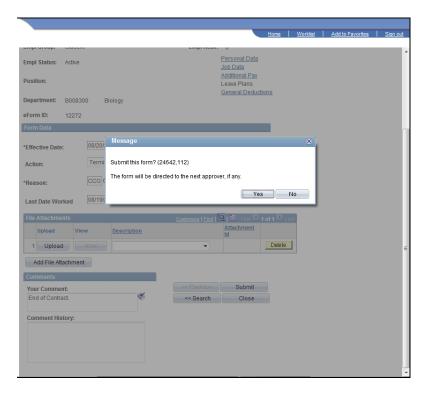
Training Guide



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



Step	Action
30.	Click the Effective Date look up button. Example: 09/01/2012
31.	Click the Action list.
32.	The Action choices are Leave of Absence, Paid Leave of Absence, Retirement, Return from Leave, and Termination. Example: Leave of Absence
33.	Click the Reason look up button. Choose appropriate Reason code Example: Sabbatical
34.	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.
35.	Click the Submit button. Submit



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



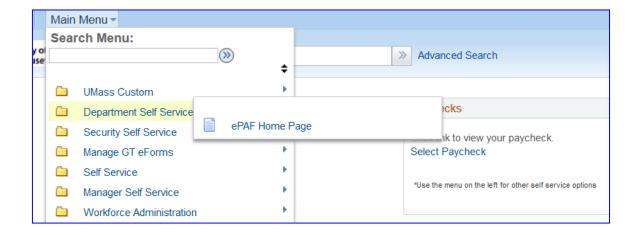
Step	Action
37.	The Form Status indicates that you have submitted this form.
38.	Congratulations! You have successfully submitted a termination. End of Procedure.

Managing ePAF Workflow (Initiators, Approvers, & HR Office) Upon completion of this section, you will be able to:

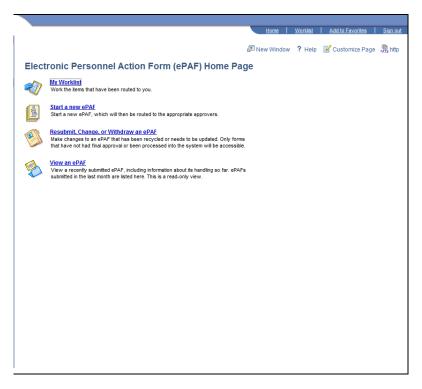
- Open your worklist
- Approve an ePAF form
- Reprocess an ePAF form
- Close an ePAF form
- Add attachments to an ePAF form
- Add comments to an EPAF form
- Create and clone an eform

Opening your Worklist

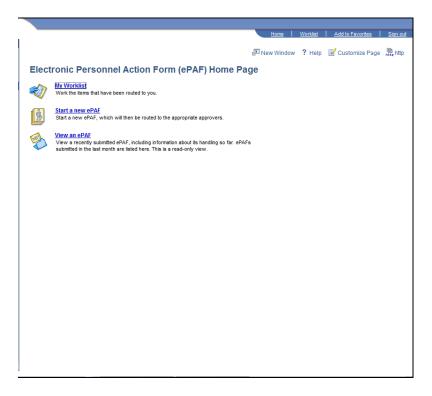
Upon completion of this topic, you will be able to open your worklist.



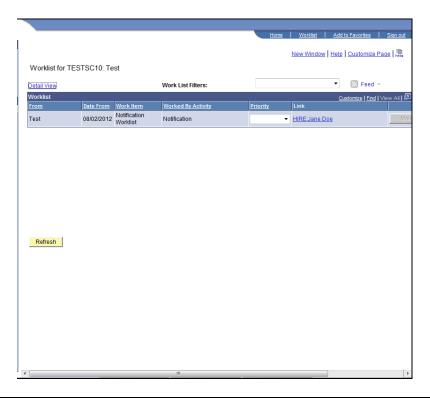
Step	Action
1.	Begin by navigating to the ePAF Home Page.
	Click the Department Self Service link. Department Self Service



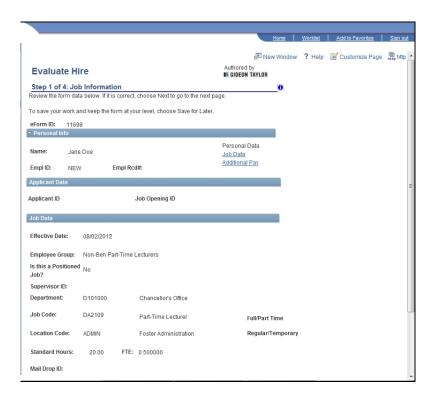
Step	Action
2.	Click the ePAF Home Page link. ePAF Home Page
3.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.



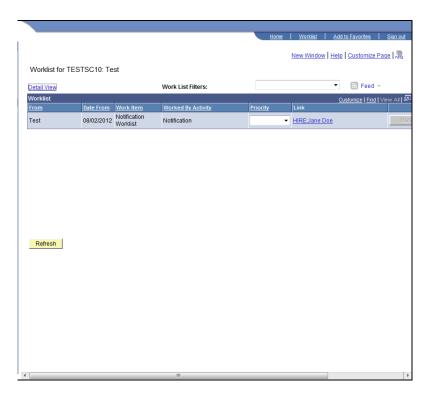
Step	Action
4.	Click the My Worklist link.



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



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

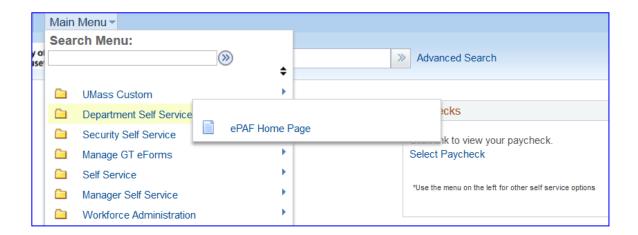


Step	Action
9.	You are now back to your Worklist page.
	<i>Note:</i> For the most current view, you will use the Refresh button to update your Worklist view.
10.	Congratulations! You have opened your Worklist. End of Procedure.

Approving an ePAF Form

Upon completion of this topic, you will be able to approve ePAF Forms.

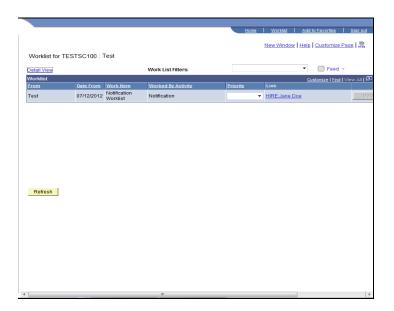
St	ер	Action
1	•	Begin by navigating to the ePAF Home Page .
		Click the Department Self Service link. Department Self Service



	Step	Action
	2.	Click the ePAF Home Page link.
L		ePAF Home Page
	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.	Click the My Worklist link.
	My Worklist

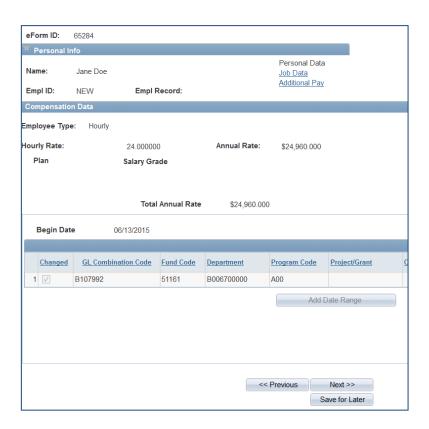


Step	Action
5.	You have one item in your worklist. You want to review and approve Jane Doe's hire form. Click the HIRE:Jane Doe link.
	HIRE:Jane Doe
6.	The Evaluate Hire page contains personal info, applicant data, job data, and compensation data.



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

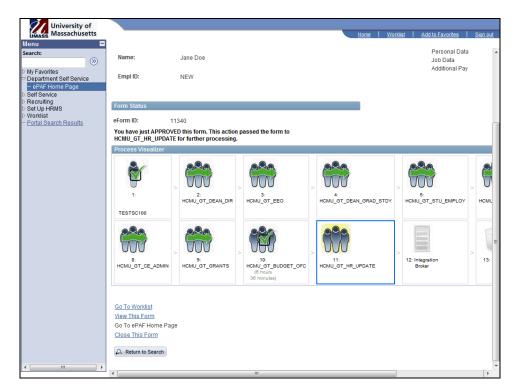
Training Guide



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



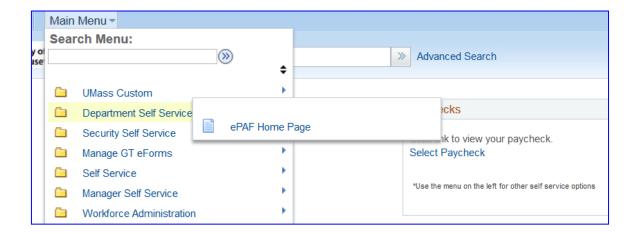
Step	Action
9.	Review the Evaluate Hire data. As an approver, you cannot make any changes to the data, but you can add comments and attachments.
	If it is correct, click the Approve button.
	Note: To send the form back to the originator for correction or clarification, enter a
	Comment and choose Reprocess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



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

Reprocessing an ePAF

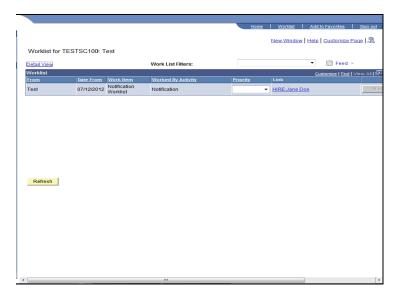
Upon completion of this topic, you will be able to reprocess an ePAF form and send it back to the initiator for changes.



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

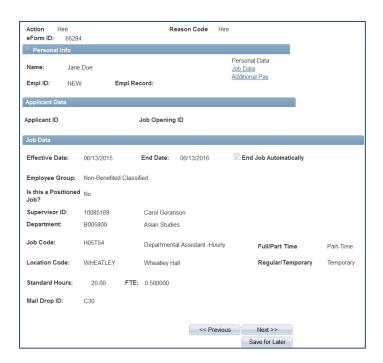


Step	Action
3.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the My Worklist link. My Worklist

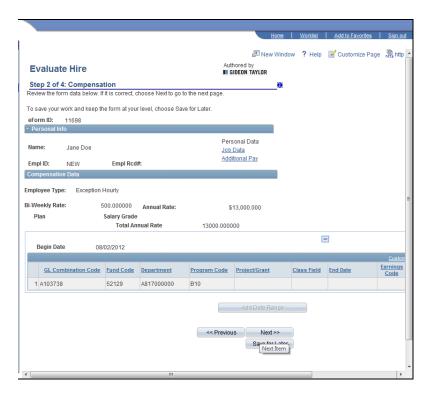


Step	Action
5.	You have one item in your worklist. You want to review and reprocess Jane Doe's hire form.
	Click the HIRE:Jane Doe link. HIRE:Jane Doe

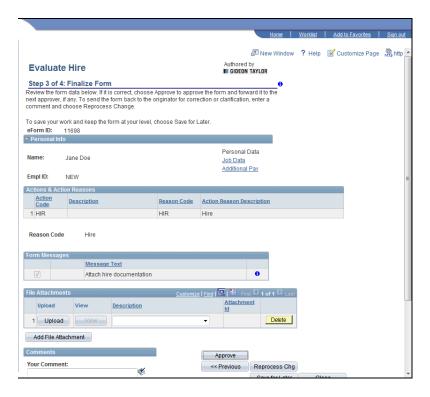
Step	Action
6.	The Evaluate Hire pages contain personal, job data, and compensation data.



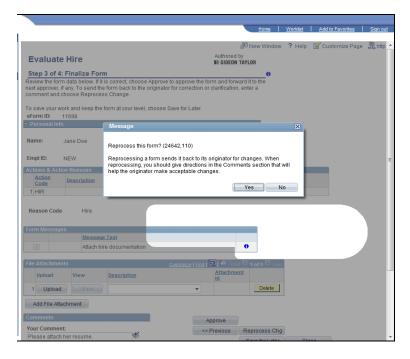
Step	Action
7.	Click the Next button. Next >>



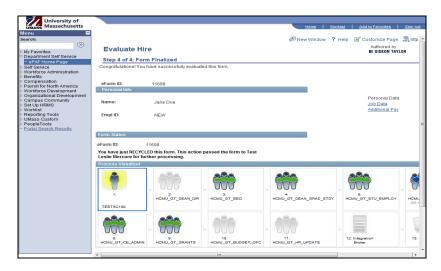
Step	Action
8.	Click the Next button. Next >>



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



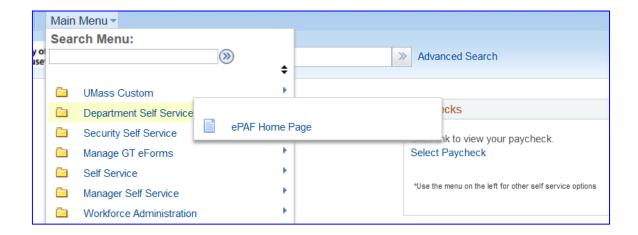
Step	Action
11.	Confirm that you have given acceptable directions for the changes you desire, then click the Yes button.
	Yes



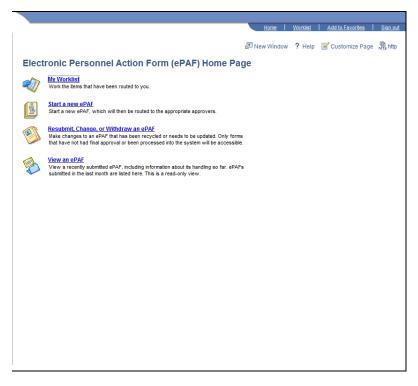
Step	Action
12.	The Form Status indicates that you have recycled/reprocessed this form and sent it back to the initiator for changes.
13.	Congratulations! You have reprocessed an ePAF Form. End of Procedure.

Withdrawing an ePAF

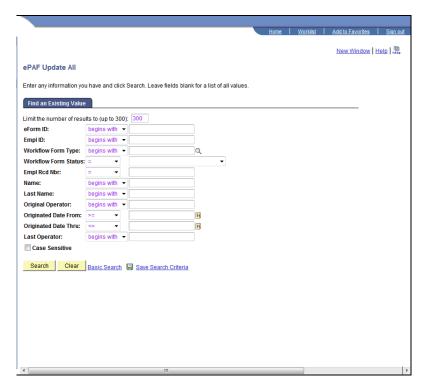
Upon completion of this topic, you will be able to withdraw an ePAF form.



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

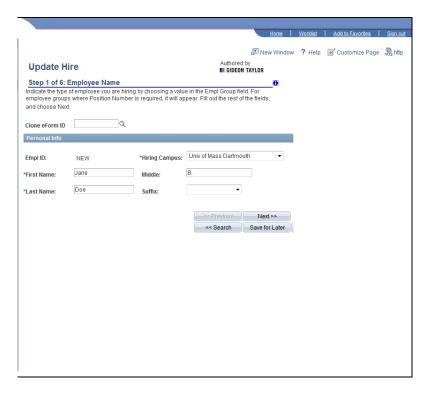


Step	Action
3.	This is the ePAF Home Page , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	You want to close (withdraw) an ePAF form that has already been submitted.
	Click the Resubmit, Change, or Withdraw an ePAF link. Resubmit, Change, or Withdraw an ePAF

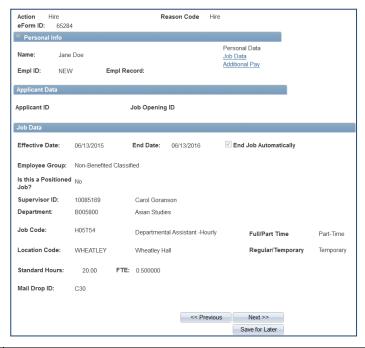


Step	Action
5.	You want to find an existing eForm by searching on the Last Name .
	Enter the desired information into the Last Name field.
	For this example, enter " Doe ".
6.	Click the Search button. Search

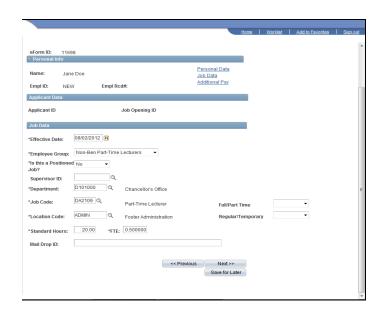
Training Guide



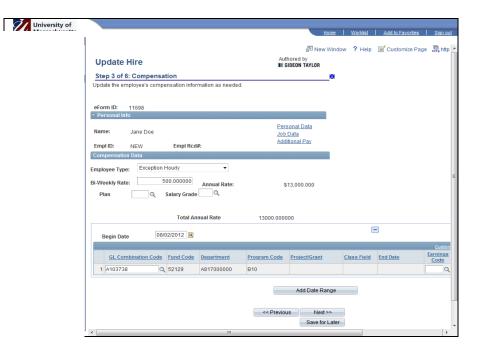
Step	Action
7.	The Update Hire page will allow you to update the form and close it.
	<i>Note:</i> Only forms that have not had final approval or been processed into the system will be available for update.
8.	Click the Next button.
	Next



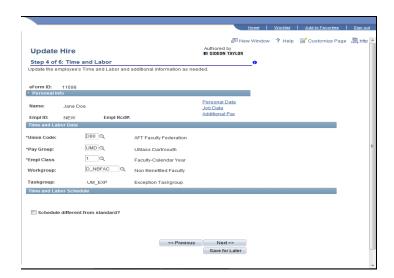
Step	Action
9.	Verify that this is the person you were searching for by viewing their Personal
	Information.



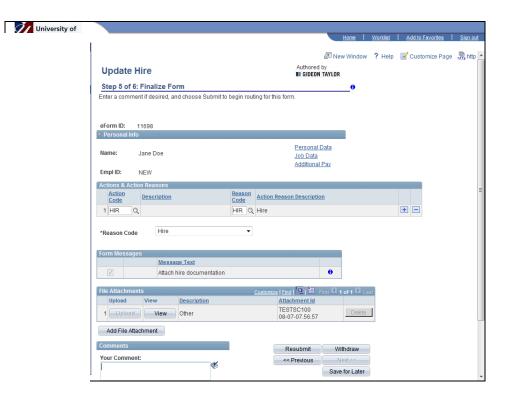
Step	Action
10.	Click the Next button.
	Next >>



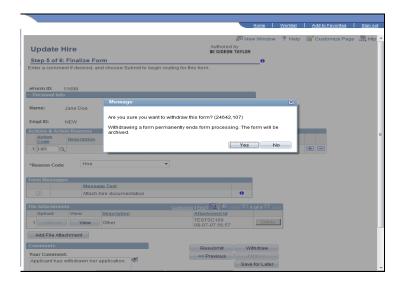
Step	Action
11.	Click the Next button.
	Next >>



Step	Action
12.	Click the Next button.
	Next >>



Step	Action
13.	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. ".
14.	Click the Withdraw button. Withdraw



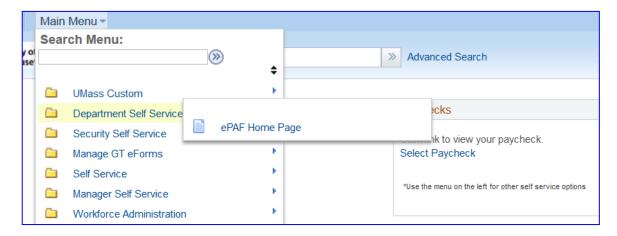
Step	Action
15.	If you are sure that you want to end processing and withdraw this form permanently, click the Yes button.



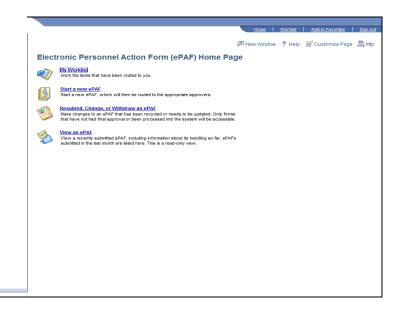
Step	Action
16.	The Form Status indicates that you have withdrawn this form.
17.	Congratulations! You have closed an ePAF form. End of Procedure.

Adding Attachments to an ePAF Form

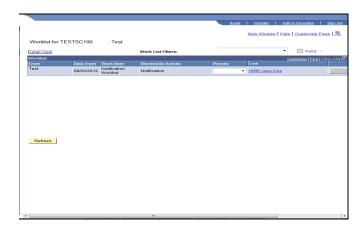
Upon completion of this topic, you will be able to add attachments to an ePAF form.



Step	Action
1.	Begin by navigating to your ePAF Home Page .
	Click the Department Self Service link. Department Self Service
2.	Click the ePAF Home Page link. EPAF Home Page
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.



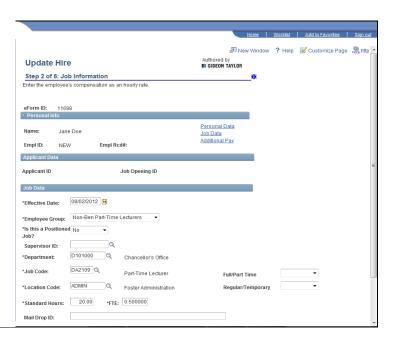
Step	Action
4.	Click the My Worklist link.



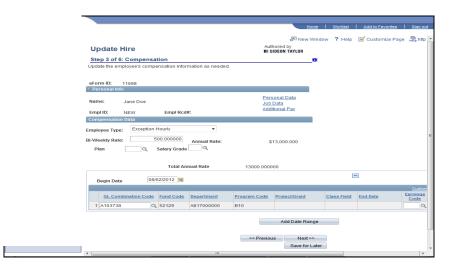
Step	Action
5.	You want to add an attachment to this eForm.
	Click the HIRE:Jane Doe link. HIRE:Jane Doe
6.	The Update Hire page will allow you to update the form and add an attachment.
	<i>Note:</i> Only forms that have not had final approval or been processed into the system will be available for update.



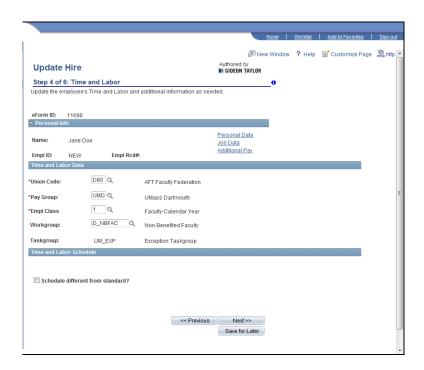
Step	Action
7.	Click the Next button.
	Next >>



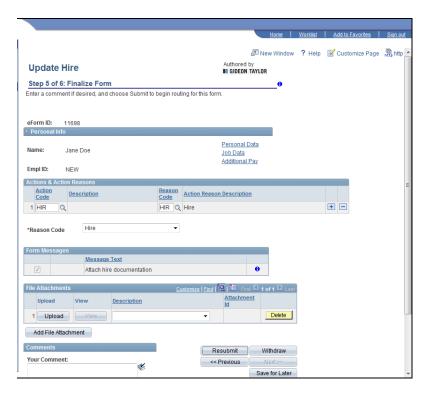
Step	Action
8.	Click the Next button.
	Next >>



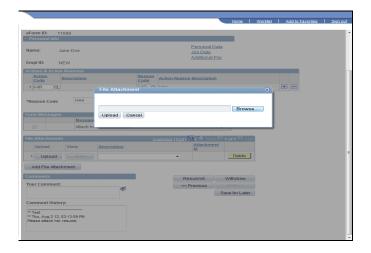
Step	Action
9.	Click the Next button.
	Next >>



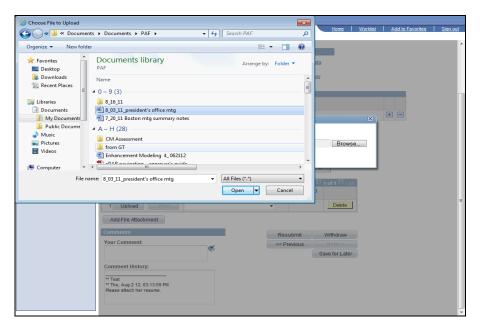
Step	Action
10.	Click the Next button. Next >>



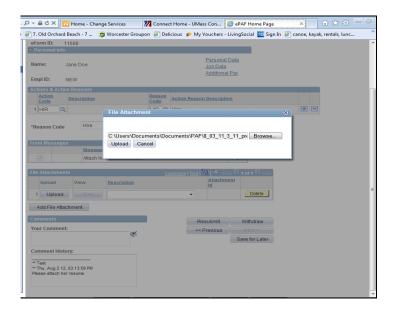
Step	Action
11.	This is the File Attachments section.
	Click the Upload button. Upload



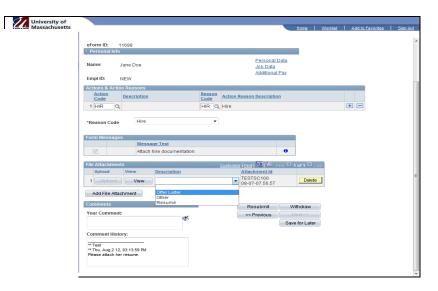
Step	Action
12.	To search for the desired file to upload, click the Browse button. Browse



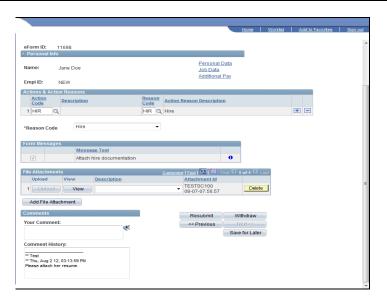
Step	Action
13.	Select the document you wish to attach and upload.



Step	Action
14.	Click the Upload button. Upload



Step	Action
15.	Click the Description list box.
16.	For this example, click the Other list item. Other



Step	Action
17.	To resubmit this eForm with the new attachment, click the Resubmit button. Resubmit
18.	If you are ready to resubmit this form with your changes, click the Yes button.

Training Guide

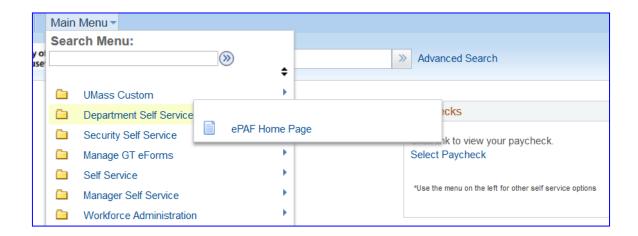
Step	Action
19.	The Form Status indicates that you have resubmitted this form.
20.	Congratulations! You have added an attachment to an ePAF form. End of Procedure.

Creating and Cloning an eForm

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

Key Information:

eForm ID: 12683



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



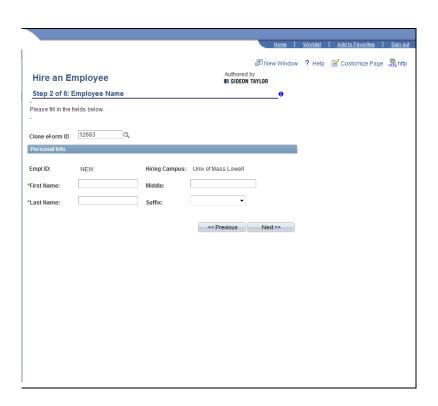
Step	Action
3.	Click the Start a new ePAF link.
	Start a new ePAF



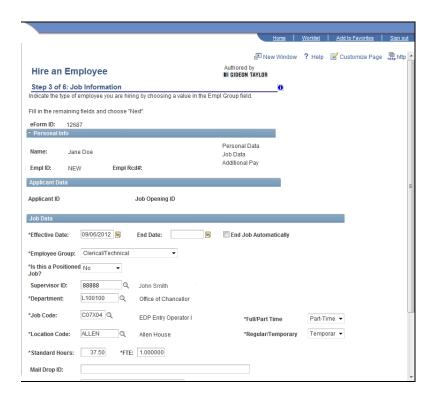
Step	Action
4.	Click the Hire an Employee link.
	Hire an Employee



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



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



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

Training Guide

Step	Action
12.	<i>Note:</i> If you had previously entered a bi-weekly rate on the original eForm , when you clone this eForm the bi-weekly rate will be zeroed out and will need to be reentered for subsequent eForms .
13.	Congratulations! You have created and cloned an eForm. End of Procedure.