

**ePAF Automated Forms**  
**Created on 11/19/2012 12:34:00 PM**

# Table of Contents

- ePAF Automated Forms..... 1**
- Automated Forms ..... 1**
- Adding a Person (Initiator)..... 1
- Adding an Employee into a Position ..... 1
- Adding an Employee into a Job..... 27
- Hiring Student Employees..... 49
- Processing Employee Job Change ..... 68
- Entering a Rehire..... 69
- Entering a Department Transfer ..... 80
- Entering a Funding Swap ..... 94
- Updating Employee Status (Initiator) ..... 106
- Entering Terminations, Retirements, Leave of Absence, and Return from Leave ..... 106
- Managing ePAF Workflow (Initiators, Approvers, & HR Office)..... 115
- Opening your Worklist ..... 115
- Approving an ePAF Form ..... 120
- Reprocessing an ePAF..... 127
- Closing an ePAF..... 134
- Adding Attachments to an ePAF Form..... 144
- Adding Comments to an ePAF Form..... 154
- Creating and Cloning an eForm..... 161
- Managing HR Specific Workflow ..... 181
- Submitting an HR Approval ..... 181
- Managing Security (Data Custodian)..... 186
- Updating Funneled Security ..... 186
- Managing Administration (Admin Tool) ..... 192
- Using the Admin Tool ..... 192

## 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 position
- Add an employee into a job
- Hire a student employee (non-work study and work study)

### Adding an Employee into a Position

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

#### Procedure

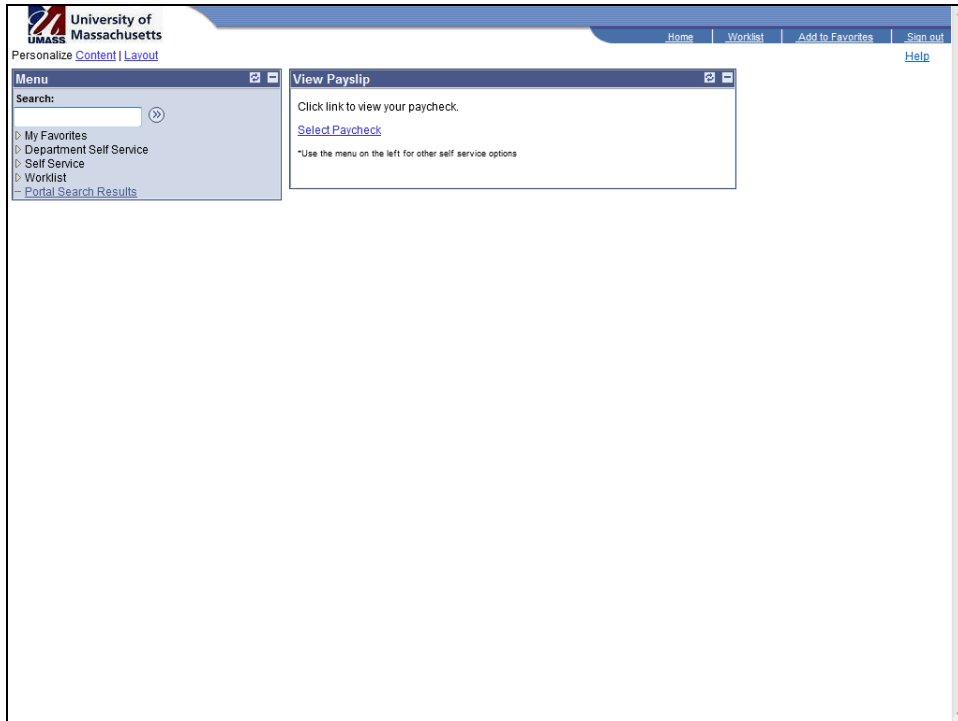
#### Consider this scenario:

Your goal is to add an employee into a position.

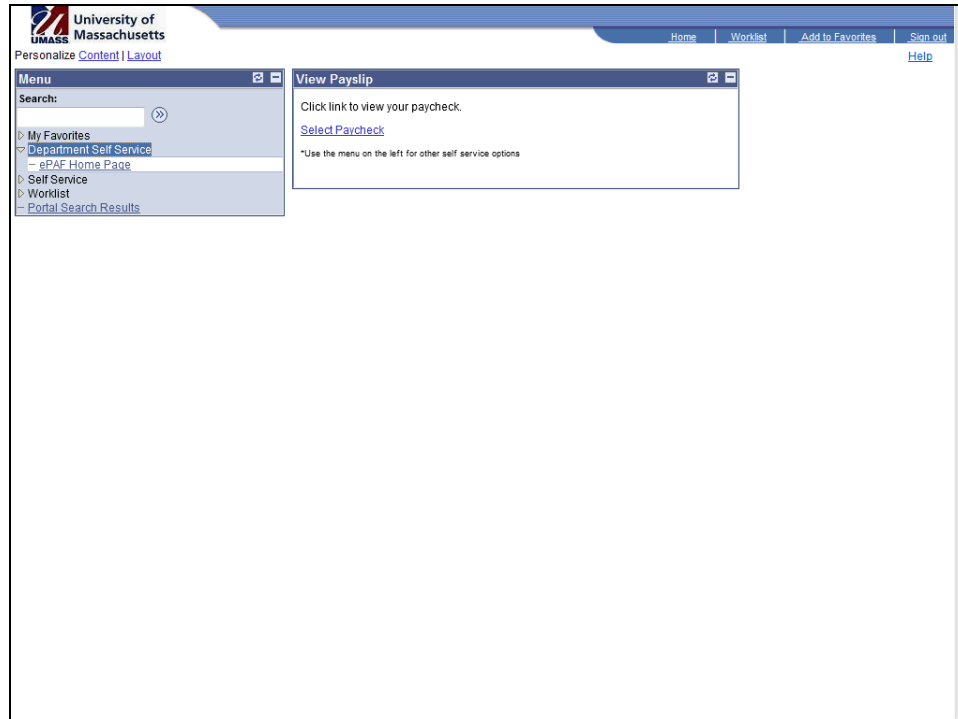
#### Key Information:

Employee Group: Faculty

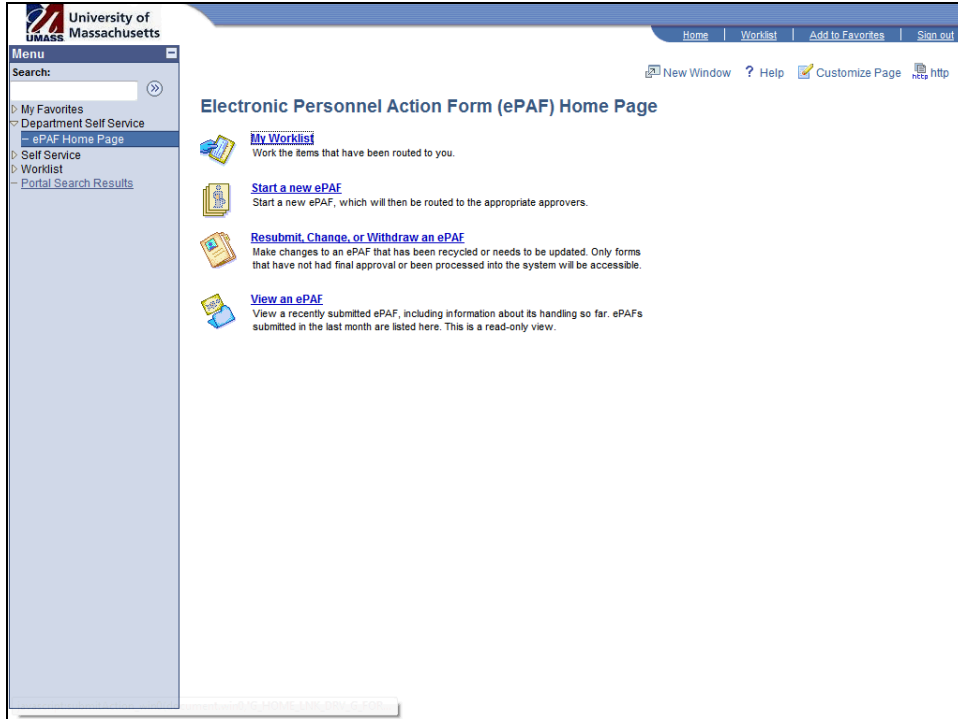
Is this a positioned job?: Yes



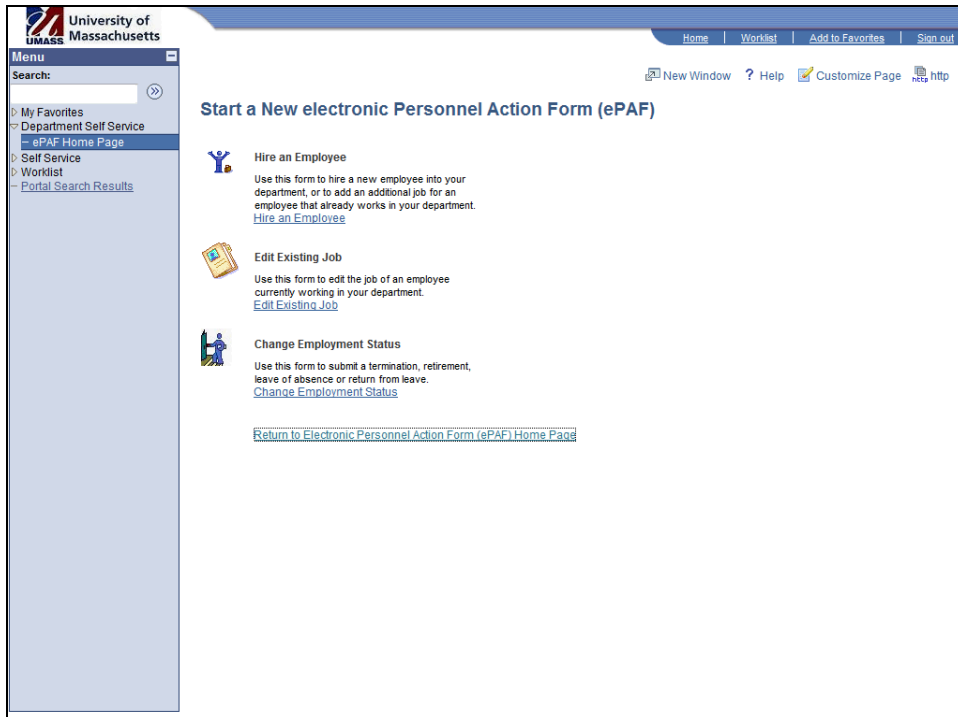
Step	Action
1.	Begin by navigating to the <b>ePAF Home Page</b> .  Click the <b>Department Self Service</b> link. <span style="border: 1px solid black; padding: 2px;">▶ Department Self Service</span>



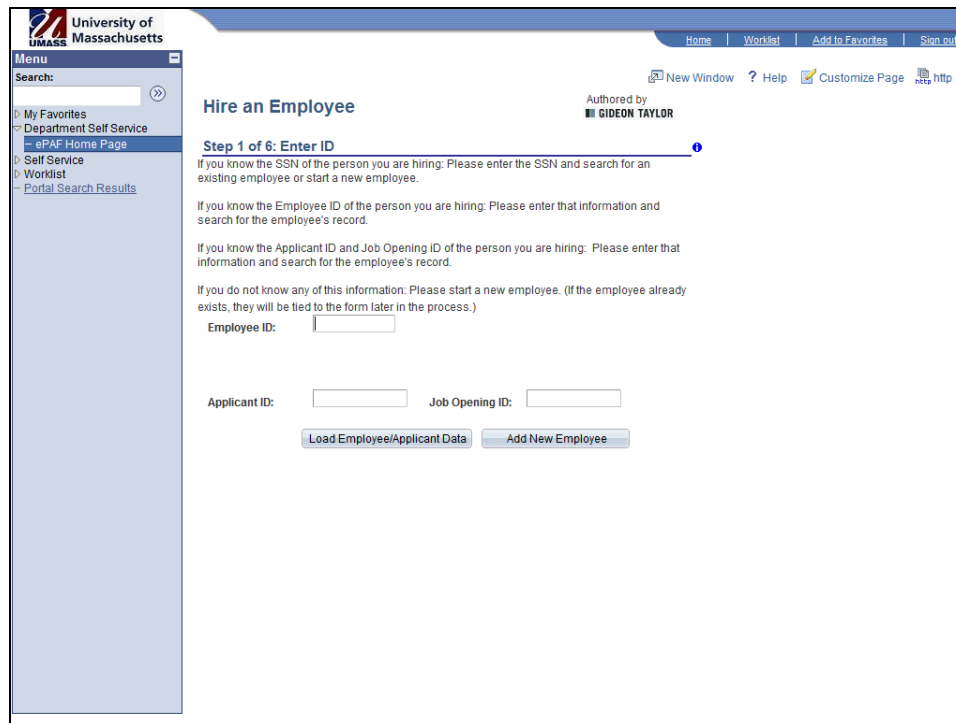
Step	Action
2.	Click the <b>ePAF Home Page</b> link. <a href="#">ePAF Home Page</a>
3.	This is the <b>ePAF Home Page</b> , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.



Step	Action
4.	Click the <b>Start a new ePAF</b> link. <span style="border: 1px solid black; padding: 2px;"><a href="#">Start a new ePAF</a></span>

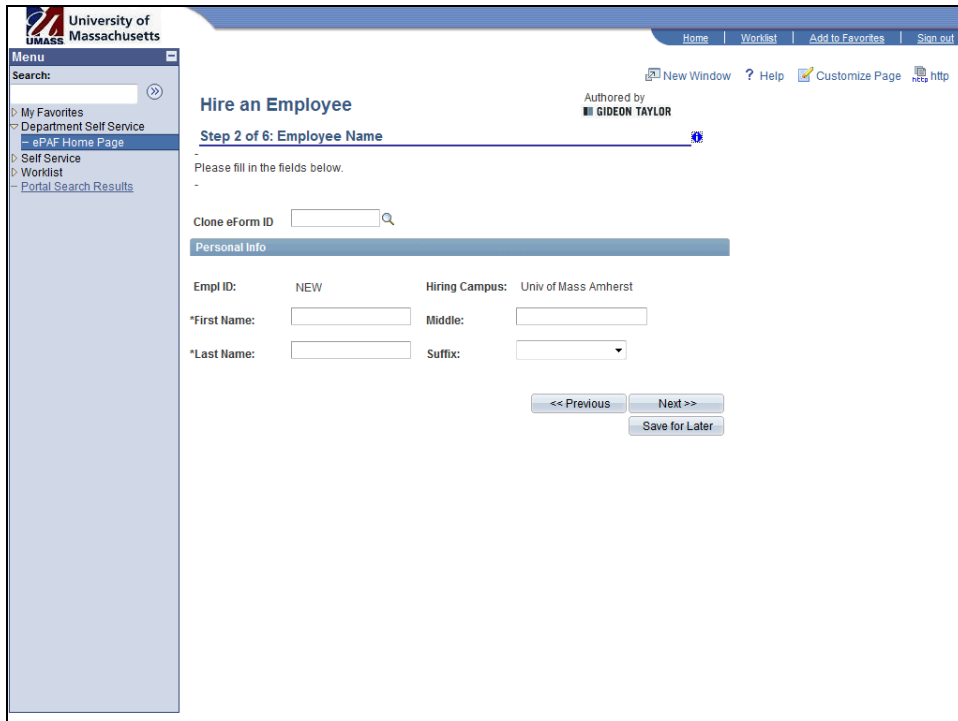


Step	Action
5.	<p>Depending on your campus practice, you can add employees with positions or jobs. For this example, you are hiring an employee into position.</p> <p>Click the <b>Hire an Employee</b> link.</p> <p><a href="#">Hire an Employee</a></p>
6.	<p>If you know the <b>Employee ID</b> of the person you are hiring (or if you are hiring a contingent worker or POI); you can enter this information and then search for the employee's record.</p> <p>Another way to search would be to use the <b>Applicant ID</b> and the <b>Job Opening ID</b> of the person you are hiring; you can enter this information and then search for the employee's record.</p>

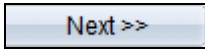


Step	Action
7.	<p>For this example, you do not have any ID's to search on.</p> <p>Click the <b>Add New Employee</b> button.</p> <p><a href="#">Add New Employee</a></p>

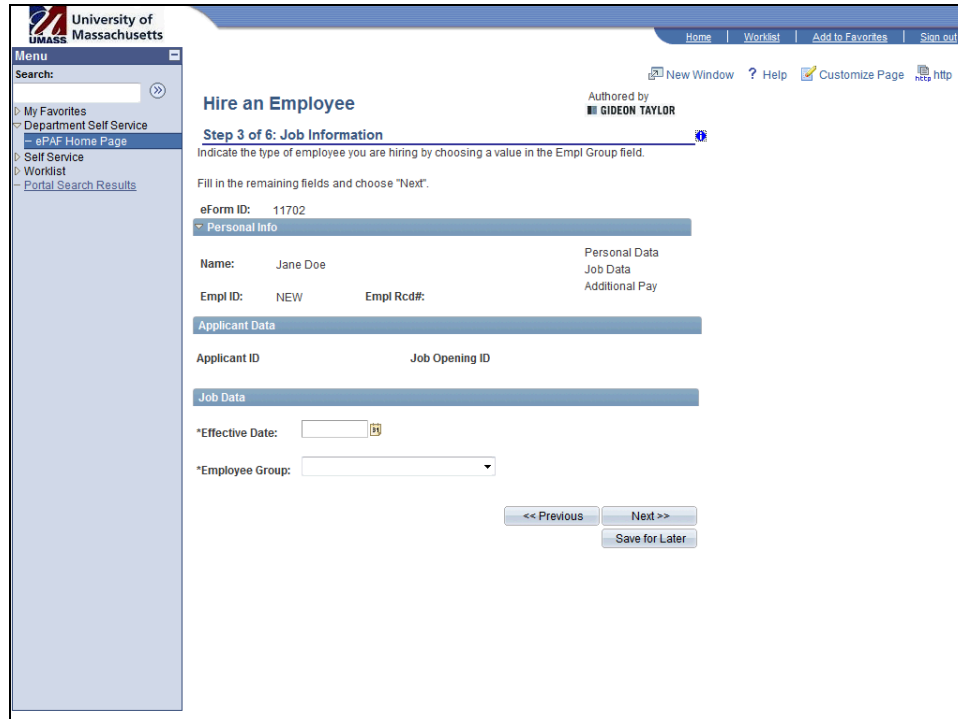
Step	Action
8.	<p>If you wanted to clone a previous eForm and use it as a template for multiple hires of the same type, you would enter the <b>Clone eForm ID</b> here (or you could search for the <b>Clone eForm ID</b> if you did not know it).</p> <p><i>Note:</i> For this example, we will not use the <b>Clone eForm ID</b>.</p>






The screenshot shows a web browser window with the University of Massachusetts logo and navigation links (Home, Worklist, Add to Favorites, Sign out). The page title is "Hire an Employee" and the current step is "Step 2 of 6: Employee Name". A search bar for "Clone eForm ID" is present. Below it is a "Personal Info" section with the following fields: "Empl ID:" (NEW), "Hiring Campus:" (Univ of Mass Amherst), "\*First Name:" (text input), "Middle:" (text input), "\*Last Name:" (text input), and "Suffix:" (dropdown menu). At the bottom of the form are three buttons: "<< Previous", "Next >>", and "Save for Later".

Step	Action
9.	<p>Enter the desired information into the <b>First Name</b> field.</p> <p>For this example, enter "<b>Jane</b>".</p>
10.	<p>Enter the desired information into the <b>Middle</b> field.</p> <p>For this example, enter "<b>B.</b>".</p>
11.	<p>Enter the desired information into the <b>Last Name</b> field.</p> <p>For this example, enter "<b>Doe</b>".</p>
12.	<p>Click the <b>Next</b> button.</p> 





Step	Action
13.	Click the <b>Effective Date</b> calendar button. 
14.	Choose the <b>Effective Date</b> . For this example, click the August <b>6</b> link. 
15.	Click the <b>Employee Group</b> list. 

Step	Action
16.	Click the <b>Faculty</b> list item. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Faculty</div>
17.	<b>Note:</b> Refer to your campus business practices on when to use the <b>End Date</b> .

**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: 11702

**Personal Info**

Name: Jane Doe Personal Data  
Job Data  
Additional Pay

Empl ID: NEW      Empl Rcd#:

**Applicant Data**

Applicant ID      Job Opening ID

**Job Data**

\*Effective Date: 08/06/2012      End Date:

\*Employee Group: Faculty

\*Is this a Positioned Job?

\*Academic or Calendar?

Step	Action
18.	Click the <b>Is this a Positioned Job?</b> list. <div style="border: 1px solid black; width: 100px; height: 20px; margin: 5px auto; text-align: center;">▼</div>

**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: 11702

**Personal Info**

Name: Jane Doe Personal Data  
Job Data  
Additional Pay

Empl ID: NEW      Empl Rcd#:

**Applicant Data**

Applicant ID      Job Opening ID


**Job Data**


\*Effective Date: 08/06/2012      End Date:

\*Employee Group: Faculty


\*Is this a Positioned Job? No

\*Academic or Calendar? Yes

Step	Action
19.	Click the <b>Yes</b> list item. 

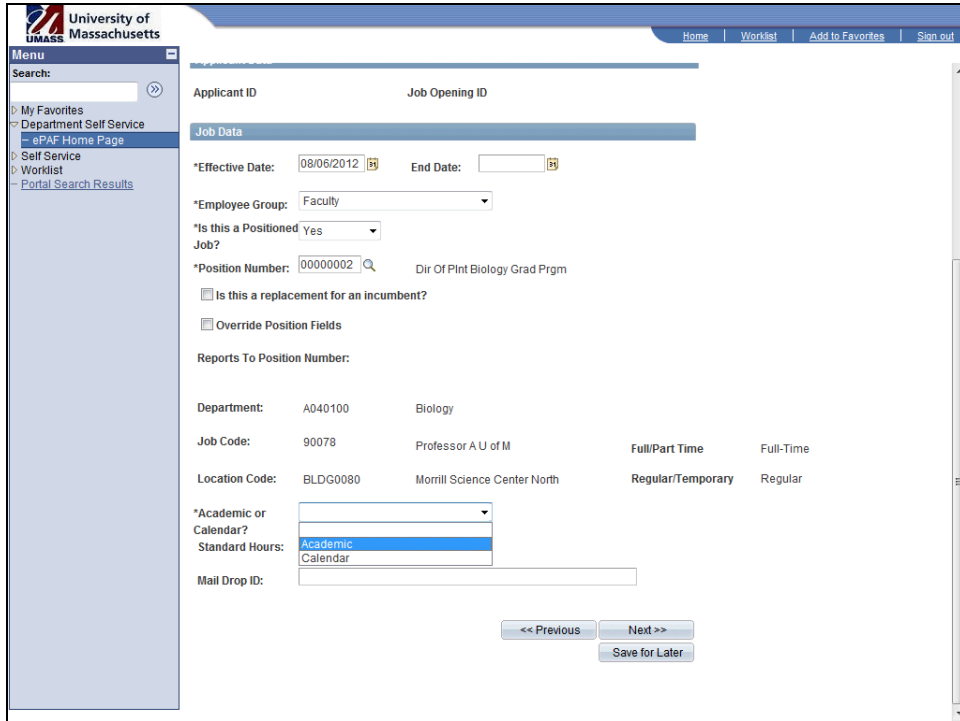
Step	Action
20.	Click the <b>Position Number</b> look up button. 

The screenshot shows the University of Massachusetts ePAF interface. A 'Look Up' dialog box is open, titled 'Look Up Position Number'. It contains several search criteria fields: Position Number, Description, Short Description, Job Code, and Department, each with a 'begins with' dropdown and an input field. Below these fields are 'Look Up', 'Clear', and 'Cancel' buttons, along with a 'Basic Lookup' link. The background shows the 'Job Data' section of the applicant's profile, including fields for Effective Date, Employee Group, and Position Number (0000002).

Step	Action
21.	For this example, click the <b>0000002</b> link. 

The screenshot shows the 'Job Data' section of the ePAF system. The 'Position Number' field is set to 0000002, and the 'Job Description' is 'Dir Of Plnt Biology Grad Prgm'. Other fields include 'Effective Date' (08/06/2012), 'Employee Group' (Faculty), and 'Department' (A040100). A dropdown menu for 'Academic or Calendar?' is open, showing 'Academic' and 'Calendar' options. At the bottom, there are navigation buttons: '<< Previous', 'Next >>', and 'Save for Later'.

Step	Action
22.	<p>Click the <b>Academic or Calendar?</b> list.</p> <p><i>Note:</i> Not all campuses will see this field.</p> <div style="border: 1px solid black; width: 100px; height: 20px; margin-left: 20px; text-align: center;">▼</div>



Step	Action
23.	<p>For this example, click the <b>Academic</b> list item.</p> <div style="border: 1px solid black; background-color: #0070C0; color: white; padding: 2px; margin-left: 20px;">Academic</div>

University of Massachusetts

Home | Worklist | Add to Favorites | Sign out

Menu

Search: [ ]

My Favorites

Department Self Service

ePAF Home Page

Self Service

Worklist

Portal Search Results

Applicant ID: [ ] Job Opening ID: [ ]

Job Data

\*Effective Date: 08/06/2012 [B] End Date: [B]

\*Employee Group: Faculty [v]

\*Is this a Positioned Job? Yes [v]

\*Position Number: 00000002 [Q] Dir Of Pint Biology Grad Prgm

Is this a replacement for an incumbent?

Override Position Fields

Reports To Position Number:

Department: A040100 Biology

Job Code: 90078 Professor A U of M Full/Part Time Full-Time

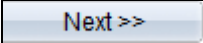
Location Code: BLDG0080 Morrill Science Center North Regular/Temporary Regular

\*Academic or Calendar? Academic [v]

Standard Hours: 40.00 FTE: 1.000000

Mail Drop ID: [ ]

<< Previous Next >> Save for Later

Step	Action
24.	Click the <b>Next</b> button. 

University of Massachusetts

Home | Worklist | Add to Favorites | Sign out

Menu

Search: [ ]

My Favorites

Department Self Service

ePAF Home Page

Self Service

Worklist

Portal Search Results

Applicant ID: [ ] Job Opening ID: [ ]

Job Data

\*Effective Date: 08/06/2012 [B] End Date: [B]

\*Employee Group: Faculty [v]

\*Is this a Positioned Job? Yes [v]

\*Position Number: 00000002 [Q] Dir Of Pint Biology Grad Prgm

Is this a replacement for an incumbent?

Override Position Fields

Reports To Position Number:

Department: A040100 Biology

Job Code: 90078 Professor A U of M Full/Part Time Full-Time

Location Code: BLDG0080 Morrill Science Center North Regular/Temporary Regular

\*Academic or Calendar? Academic [v]

Standard Hours: 40.00 FTE: 1.000000


Mail Drop ID: [ ]

<< Previous Next >> Save for Later

Message


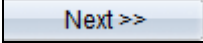
With this hire, the number of incumbents in the position will be greater than the max head count.

OK

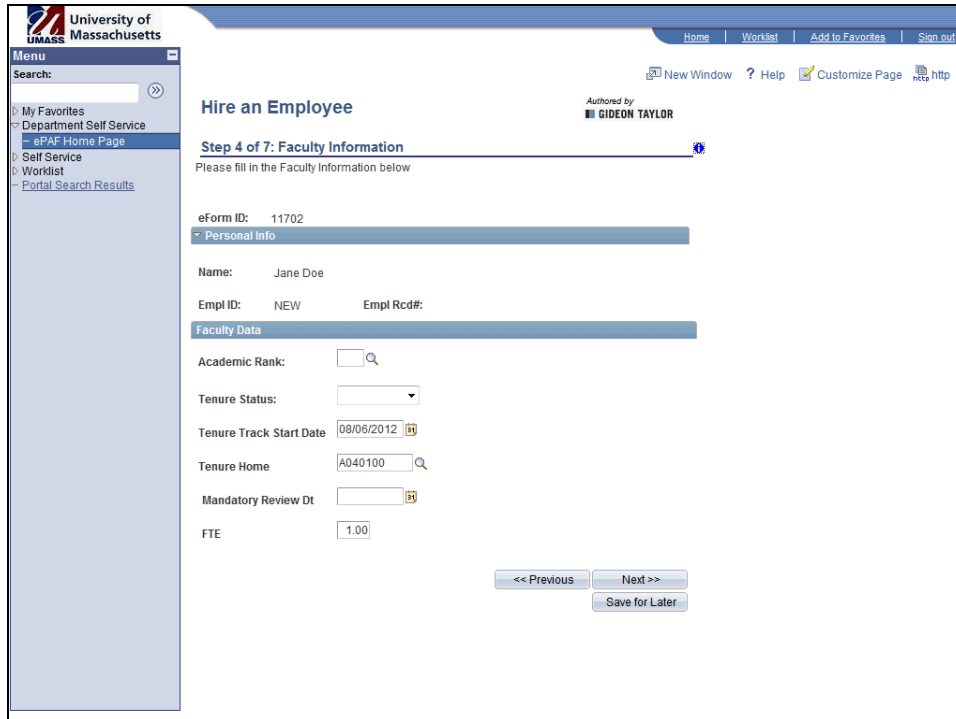
Step	Action
25.	<p>You have tried to hire someone into a position that is occupied. To continue, you may override this message.</p> <p>Click the <b>OK</b> button.</p> 

The screenshot shows the 'Job Data' section of a web application. The 'Is this a replacement for an incumbent?' checkbox is highlighted with a red box. Other visible fields include:
 

- Applicant ID: [ ] Job Opening ID: [ ]
- Effective Date: 08/06/2012 End Date: [ ]
- Employee Group: Faculty
- Is this a Positioned Job?: Yes
- Position Number: 00000002 Dir Of Plnt Biology Grad Prgm
- Reports To Position Number: [ ]
- Department: A040100 Biology
- Job Code: 90078 Professor A U of M
- Location Code: BLDG0080 Morrill Science Center North
- Academic or Calendar?: Academic
- Standard Hours: 40.00 FTE: 1.000000
- Mail Drop ID: [ ]

Step	Action
26.	<p>Click the <b>Is this a replacement for an incumbent?</b> option.</p> 
27.	<p><b>Note:</b> Refer to your campus business practices on when to use the <b>Override Position Fields</b>.</p>
28.	<p>Click the <b>Next</b> button.</p> 





University of Massachusetts

Home | Worklist | Add to Favorites | Sign out

Menu

Search: [ ]

- My Favorites
- Department Self Service
  - ePAF Home Page
- Self Service
- Worklist
- Portal Search Results

**Hire an Employee**

Authorized by GIDEON TAYLOR

**Step 4 of 7: Faculty Information**

Please fill in the Faculty Information below

eForm ID: 11702

**Personal Info**

Name: Jane Doe

Empl ID: NEW      Empl Rcd#:

**Faculty Data**

Academic Rank: [ ]

Tenure Status: [ ]

Tenure Track Start Date: 08/06/2012

Tenure Home: A040100

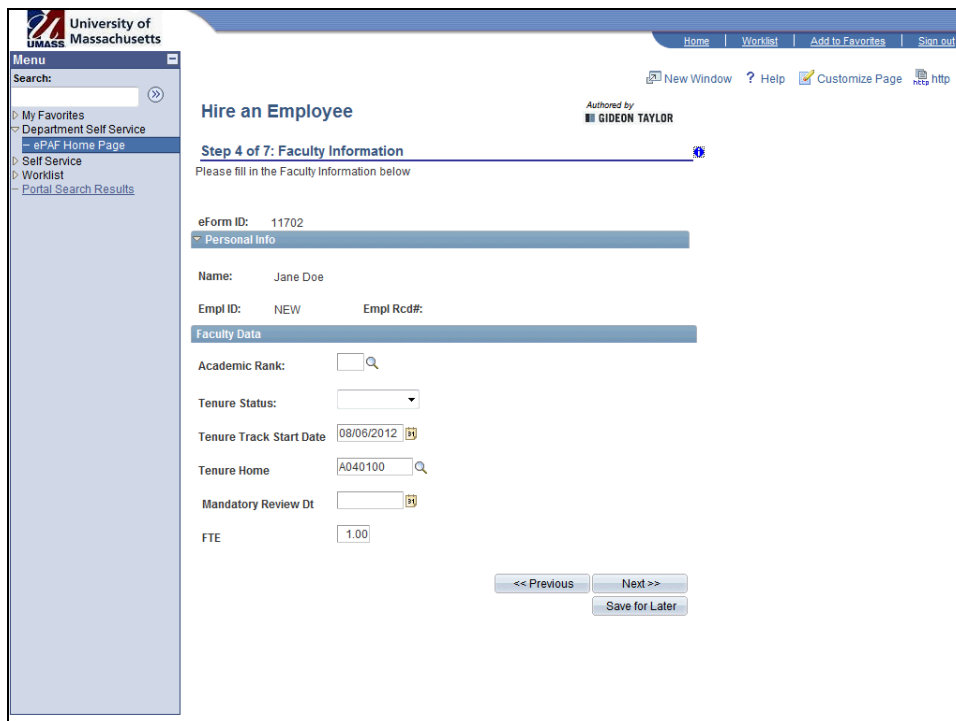
Mandatory Review Dt: [ ]

FTE: 1.00

<< Previous      Next >>

Save for Later

Step	Action
29.	The <b>Faculty Data</b> section will be completed by campus, where applicable.



University of Massachusetts

Home | Worklist | Add to Favorites | Sign out

Menu

Search: [ ]

- My Favorites
- Department Self Service
  - ePAF Home Page
- Self Service
- Worklist
- Portal Search Results

**Hire an Employee**

Authorized by GIDEON TAYLOR

**Step 4 of 7: Faculty Information**

Please fill in the Faculty Information below

eForm ID: 11702

**Personal Info**

Name: Jane Doe

Empl ID: NEW      Empl Rcd#:

**Faculty Data**

Academic Rank: [ ]

Tenure Status: [ ]

Tenure Track Start Date: 08/06/2012

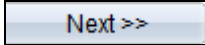
Tenure Home: A040100

Mandatory Review Dt: [ ]

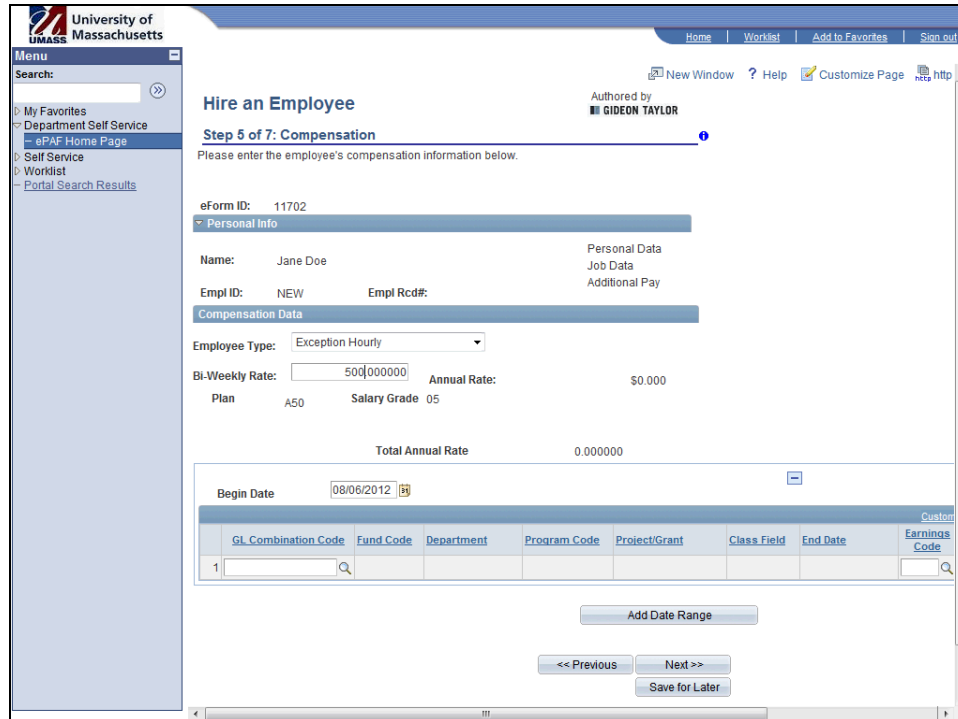
FTE: 1.00

<< Previous      Next >>

Save for Later

Step	Action
30.	Click the <b>Next</b> button. 

Step	Action
31.	Enter the desired information into the <b>Bi-Weekly Rate</b> field.  For this example, enter " <b>500</b> ".
32.	<b>Note:</b> Notice that the <b>Begin Date</b> defaults to the hire date. You may change this date if needed.



University of Massachusetts  
 Home | Worklist | Add to Favorites | Sign out  
 Authorized by: GIDEON TAYLOR

### Hire an Employee

Step 5 of 7: Compensation

Please enter the employee's compensation information below.

eForm ID: 11702

**Personal Info**

Name: Jane Doe Personal Data  
Job Data  
Additional Pay

Empl ID: NEW      Empl Rcd#:

**Compensation Data**

Employee Type: Exception Hourly

Bi-Weekly Rate: 500000000      Annual Rate: \$0.000



Plan: A50      Salary Grade: 05



Total Annual Rate: 0.000000

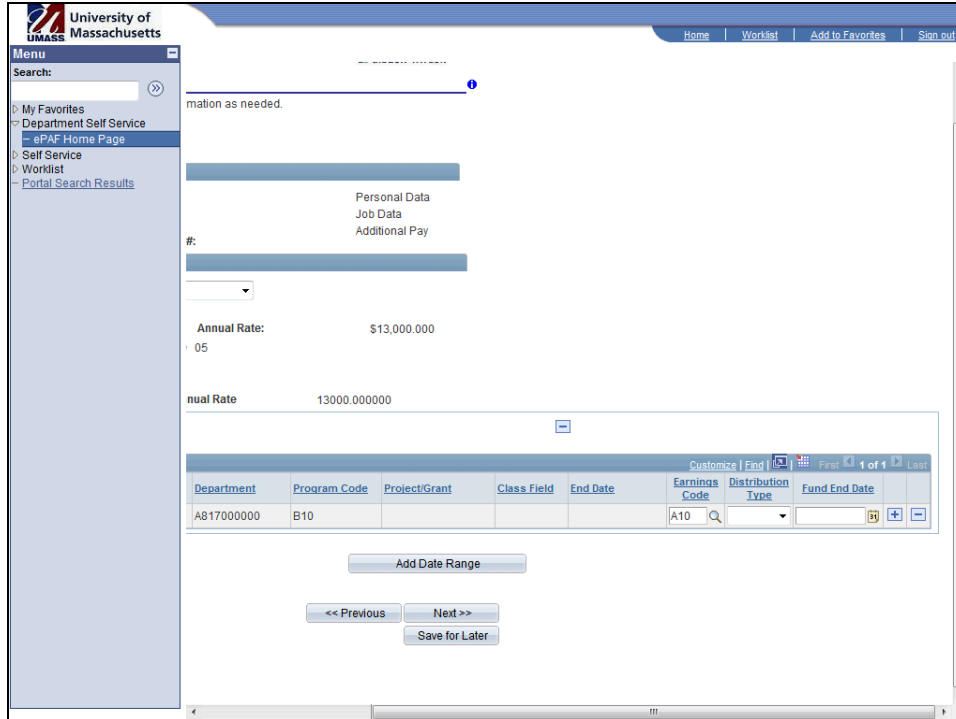
Begin Date: 08/06/2012


GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
1							

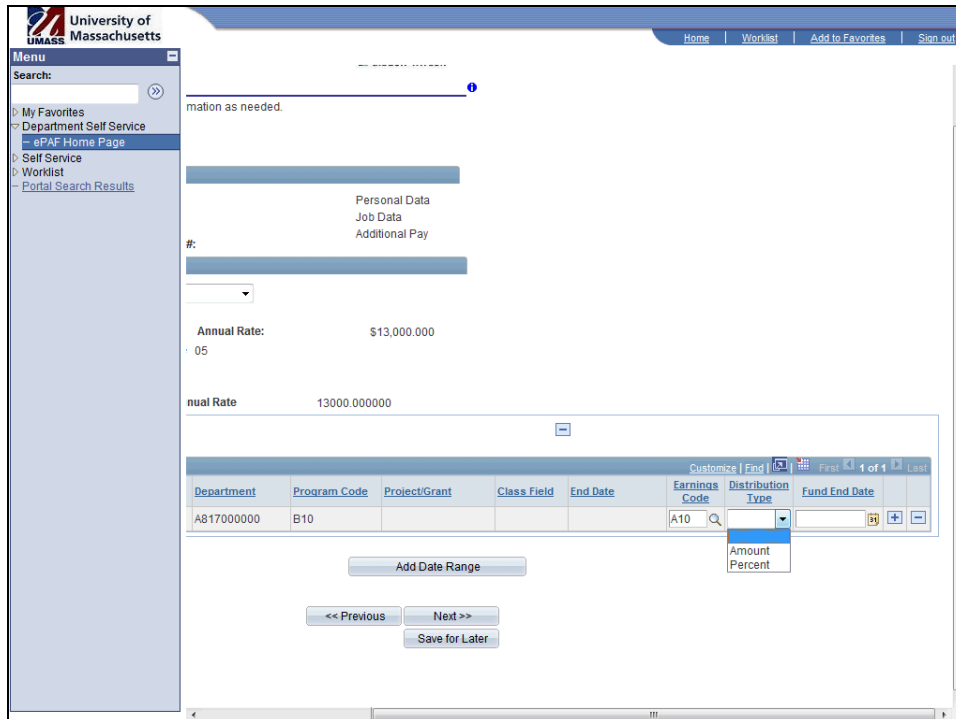
Buttons: Add Date Range, << Previous, Next >>, Save for Later

Step	Action
33.	Click the <b>GL Combination Code</b> look up button. 
34.	For this example, click the <b>A103738</b> link. <p><i>Note:</i> You can also use the <b>GL Combination Code</b> search field, and enter the first letter of your campus to expedite the search.</p> 

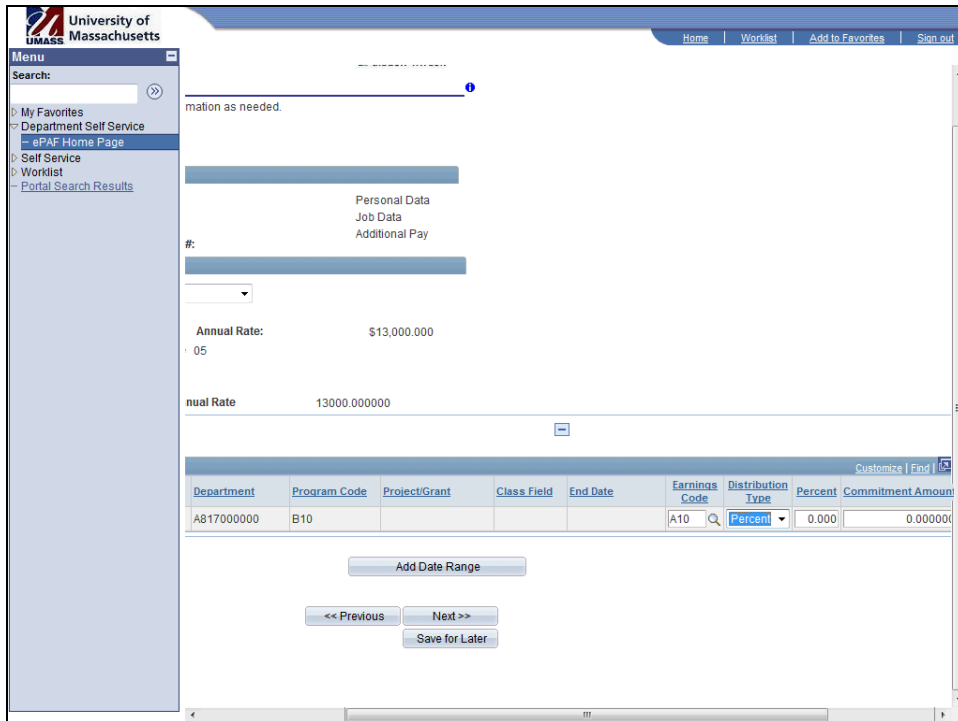
Step	Action
35.	<b>Note:</b> The Worcester campus will leave the <b>Earnings Code</b> blank. However, other campuses may choose to enter information in this field if needed.
36.	Click the <b>Earnings Code</b> look up button. 
37.	For this example, click the <b>A10</b> link.  <b>Note:</b> You may also select the <b>Description</b> link. 



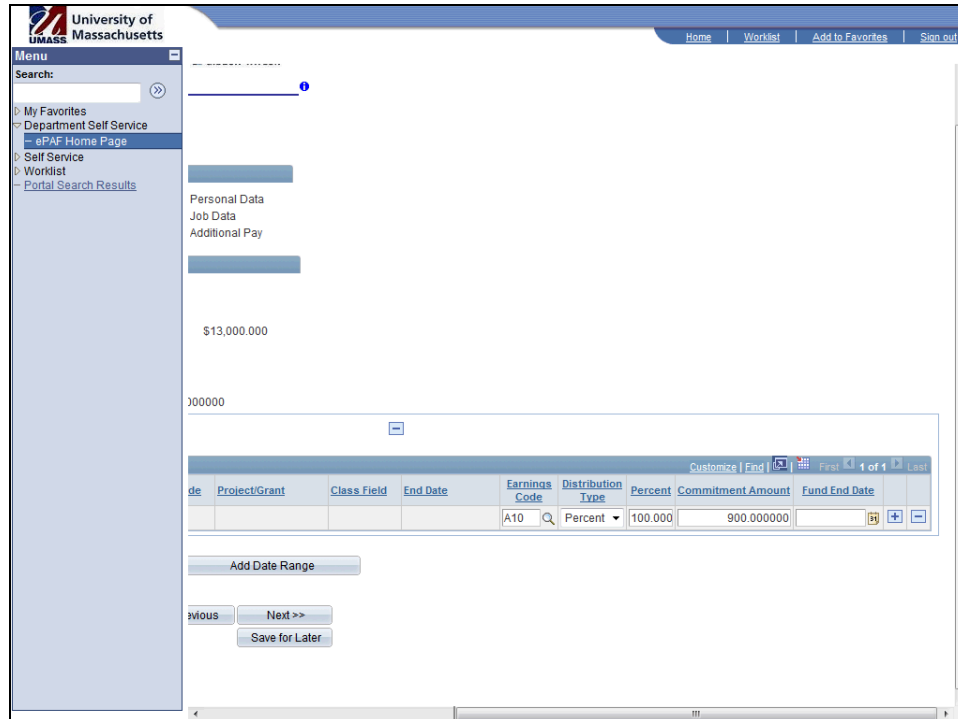
Step	Action
38.	Click the <b>Distribution Type</b> list. 



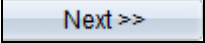


Step	Action
39.	For this example, click the <b>Percent</b> list item. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Percent</div>



Step	Action
40.	The <b>Percent</b> field amount cannot exceed 100%, but you may have multiple rows that add up to 100%.  For this example, enter " <b>100</b> ".
41.	Click the horizontal <b>Scrollbar</b> .



Step	Action
42.	The <b>Commitment Amount</b> is a calculated amount, which will be different by campus.  <i>Note:</i> Amherst will manually enter their amount, however all other campuses will use an auto calculation.
43.	<i>Note:</i> The campus will choose the <b>Fund End Date</b> , if applicable.
44.	Click the <b>Fund End Date</b> calendar look up button. 
45.	For this example, click the August <b>31</b> link. 
46.	<i>Note:</i> To add additional rows, use the plus sign. To delete rows, use the minus sign.
47.	The <b>Add Date Range</b> field is not required, but it can be notated if applicable.
48.	Click the <b>Next</b> button. 
49.	The <b>Time and Labor Data</b> page allows human resources to establish a person into the appropriate groups necessary for reporting time.

University of Massachusetts

Menu

Search: [ ]

My Favorites

Department Self Service

ePAF Home Page

Self Service

Worklist

Portal Search Results

Home Worklist Add to Favorites Sign out

New Window ? Help Customize Page http

Authorized by GIDEON TAYLOR

## Hire an Employee

### Step 6 of 7: HR Information

Enter or change any known information.

eForm ID: 11702

Personal Info

Name: Jane Doe Personal Data  
Job Data  
Additional Pay

Empl ID: NEW Empl Rcd#: [ ]

Time and Labor Data

\*Benefit Status: [ ]

\*Union Code: A50 [ ] MT/NEA MSP Faculty

\*Pay Group: UMA [ ] UMass Amherst

\*Empl Class: [ ] [ ]

Workgroup: [ ] [ ]

Taskgroup: [ ]

Time and Labor Schedule

Schedule different from standard?

<< Previous Next >>

Save for Later

Step	Action
50.	Click the <b>Benefit Status</b> list. <div style="border: 1px solid black; width: 150px; height: 20px; margin: 5px 0;"></div>

University of Massachusetts

Menu

Search: [ ]

My Favorites

Department Self Service

ePAF Home Page

Self Service

Worklist

Portal Search Results

Home Worklist Add to Favorites Sign out

New Window ? Help Customize Page http

Authorized by GIDEON TAYLOR

## Hire an Employee

### Step 6 of 7: HR Information

Enter or change any known information.

eForm ID: 11702

Personal Info

Name: Jane Doe Personal Data  
Job Data  
Additional Pay

Empl ID: NEW Empl Rcd#: [ ]

Time and Labor Data

\*Benefit Status: [ Benefit ]

\*Union Code: A50 [ ] MT/NEA MSP Faculty

\*Pay Group: UMA [ ] UMass Amherst

\*Empl Class: [ ] [ ]

Workgroup: [ ] [ ]

Taskgroup: [ ]

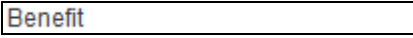
Time and Labor Schedule

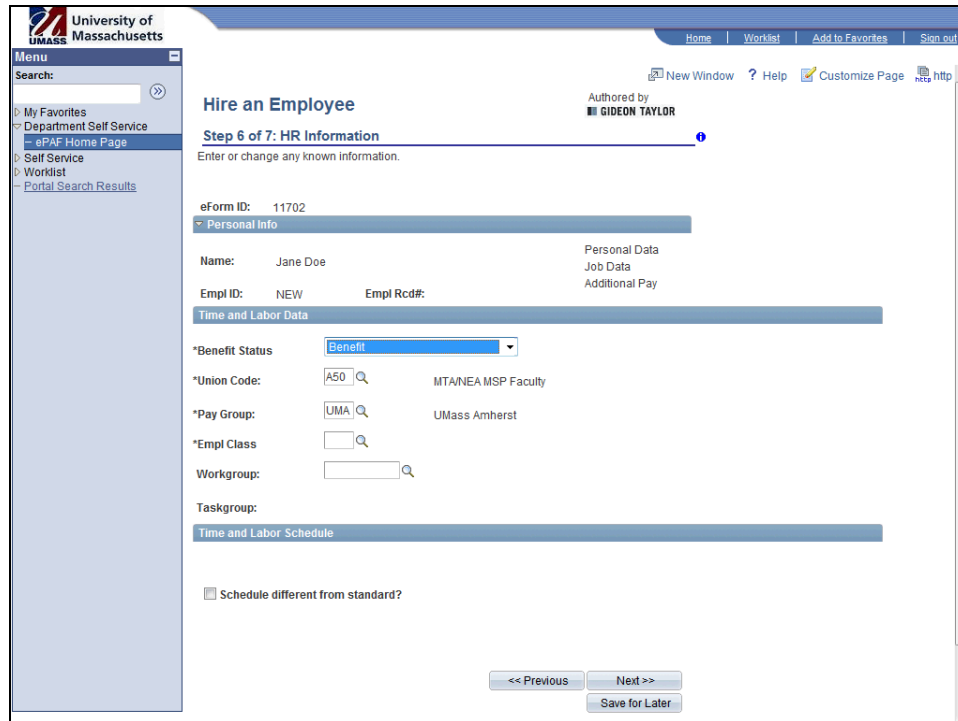
Schedule different from standard?



<< Previous Next >>

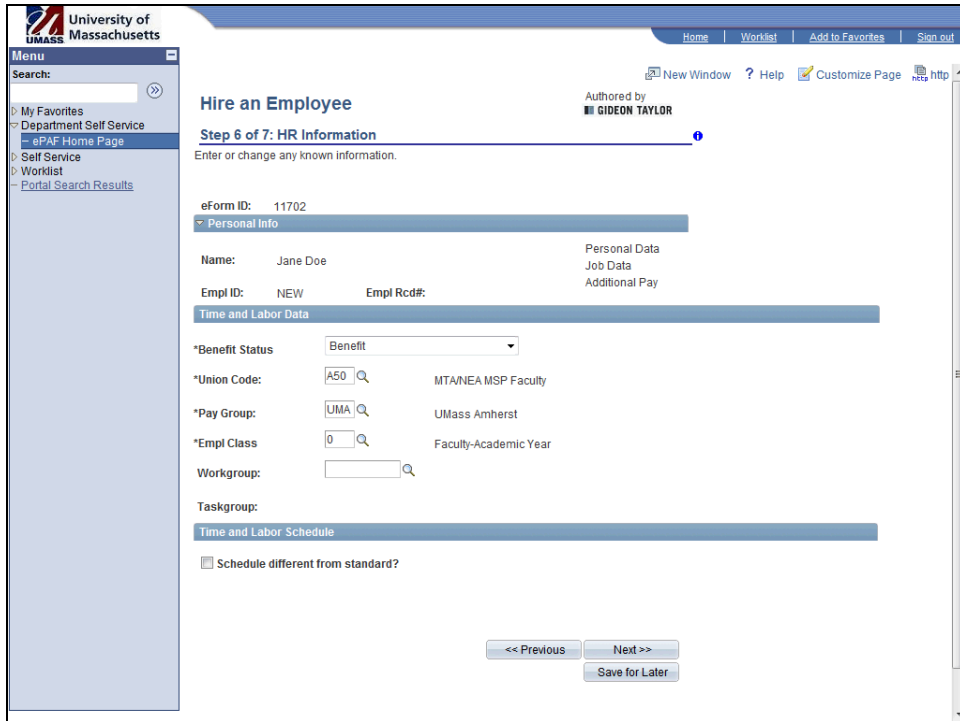
Save for Later



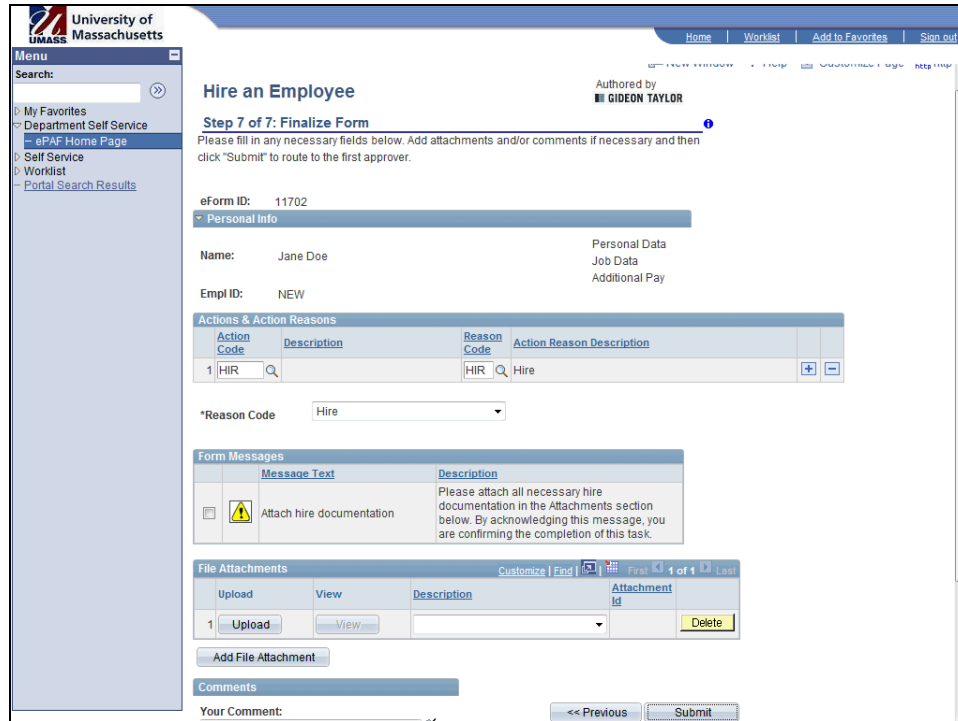
Step	Action
51.	Click the <b>Benefit</b> list item. 



Step	Action
52.	Click the <b>Empl Class</b> look up button. 
53.	For this example, click the <b>0</b> link. 



Step	Action
54.	<p>The use of <b>Schedule different from standard?</b>, is by campus choice.</p> <p>For this example, click the <b>Schedule different from standard?</b> option.</p> <p><input type="checkbox"/> <b>Schedule different from standard?</b></p>
55.	<p><b>Note:</b> If you decide to use the <b>Schedule different from standard</b>, then you would enter your <b>Schedule Description</b> here.</p>
56.	<p>Click the <b>Next</b> button.</p> <p><input type="button" value="Next &gt;&gt;"/></p>



**Hire an Employee** Authorized by GIDEON TAYLOR

**Step 7 of 7: Finalize Form**

Please fill in any necessary fields below. Add attachments and/or comments if necessary and then click "Submit" to route to the first approver.

eForm ID: 11702

**Personal Info**

Name: Jane Doe Personal Data  
Job Data  
Additional Pay


Empl ID: NEW

**Actions & Action Reasons**

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

\*Reason Code: Hire

**Form Messages**

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

**File Attachments**


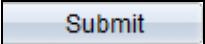
Upload	View	Description	Attachment Id
1   Upload	View		Delete

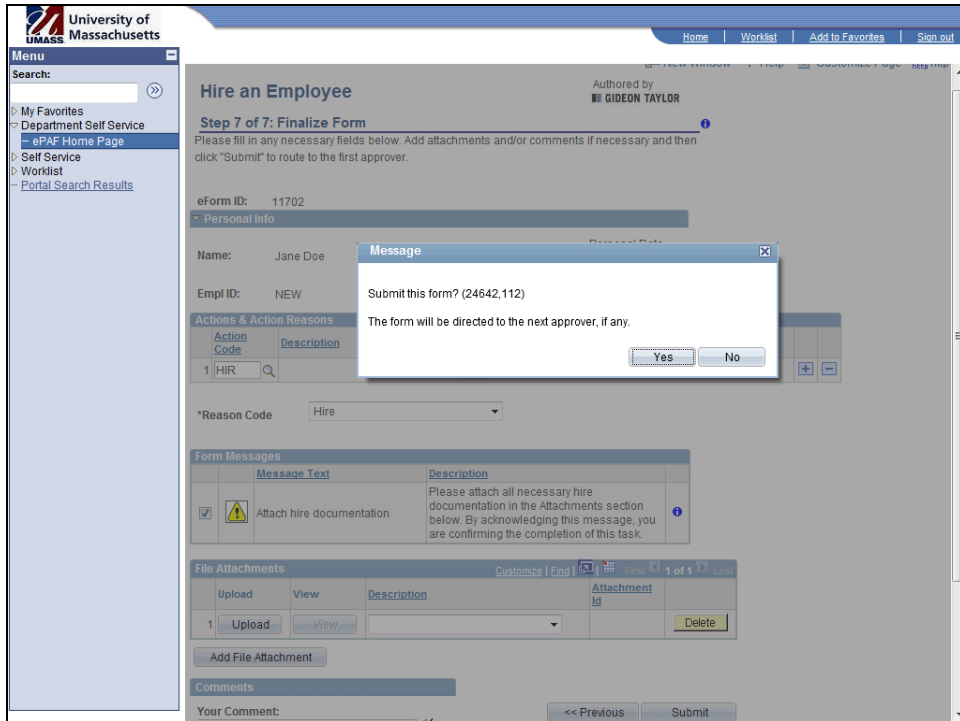
Add File Attachment

**Comments**

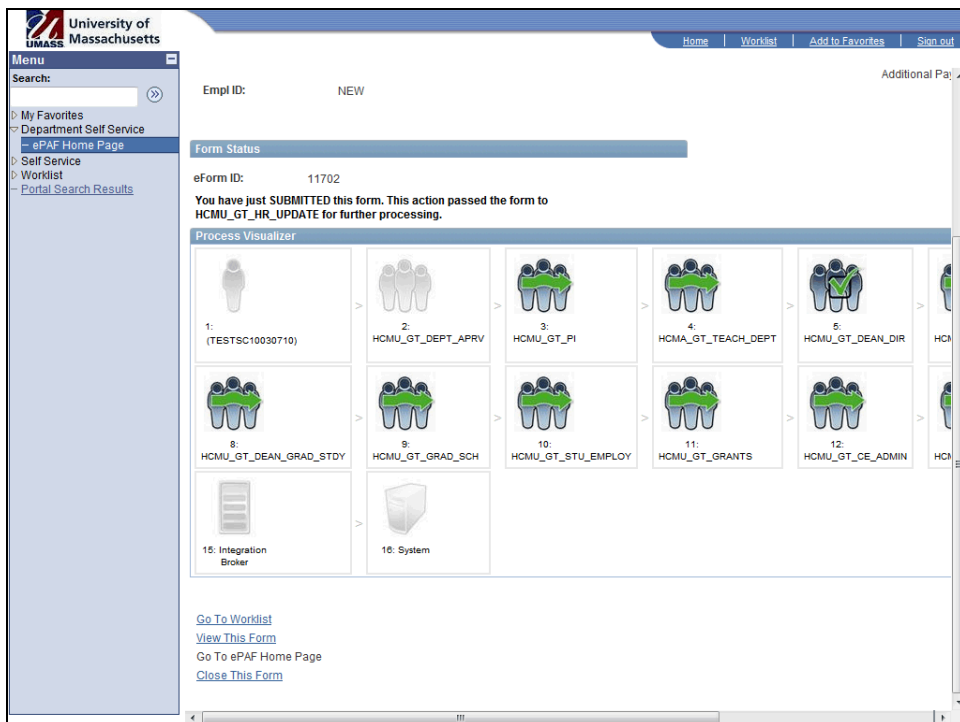
Your Comment:

<< Previous Submit

Step	Action
57.	<p>Whether you are attaching documentation or not, you must always acknowledge <b>Form Messages</b> and confirm that you have completed attaching any documentation.</p> <p>Click the <b>Attach hire documentation</b> option.</p> 
58.	<p>Click the <b>Submit</b> button.</p> 



Step	Action
59.	Confirm that you are ready to submit this form, and click the <b>Yes</b> button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">                         Yes                     </div>



Step	Action
60.	The <b>Form Status</b> indicates that you have submitted this form.  <i>Note:</i> The <b>Process Visualizer</b> shows a workflow that is completely customized by campus.
61.	Congratulations! You have added an employee into a position. <b>End of Procedure.</b>

### Adding an Employee into a Job

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

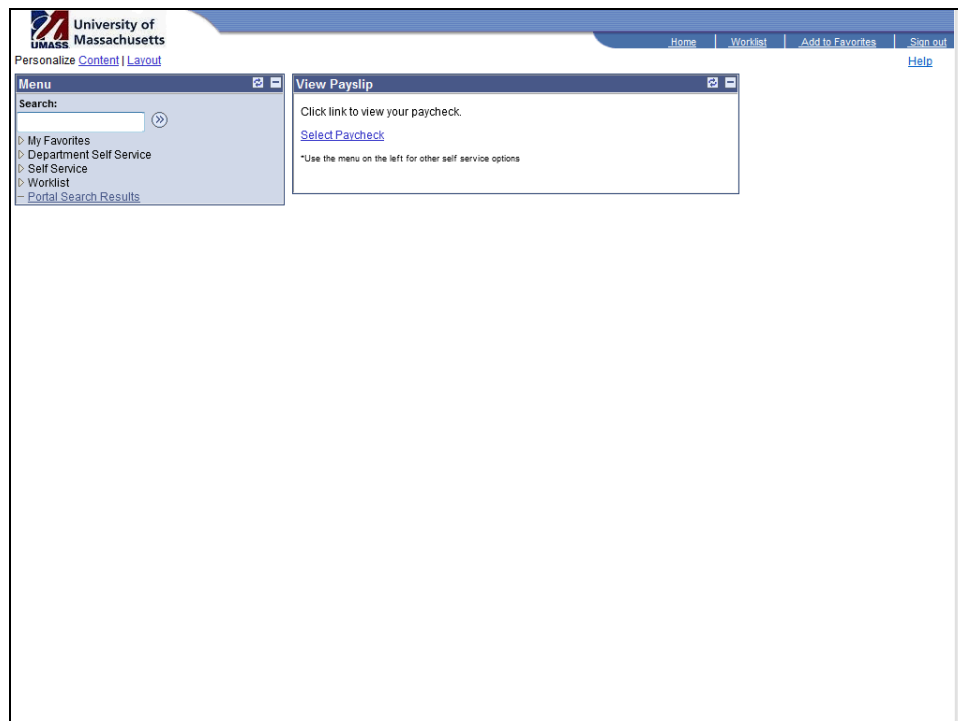
#### Procedure

#### Consider this scenario:

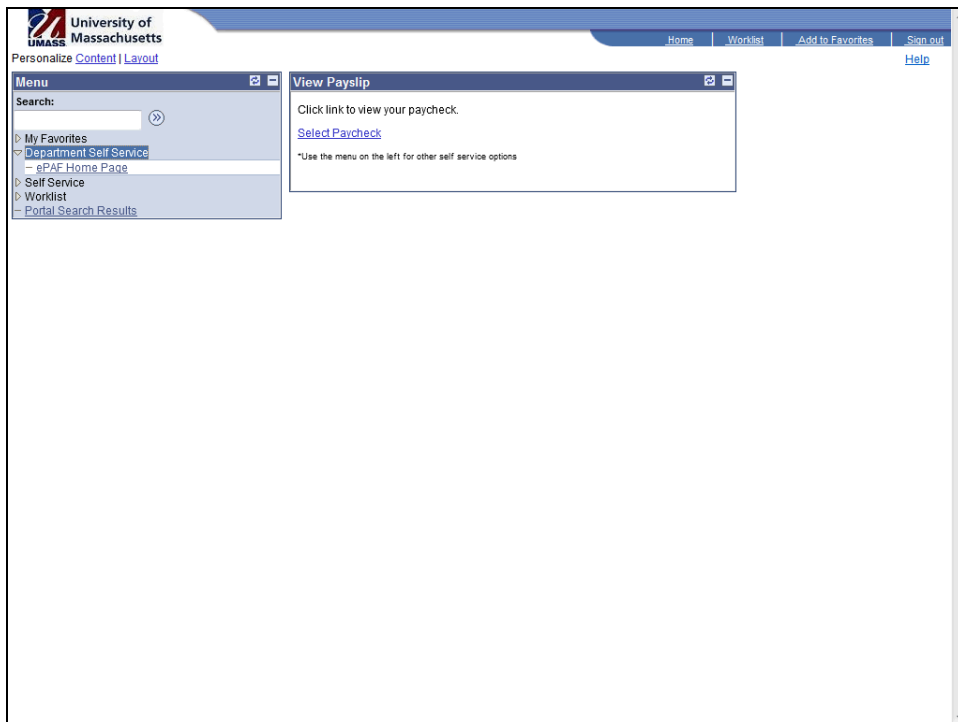
Your goal is to add an employee into a job.

#### Key Information:

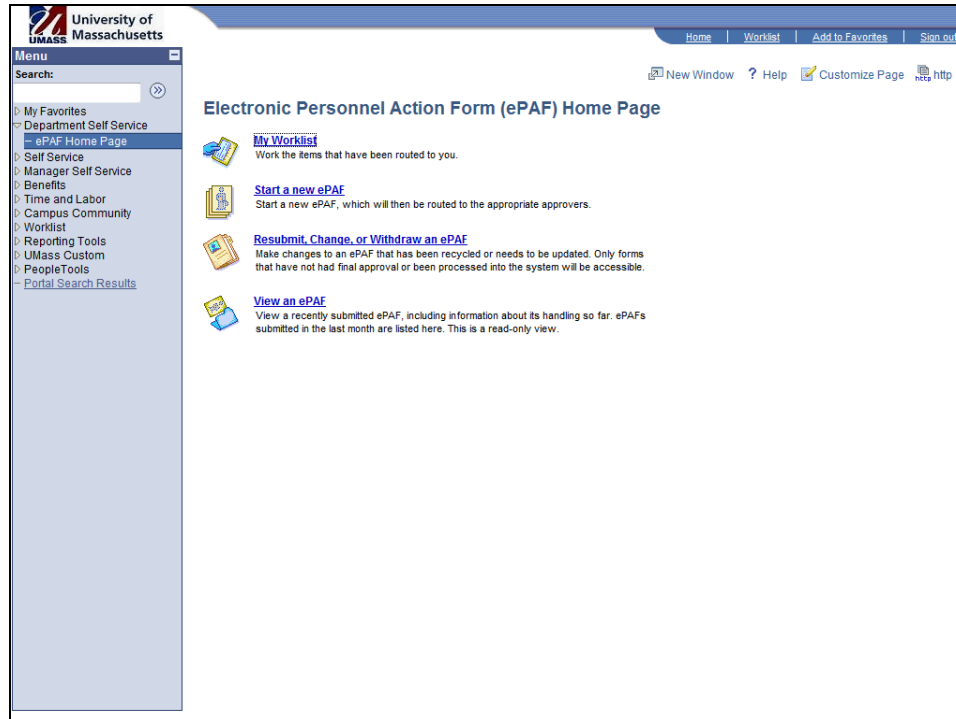
Employee Group: Classified  
Is this a Positioned Job?: No



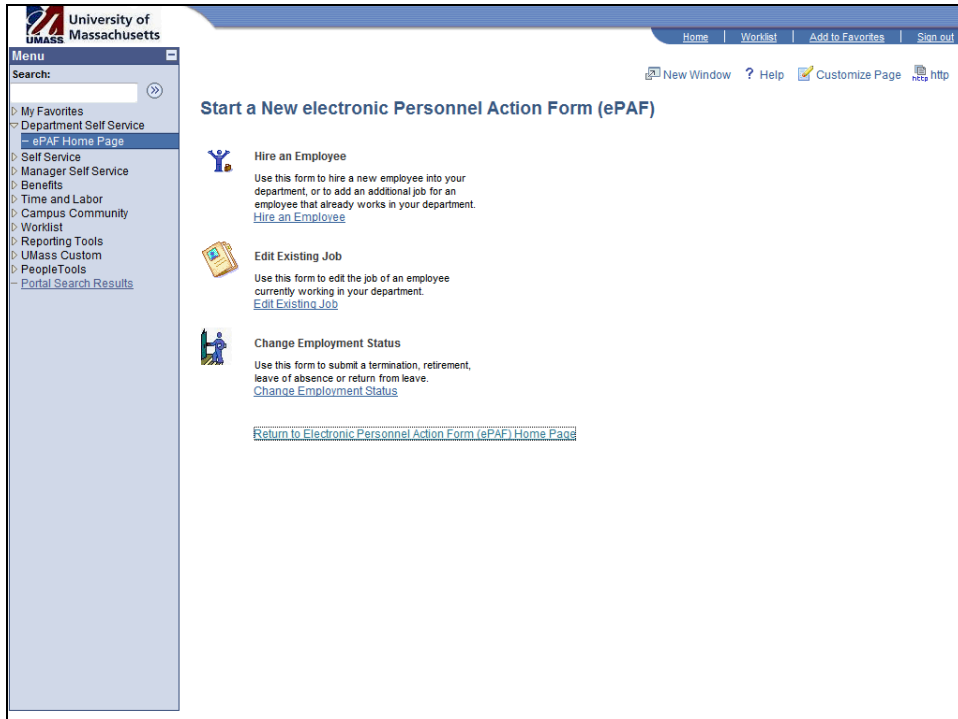
Step	Action
1.	<p>Begin by navigating to the <b>ePAF Home Page</b>.</p> <p>Click the <b>Department Self Service</b> link.</p> <p><a href="#">▶ Department Self Service</a></p>



Step	Action
2.	<p>Click the <b>ePAF Home Page</b> link.</p> <p><a href="#">ePAF Home Page</a></p>

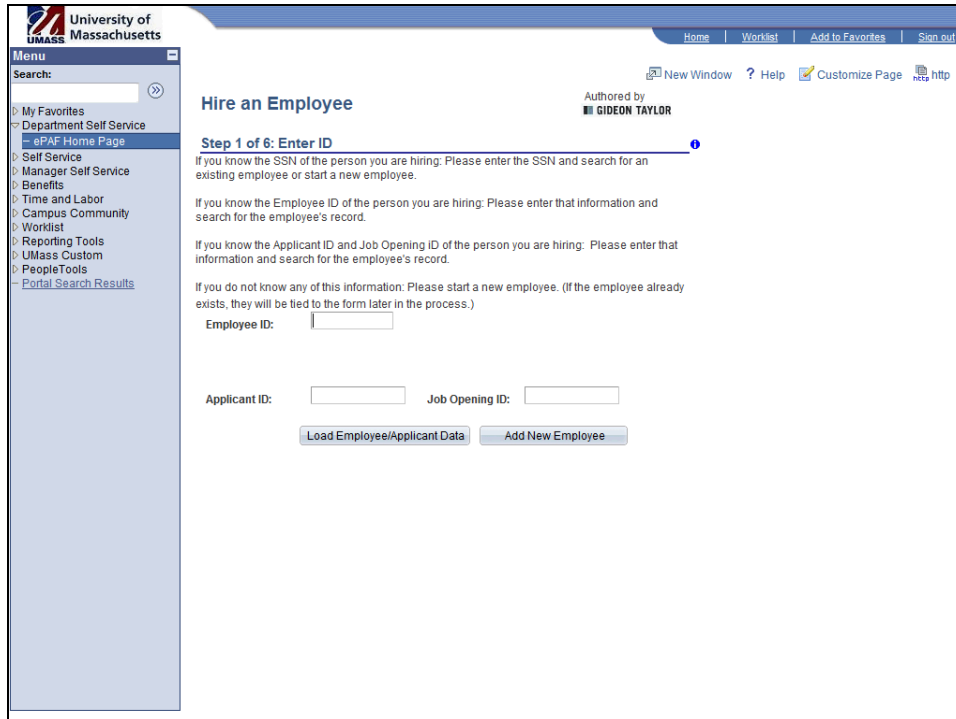


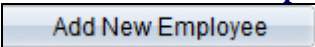
Step	Action
3.	This is the <b>ePAF Home Page</b> , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the <b>Start a new ePAF</b> link. <a href="#">Start a new ePAF</a>

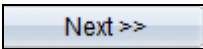


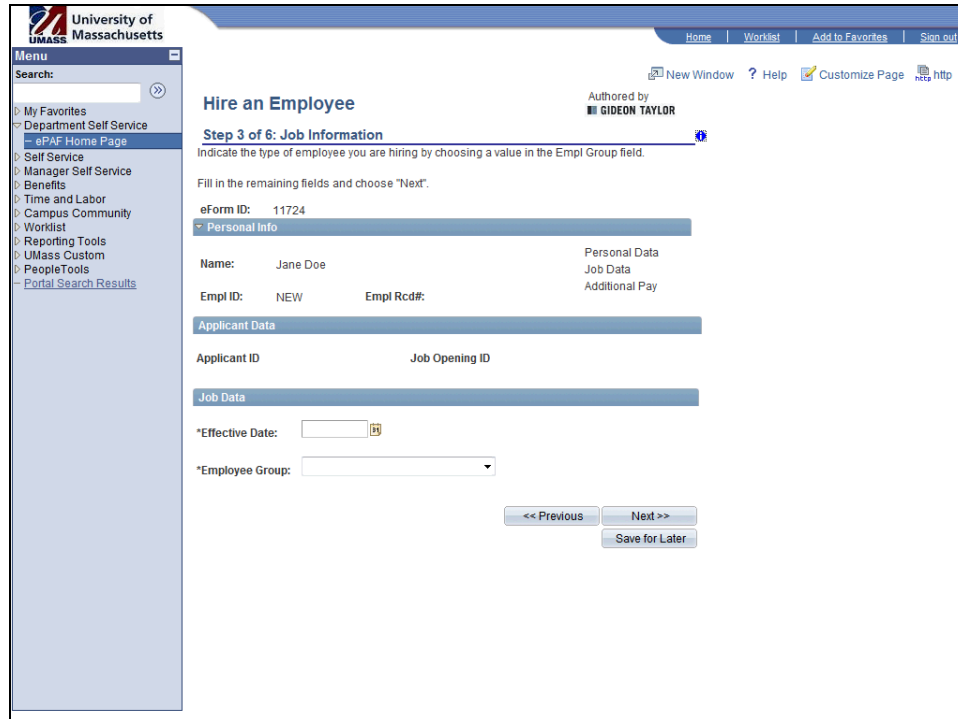
Step	Action
5.	<p>Depending on your campus practice, you can add employees with positions or jobs. For this example, you are hiring an employee into job.</p> <p>Click the <b>Hire an Employee</b> link.</p> <p><a href="#">Hire an Employee</a></p>
6.	<p>If you know the <b>Employee ID</b> of the person you are hiring (or if you are hiring a contingent worker or POI); you can enter this information and then search for the employee's record.</p> <p>Another way to search would be to use the <b>Applicant ID</b> and the <b>Job Opening ID</b> of the person you are hiring; you can enter this information and then search for the employee's record.</p>






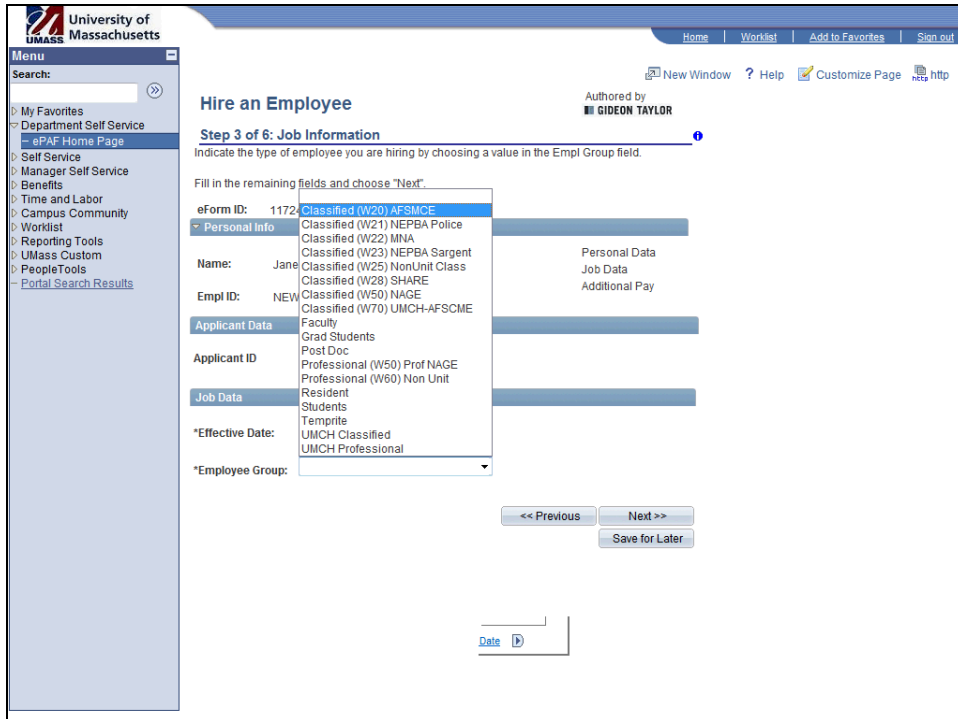






Step	Action
7.	<p>For this example, you do not have any ID's to search on.</p> <p>Click the <b>Add New Employee</b> button.</p> 

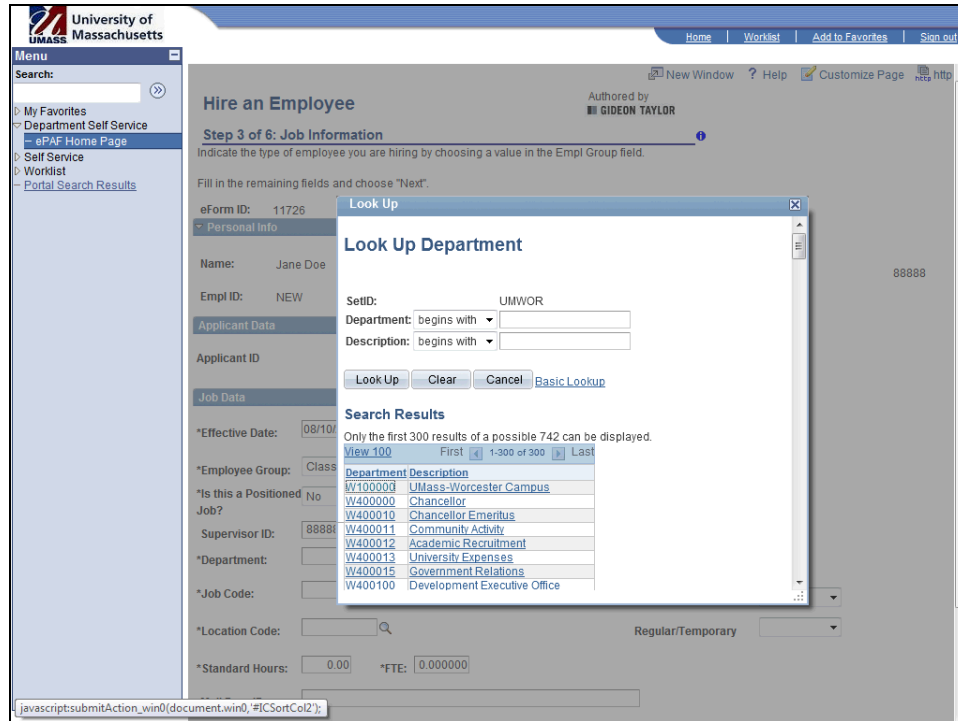
Step	Action
8.	<p>If you wanted to clone a previous eform and use it as a template for multiple hires of the same type, you would enter the <b>Clone eForm ID</b> here (or you could search for the <b>Clone eForm ID</b> if you did not know it).</p> <p><i>Note:</i> For this example, we will not use the <b>Clone eForm ID</b>.</p>
9.	<p>Enter the desired information into the <b>First Name</b> field.</p> <p>Enter "<b>Jane</b>".</p>
10.	<p>Enter the desired information into the <b>Middle</b> field.</p> <p>Enter "<b>B.</b>".</p>
11.	<p>Enter the desired information into the <b>Last Name</b> field.</p> <p>Enter "<b>Doe</b>".</p>
12.	<p>Click the <b>Next</b> button.</p> 





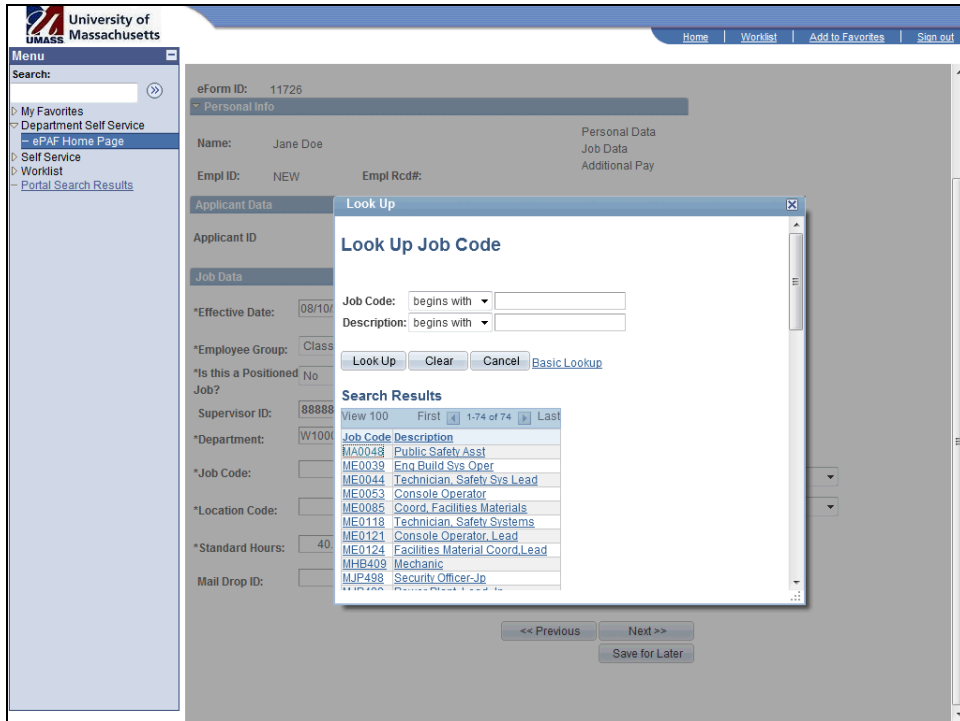
Step	Action
13.	Click the <b>Effective Date</b> calendar button. 
14.	For this example, click the August <b>10</b> link. 
15.	Click the <b>Employee Group</b> list. 



Step	Action
16.	For this example, click the <b>Classified (W20) AFSMCE</b> list item. 
17.	Click the <b>Is this a Positioned Job?</b> list. 
18.	Click the <b>No</b> list item. 
19.	Enter the desired information into the <b>Supervisor ID</b> field. For this example, enter " <b>88888</b> ". <i>Note:</i> You can also use the <b>Supervisor ID</b> look up button to search for this value.
20.	Click the <b>Department</b> look up button. 



Step	Action
21.	For this example, click the <b>W100000</b> link.  <i>Note:</i> You can also click on the <b>Description</b> link next to the Department link. 
22.	Click the <b>Job Code</b> look up button. 



Step	Action
23.	For this example, click the <b>ME0085</b> link.  <i>Note:</i> You can also click the <b>Description</b> link next to the <b>Job Code</b> link. <b>ME0085</b>
24.	Click the <b>Full/Part Time</b> list. <input type="text" value="Full/Part Time"/>
25.	For this example, click the <b>Full-Time</b> list item. <input type="text" value="Full-Time"/>
26.	Click the <b>Regular/Temporary</b> list. <input type="text" value="Regular/Temporary"/>
27.	For this example, click the <b>Regular</b> list item. <input type="text" value="Regular"/>

**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: 11726

**Personal Info**

Name: Jane Doe Personal Data  
Job Data  
 Empl ID: NEW      Empl Rcd#: Additional Pay

**Applicant Data**

Applicant ID      Job Opening ID

**Job Data**

\*Effective Date: 08/10/2012  
 \*Employee Group: Classified (W20) AFSMCE  
 \*Is this a Positioned Job? No  
 Supervisor ID: 88888      John Doe  
 \*Department: W100000      UMass-Worcester Campus  
 \*Job Code: ME0085      Coord, Facilities Materials      Full/Part Time: Full-Time  
 \*Location Code: MED SCHOOL      Medical School      Regular/Temporary: Regular  
 \*Standard Hours: 40.00      \*FTE: 1.000000  
 Mail Drop ID:

Step	Action
28.	The <b>Mail Drop ID</b> is not a required field, however you may enter it if you know it.
29.	Click the vertical <b>Scrollbar</b> to scroll down the page.

Fill in the remaining fields and choose "Next".

eForm ID: 11726

**Personal Info**

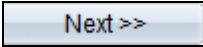
Name: Jane Doe Personal Data  
Job Data  
 Empl ID: NEW      Empl Rcd#: Additional Pay

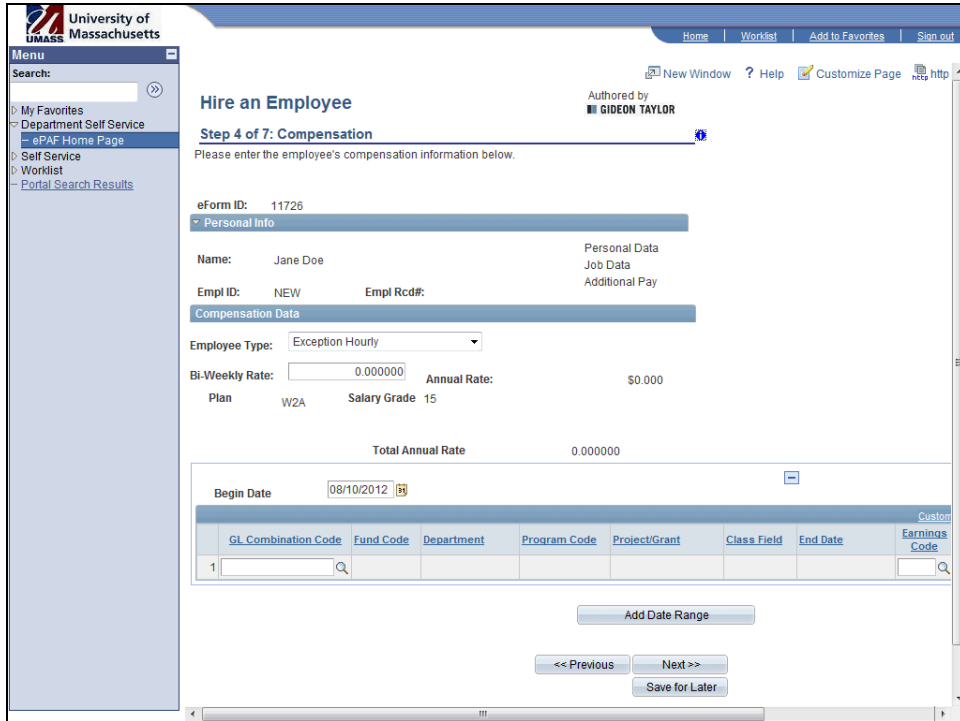
**Applicant Data**

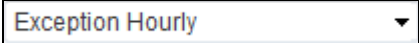


Applicant ID      Job Opening ID

**Job Data**

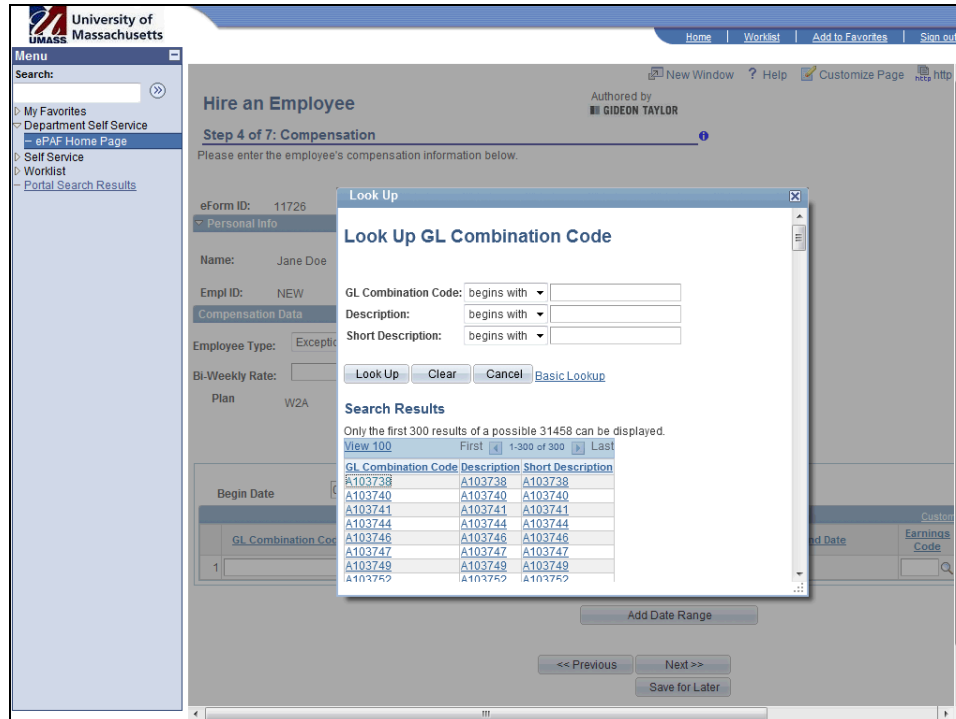
\*Effective Date: 08/10/2012  
 \*Employee Group: Classified (W20) AFSMCE  
 \*Is this a Positioned Job? No  
 Supervisor ID: 88888      John Doe  
 \*Department: W100000      UMass-Worcester Campus  
 \*Job Code: ME0085      Coord, Facilities Materials      Full/Part Time: Full-Time  
 \*Location Code: MED SCHOOL      Medical School      Regular/Temporary: Regular  
 \*Standard Hours: 40.00      \*FTE: 1.000000  
 Mail Drop ID:

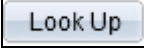

Step	Action
30.	Click the <b>Next</b> button. 




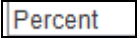
Step	Action
31.	The <b>Employee Type</b> will default. You may change this field if needed. Click the <b>Employee Type</b> list. 
32.	For this example, click the <b>Exception Hourly</b> list item. 
33.	Enter the desired information into the <b>Bi-Weekly Rate</b> field. For this example, enter " <b>500</b> ".
34.	<b>Note:</b> Notice that the <b>Begin Date</b> defaults to the hire date. You may change this date if needed.
35.	Click the <b>GL Combination Code</b> look up button. 

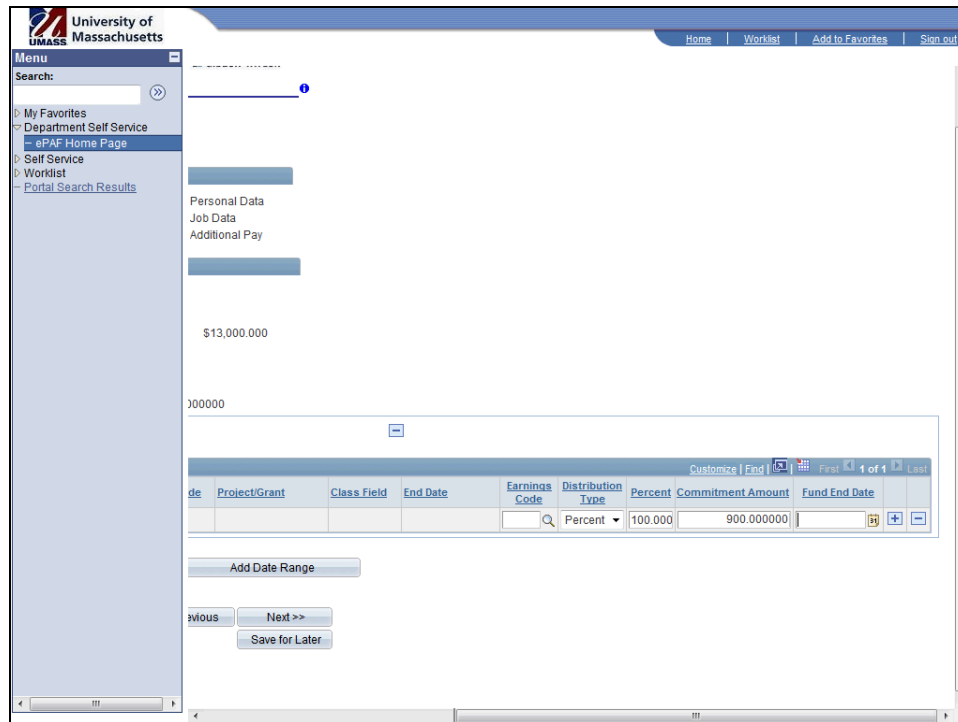






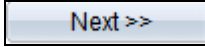
Step	Action
36.	<p>You can enter the first letter of your campus to expedite the search within this field. Enter the desired information into the <b>GL Combination Code</b> field.</p> <p>For this example, enter "<b>W</b>".</p>
37.	<p>Click the <b>Look Up</b> button.</p> <p></p>
38.	<p>For this example, click the <b>W100025</b> link.</p> <p><i>Note:</i> You may also click on the <b>Description</b> link or the <b>Short Description</b> link.</p> <p></p>

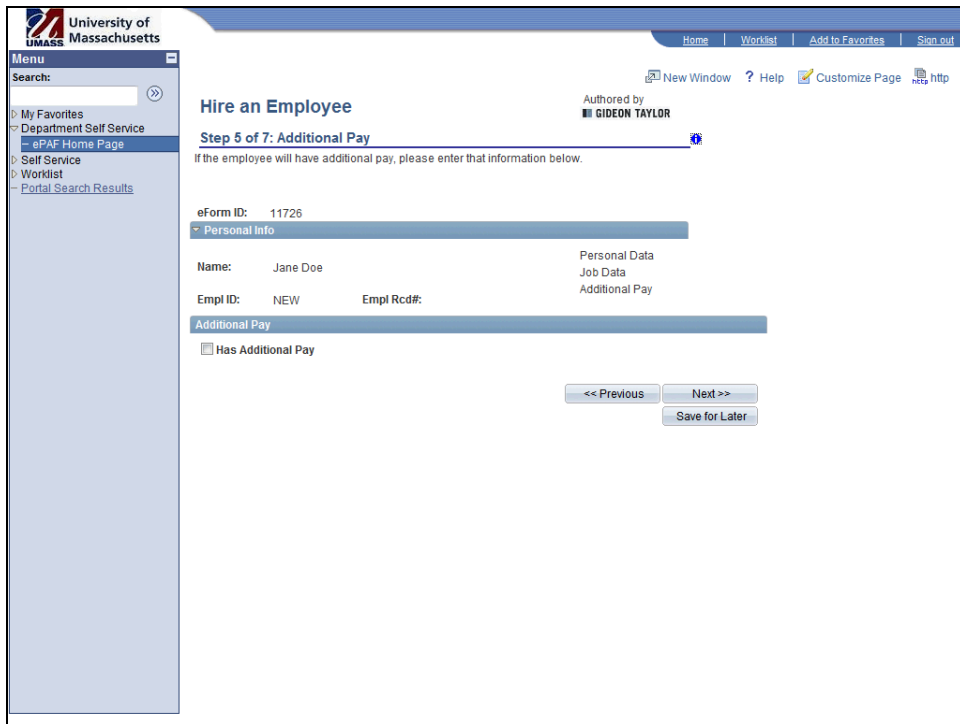
Step	Action
39.	Click the horizontal <b>Scrollbar</b> .

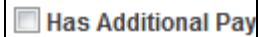
Step	Action
40.	<i>Note:</i> The Worcester campus will leave the <b>Earnings Code</b> field blank. However, other campuses may choose to enter information in this field if needed.
41.	Click the <b>Distribution Type</b> list. 
42.	For this example, click the <b>Percent</b> list item. 
43.	The <b>Percent</b> field amount cannot exceed 100%, but you have multiple rows that add up to 100%.  For this example, enter " <b>100</b> ".
44.	The <b>Commitment Amount</b> is a calculated amount, which will be different by campus.  <i>Note:</i> Amherst will manually enter their amount, however all other campuses will use an auto calculation.

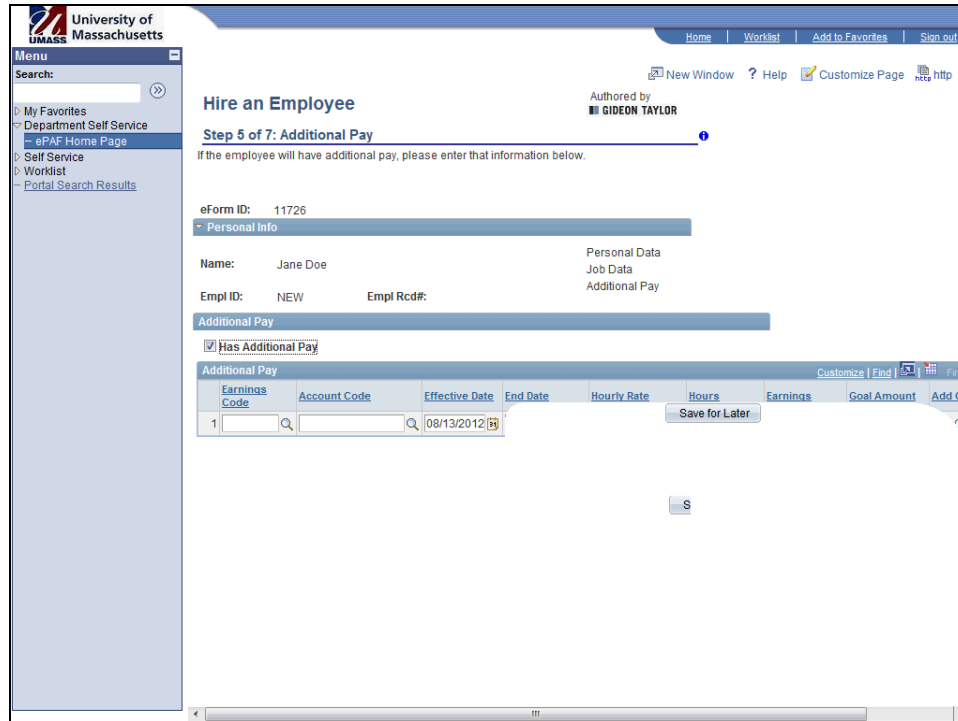



Step	Action
45.	<i>Note:</i> The campus will choose the <b>Fund End Date</b> , if applicable.

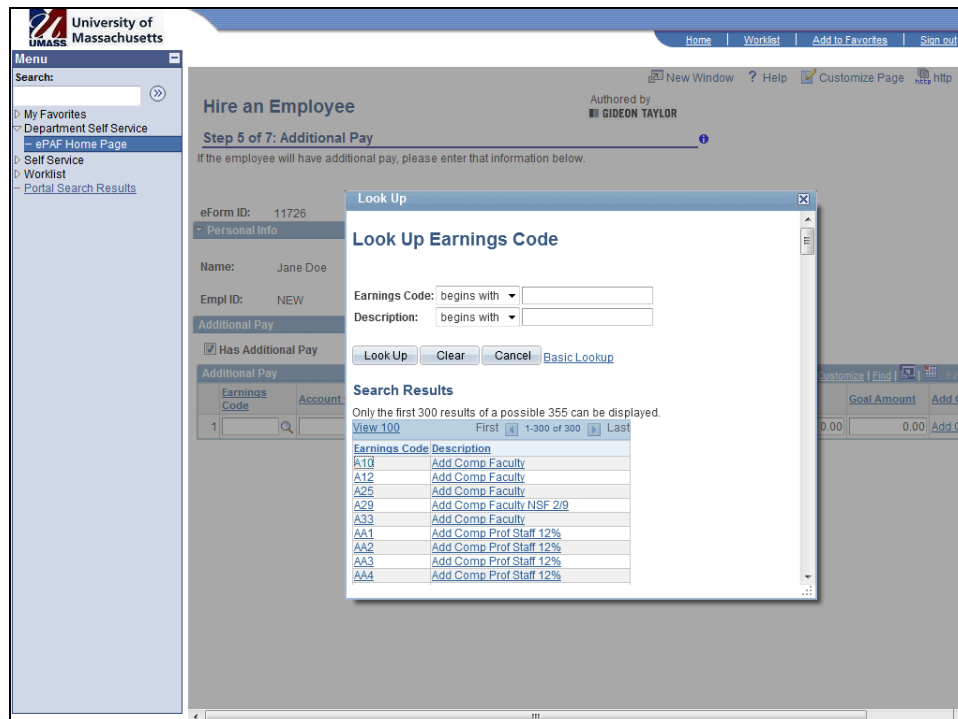
Step	Action
46.	Click the <b>Fund End Date</b> calendar look up button. 
47.	For this example, click the August <b>17</b> link. 
48.	<b>Note:</b> To add additional rows, use the plus sign. To delete rows, use the minus sign.
49.	The <b>Add Date Range</b> field is not required, but it can be notated if applicable.
50.	Click the <b>Next</b> button. 

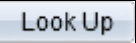


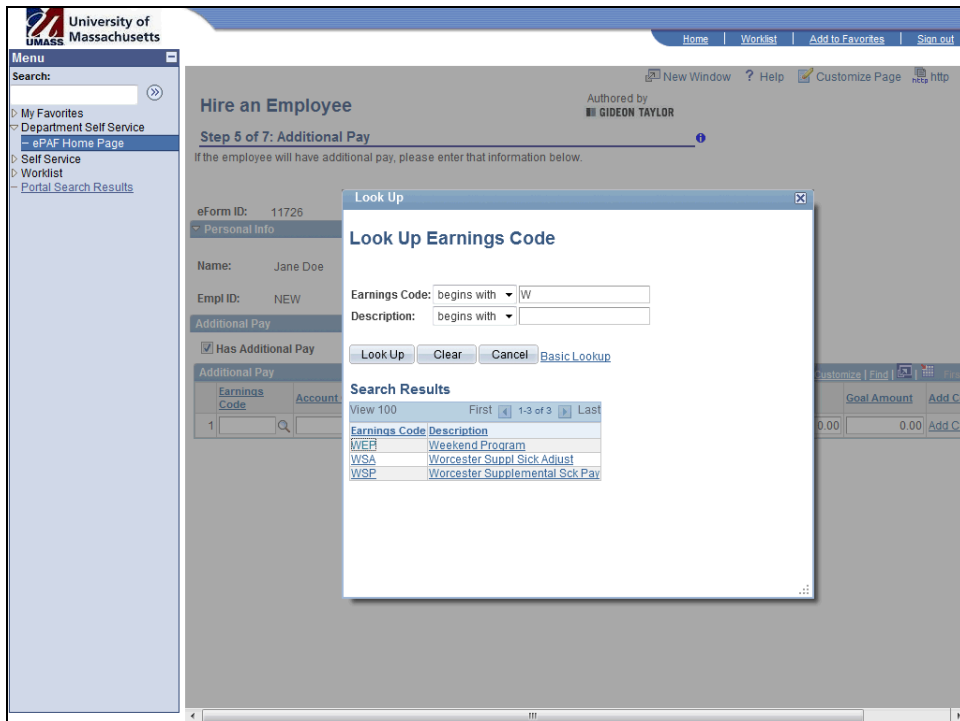
Step	Action
51.	If the employee will have additional pay, you will enter the information here.  For this example, click the <b>Has Additional Pay</b> option. 




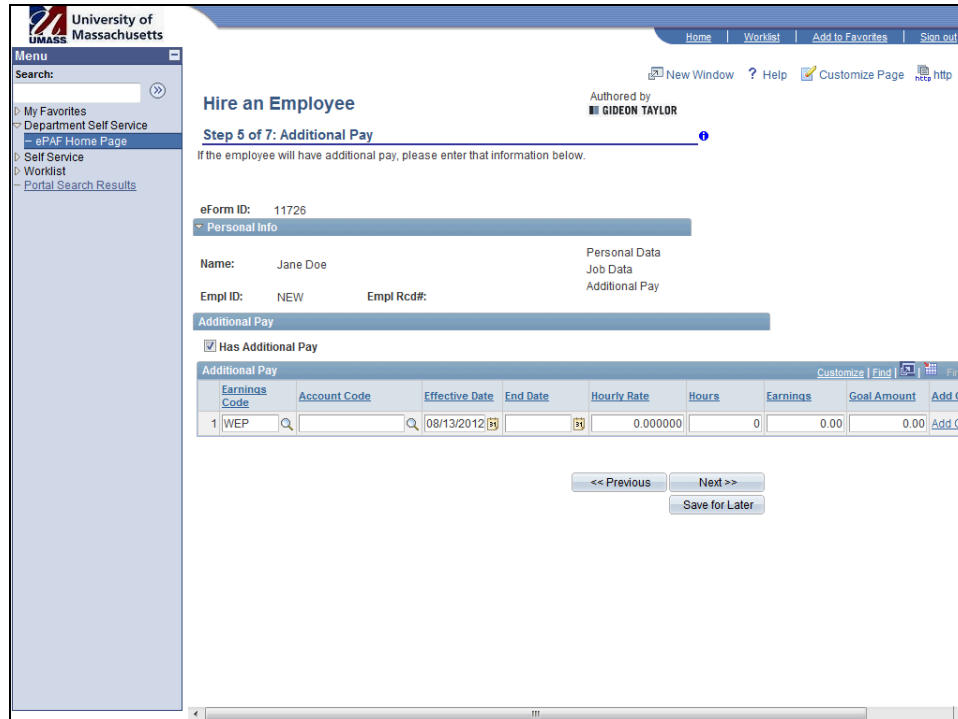
Step	Action
52.	Click the <b>Earnings Code</b> look up button. 



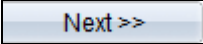


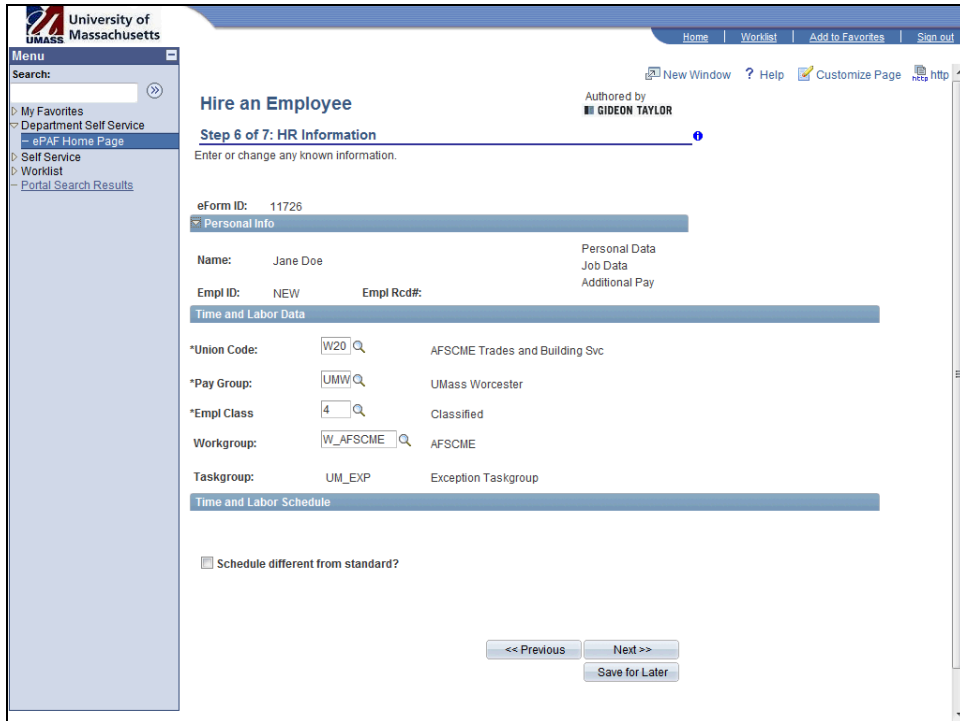
Step	Action
53.	Enter the desired information into the <b>Earnings Code</b> field.  Enter "W".
54.	Click the <b>Look Up</b> button. 



Step	Action
55.	For this example, click the <b>WEP</b> link.  <i>Note:</i> You may also click on the <b>Description</b> link, next to the <b>Earnings Code</b> link. 

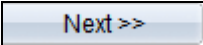



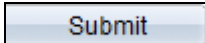
Step	Action
56.	Enter the desired information into the <b>Account Code</b> field.  Enter " <b>W100025</b> ".  <i>Note:</i> You can also use the <b>Account Code</b> look up button to search within this field.
57.	Notice that the <b>Effective Date</b> will default to the Hire Date.
58.	Click the <b>End Date Calendar</b> look up button.  <i>Note:</i> This is usually the pay period end date. 
59.	For this example, click the August <b>17</b> link. 
60.	Enter the desired information into the <b>Hourly Rate</b> field.  Enter " <b>500</b> ".
61.	Click the <b>Next</b> button. 
62.	The <b>Time and Labor Data</b> page allows human resources to establish a person into the appropriate groups necessary for reporting time.

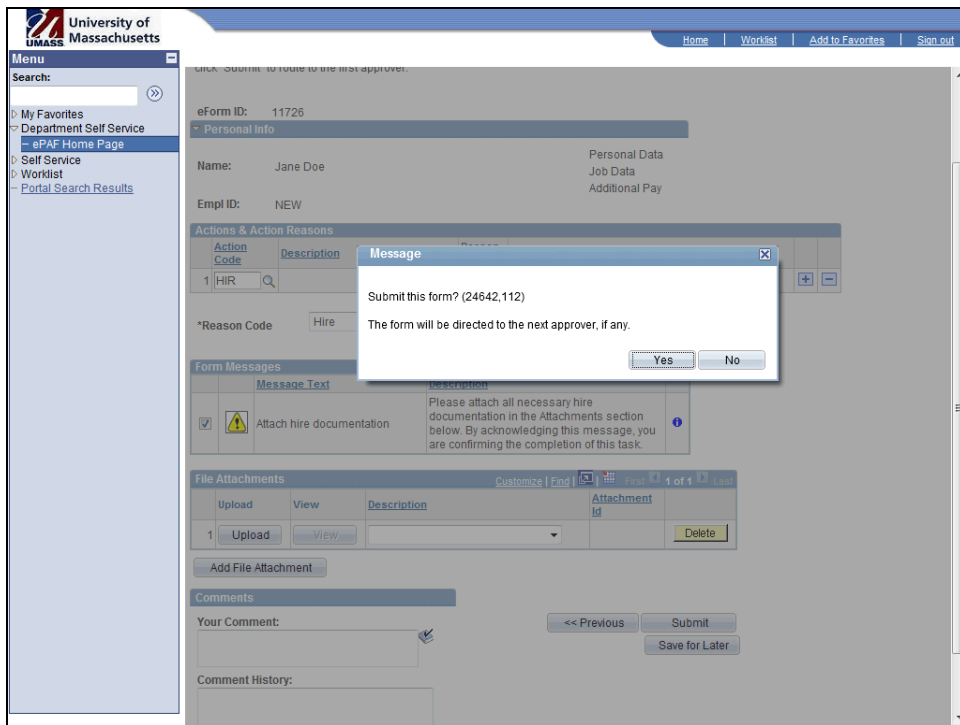


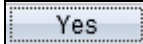
Step	Action
63.	The use of <b>Schedule different from standard?</b> , is by campus choice. For this example, click the <b>Schedule different from standard?</b> option. <input type="checkbox"/> <b>Schedule different from standard?</b>
64.	<b>Note:</b> If you decide to use the <b>Schedule different from standard</b> , then you could also enter your <b>Schedule Description</b> here.
65.	Click the vertical <b>Scrollbar</b> .

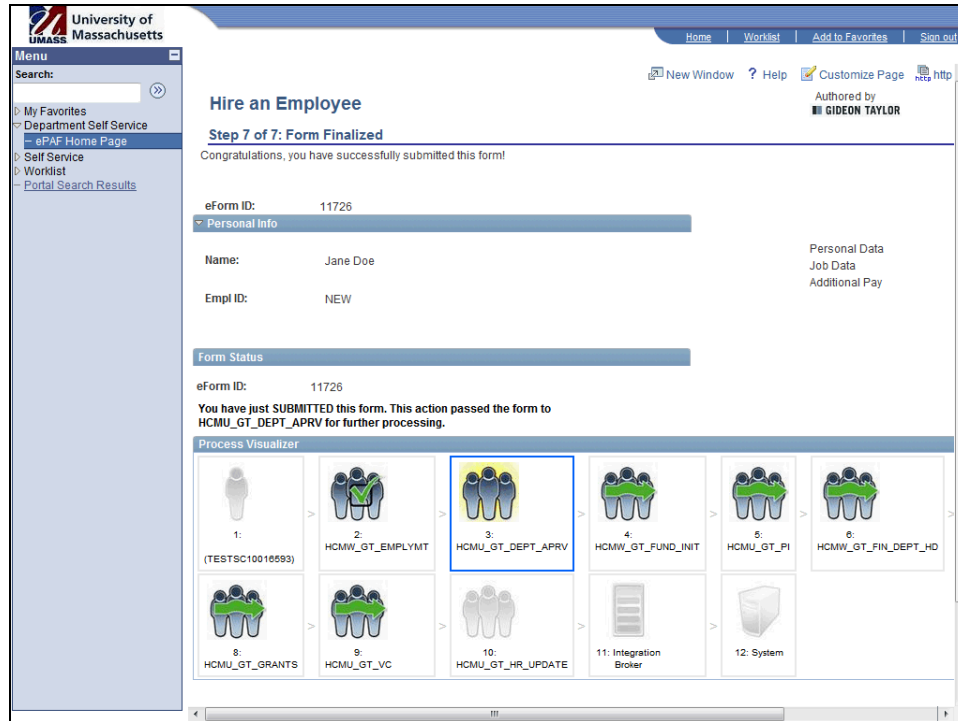


Step	Action
66.	Click the <b>Next</b> button. 

Step	Action
67.	Whether you are attaching documentation or not, you must always acknowledge <b>Form Messages</b> and confirm that you have completed attaching any documentation.  Click the <b>Attach hire documentation</b> option. 
68.	Click the vertical <b>Scrollbar</b> .
69.	<b>Note:</b> You may enter comments in the <b>Your Comment</b> field if you choose to do so.
70.	Click the <b>Submit</b> button. 



Step	Action
71.	Verify that you are ready to submit this form and click <b>Yes</b> . 



Step	Action
72.	The <b>Form Status</b> indicates that you have submitted this form.  <i>Note:</i> The <b>Process Visualizer</b> shows a workflow that is completely customized by campus.
73.	Congratulations! You have added an employee into a job. <b>End of Procedure.</b>

## Hiring Student Employees

Upon completion of this topic, you will be able to hire a Student for either work study or non-work study.

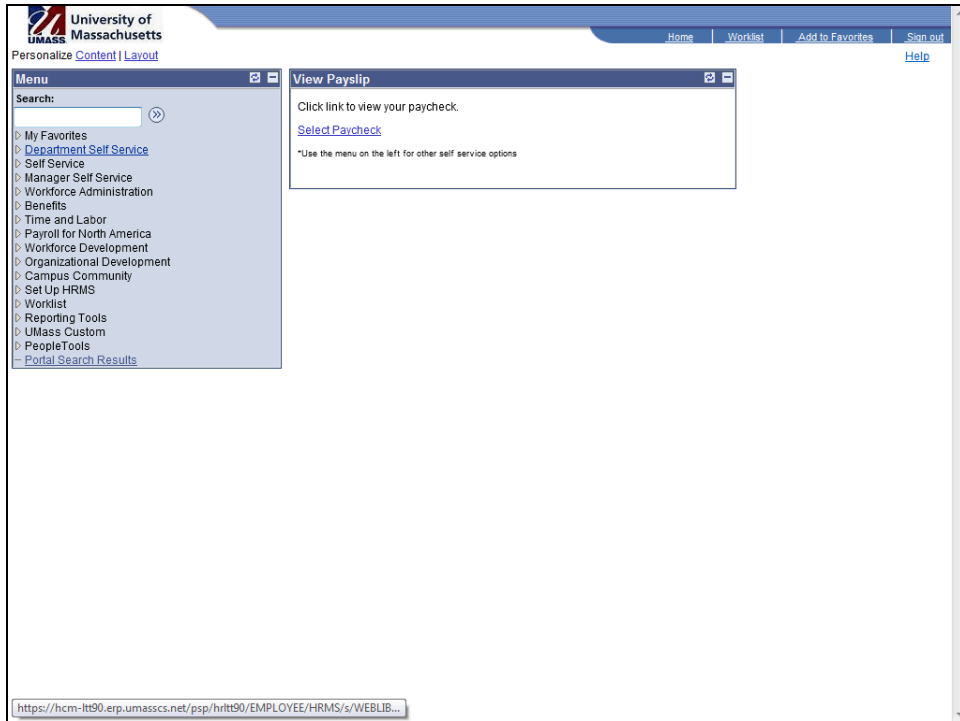
### Procedure

#### Consider this scenario:

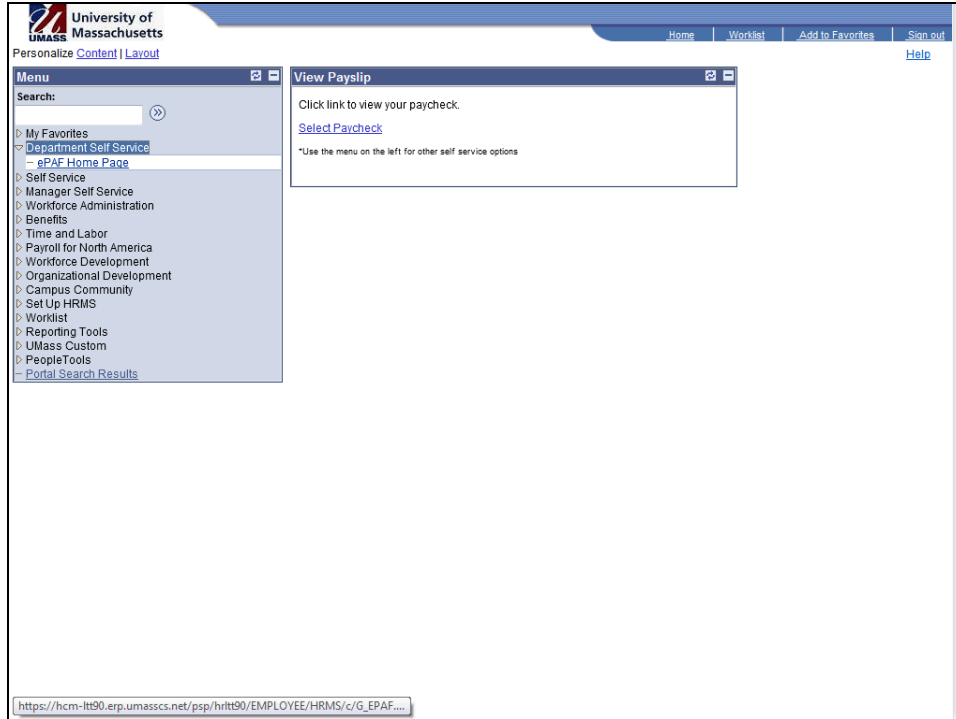
Your goal is to hire a student.

#### Key Information:

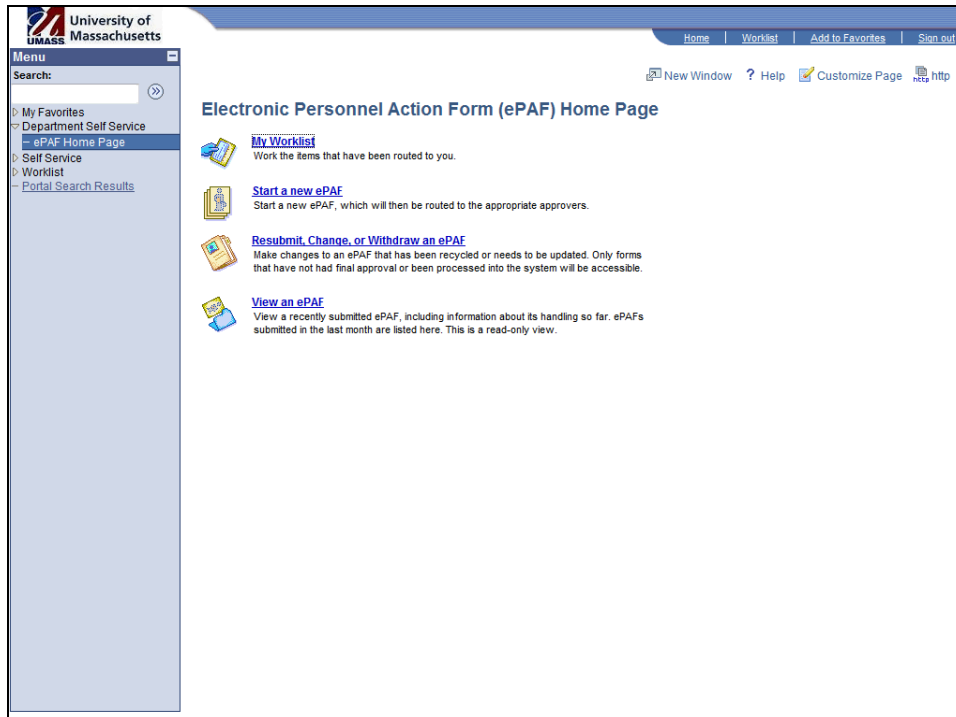
Employee Group: Student  
Is this a Positioned Job?: No



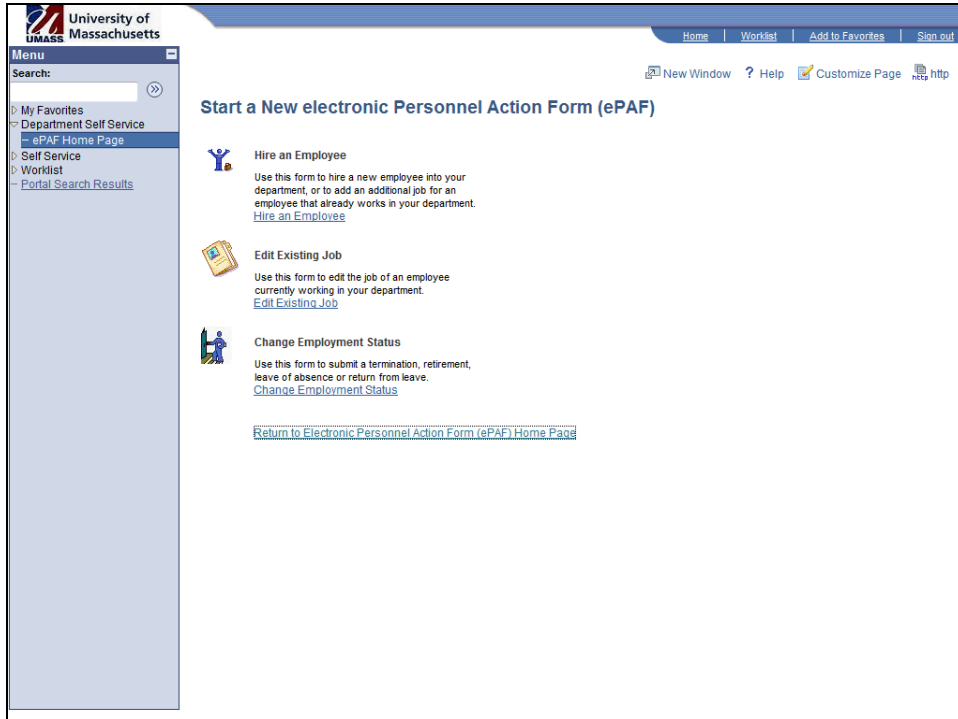
Step	Action
1.	Begin by navigating to the <b>ePAF Home Page</b> .  Click the <b>Department Self Service</b> link. <span style="border: 1px solid black; padding: 2px;">▶ Department Self Service</span>



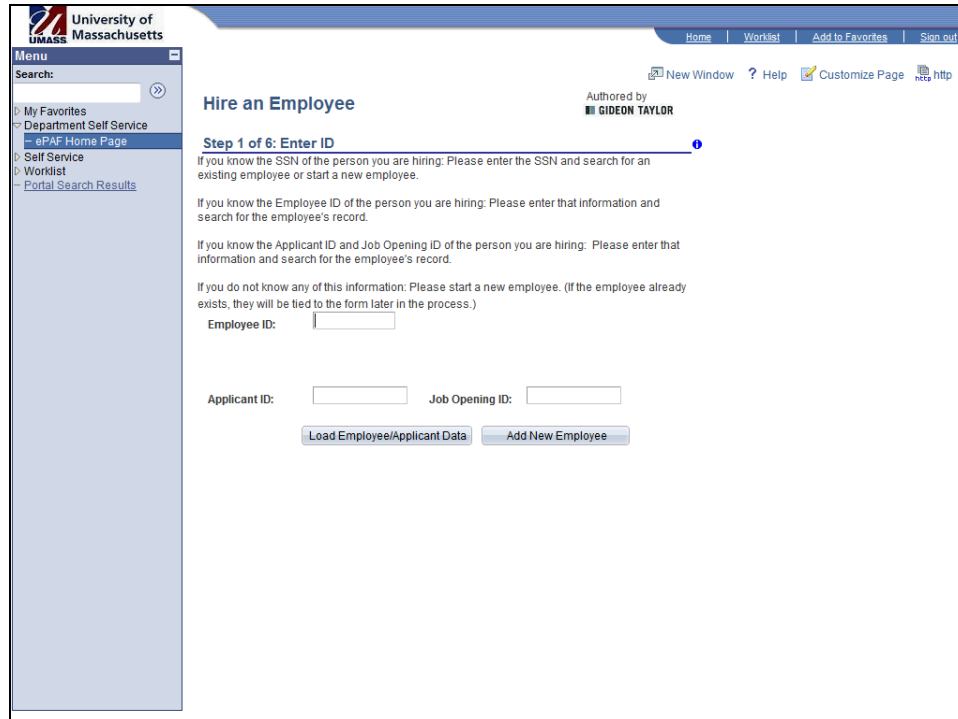
Step	Action
2.	Click the <b>ePAF Home Page</b> link. <div style="border: 1px solid black; padding: 2px; display: inline-block;">ePAF Home Page</div>



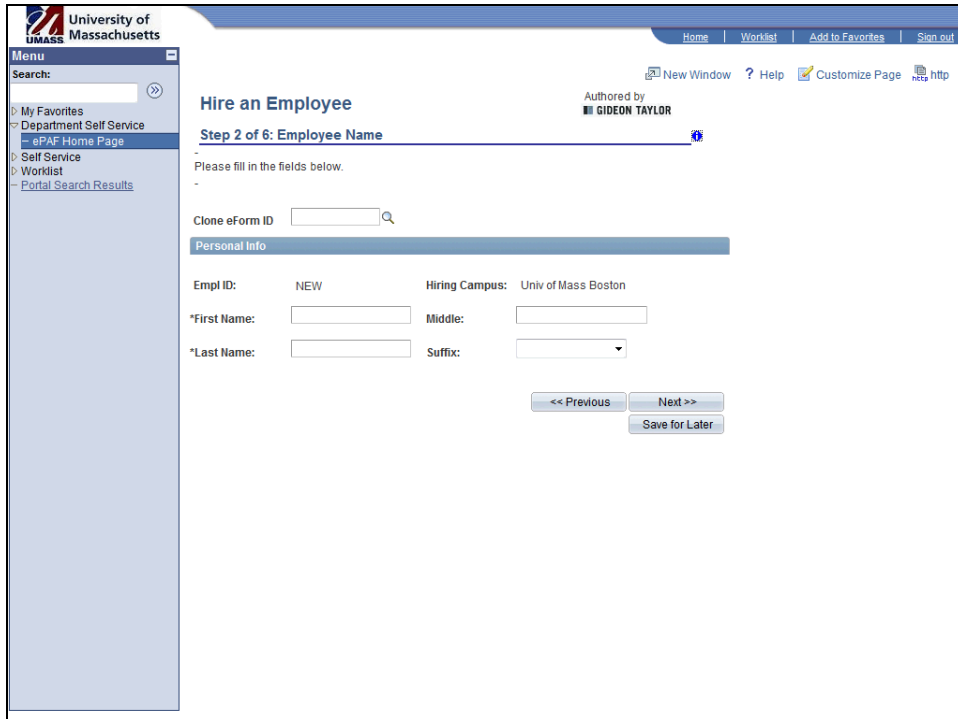
Step	Action
3.	This is the <b>ePAF Home Page</b> , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the <b>Start a new ePAF</b> link. <a href="#">Start a new ePAF</a>



Step	Action
5.	Depending on your campus practice, you can add employees with positions or jobs. For this example, you are hiring an employee into position.  Click the <b>Hire an Employee</b> link. <a href="#">Hire an Employee</a>



Step	Action
6.	<p>If you know the <b>Employee ID</b> of the person you are hiring (or if you are hiring a contingent worker or POI); you can enter this information and then search for the employee's record.</p> <p>Another way to search would be to use the <b>Applicant ID</b> and the <b>Job Opening ID</b> of the person you are hiring; you can enter this information and then search for the employee's record.</p>
7.	<p>For this example, you do not have any ID's to search on.</p> <p>Click the <b>Add New Employee</b> button.</p> <div data-bbox="440 1371 753 1415" style="border: 1px solid black; padding: 2px; display: inline-block;">Add New Employee</div>



University of Massachusetts

Home Worklist Add to Favorites Sign out

Menu

Search: [ ]

My Favorites

Department Self Service

ePAF Home Page

Self Service

Worklist

Portal Search Results

Hire an Employee

Authorized by GIDEON TAYLOR

Step 2 of 6: Employee Name

Please fill in the fields below.

Clone eForm ID [ ]

Personal Info

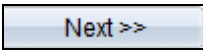
Empl ID: NEW Hiring Campus: Univ of Mass Boston

\*First Name: [ ] Middle: [ ]

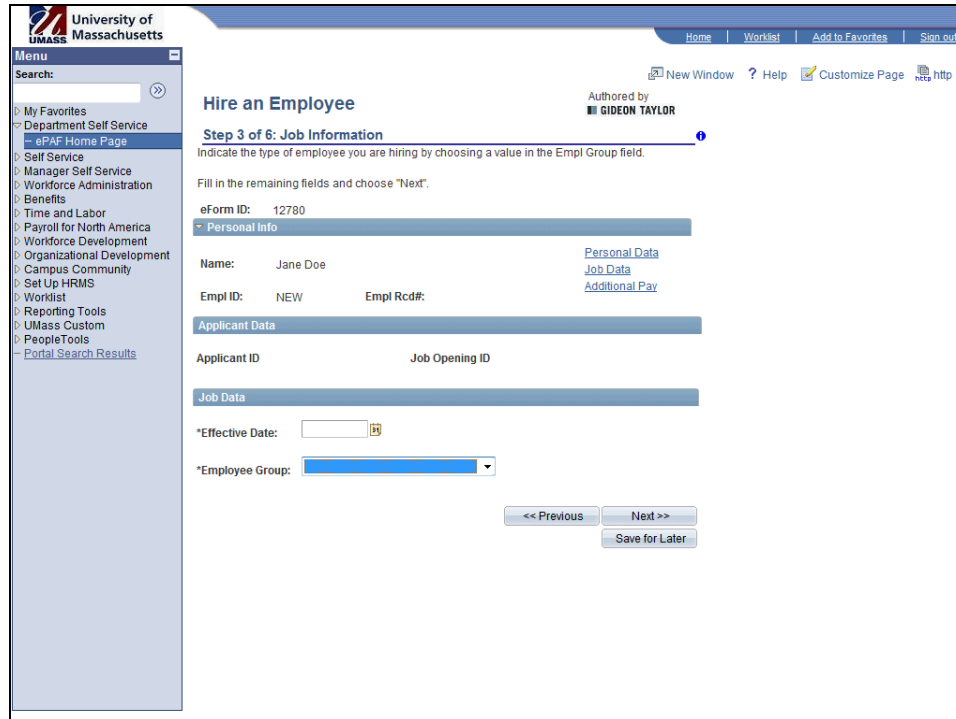
\*Last Name: [ ] Suffix: [ ]



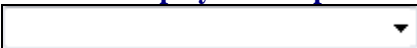


<< Previous Next >>

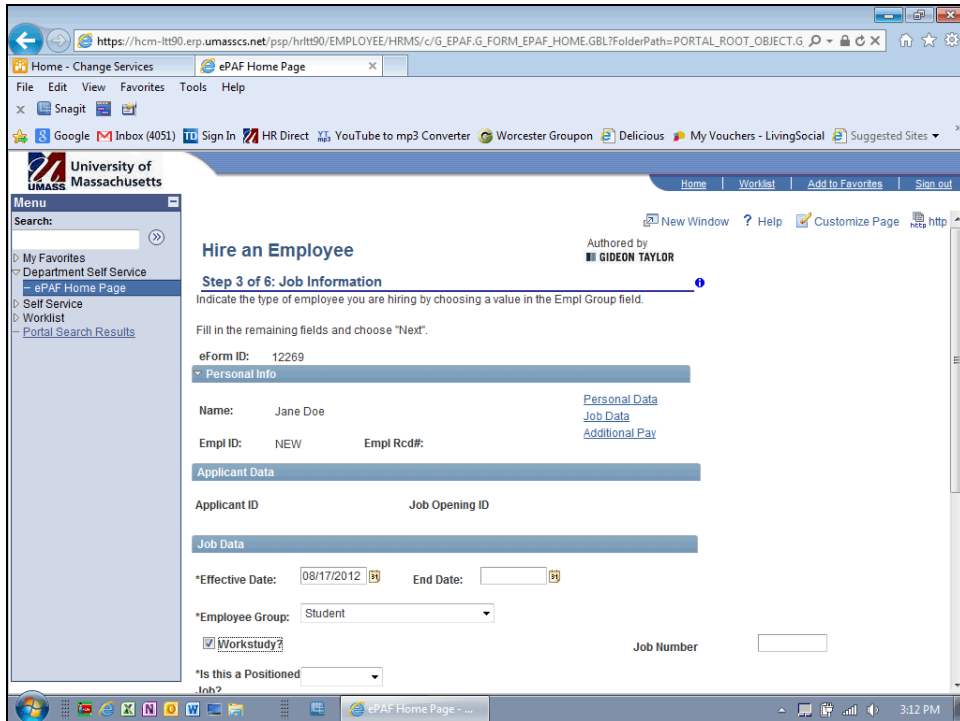
Save for Later

Step	Action
8.	Enter the desired information into the <b>First Name</b> field. Enter " <b>Jane</b> ".
9.	Enter the desired information into the <b>Middle</b> field. Enter " <b>B.</b> ".
10.	Enter the desired information into the <b>Last Name</b> field. Enter " <b>Doe</b> ".
11.	Click the <b>Next</b> button. 

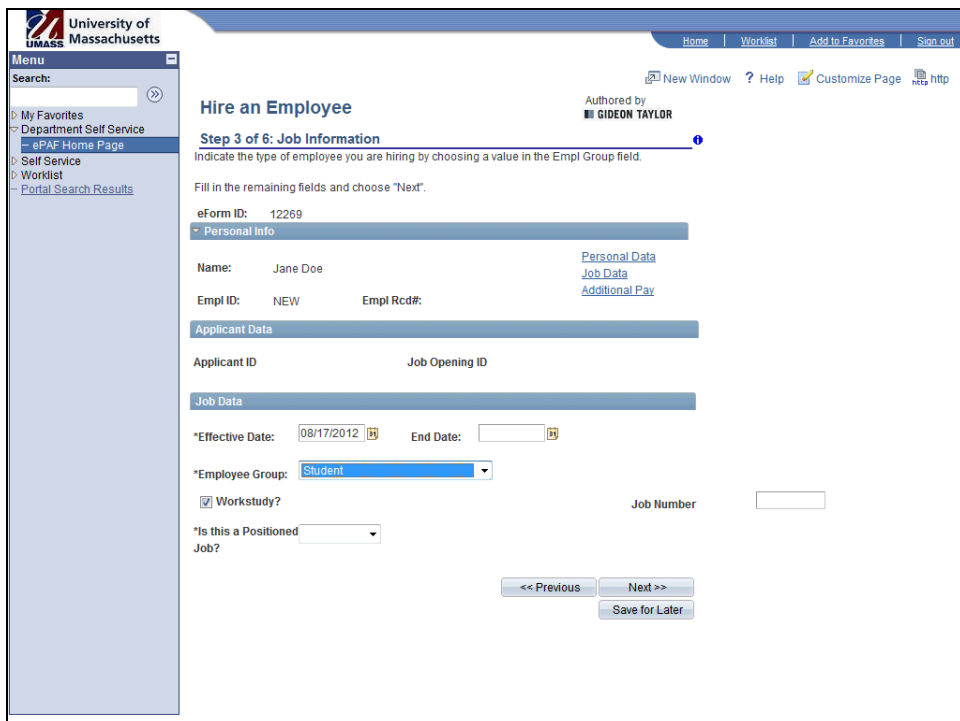







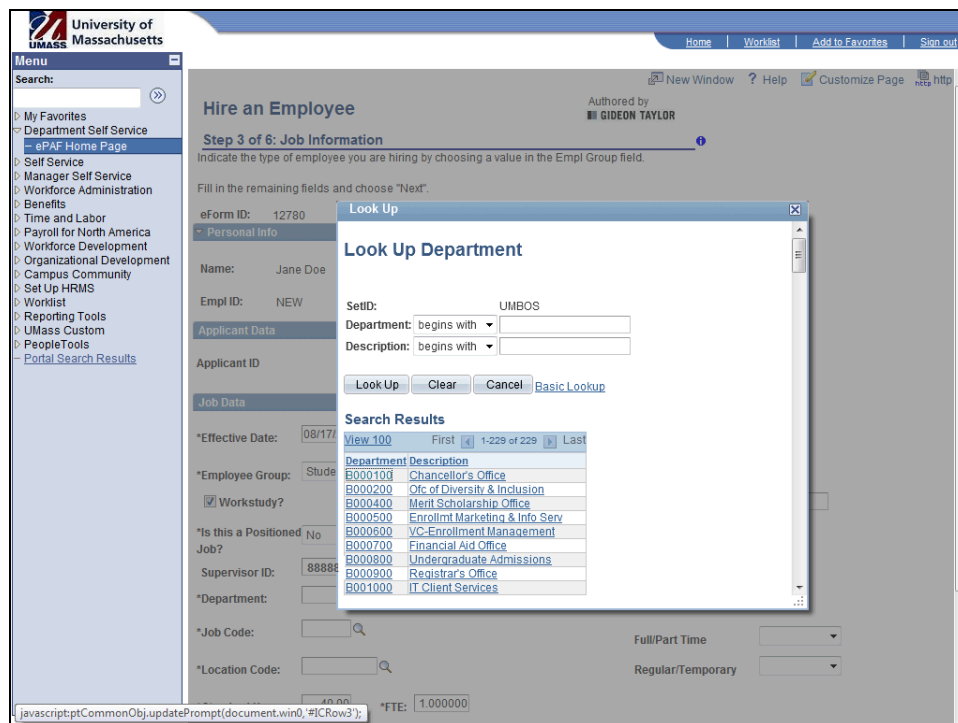
Step	Action
12.	Click the <b>Effective Date</b> calendar look up button. 
13.	For this example, click the August <b>17</b> link. 
14.	Click the <b>Employee Group</b> list. 
15.	Click the <b>Student</b> list item. 
16.	<b>Note:</b> Refer to your campus business practices on when to use the <b>End Date</b> .
17.	You are hiring for a work study job. For this example, click the <b>Workstudy?</b> option. <b>Note:</b> The <b>Workstudy</b> option is specific only to Boston. If you are hiring a student for a non-work study job, then you would leave this option unchecked. 





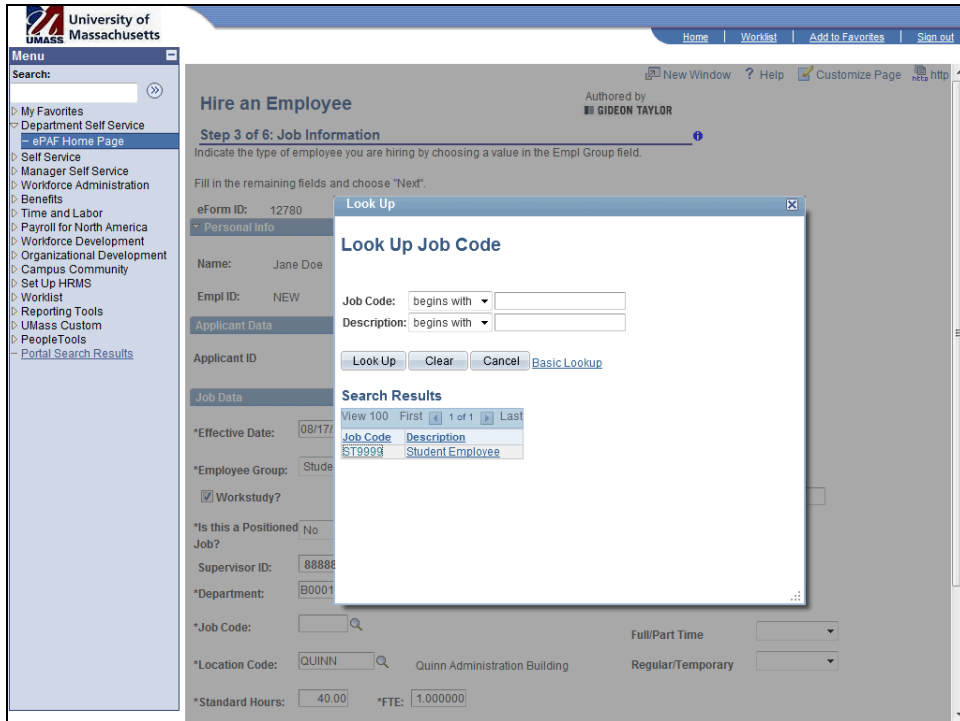
Step	Action
18.	Click the vertical <b>Scrollbar</b> .



Step	Action
19.	Click the <b>Is this a Positioned Job?</b> list. 
20.	Click the <b>No</b> list item. 
21.	Enter the desired information into the <b>Supervisor ID</b> field.  For this example, enter " <b>888888</b> ".  <i>Note:</i> You may also use the <b>Supervisor ID</b> look up button.
22.	Click the <b>Department</b> look up button. 



Step	Action
23.	For this example, click the <b>B000100</b> link.  <i>Note:</i> You may also click the <b>Description</b> link. 
24.	Click the <b>Job Code</b> look up button. 



Step	Action
25.	For this example, click the <b>ST9999</b> link.  <i>Note:</i> You may also click the <b>Description</b> link. <b>ST9999</b>
26.	Click the <b>Full/Part Time</b> list. 
27.	Click the <b>Part-Time</b> list item. 
28.	Click the <b>Regular/Temporary</b> list. 
29.	For this example, click the <b>Temporary</b> list item. 
30.	Click the vertical <b>Scrollbar</b> .
31.	Click the <b>Next</b> button. 

**Hire an Employee**  
Step 4 of 6: Compensation

Please enter the employee's compensation information below.

eForm ID: 12780

**Personal Info**

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

Empl ID: NEW Empl Rcd#:   
**Compensation Data**

Employee Type: Hourly

Hourly Rate: 0.000000 Annual Rate: \$0.000




Plan Salary Grade

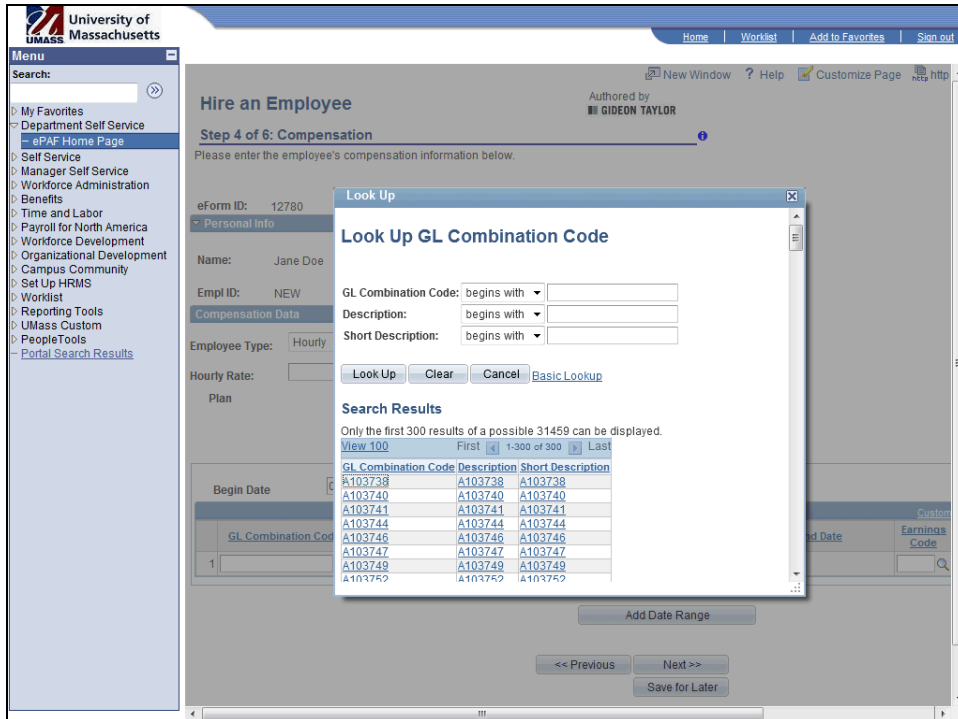
Total Annual Rate 0.000000

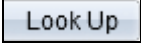
Begin Date 08/17/2012

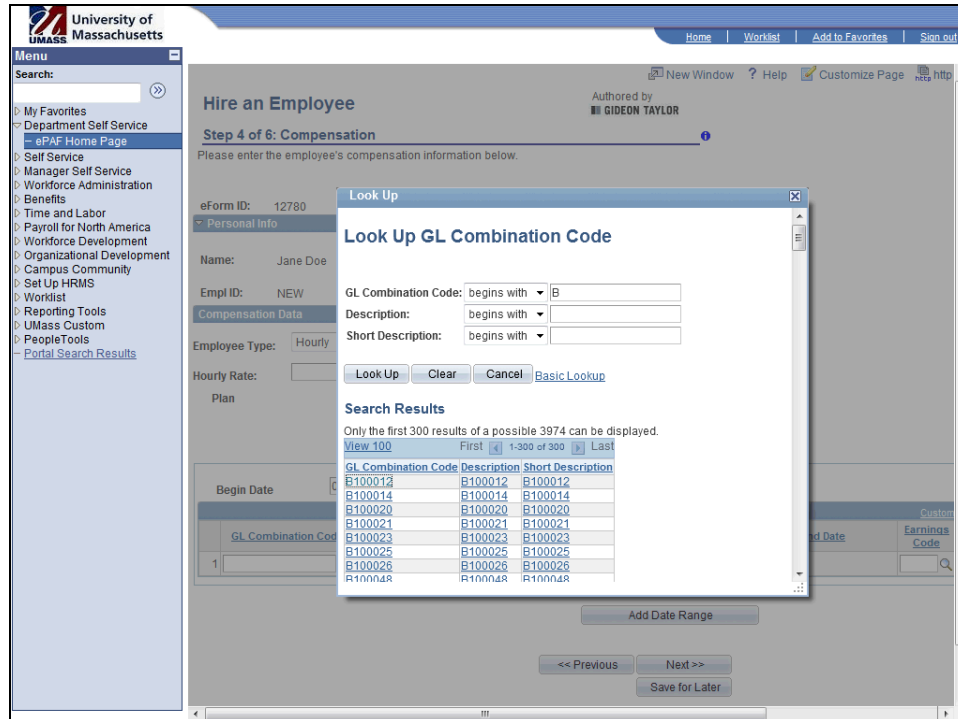
GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
1							

Buttons: Add Date Range, << Previous, Next >>, Save for Later

Step	Action
32.	The <b>Employee Type</b> defaults.  Click the <b>Employee Type</b> list. 
33.	For this example, click the <b>Hourly</b> list item. 
34.	Enter the desired information into the <b>Hourly Rate</b> field.  For this example, enter " <b>15</b> ".
35.	<b>Note:</b> Notice that the <b>Begin Date</b> defaults to the hire date. You may change this date if needed.
36.	Click the <b>GL Combination Code</b> look up button. 



Step	Action
37.	<p>You can enter the first letter of your campus to expedite the search within this field. Enter the desired information into the <b>GL Combination Code</b> field.</p> <p>For this example, enter "<b>B</b>".</p>
38.	<p>Click the <b>Look Up</b> button.</p> <p></p>
39.	<p>For work-study funding, these are some common choices:</p> <ul style="list-style-type: none"> <li>B100000 (blank erncd)</li> <li>100% seq 1</li> <li>B100000 (erncd = SYW)</li> <li>500 seq 2</li> <li>B200000 (erncd = SYW)</li> <li>1500 seq 2</li> </ul> <p><b>Note:</b> Some campuses also use seq 3. In the case above, it would be B100000 (erncd = SYW) 100% seq 3.</p>



Step	Action
40.	<p>For this example, click the <a href="#">B100012</a> link.</p> <p><i>Note:</i> You may also use the <b>Description</b> or <b>Short Description</b> links to select this choice.</p> <p><a href="#">B100012</a></p>

University of Massachusetts

Home Worklist Add to Favorites Sign out

Menu

Search: [ ]

My Favorites

Department Self Service

ePAF Home Page

Self Service

Manager Self Service

Workforce Administration

Benefits

Time and Labor

Payroll for North America

Workforce Development

Organizational Development

Campus Community

Set Up HRMS

Worklist

Reporting Tools

UMass Custom

PeopleTools

Portal Search Results

Hire an Employee

Authorized by GIDEON TAYLOR

Step 4 of 6: Compensation

Please enter the employee's compensation information below.

eForm ID: 12780

Personal Info

Name: Jane Doe [Personal Data](#)

Empl ID: NEW Empl Rcd#: [Job Data](#)

[Additional Pay](#)

Compensation Data

Employee Type: Hourly

Hourly Rate: 15.000000 Annual Rate: \$31,200.000

Plan Salary Grade

Total Annual Rate 31200.000000

Begin Date 08/17/2012

GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
1 B100012	53402	B000100000	A00	S70052024700000		12/31/1999	

Add Date Range

<< Previous Next >>

Save for Later

Step	Action
41.	Click the vertical <b>Scrollbar</b> .
42.	Click the horizontal <b>Scrollbar</b> .

https://hcm-It... ePAF Home Page

Search: [ ]

My Favorites

Department Self Service

ePAF Home Page

Self Service

Manager Self Service

Workforce Administration

Benefits

Time and Labor

Payroll for North America

Workforce Development

Organizational Development

Campus Community

Set Up HRMS

Worklist

Reporting Tools

UMass Custom

PeopleTools

Portal Search Results

information below.

[Personal Data](#)

[Job Data](#)

[Additional Pay](#)

Annual Rate: \$31,200.000

nual Rate 31200.000000


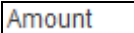

Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code	Distribution Type	Fund End Date
B000100000	A00	S70052024700000		12/31/1999			

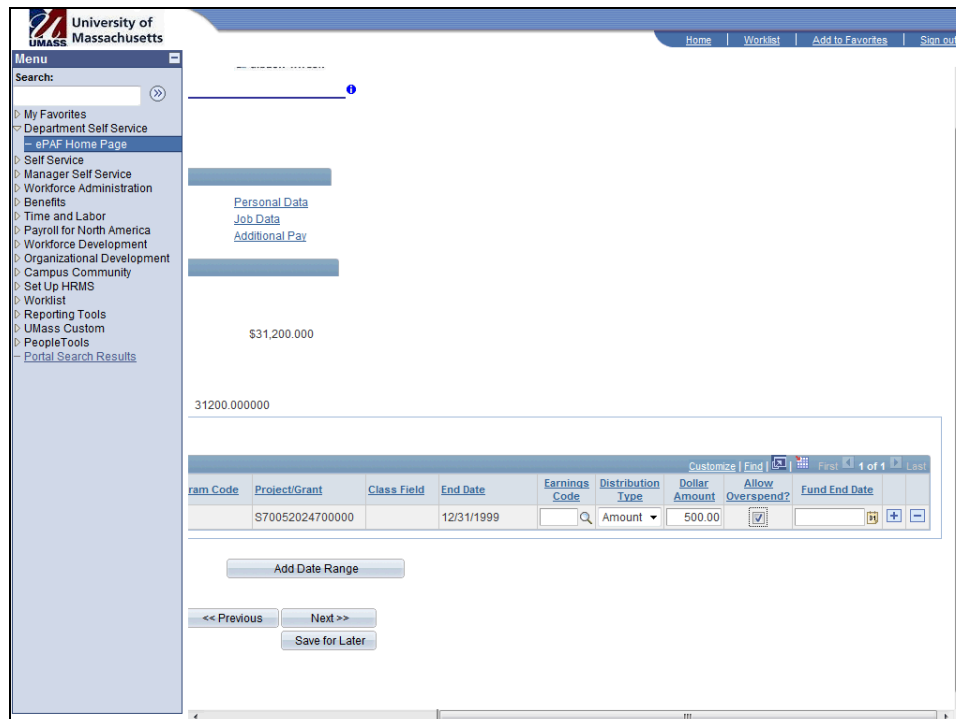
Add Date Range

<< Previous Next >>

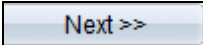
Save for Later

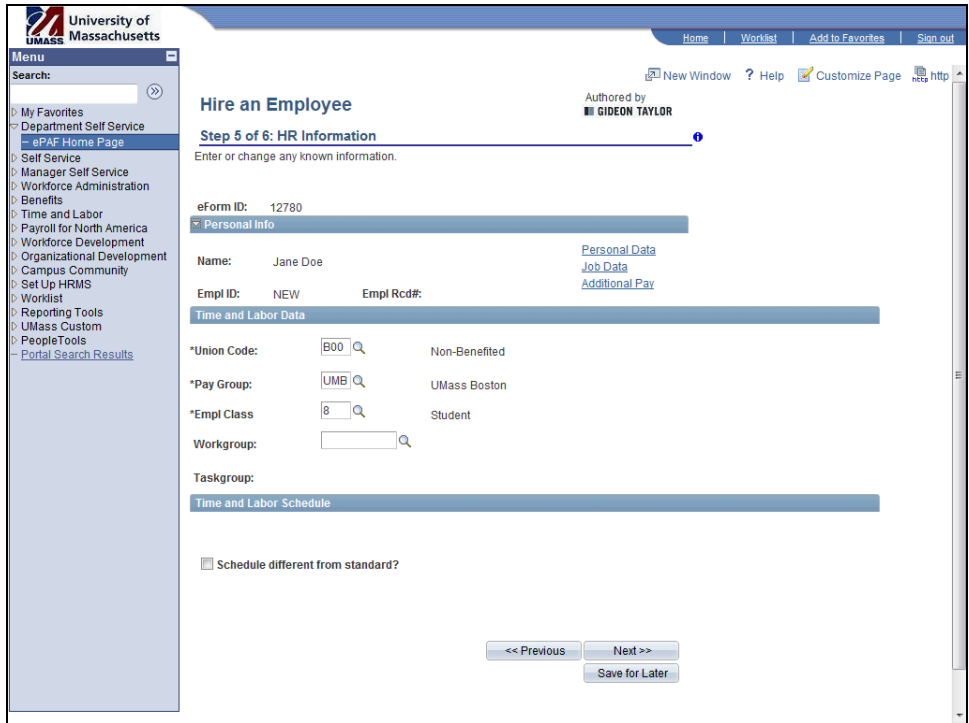



Step	Action
43.	<i>Note:</i> The Worcester campus will leave the <b>Earnings Code</b> blank. However, other campuses may choose to enter information in this field if needed.
44.	Click the <b>Distribution Type</b> list. 
45.	The campus will choose which <b>Distribution Type</b> they desire.  For this example, click the <b>Amount</b> list item. 
46.	Enter the desired information into the <b>Dollar Amount</b> field.  For this example, enter " <b>500</b> ".
47.	<i>Note:</i> The campus will use the <b>Allow Overspend</b> if applicable.
48.	For this example, click the <b>Allow Overspend?</b> option. 
49.	Click the horizontal <b>Scrollbar</b> .

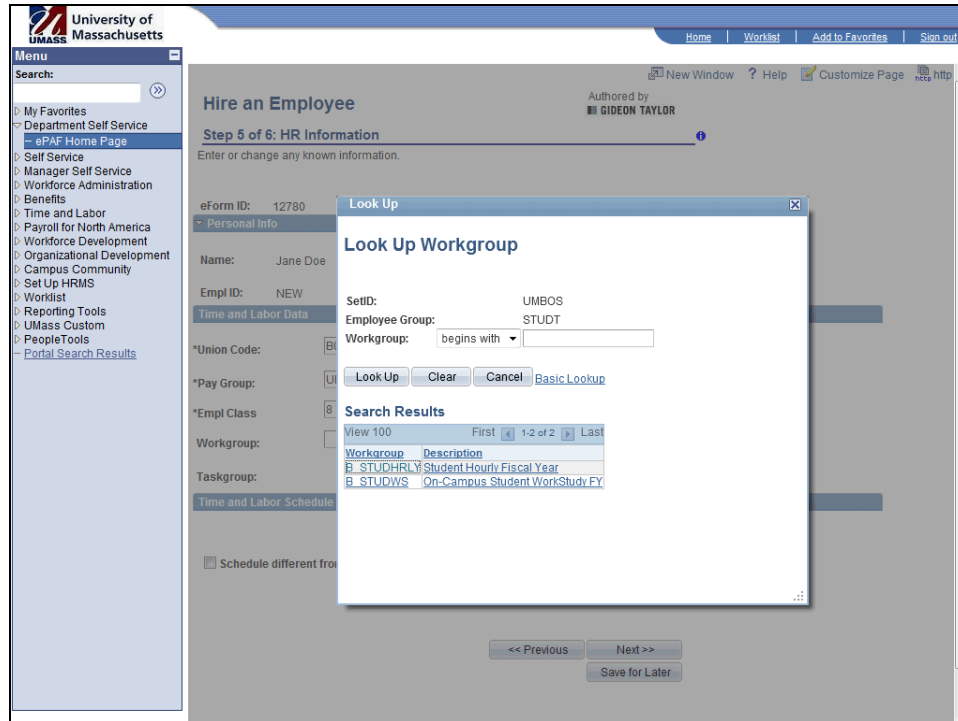


Step	Action
50.	<i>Note:</i> The campus will choose the <b>Fund End Date</b> , if applicable.
51.	<i>Note:</i> To add additional rows, use the plus sign. To delete rows, use the minus sign.

Step	Action
52.	Click the <b>Next</b> button. 



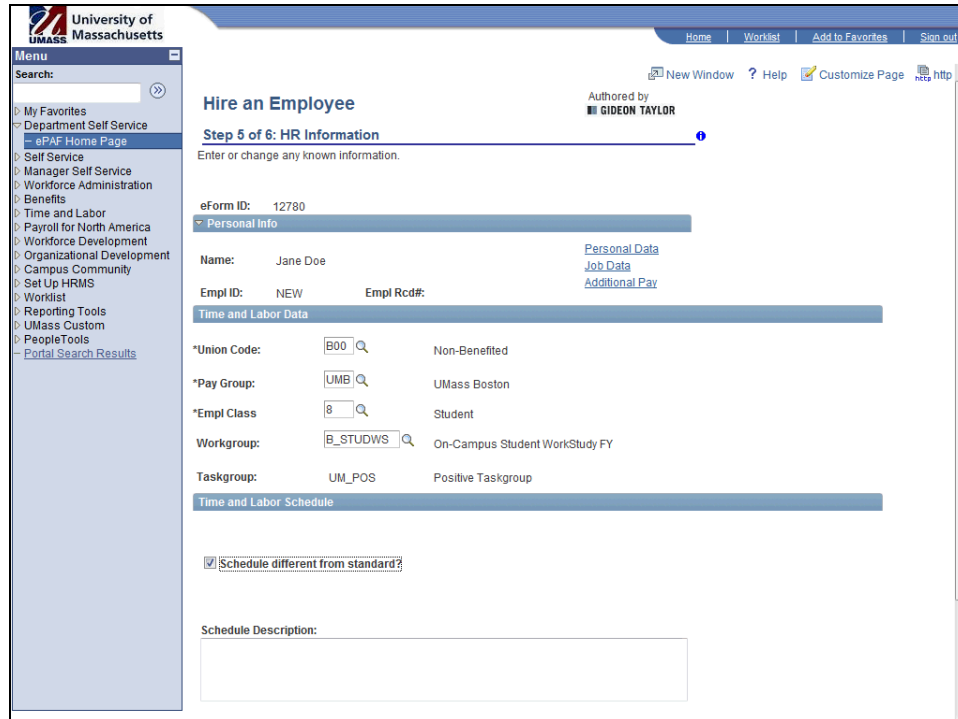
Step	Action
53.	The <b>Time and Labor Data</b> page allows human resources to establish a person into the appropriate groups necessary for reporting time.
54.	Click the <b>Workgroup</b> look up button. 



Step	Action
55.	For this example, click the <b>B_STUDWS</b> link.  <i>Note:</i> You may also use the <b>Description</b> link. <b>B_STUDWS</b>

The screenshot shows the 'Hire an Employee' process in the University of Massachusetts HR system. The current step is 'Step 5 of 6: HR Information'. The form is for a new employee named Jane Doe. The 'Personal Info' section is expanded, showing fields for Name, Empl ID, and Empl Rcd#. The 'Time and Labor Data' section includes fields for Union Code (B00), Pay Group (UMB), Empl Class (8), Workgroup (B\_STUDWS), and Taskgroup (UM\_POS). The 'Time and Labor Schedule' section has a checkbox for 'Schedule different from standard?' which is highlighted with a red box in the original image. Navigation buttons for '<< Previous', 'Next >>', and 'Save for Later' are at the bottom.

Step	Action
56.	<p>The use of <b>Schedule different from standard?</b>, is by campus choice.</p> <p>For this example, click the <b>Schedule different from standard?</b> option.</p> <div data-bbox="347 1129 776 1163" style="border: 1px solid red; padding: 2px;"> <input type="checkbox"/> <b>Schedule different from standard?</b> </div>



University of Massachusetts

Home | Worklist | Add to Favorites | Sign out

Menu

Search: [ ]

My Favorites

Department Self Service

ePAF Home Page

Self Service

Manager Self Service

Workforce Administration

Benefits

Time and Labor

Payroll for North America

Workforce Development

Organizational Development

Campus Community

Set Up HRMS

Worklist

Reporting Tools

UMass Custom

PeopleTools

Portal Search Results

**Hire an Employee**

Authorized by  
GIDEON TAYLOR

**Step 5 of 6: HR Information**

Enter or change any known information.

eForm ID: 12780

**Personal Info**

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

Empl ID: NEW      Empl Rcd#: [ ]

**Time and Labor Data**

\*Union Code: B00 [ ] Non-Benefited

\*Pay Group: UMB [ ] UMass Boston

\*Empl Class: 8 [ ] Student

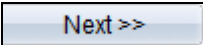
Workgroup: B\_STUDWS [ ] On-Campus Student WorkStudy FY


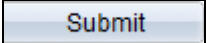
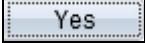
Taskgroup: UM\_POS Positive Taskgroup

**Time and Labor Schedule**

Schedule different from standard?

Schedule Description:  
[ ]

Step	Action
57.	<b>Note:</b> If you decide to use the <b>Schedule different from standard</b> , then you could also enter your <b>Schedule Description</b> here.
58.	Click the <b>Next</b> button. 

Step	Action
59.	Whether you are attaching documentation or not, you must always acknowledge <b>Form Messages</b> and confirm that you have completed attaching any documentation.  Click the <b>Attach hire documentation</b> option. 
60.	Click the <b>Submit</b> button. 
61.	Verify that you are ready to submit this form and click <b>Yes</b> . 
62.	The <b>Form Status</b> indicates that you have submitted this form.  <i>Note:</i> The <b>Process Visualizer</b> shows a workflow that is completely customized by campus.
63.	Congratulations! You have hired a student employee. <b>End of Procedure.</b>

## Processing Employee Job Change

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

- Enter a rehire
- Enter a department transfer
- Enter a funding swap

## Entering a Rehire

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

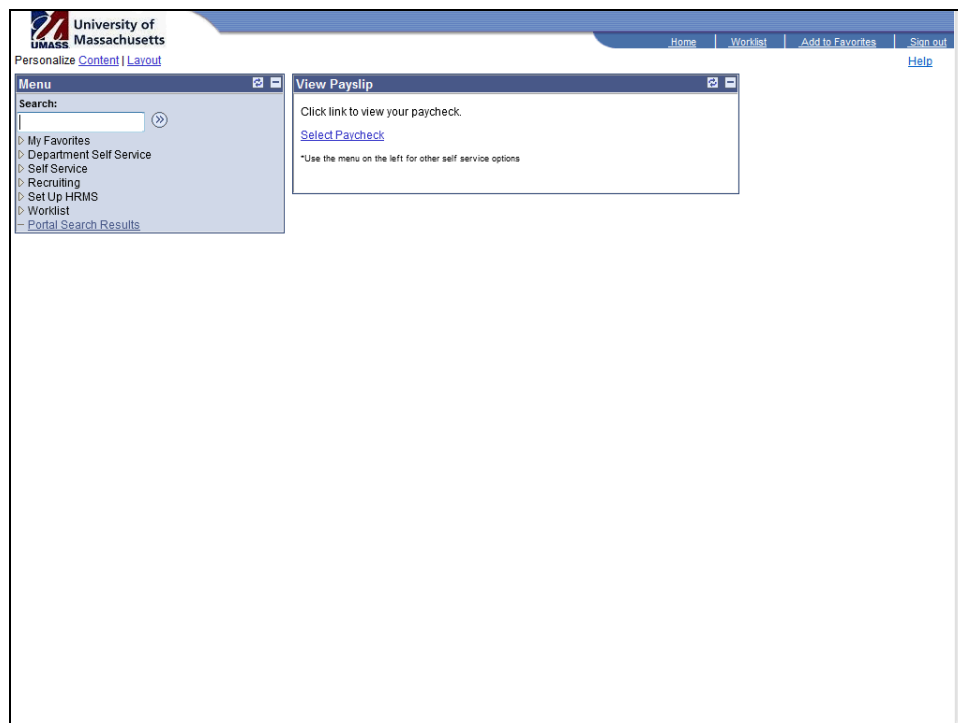
### Procedure


#### Consider this Scenario:

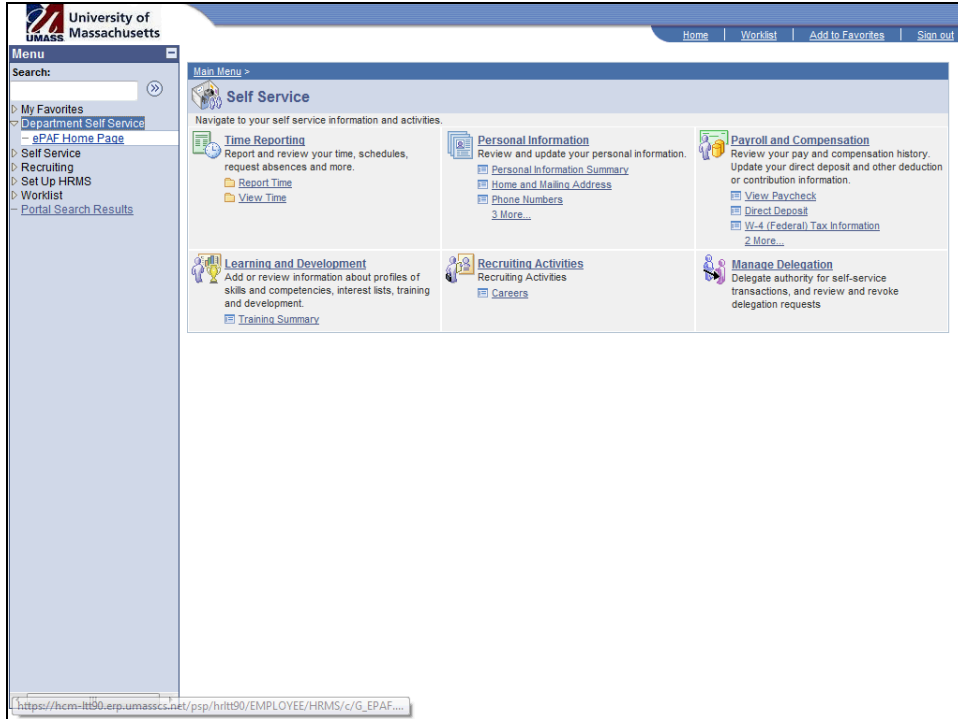
Your goal is to enter a rehire.

#### Key Information:

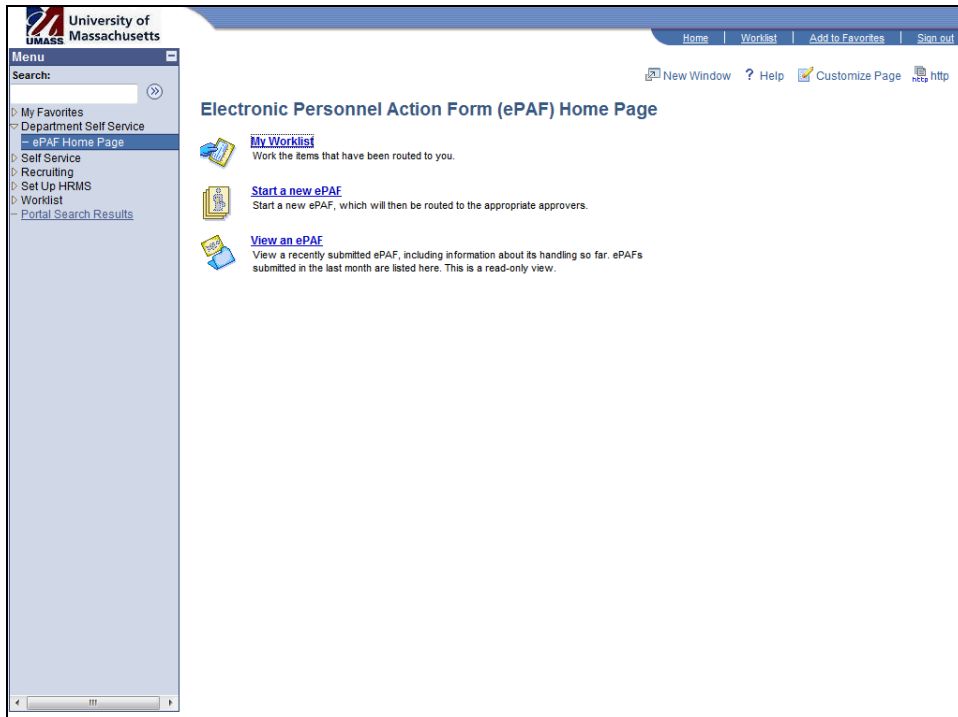
Name: Jane Doe



Step	Action
1.	<p>Begin by navigating to the <b>ePAF Home Page</b>.</p> <p>Click the <b>Department Self Service</b> link.</p> <p></p>

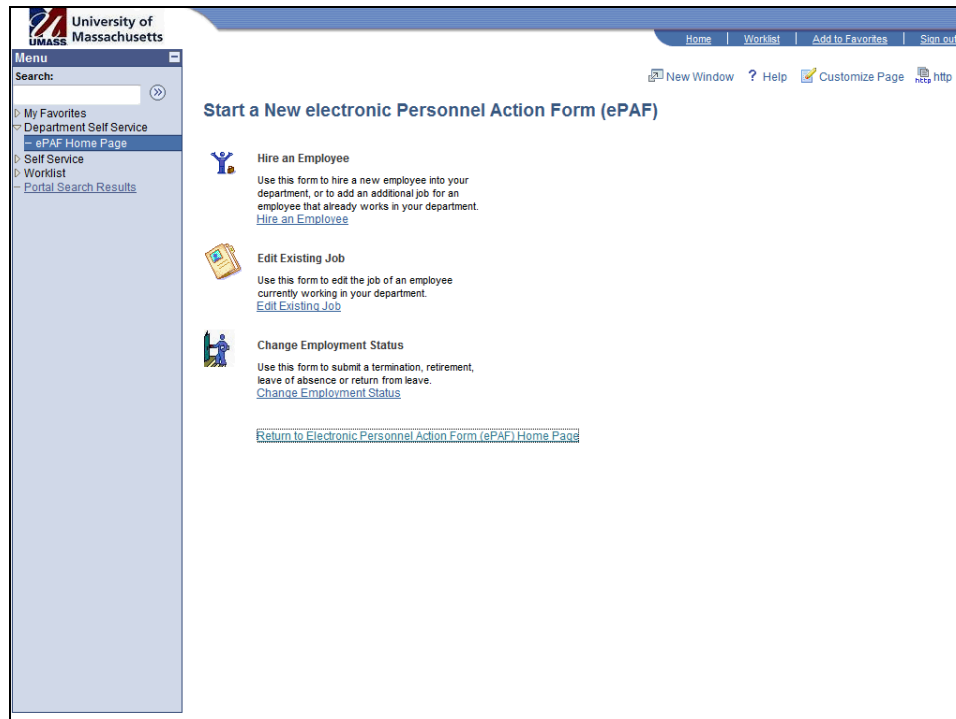


Step	Action
2.	Click the <b>ePAF Home Page</b> link. <a href="#">ePAF Home Page</a>

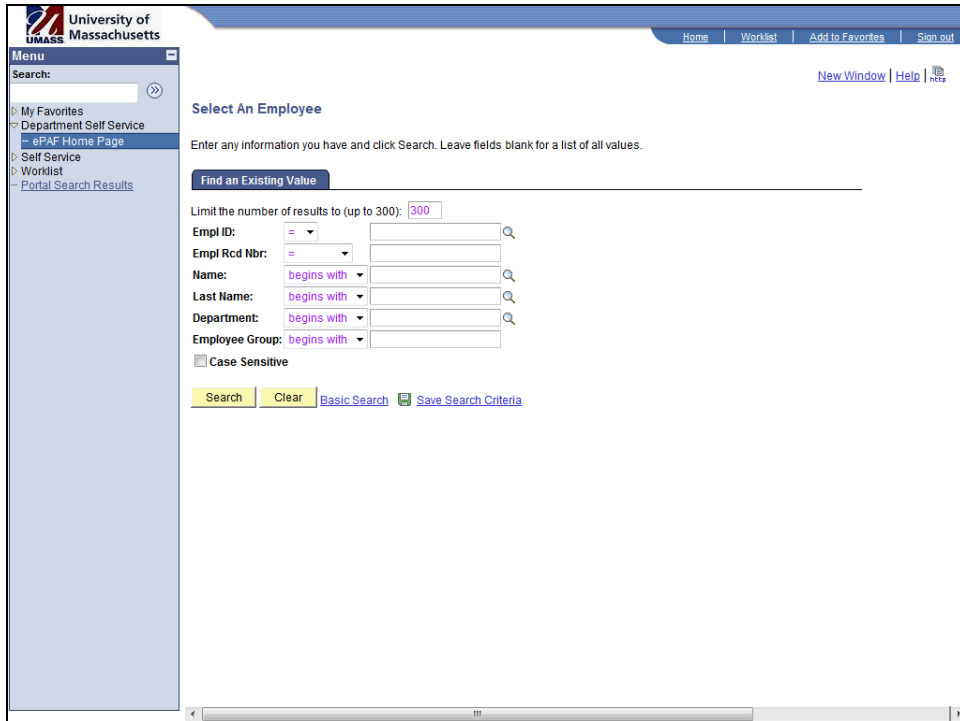


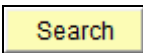


Step	Action
3.	This is the <b>ePAF Home Page</b> , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the <b>Start a new ePAF</b> link. <a href="#">Start a new ePAF</a>



Step	Action
5.	Before you can begin a rehire, you will need to refer to your campus business practices. Some campuses use the <b>Job Change</b> form and others use the <b>Hire</b> form.  For this example, you have access to the person you are trying to rehire and your campus uses the <b>Job Change</b> form for rehires.  <i>Note:</i> If your campus uses the <b>Hire</b> form for rehires, please refer to the online training topics: <i>Adding a Person into a Job</i> , and <i>Adding a Person into a Position</i> .
6.	Click the <b>Edit Existing Job</b> link. <a href="#">Edit Existing Job</a>



Step	Action
7.	<p>Enter the desired information into the <b>Last Name</b> field.</p> <p>Enter "d".</p> <p><i>Note:</i> You may also search by using the <b>Empl ID</b>.</p>
8.	<p>Click the <b>Search</b> button.</p> 

**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:

Empl Rcd Nbr:

Name:  begins with

Last Name:  begins with D

Department:  begins with

Employee Group:  begins with

Case Sensitive

**Search Results**

Only the first 300 results of a possible 407 can be displayed.

Empl ID	Empl Rcd Nbr	Name	Last Name	Department	Employee Group	Payroll Status
99999	0	Jane Doe	DOE	B000800	STUDT	Terminated

Step	Action
9.	Click the <b>Jane Doe</b> link. <a href="#">Jane Doe</a>

**Change Job Data**

Authorized by GIDEON TAYLOR

**Step 1 of 5: Enter Job Change Details**

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

**Current Job Info**

Name: Jane Doe Empl ID: 99999

Empl Group: Student Empl Rcd#: 0

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

Position: [General Deductions](#)

Department: B000800 Undergraduate Admissions

eForm ID: 12630

[View Original Job Data](#)

**Job Data**

\*Effective Date:  End Date:   End Job Automatically

\*Employee Group: Student



Workstudy? Job Number:

\*Is this a Positioned Job? No

Supervisor ID: 1009 John Smith

\*Department: B000800 Undergraduate Admissions

\*Job Code: ST9999 UMass Student Full/Part Time: Part-Time

Step	Action
10.	The <b>Change Job Data</b> form is used to edit the information of an existing employee.
11.	Click the <b>Effective Date</b> look up button. 
12.	For this example, click the August <b>28</b> link. 
13.	<b>Note:</b> Refer to your campus business practice for when to use <b>End Date</b> .
14.	Click the vertical <b>Scrollbar</b> .

Step	Action
15.	For this example, except for the <b>Effective Date</b> , you are accepting the previous <b>Job Data</b> with no changes for the rehire.  Click the <b>Next</b> button.

**Change Job Data**  
Step 2 of 5: Compensation

Please update compensation data here as needed.

**Current Job Info**

Name: Jane Doe      Empl ID: 99999  
 Empl Group: Student      Empl Rcd#: 0  
 Empl Status: Terminated      [Personal Data](#)  
    [Job Data](#)  
    [Additional Pay](#)  
 Position:      [General Deductions](#)

Department: B000800 Undergraduate Admissions  
 eForm ID: 12630

[View Original Comp Data](#)

**Compensation Data**

Employee Type: Hourly  
 Hourly Rate: 8.000000      Annual Rate: \$8,320.000  
 Plan: Salary Grade  
 Compensation Rate: \$8,320.000

Begin Date: 09/12/2010

GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
---------------------	-----------	------------	--------------	---------------	-------------	----------	---------------

Step	Action
16.	Click the vertical <b>Scrollbar</b> .

Department: B000800 Undergraduate Admissions      [General Deductions](#)  
 eForm ID: 12630

[View Original Comp Data](#)

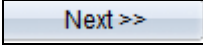
**Compensation Data**

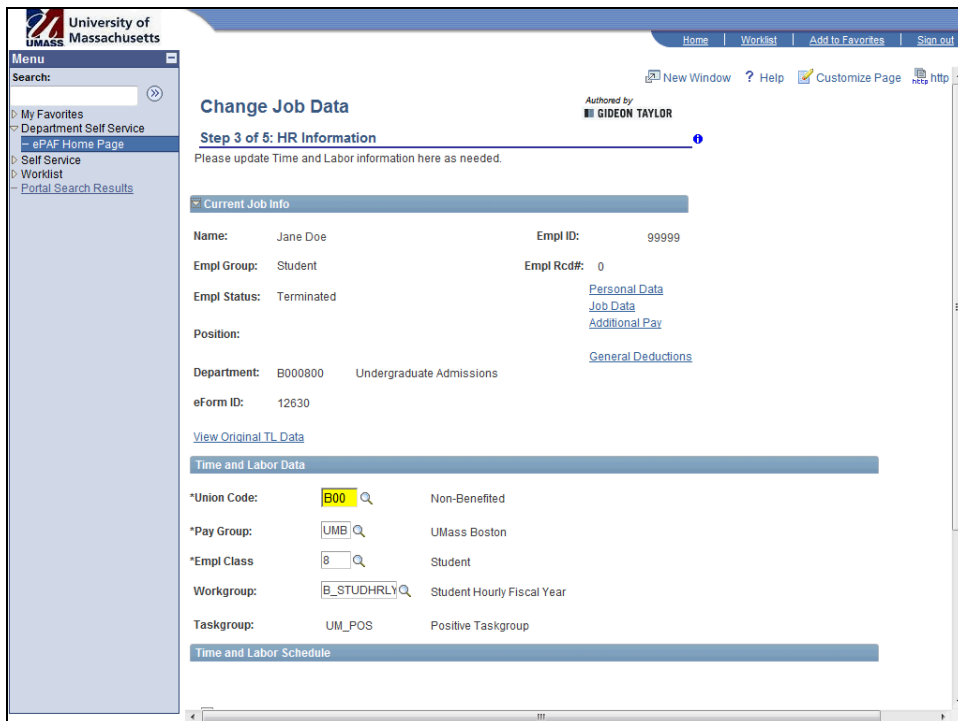
Employee Type: Hourly  
 Hourly Rate: 8.000000      Annual Rate: \$8,320.000  
 Plan: Salary Grade  
 Compensation Rate: \$8,320.000

Begin Date: 09/12/2010

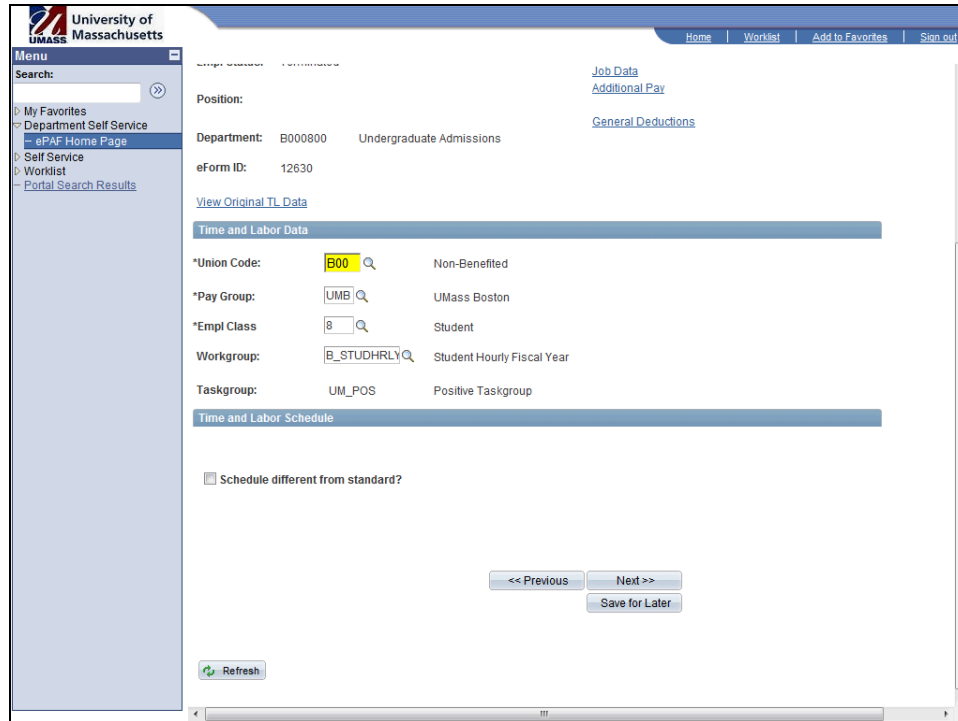
GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
1 B100430	51076	B000900000	E00				

Buttons: Add Date Range, << Previous, Next >>, Save for Later, Refresh

Step	Action
17.	<p>For this example, you are accepting the previous <b>Compensation Data</b> for rehire.</p> <p>Click the <b>Next</b> button.</p> 



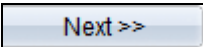
Step	Action
18.	Click the vertical <b>Scrollbar</b> .




The screenshot shows the University of Massachusetts HR system interface. The left sidebar contains a menu with options like 'My Favorites', 'Department Self Service', 'ePAF Home Page', 'Self Service', 'Worklist', and 'Portal Search Results'. The main content area displays the following information:

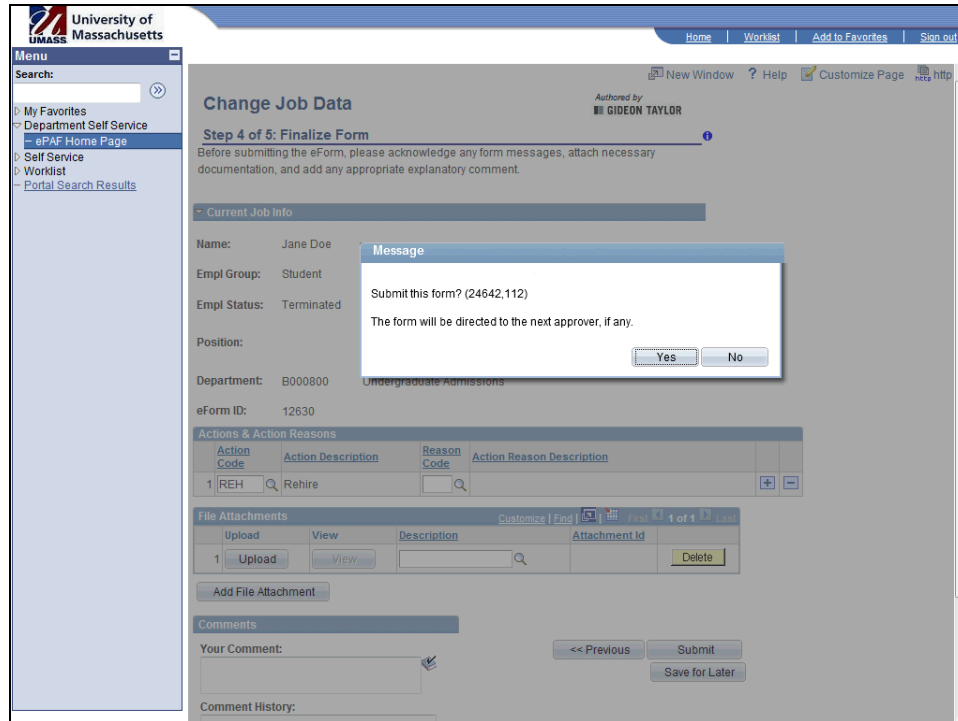
- Position: (blank)
- Department: B000800 Undergraduate Admissions
- eForm ID: 12630
- View Original TL Data (link)
- Time and Labor Data** (Section Header)
- \*Union Code: B00 Non-Benefited
- \*Pay Group: UMB UMass Boston
- \*Empl Class: 8 Student
- Workgroup: B\_STUDHRLY Student Hourly Fiscal Year
- Taskgroup: UM\_POS Positive Taskgroup
- Time and Labor Schedule** (Section Header)
- Schedule different from standard?


At the bottom of the form, there are three buttons: '<< Previous', 'Next >>', and 'Save for Later'. A 'Refresh' button is also present at the bottom left.

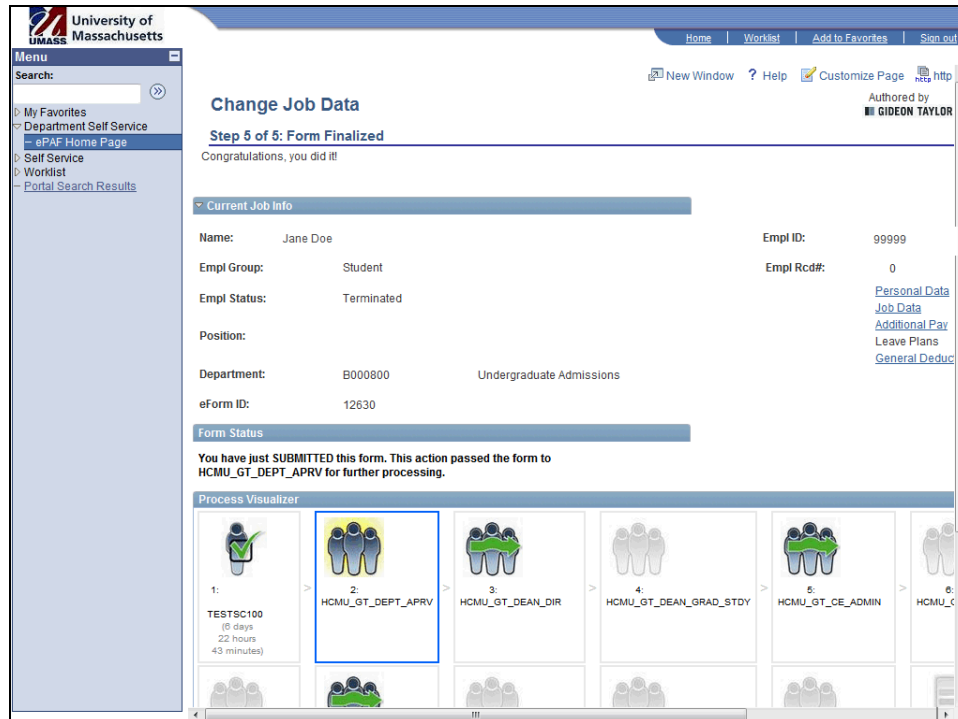
Step	Action
19.	For this example, you are accepting the previous <b>Time and Labor Data</b> for rehire. Click the <b>Next</b> button. 

Step	Action
20.	Notice that the <b>Action &amp; Action Reasons</b> section is notated as <b>Rehire</b> .
21.	Click the <b>Submit</b> button. 





Step	Action
22.	Confirm that you are ready to submit this form and click the <b>Yes</b> button. 



Step	Action
23.	The <b>Form Status</b> indicates that you have submitted this form.
24.	Congratulations! You have entered a rehire. <b>End of Procedure.</b>

## Entering a Department Transfer

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

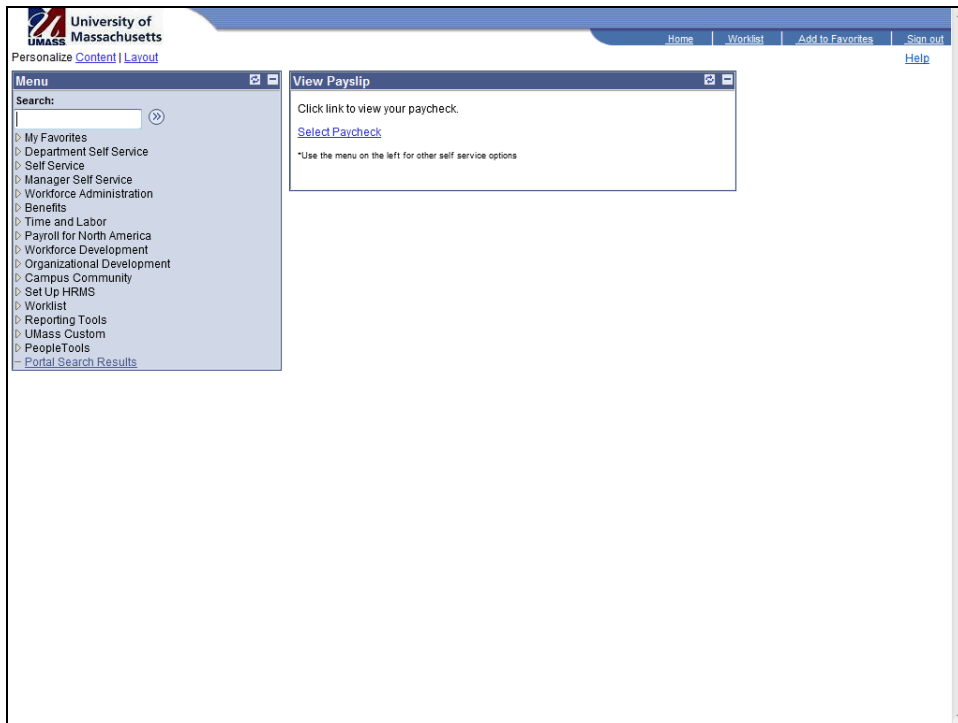
### Procedure

#### Consider this scenario:

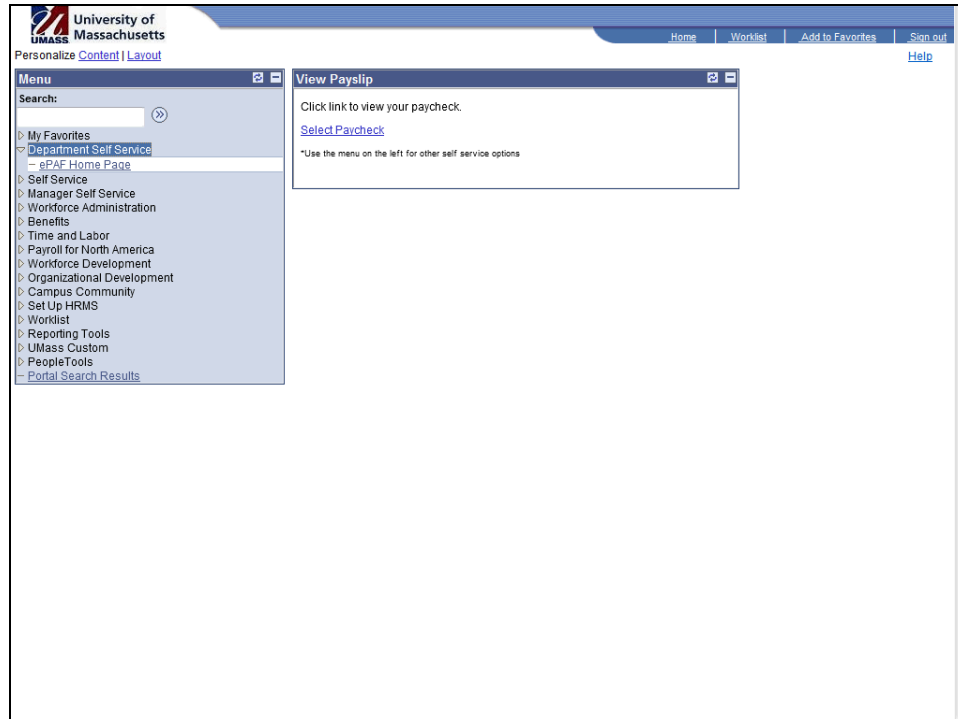
Your goal is to enter a department transfer.

#### Key Information:

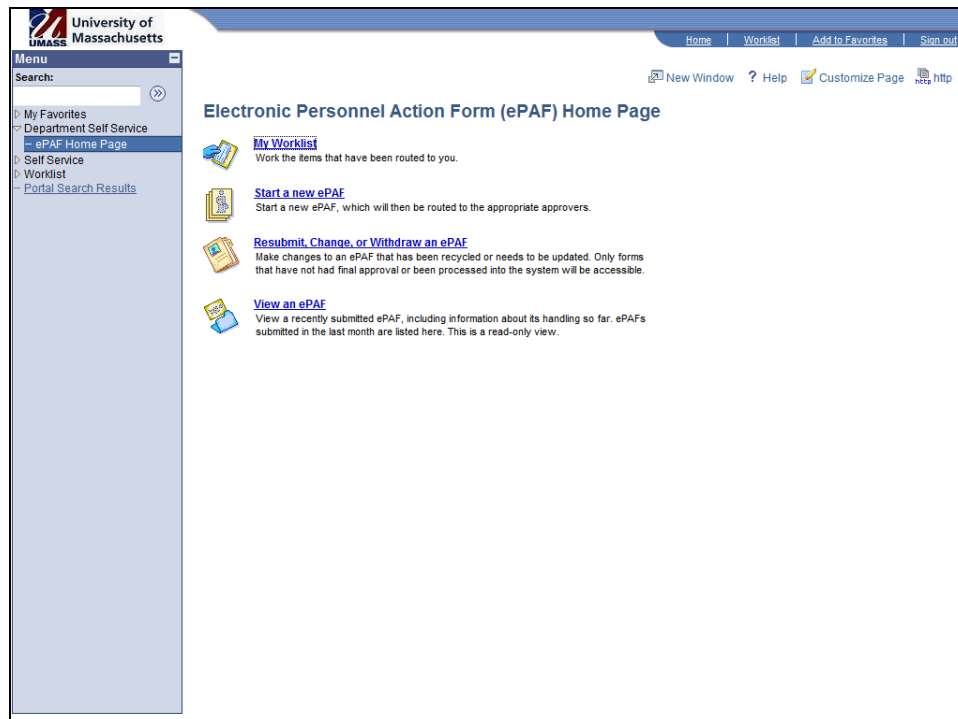
Last Name: Doe



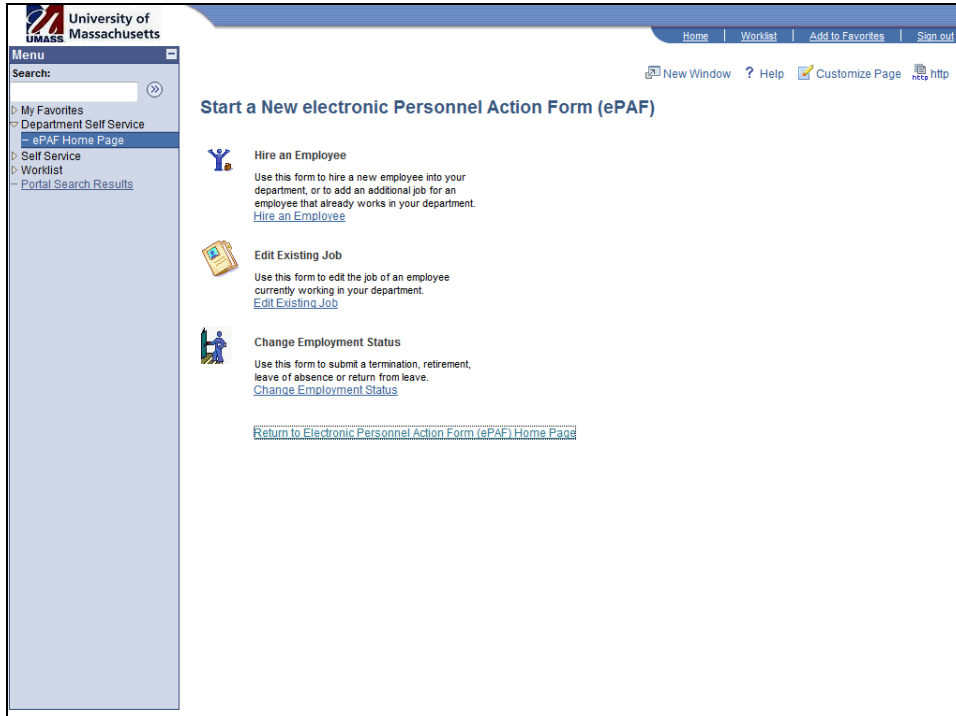
Step	Action
1.	Begin by navigating to the <b>ePAF Home Page</b> .  Click the <b>Department Self Service</b> link. <b>▶ Department Self Service</b>



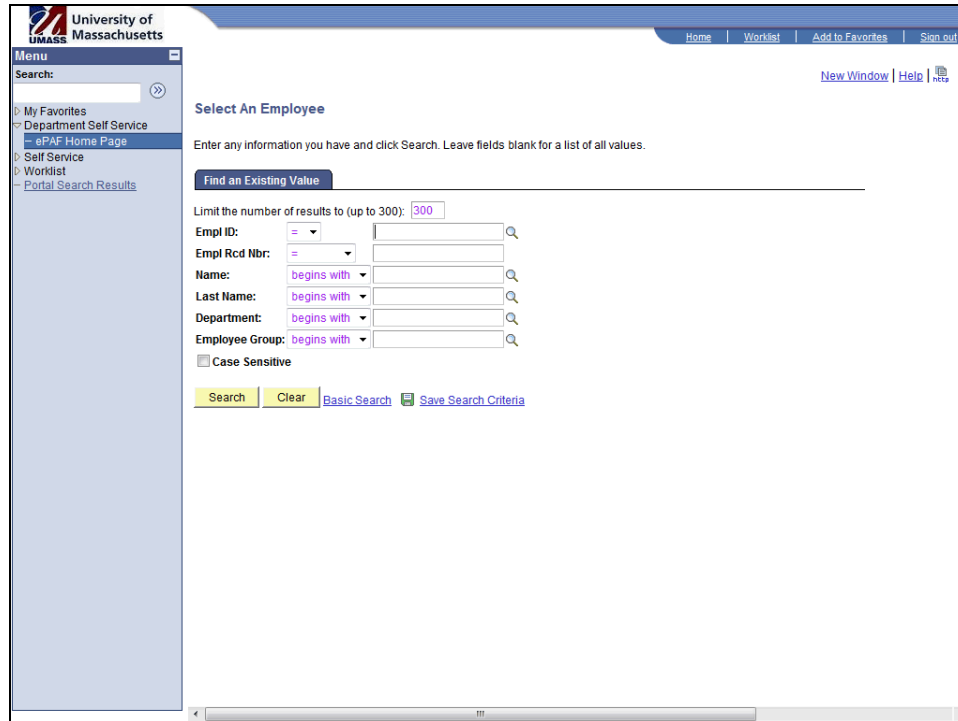
Step	Action
2.	Click the <b>ePAF Home Page</b> link. <span style="border: 1px solid black; padding: 2px;">ePAF Home Page</span>

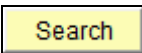


Step	Action
3.	This is the <b>ePAF Home Page</b> , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the <b>Start a new ePAF</b> link. <a href="#">Start a new ePAF</a>






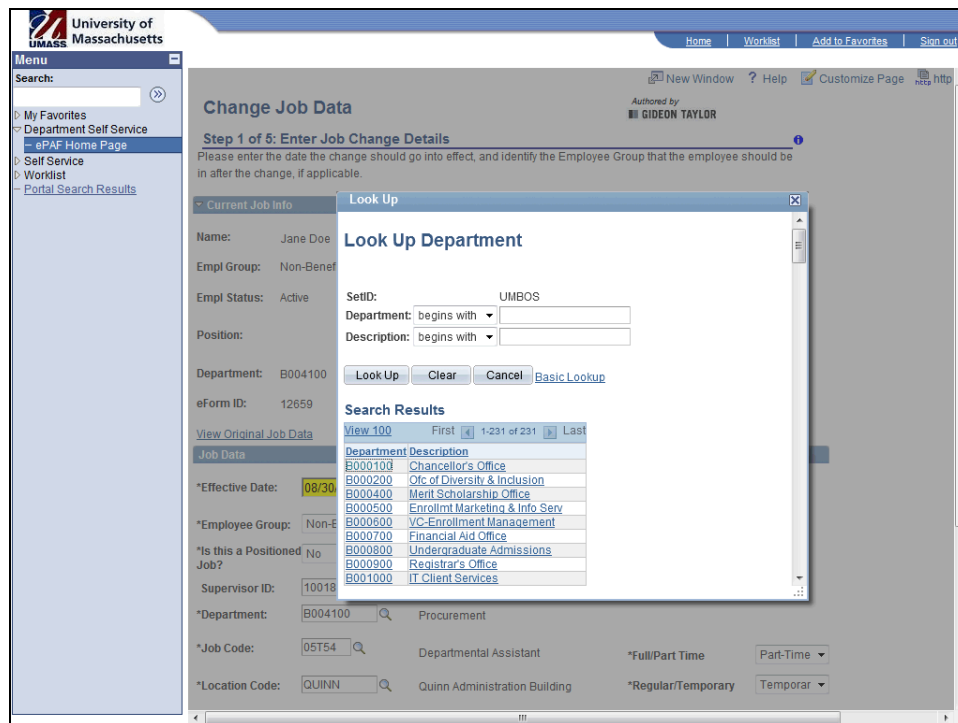
Step	Action
5.	<p>Before you can enter a <b>Department Transfer</b>, you will need to refer to your campus business practices. Some campuses use the <b>Job Change</b> form (if they have access to this person) and others use the <b>Hire</b> form (if they don't have access to this person).</p> <p>For this example, you have access to this person and will be using the <b>Job Change</b> form.</p> <p>Click the <b>Edit Existing Job</b> link.</p> <p><i>Note:</i> If your campus uses the <b>Hire</b> form for department transfers, please refer to the online training topics: <i>Adding a Person into a Job</i>, and <i>Adding a Person into a Position</i>.</p> <p><a href="#">Edit Existing Job</a></p>




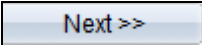
Step	Action
6.	Enter the desired information into the <b>Last Name</b> field.  Enter " <b>D</b> ".  <i>Note:</i> You may also search on the <b>Empl ID</b> field.
7.	Click the <b>Search</b> button. 



Step	Action
9.	The <b>Change Job Data</b> form is used to edit the job of a current employee.
10.	Click the <b>Effective Date</b> look up button. 
11.	For this example, click the August <b>30</b> link. 
12.	Click the <b>Department</b> look up button. 

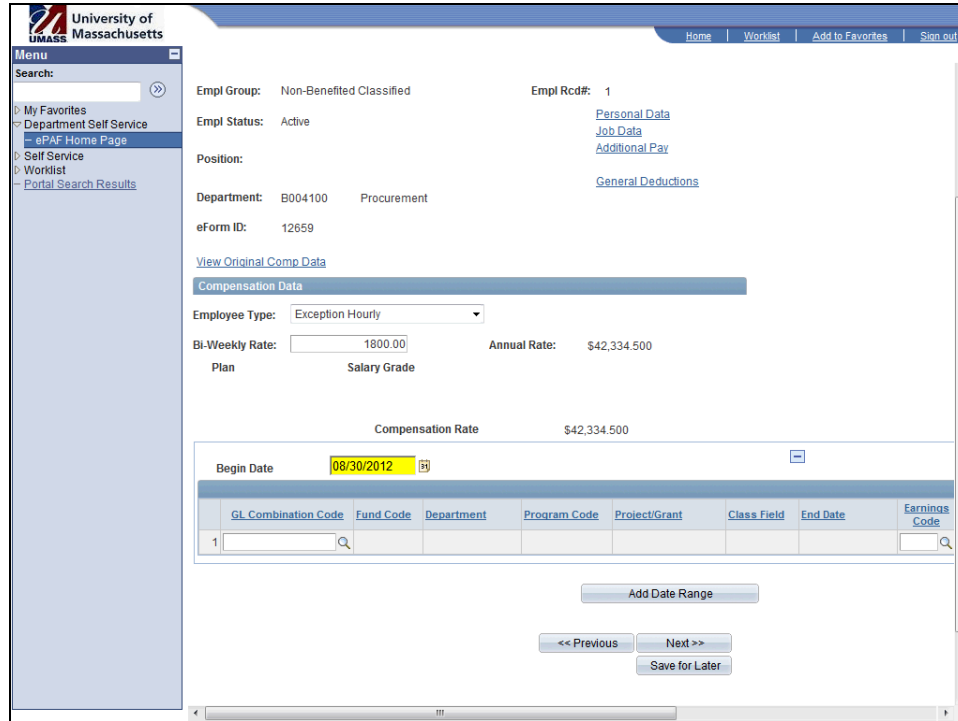


Step	Action
13.	For this example, click the <b>B000500</b> link.  <i>Note:</i> You may also click the <b>Description</b> link. 
14.	Click the vertical <b>Scrollbar</b> .


Step	Action
15.	Click the <b>Next</b> button. 

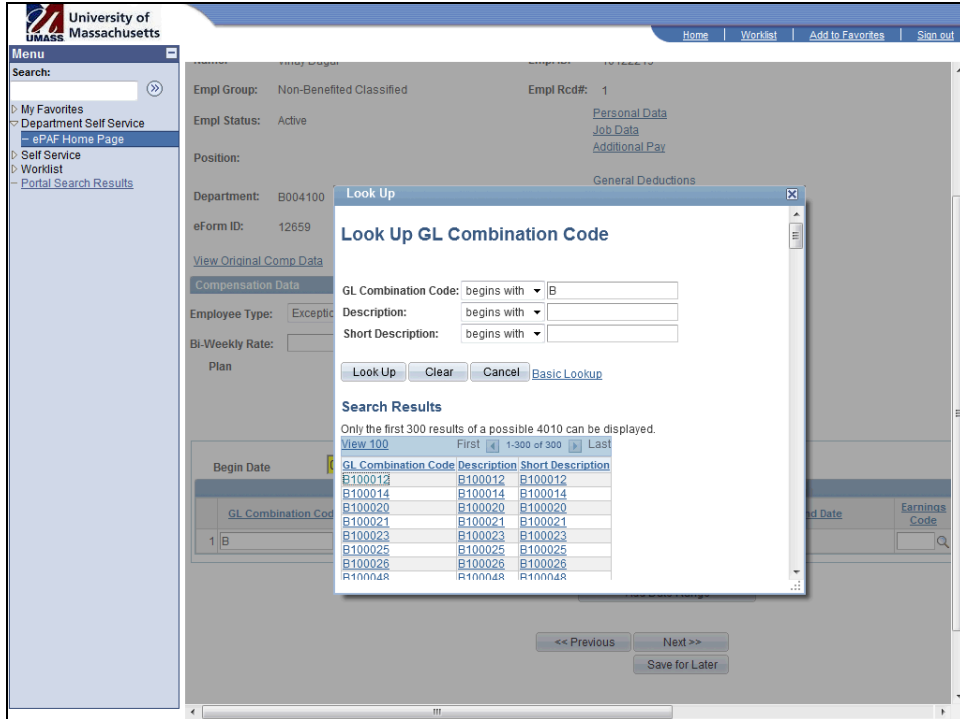


Step	Action
16.	<p>Enter the desired information into the <b>Bi-Weekly Rate</b> field, if applicable.</p> <p>For this example, enter "<b>1800.00</b>".</p> <p><b>Note:</b> You may also need to enter a new <b>Job Code</b>, if applicable.</p>

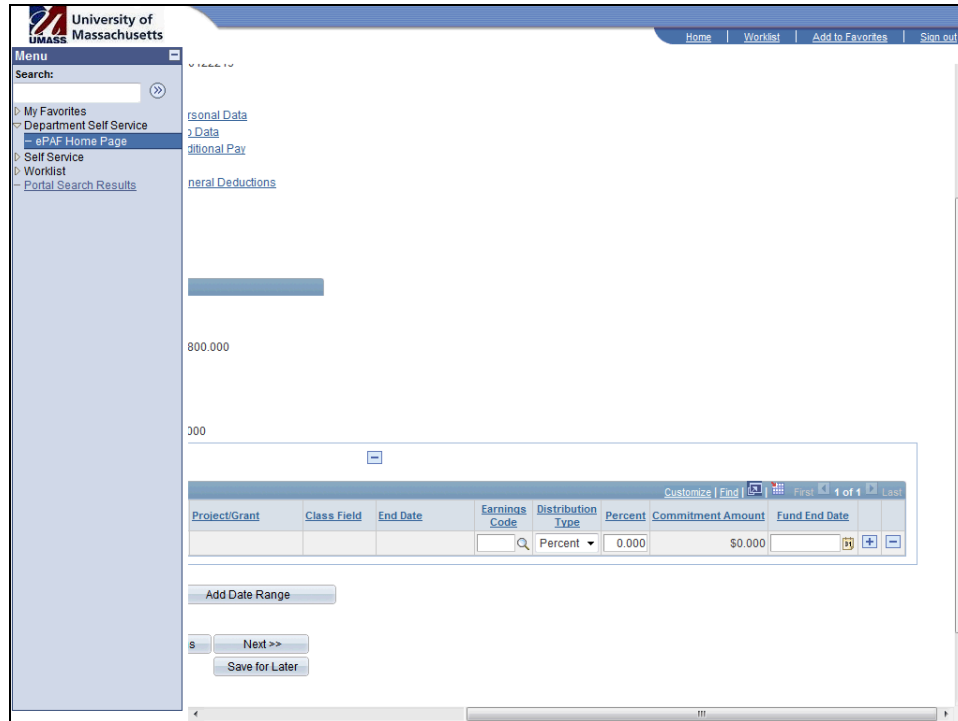


The screenshot shows the 'Compensation Data' section of the HR system. The 'Employee Type' is 'Exception Hourly'. The 'Bi-Weekly Rate' is entered as '1800.00' and the 'Annual Rate' is '\$42,334.500'. Below this, there is a table with columns: 'GL Combination Code', 'Fund Code', 'Department', 'Program Code', 'Project/Grant', 'Class Field', 'End Date', and 'Earnings Code'. The first row of the table has a search icon in the 'GL Combination Code' column.

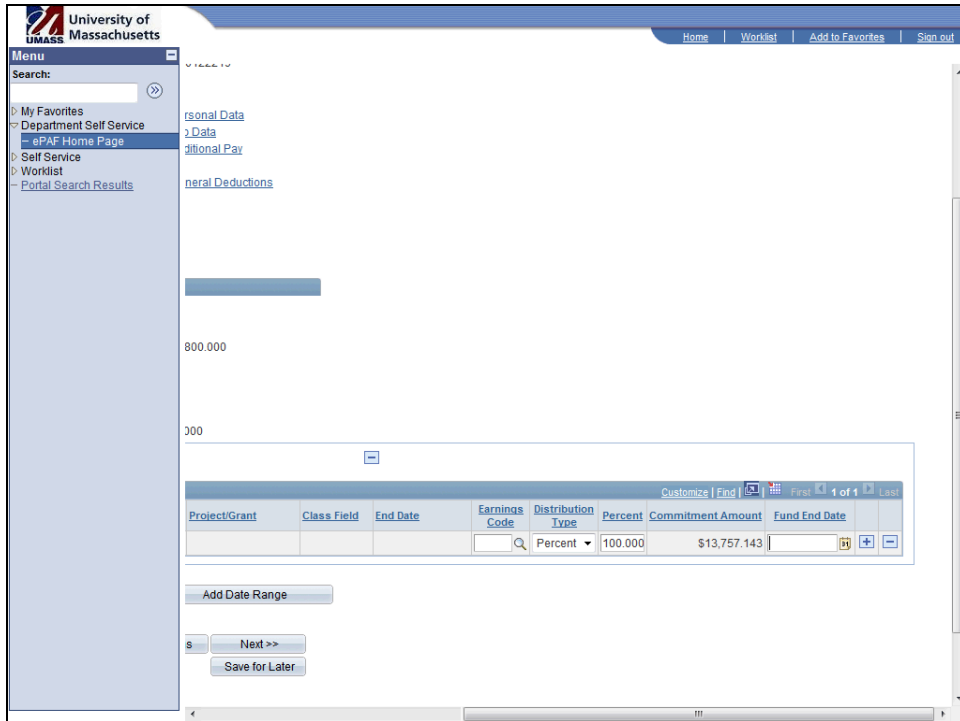
Step	Action
17.	<p>Enter the desired information into the <b>GL Combination Code</b> field.</p> <p>Enter "<b>B</b>".</p>
18.	<p>Click the <b>GL Combination Code</b> look up button.</p> 

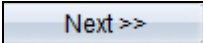


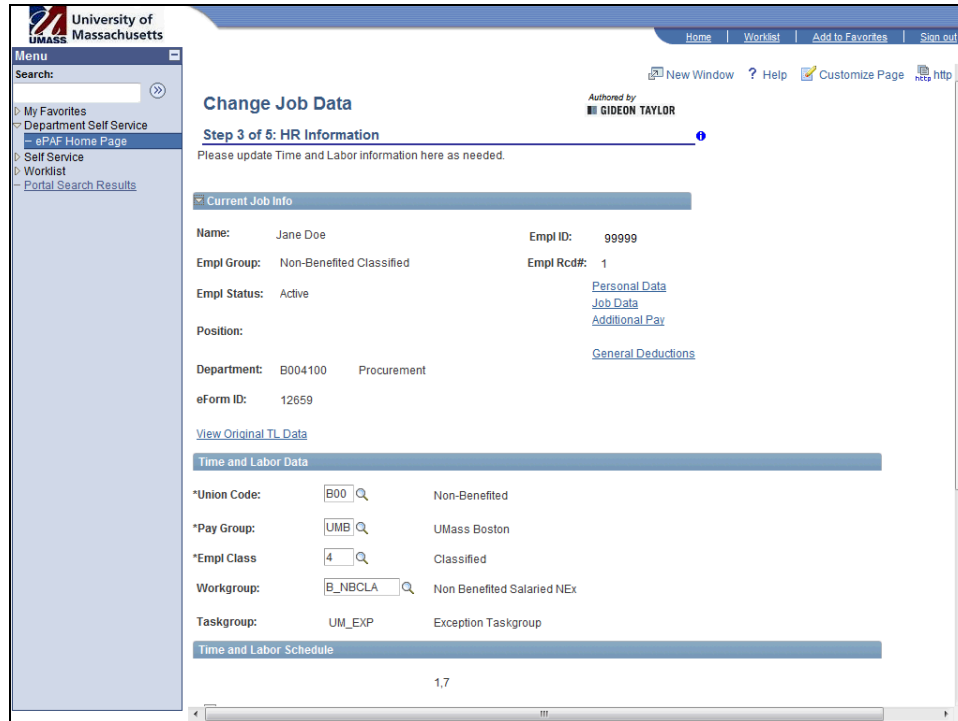
Step	Action
19.	For this example, click the <b>B100021</b> link. <b>B100021</b>
20.	Click the horizontal <b>Scrollbar</b> .
21.	<b>Note:</b> For <b>Distribution Type</b> , refer to your campus business processes for direction on whether to use <b>Percent</b> or <b>Amount</b> .



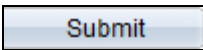
Step	Action
22.	Enter the desired information into the <b>Percent</b> field.  For this example, enter " <b>100</b> ".
23.	Click in the <b>Fund End Date</b> field. <input type="text"/>

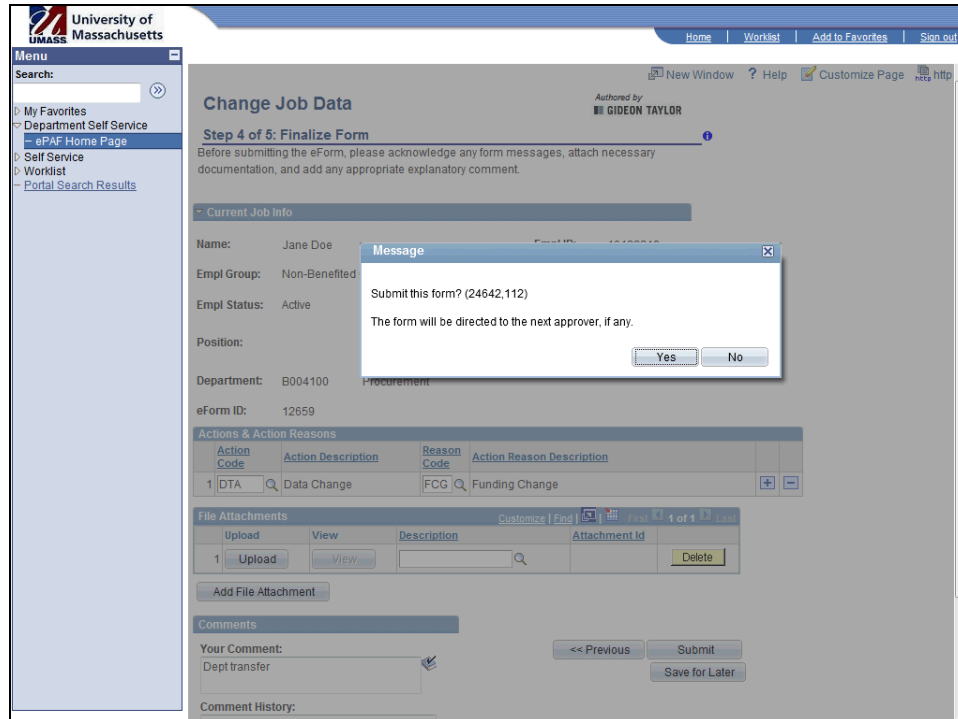



Step	Action
24.	<p>Notice that the <b>Commitment Amount</b> has updated.</p> <p><i>Note:</i> The <b>Fund End Date</b> is used by the campus where applicable.</p>
25.	<p>Click the <b>Next</b> button.</p> <p></p>

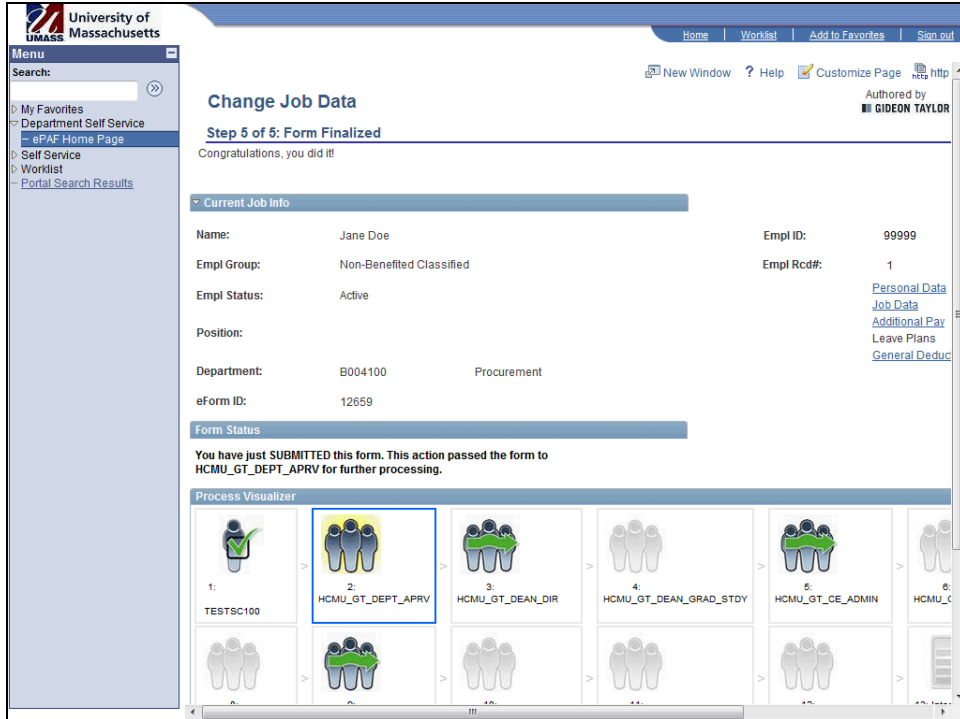


Step	Action
26.	Click the vertical <b>Scrollbar</b> .
27.	Click the <b>Next</b> button. <div data-bbox="440 1102 641 1146" style="border: 1px solid black; padding: 2px; display: inline-block;">Next &gt;&gt;</div>

Step	Action
28.	Notice that the <b>Actions &amp; Action Reasons</b> section has updated.
29.	Enter the desired information into the <b>Your Comment</b> field. For this example, enter " <b>Dept transfer</b> ".
30.	Click the <b>Submit</b> button. 



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



Step	Action
32.	The <b>Form Status</b> indicates that you have submitted this form.
33.	Congratulations! You have entered a department transfer. <b>End of Procedure.</b>

### Entering a Funding Swap

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

#### Procedure

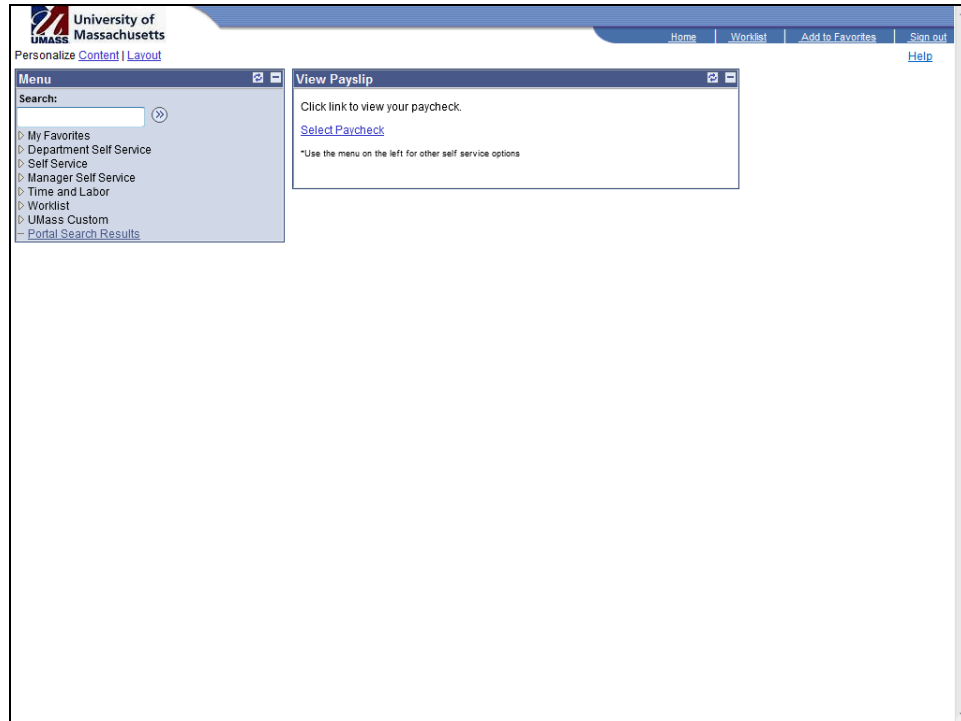
#### Consider this Scenario:

Your goal is to enter a funding swap.

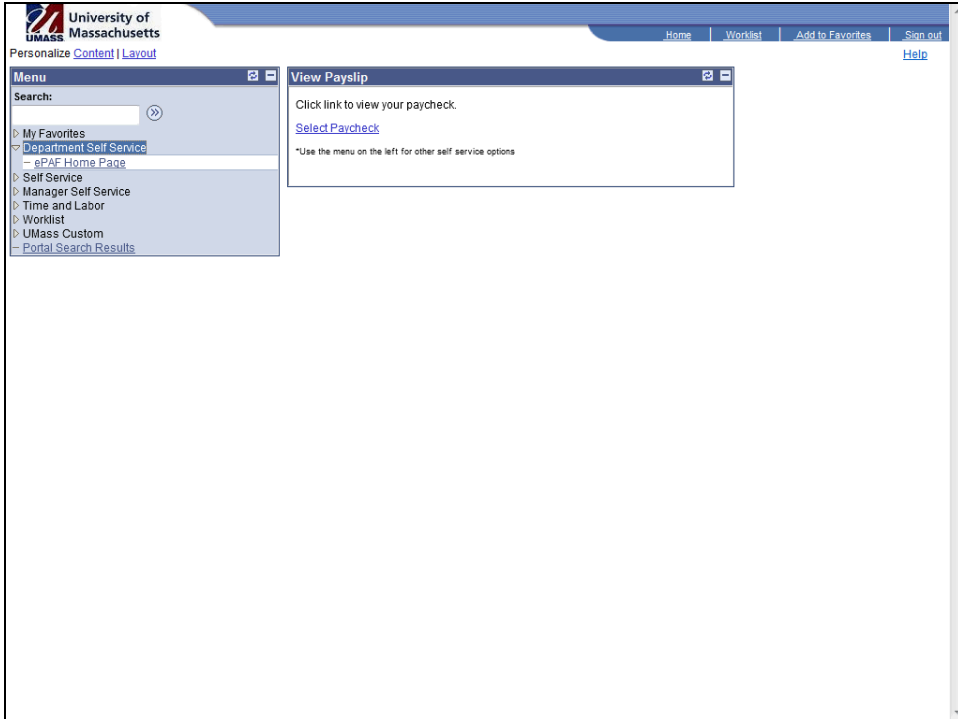
#### Key Information:

Name: Jane Doe

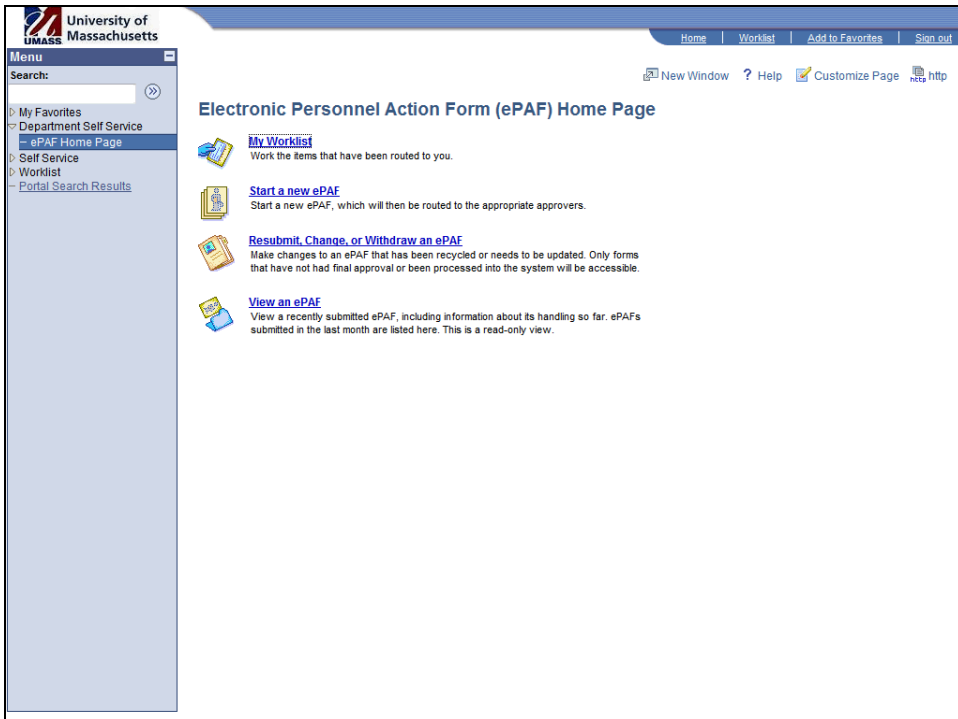




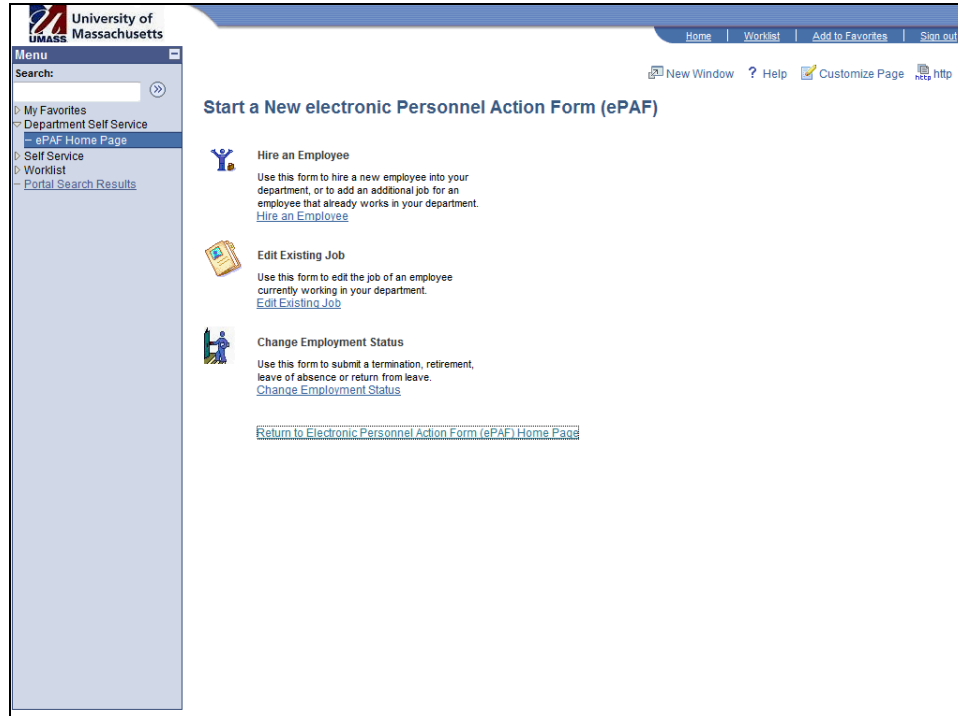
Step	Action
1.	Begin by navigating to the <b>ePAF Home Page</b> .  Click the <b>Department Self Service</b> link. <input data-bbox="440 1129 732 1161" type="text" value="▶ Department Self Service"/>



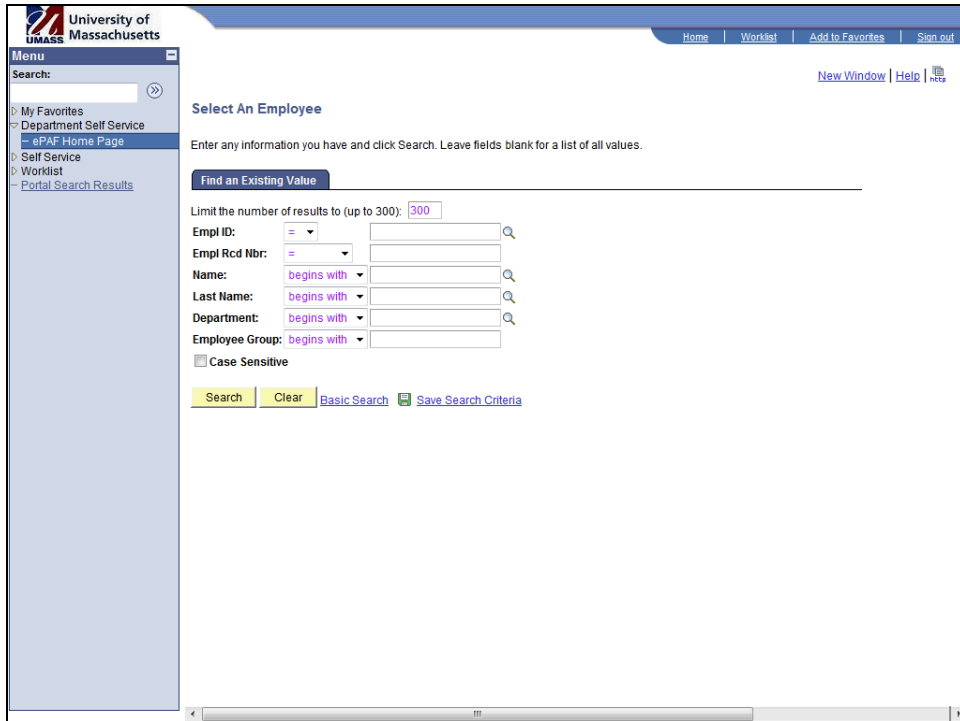
Step	Action
2.	Click the <b>ePAF Home Page</b> link. <span style="border: 1px solid black; padding: 2px;">ePAF Home Page</span>

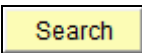


Step	Action
3.	This is the <b>ePAF Home Page</b> , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the <b>Start a new ePAF</b> link. <a href="#">Start a new ePAF</a>



Step	Action
5.	Click the <b>Edit Existing Job</b> link. <a href="#">Edit Existing Job</a>



Step	Action
6.	Enter the desired information into the <b>Last Name</b> field.  For this example, enter " <b>Doe</b> ".  <i>Note:</i> You may also search by using the <b>Empl ID</b> .
7.	Click the <b>Search</b> button. 

**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:

Empl Rcd Nbr:

Name:  begins with

Last Name:  begins with Doe

Department:  begins with

Employee Group:  begins with

Case Sensitive

**Search Results**

Only the first 300 results of a possible 624 can be displayed.

Empl ID	Empl Rcd Nbr	Name	Last Name	Department	Employee Group	Pavroll Status
99999	0	Jane Doe	DOE	L690300	HRLYS	Active

Step	Action
8.	Click the <b>Jane Doe</b> link. <a href="#">Jane Doe</a>

**Change Job Data**

Authorized by GIDEON TAYLOR

**Step 1 of 5: Enter Job Change Details**

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

**Current Job Info**

Name: Jane Doe      Empl ID: 99999

Empl Group: Student Hourly      Empl Rcd#: 0

Empl Status: Active

Position:

Department: L690300      Residence Life

eForm ID: 12652

[View Original Job Data](#)

**Job Data**

\*Effective Date:  \*End Date: 05/19/2013  End Job Automatically

\*Employee Group:  Student Hourly



\*Is this a Positioned Job?  No

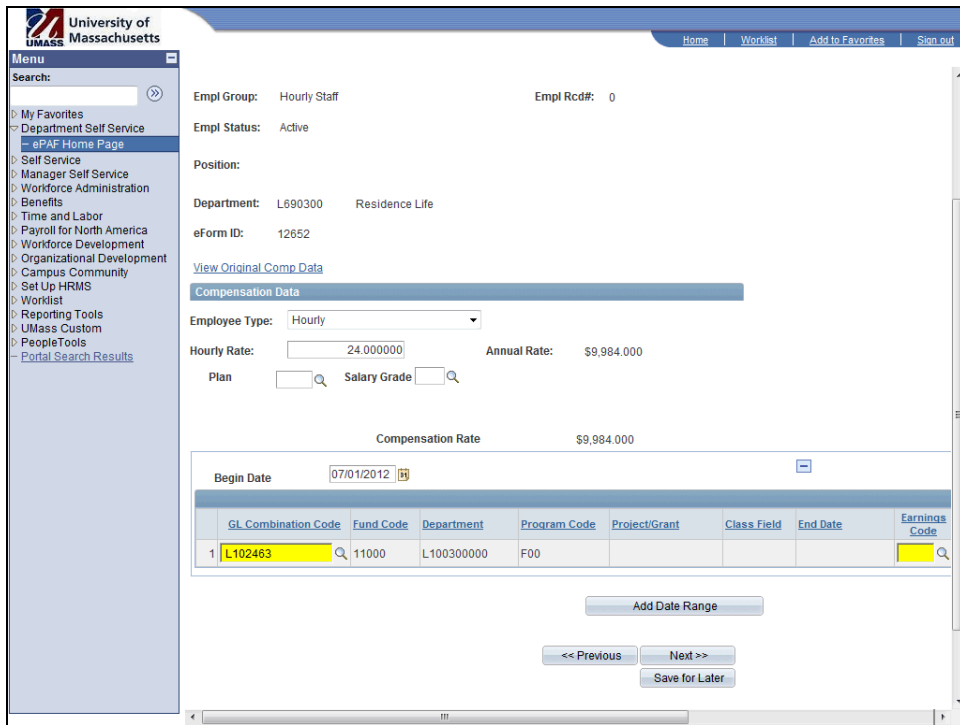
Supervisor ID:  88888      John Smith


\*Department:  L690300      Residence Life

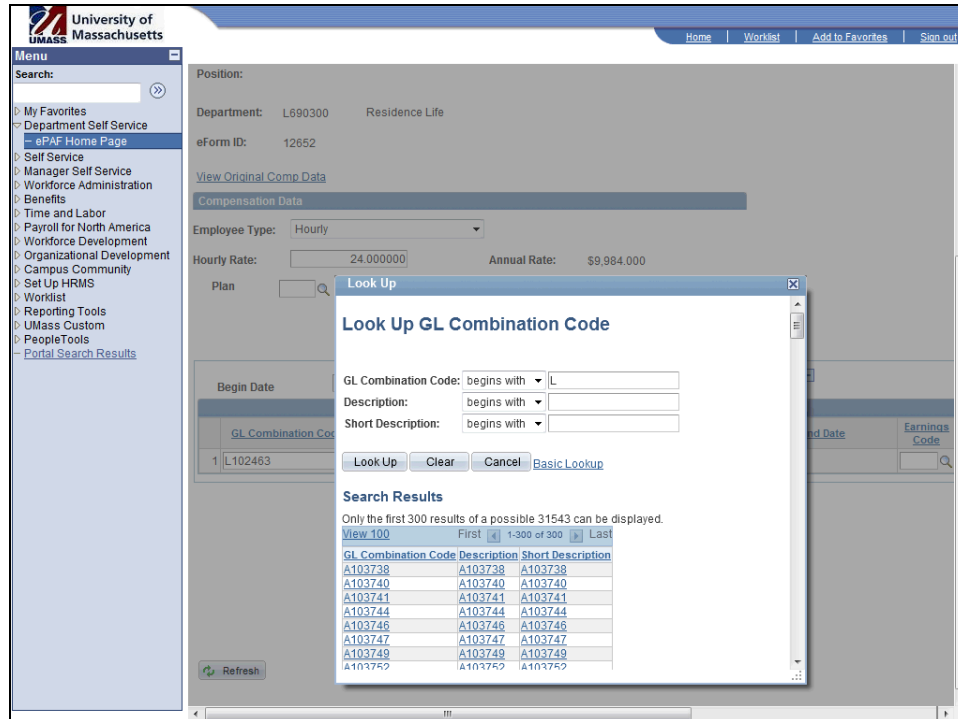
\*Job Code:  ST9999      UMass Student      \*Full/Part Time:  Part-Time

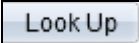
\*Location Code:  FOXHALL1FL      FOXHALL1FL      \*Regular/Temporary:  Temporar

Step	Action
9.	The <b>Change Job Data</b> form is used to edit the information of an existing employee. For this example, you are going to enter a funding swap for Jane Doe.
10.	Click the <b>Effective Date</b> button. 
11.	For this example, click the August <b>31</b> link. 
12.	Click the vertical <b>Scrollbar</b> .



Step	Action
13.	Click the <b>GL Combination Code</b> look up button. 



Step	Action
14.	<p>You can use the <b>GL Combination Code</b> search field, and enter the first letter of your campus to expedite the search.</p> <p>Enter the desired information into the <b>GL Combination Code</b> field.</p> <p>For this example, enter "<b>L</b>".</p>
15.	<p>Click the <b>Look Up</b> button.</p> 

The screenshot shows the 'Look Up' dialog box for 'GL Combination Code'. The search criteria are: 'begins with' L. The search results table is as follows:

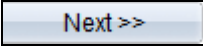
GL Combination Code	Description	Short Description
L100001	L100001	L100001
L100011	L100011	L100011
L100012	L100012	L100012
L100015	L100015	L100015
L100018	L100018	L100018
L100027	L100027	L100027
L100036	L100036	L100036
L100037	L100037	L100037

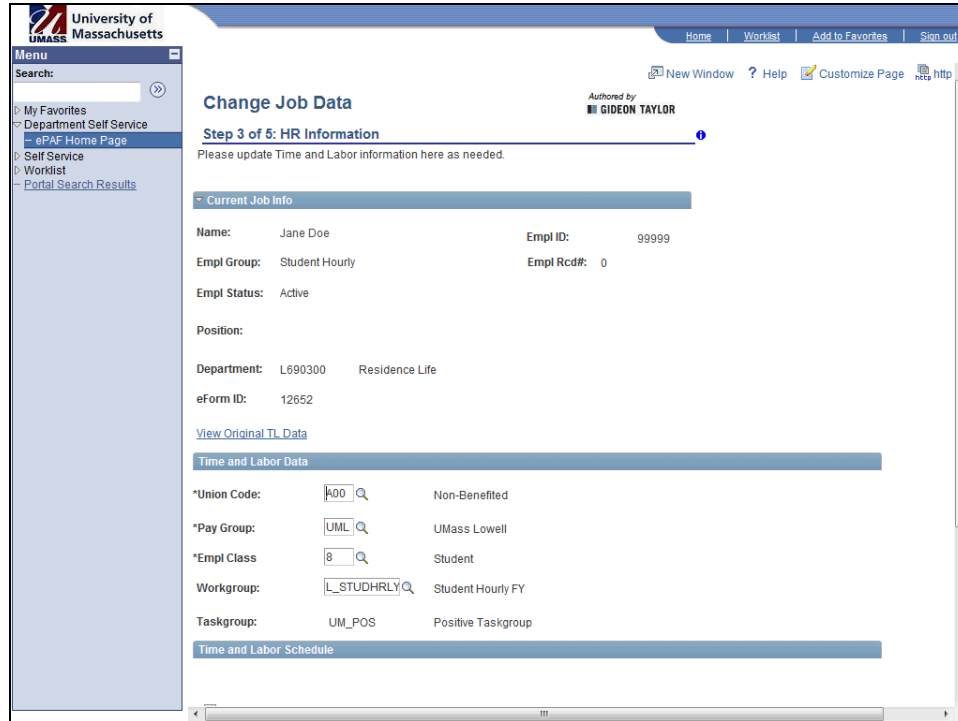
Step	Action
16.	For this example, click the <b>L100001</b> link.

The screenshot shows the 'Compensation Data' section of the HRMS system. The 'GL Combination Code' field is highlighted with the value 'L100001'. The table below shows the compensation details:

GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
1 L100001	11000	L100300000	F00				



Step	Action
17.	Click the <b>Next</b> button. 



Step	Action
18.	Click the vertical <b>Scrollbar</b> .

University of Massachusetts

Home Worklist Add to Favorites Sign out

Menu

Search: [ ]

- My Favorites
- Department Self Service
  - ePAF Home Page
- Self Service
- Worklist
- Portal Search Results

Position: [ ]

Department: L690300 Residence Life

eForm ID: 12652

[View Original TL Data](#)

**Time and Labor Data**

\*Union Code: A00 Non-Benefited

\*Pay Group: UML UMass Lowell

\*Empl Class: 8 Student

Workgroup: L\_STUDHRLY Student Hourly FY

Taskgroup: UM\_POS Positive Taskgroup

**Time and Labor Schedule**

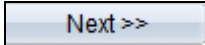
Schedule different from standard?

<< Previous Next >>

Save for Later

Refresh

Step	Action
19.	Click the <b>Next</b> button.



University of Massachusetts

Home Worklist Add to Favorites Sign out

Menu

Search: [ ]

- My Favorites
- Department Self Service
  - ePAF Home Page
- Self Service
- Manager Self Service
- Workforce Administration
- Benefits
- Time and Labor
- Payroll for North America
- Workforce Development
- Organizational Development
- Campus Community
- Set Up HRMS
- Worklist
- Reporting Tools
- UMass Custom
- PeopleTools
- Portal Search Results

**Change Job Data**

Authorized by GIDEON TAYLOR

**Step 4 of 5: Finalize Form**

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

**Current Job Info**

Name: Jane Doe Empl ID: 99999

Empl Group: Student Hourly Empl Rcd#: 0

Empl Status: Active

Position: [ ]

Department: L690300 Residence Life

eForm ID: 12652

**Actions & Action Reasons**

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

**File Attachments**

Upload	View	Description	Attachment Id
1 Upload	View	[ ]	Delete

Add File Attachment

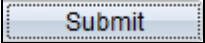
**Comments**

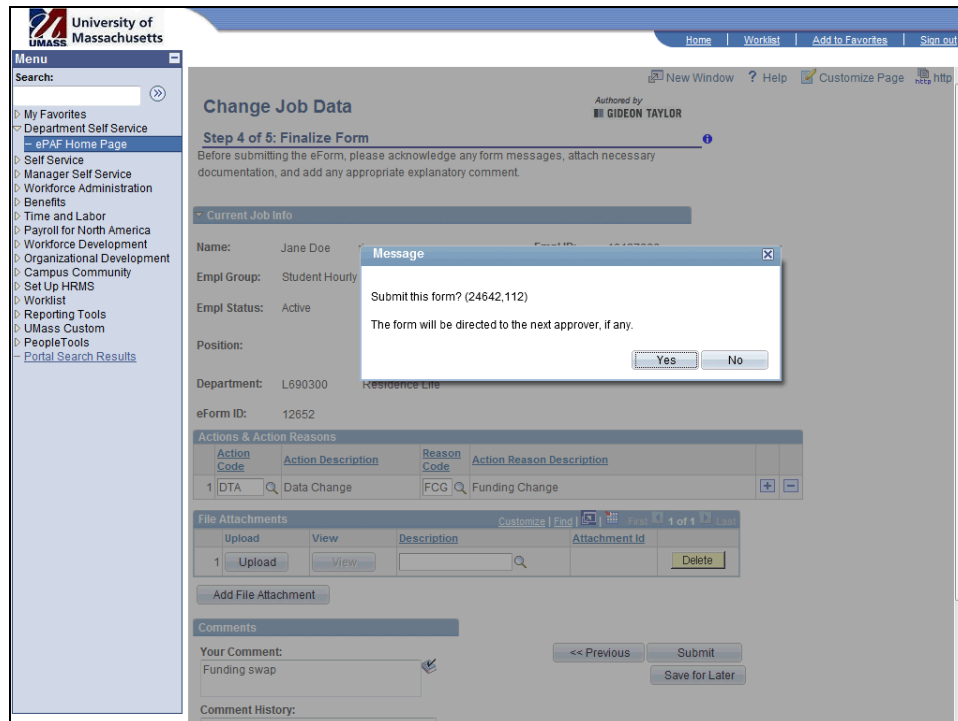
Your Comment: [ ]

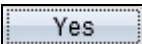
Comment History: [ ]

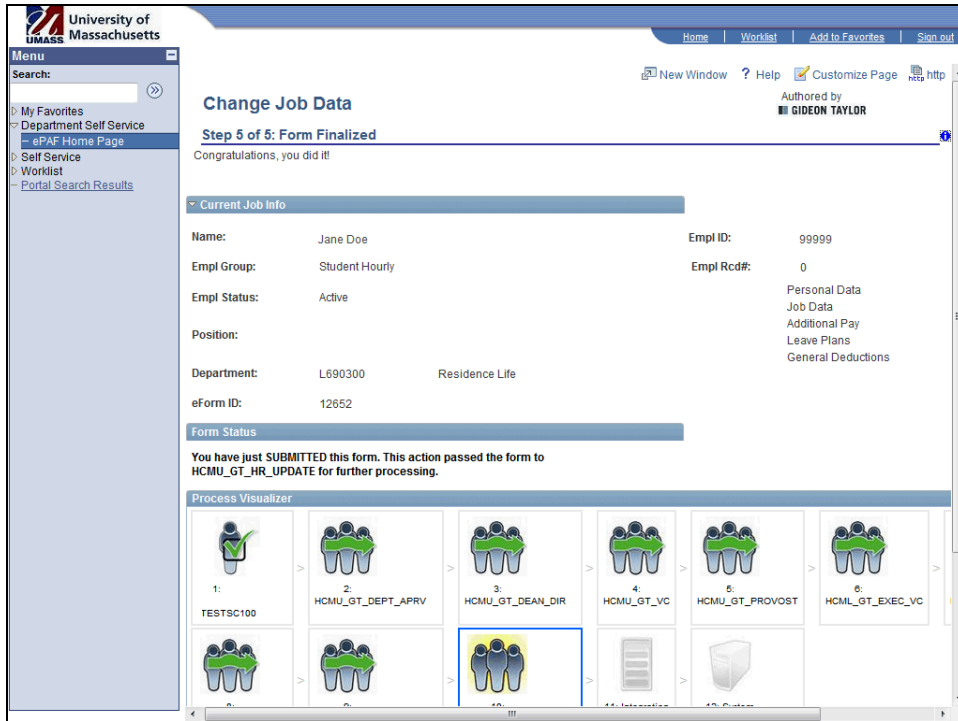
<< Previous Submit

Save for Later

Step	Action
20.	Notice that the <b>Actions &amp; Action Reasons</b> section has been updated.
21.	Click the <b>Submit</b> button. 



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



Step	Action
23.	The <b>Form Status</b> indicates that you have submitted this form.
24.	Congratulations! You have entered a funding swap. <b>End of Procedure.</b>

## Updating Employee Status (Initiator)

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

- Enter a leave of absence
- Enter terminations and retirements
- Enter a return from leave

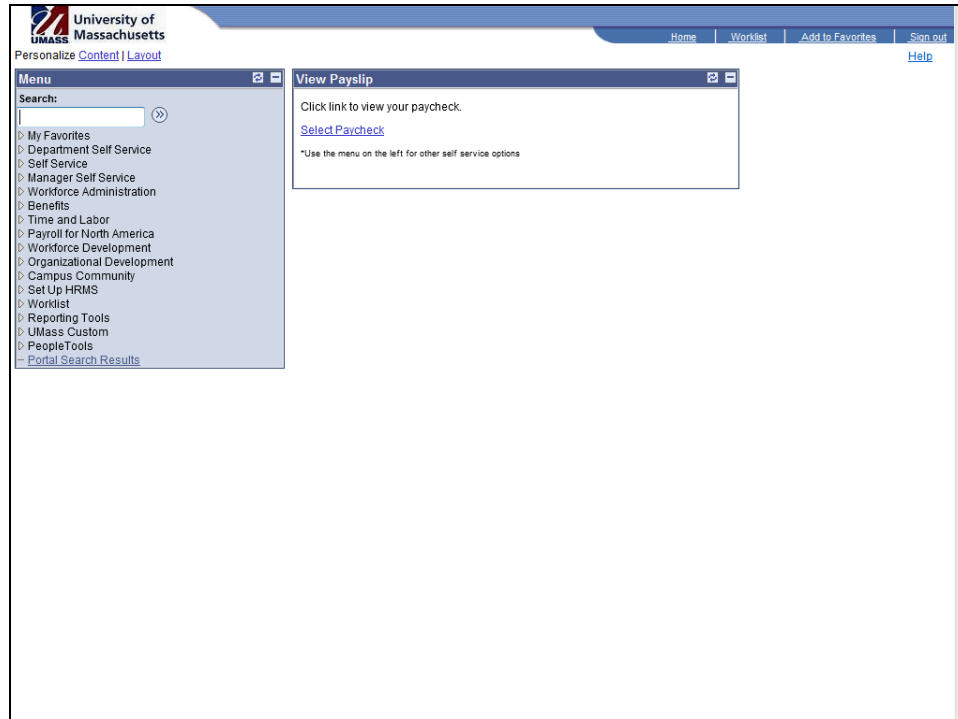
## Entering Terminations, Retirements, Leave of Absence, and Return from Leave


Upon completion of this topic, you will be able to enter a termination, retirement, leave of absence or a return from leave.

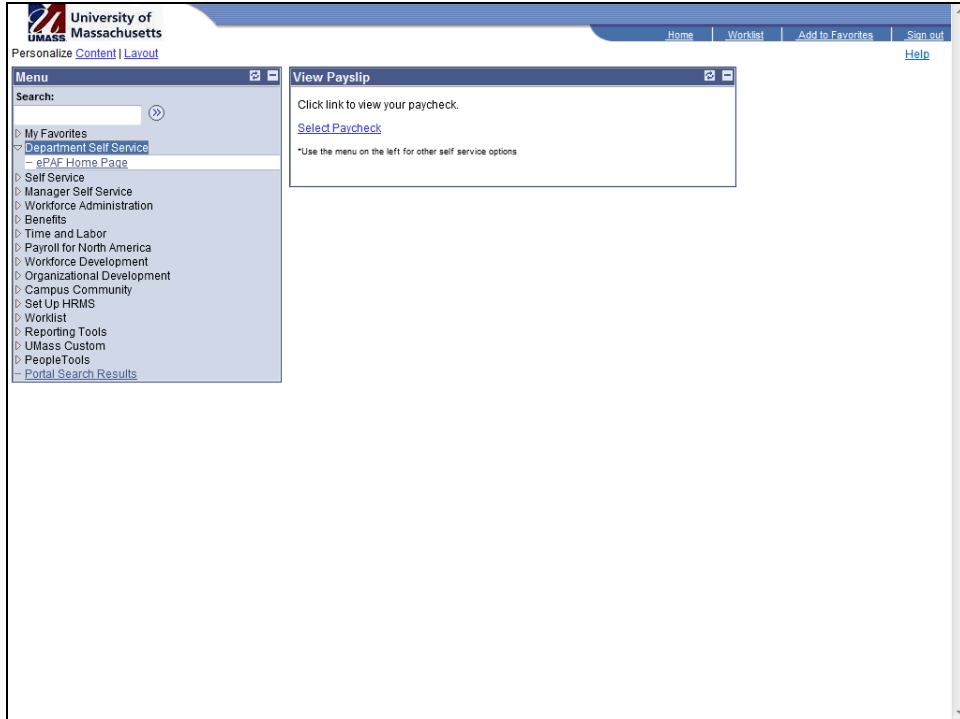
### Procedure

#### Consider this scenario:

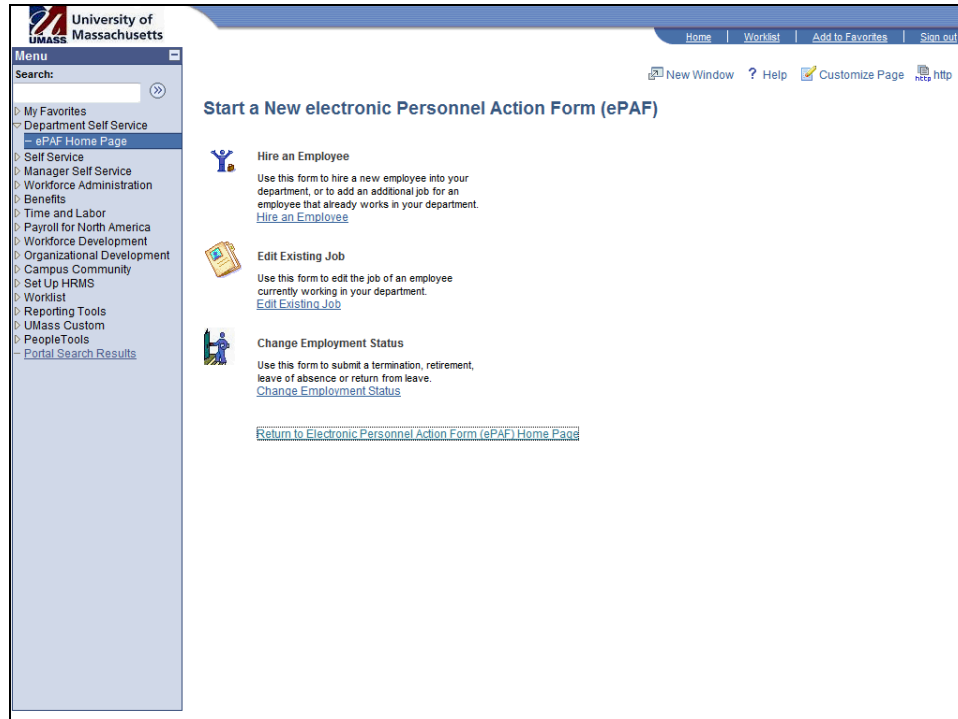
Your goal is to enter a termination, retirement, leave of absence, or return from leave.



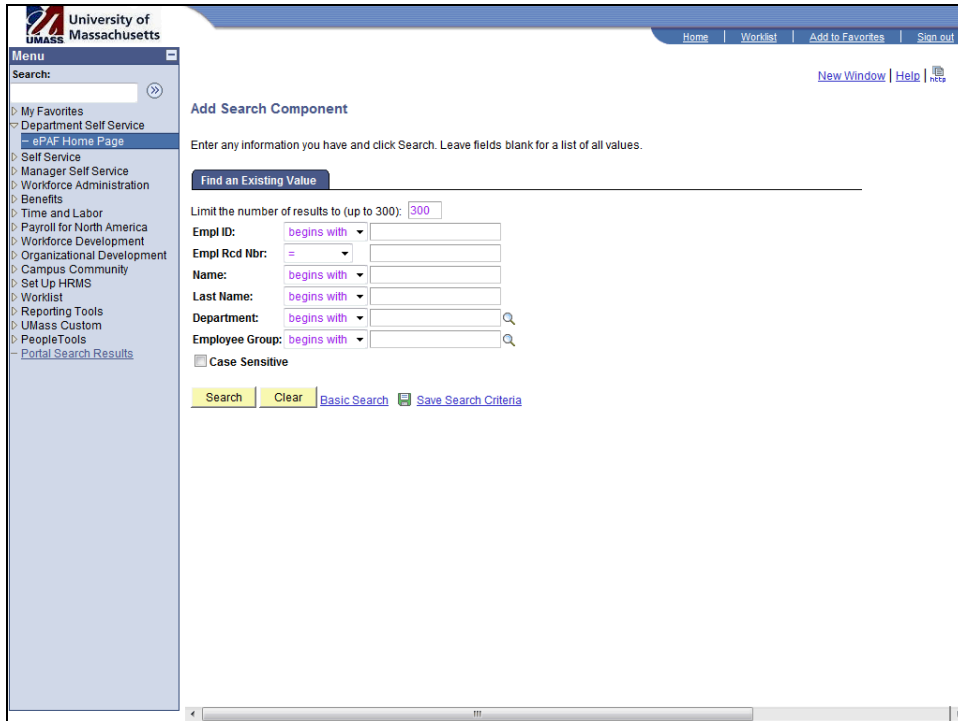
Step	Action
1.	Begin by navigating to the <b>ePAF Home Page</b> .  Click the <b>Department Self Service</b> link. 

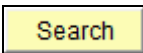



Step	Action
2.	Click the <b>ePAF Home Page</b> link. <a href="#">ePAF Home Page</a>
3.	This is the <b>ePAF Home Page</b> , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the <b>Start a new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








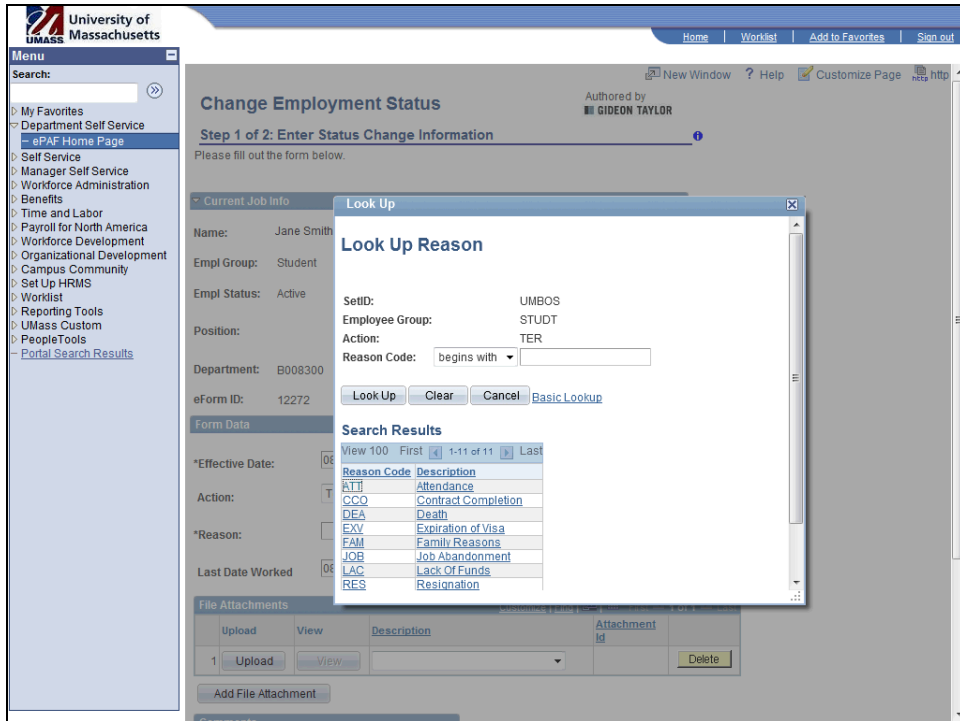
Step	Action
5.	To submit a termination, retirement, leave of absence, or return from leave, click the <b>Change Employment Status</b> link. <a href="#">Change Employment Status</a>



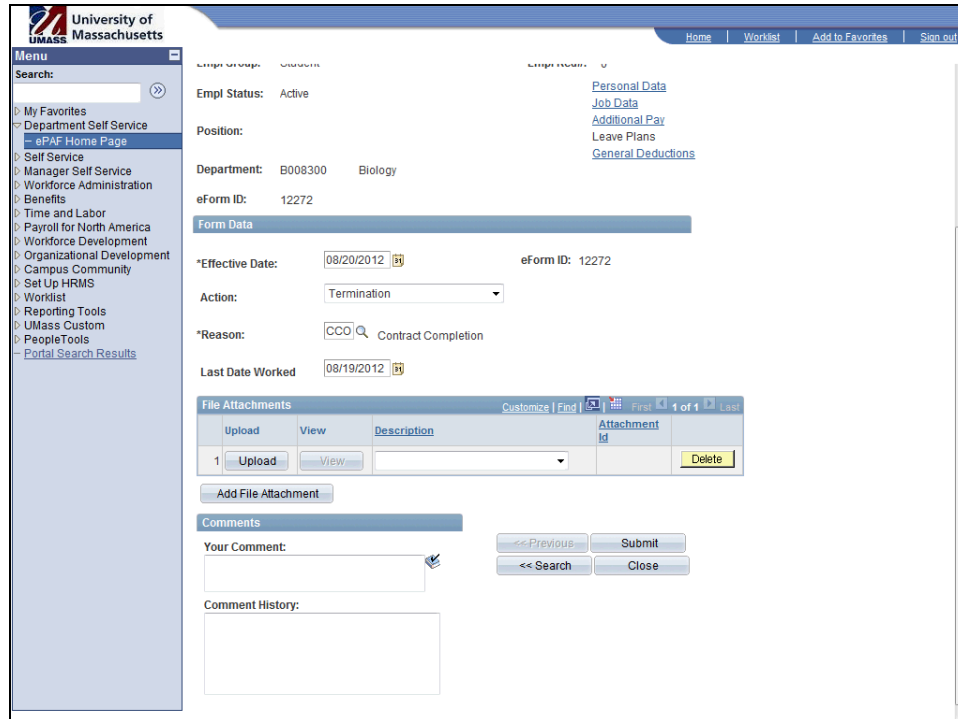
Step	Action
6.	<p>You can search by different criteria.</p> <p>For this example, we will search by <b>Last Name</b>.</p> <p>For this example, enter "S".</p>
7.	<p>Click the <b>Search</b> button.</p> 
8.	<p>Click the <b>Jane Smith</b> link.</p> 



Step	Action
9.	The <b>Change Employment Status</b> form is used for terminations, retirements, leave of absence, or return from leave.
10.	Click the <b>Effective Date</b> look up button. 
11.	For this example, click the August <b>20</b> link. 
12.	Click the <b>Action</b> list. 
13.	The <b>Action</b> choices are <b>Leave of Absence, Retirement, Return from Leave, and Termination</b> .  <i>Note:</i> Your campus procedures will dictate the <b>Action</b> choices available for your selection.
14.	For this example, click the <b>Termination</b> list item.  <i>Note:</i> Your choice of <b>Action</b> will determine the choices you will see for <b>Reason</b> . 
15.	Click the <b>Reason</b> look up button. 



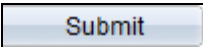
Step	Action
16.	For this example, click the <b>Contract Completion</b> link.  <i>Note:</i> Your choices for <b>Reason</b> are determined by your previous <b>Action</b> selection. <a href="#">Contract Completion</a>
17.	<i>Note:</i> Once the action of <b>Termination</b> is selected, the system will calculate the <b>Last Date Worked</b> based on the <b>Effective Date</b> of the transaction.
18.	Click the vertical <b>Scrollbar</b> .

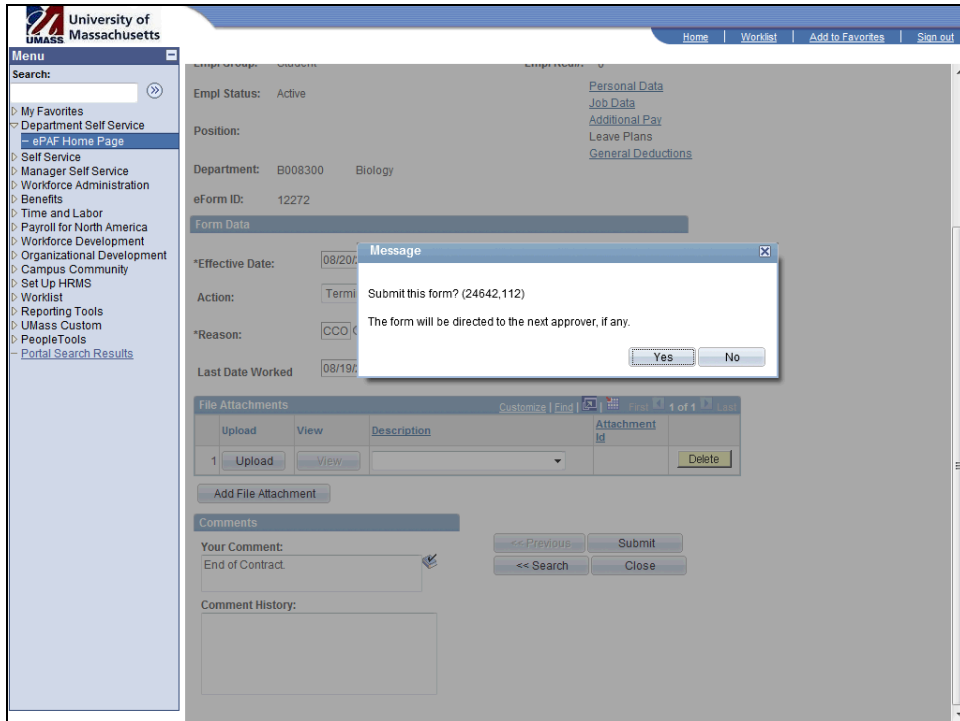


The screenshot shows the University of Massachusetts HRMS interface. The main content area displays employee information for an active employee. The 'Form Data' section includes the following fields:

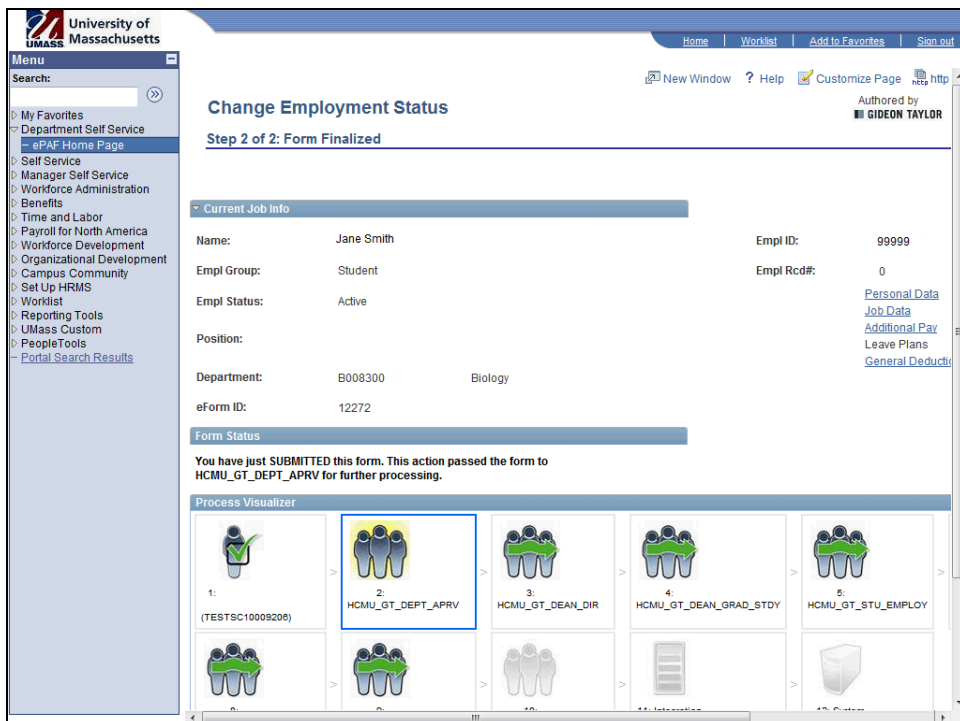
- \*Effective Date:** 08/20/2012
- Action:** Termination
- \*Reason:** CCO Contract Completion
- Last Date Worked:** 08/19/2012

Below the form data is a 'File Attachments' table with one row and columns for 'Upload', 'View', 'Description', and 'Attachment Id'. There is also a 'Comments' section with a 'Your Comment' text area and a 'Submit' button.

Step	Action
19.	<p>It is important to notate actions with applicable comments.</p> <p>Enter the desired information into the <b>Your Comment</b> field.</p> <p>For this example, enter "<b>End of Contract.</b>".</p>
20.	<p>Click the <b>Submit</b> button.</p> 



Step	Action
21.	Confirm that you are ready to submit this form and click the <b>Yes</b> button.



Step	Action
22.	<p>The <b>Form Status</b> indicates that you have submitted this form.</p> <p><i>Note:</i> Refer to your campus business practices for any additional tasks that may be required for completion, outside of ePAF.</p>
23.	<p>Congratulations! You have successfully submitted a termination.</p> <p><b>End of Procedure.</b></p>

## 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

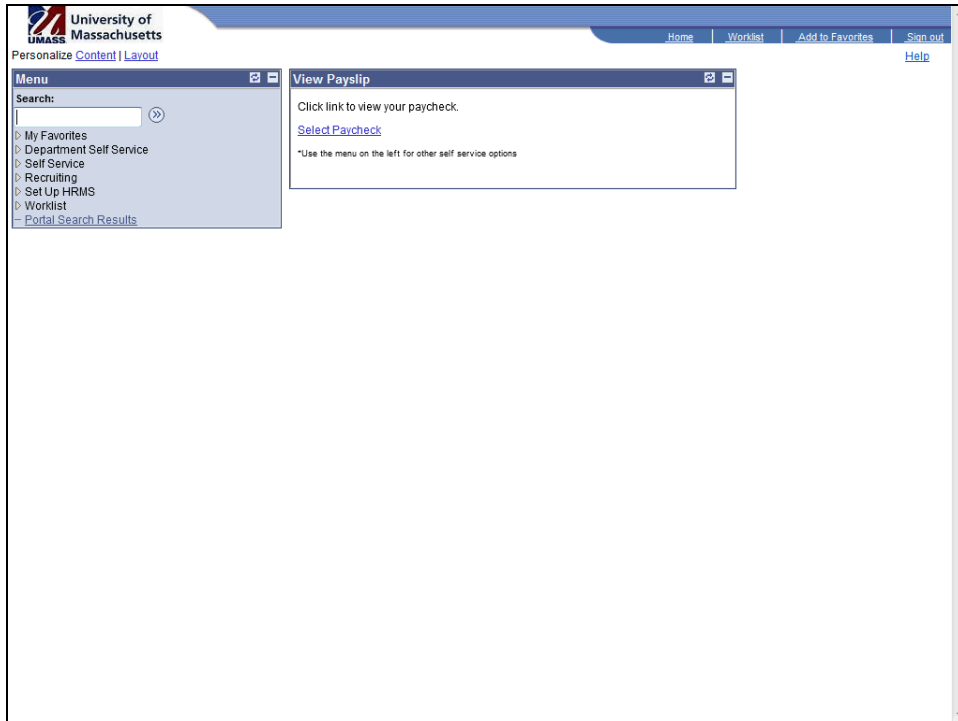
### Opening your Worklist

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

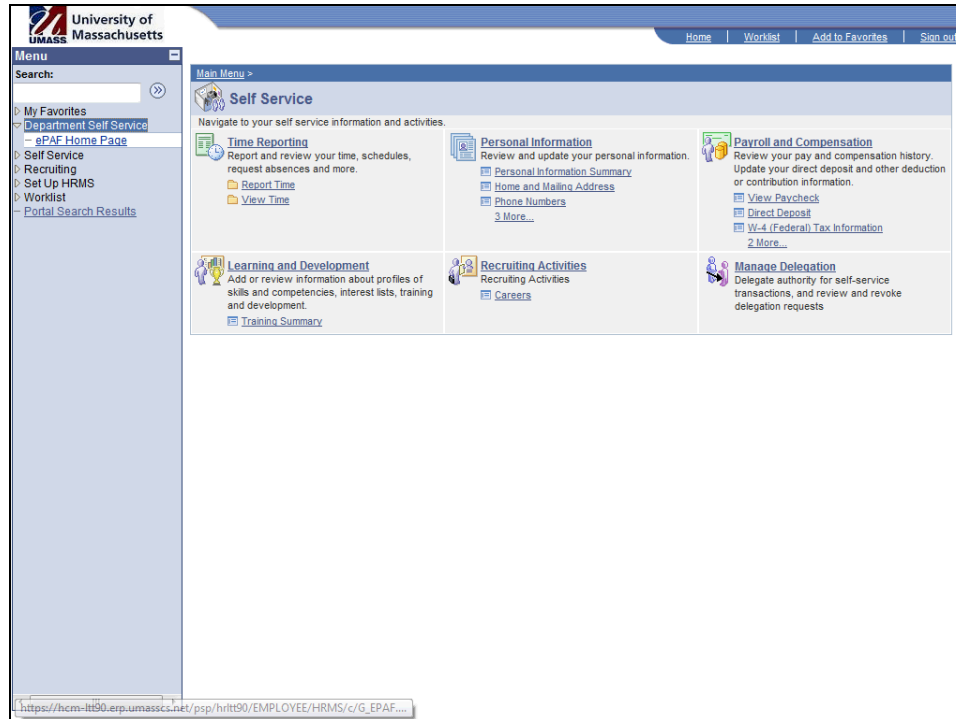
#### Procedure

#### Consider this Scenario:

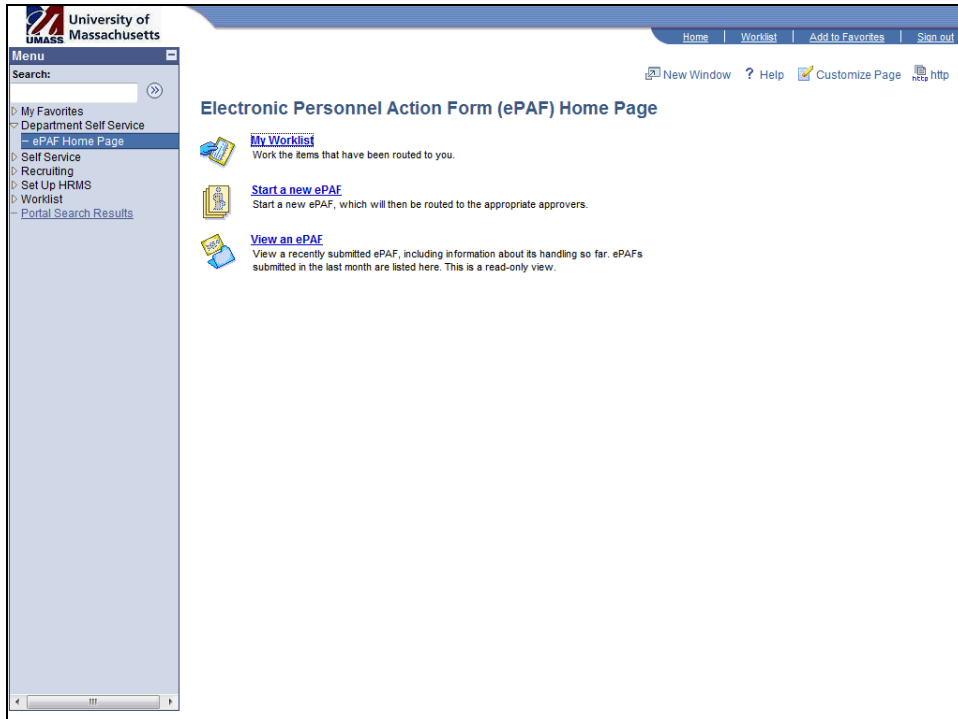
Your goal is to open your ePAF worklist.




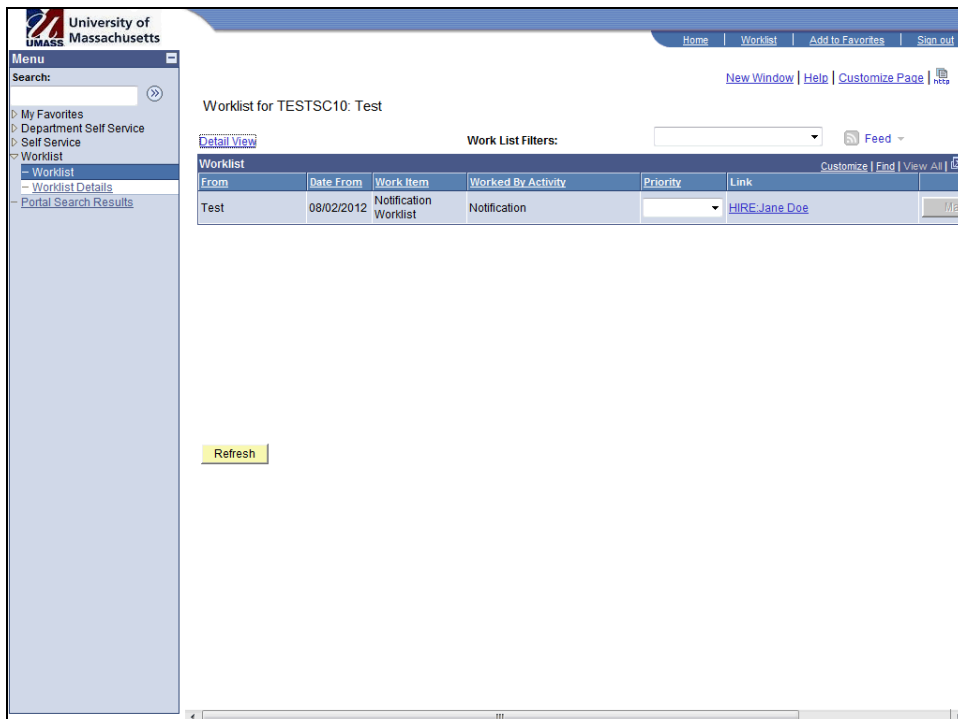
Step	Action
1.	Begin by navigating to the ePAF Home Page.  Click the <b>Department Self Service</b> link. <span style="border: 1px solid black; padding: 2px;">▶ Department Self Service</span>



Step	Action
2.	Click the <b>ePAF Home Page</b> link. <a href="#">ePAF Home Page</a>
3.	This is the <b>ePAF Home Page</b> , 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.

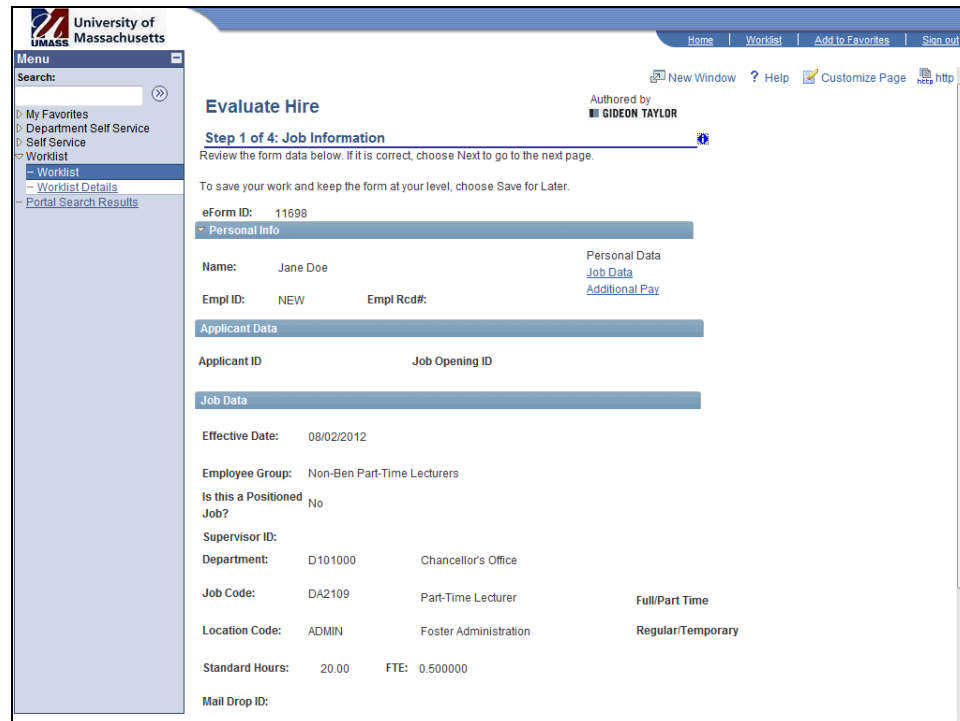


Step	Action
4.	Click the <a href="#">My Worklist</a> link. 

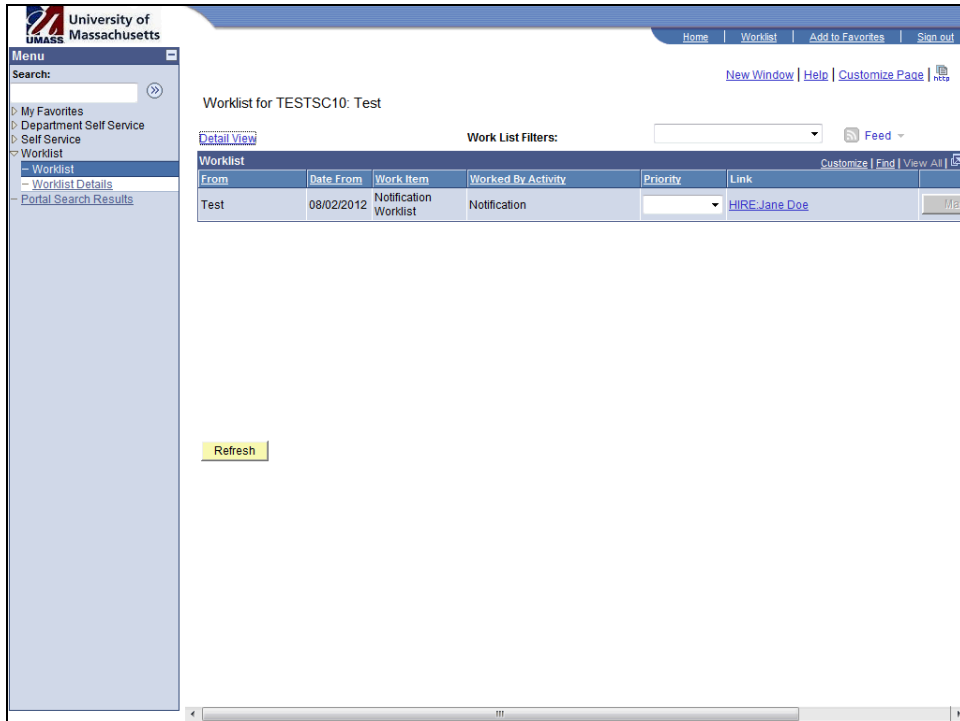




Step	Action
5.	This is your <b>Worklist</b> page. You currently have one item in your Worklist.
6.	If you want to open and view this item, click the <b>HIRE:Jane Doe</b> link. <a href="#">HIRE:Jane Doe</a>



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 <b>Worklist</b> link.  <i>Note:</i> You may also use the side bar menu to navigate back to your <b>Worklist</b> .



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

### Approving an ePAF Form

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

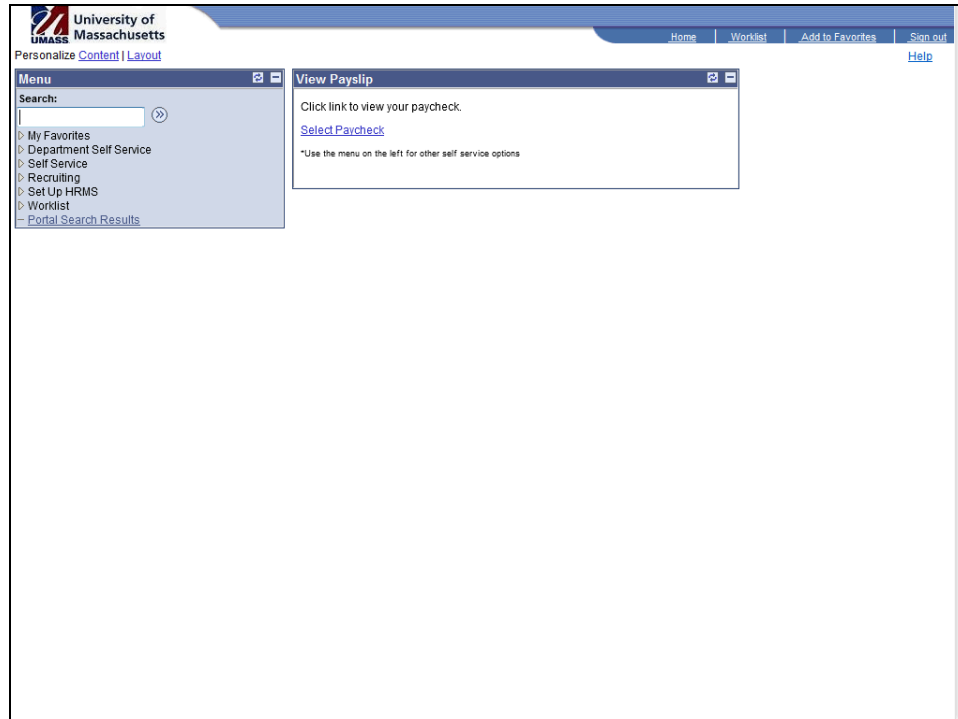
#### Procedure

#### Consider this Scenario:

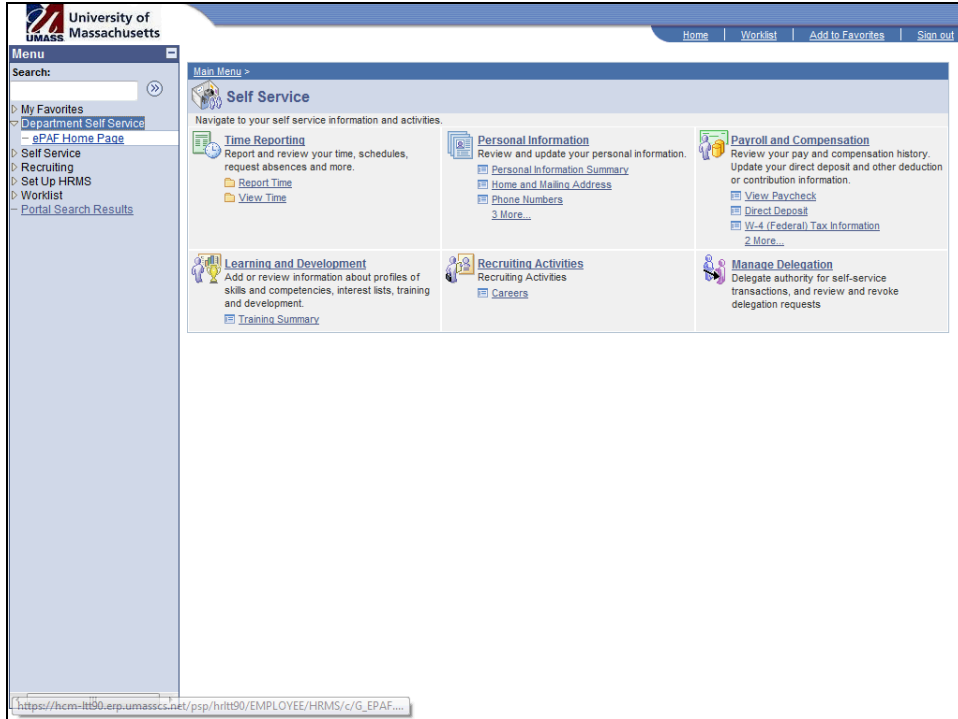
Your goal is to approve an ePAF Form.

#### Key Information:

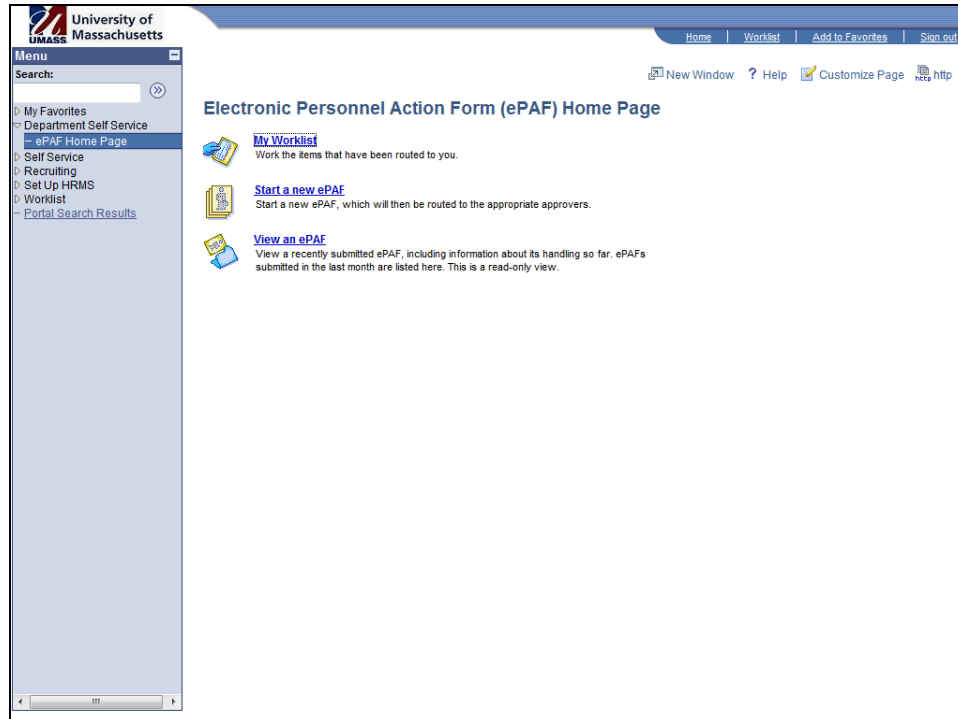
Link: HIRE:Jane Doe




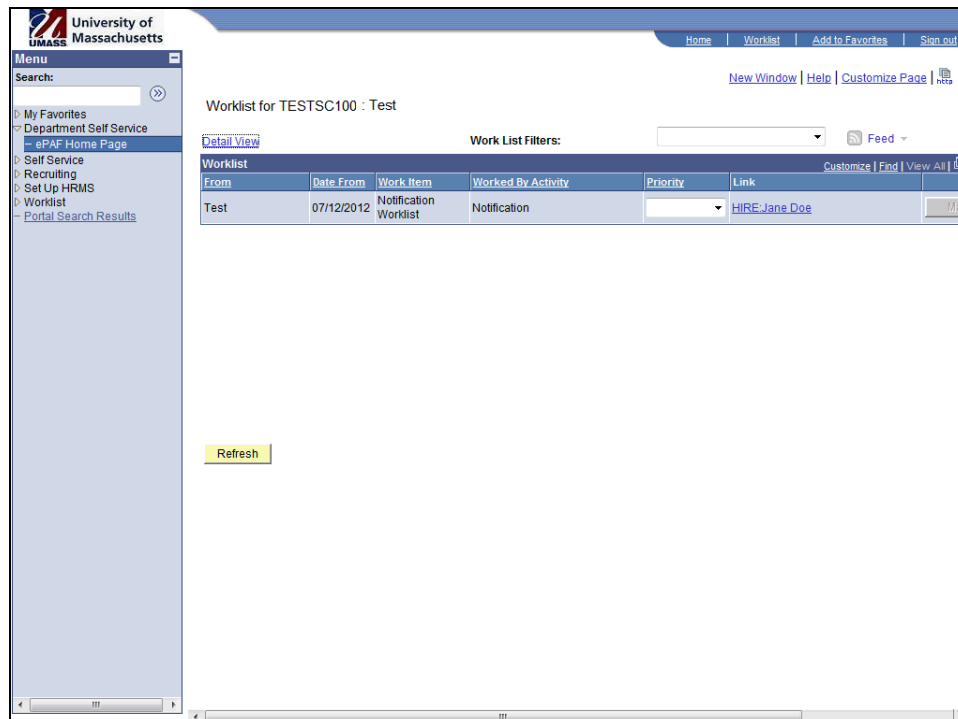
Step	Action
1.	Begin by navigating to the <b>ePAF Home Page</b> .  Click the <b>Department Self Service</b> link. <span style="border: 1px solid black; padding: 2px;">▶ Department Self Service</span>



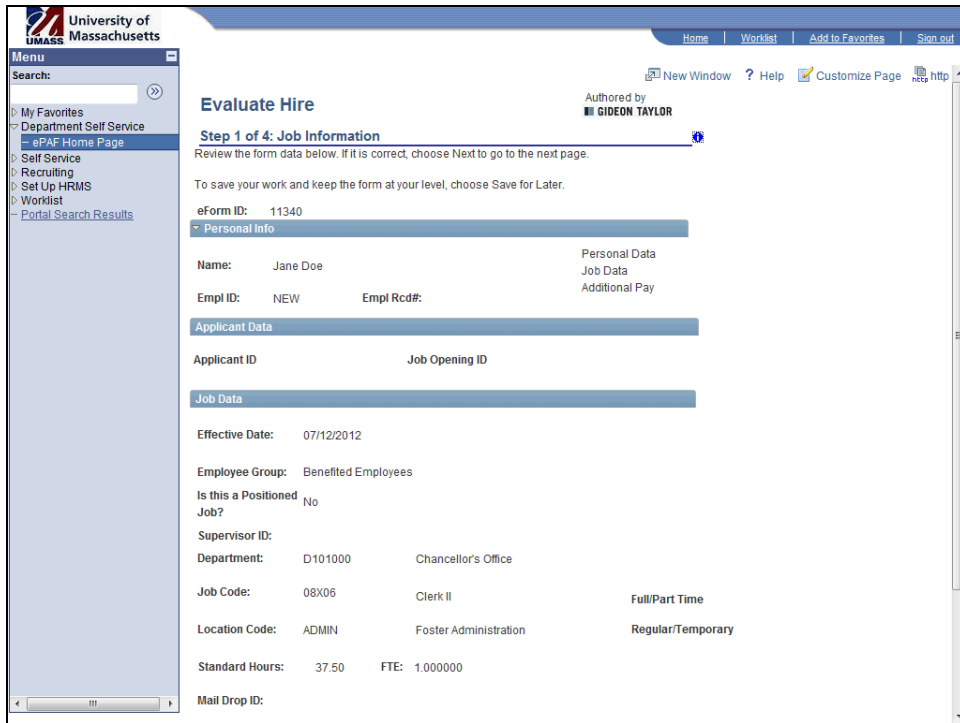
Step	Action
2.	Click the <b>ePAF Home Page</b> link. <a href="#">ePAF Home Page</a>
3.	This is the <b>ePAF Home Page</b> , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.



Step	Action
4.	Click the <a href="#">My Worklist</a> link. 



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



Step	Action
7.	Click the <b>Vertical Scrollbar</b> .
8.	Click the <b>Next</b> button. 

**Evaluate Hire**  
 Authorized by: GIDEON TAYLOR  
**Step 2 of 4: Compensation**  
 Review the form data below. If it is correct, choose Next to go to the next page.  
 To save your work and keep the form at your level, choose Save for Later.

eForm ID: 11340

**Personal Info**

Name: Jane Doe (Personal Data)  
 Empl ID: NEW (Job Data)      Empl Rcd#: (Additional Pay)

**Compensation Data**

Employee Type: Exception Hourly

Bi-Weekly Rate: 850.000000      Annual Rate: \$22,100.000

Plan: D82      Salary Grade: 08

Add Additional Components of Pay?

Total Annual Rate: 22100.000000

Begin Date: 07/12/2012

GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
1 A103738	52129	A817000000	B10				

Buttons: << Previous, Next >>, Save for Later

Step	Action
9.	Click the <b>Next</b> button.

Next >>

**Evaluate Hire**  
 Authorized by: GIDEON TAYLOR  
**Step 3 of 4: Finalize Form**  
 Review the form data below. If it is correct, choose Approve to approve the form and forward it to the next approver, if any. To send the form back to the originator for correction or clarification, enter a comment and choose Reprocess Change.  
 To save your work and keep the form at your level, choose Save for Later.

eForm ID: 11340

**Personal Info**

Name: Jane Doe (Personal Data)  
 Empl ID: NEW (Job Data)      Empl Rcd#: (Additional Pay)

**Actions & Action Reasons**

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

Reason Code: Hire



**Form Messages**

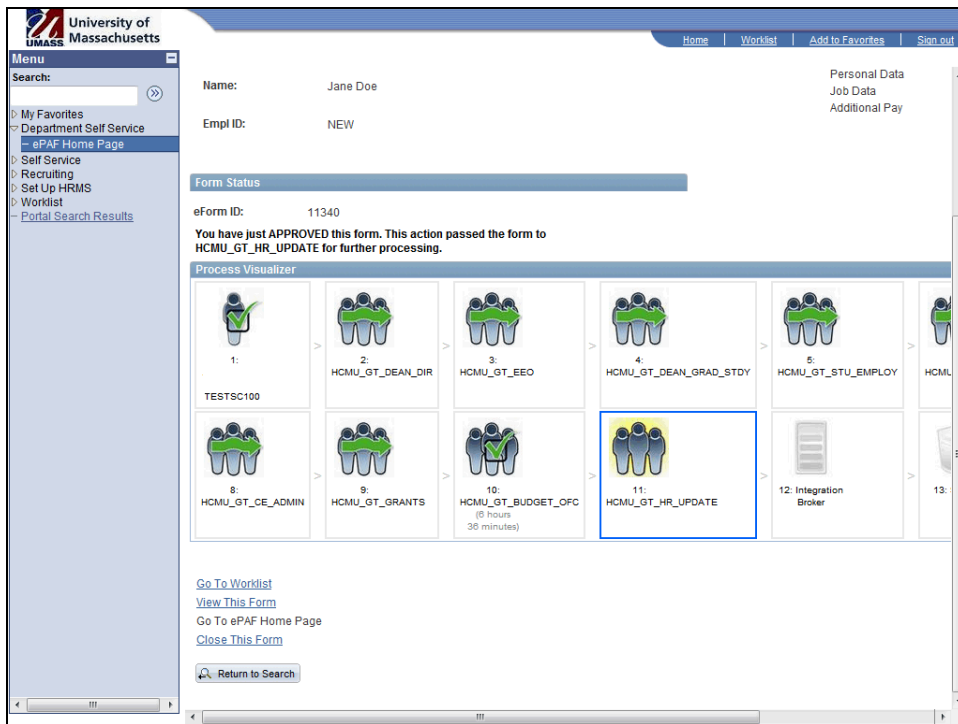
Message Text
<input checked="" type="checkbox"/> Attach hire documentation

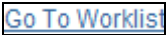
**File Attachments**

Upload	View	Description	Attachment Id	Delete
1 Upload	View			Delete

Buttons: Approve, << Previous, Reprocess Chg, Save for Later, Close

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



Step	Action
13.	<p>You want to return to your <b>Worklist</b> page.</p> <p>Click the <b>Go To Worklist</b> link.</p> 



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

## 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.

### Procedure

#### Consider this Scenario:

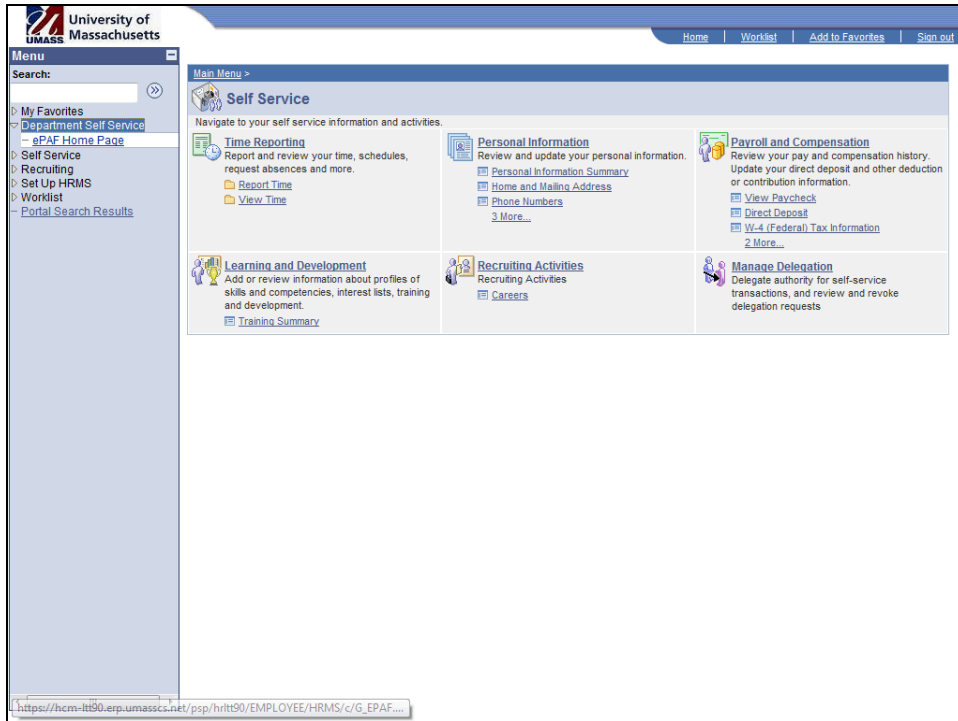
Your goal is to reprocess an ePAF Form.

#### Key Information:

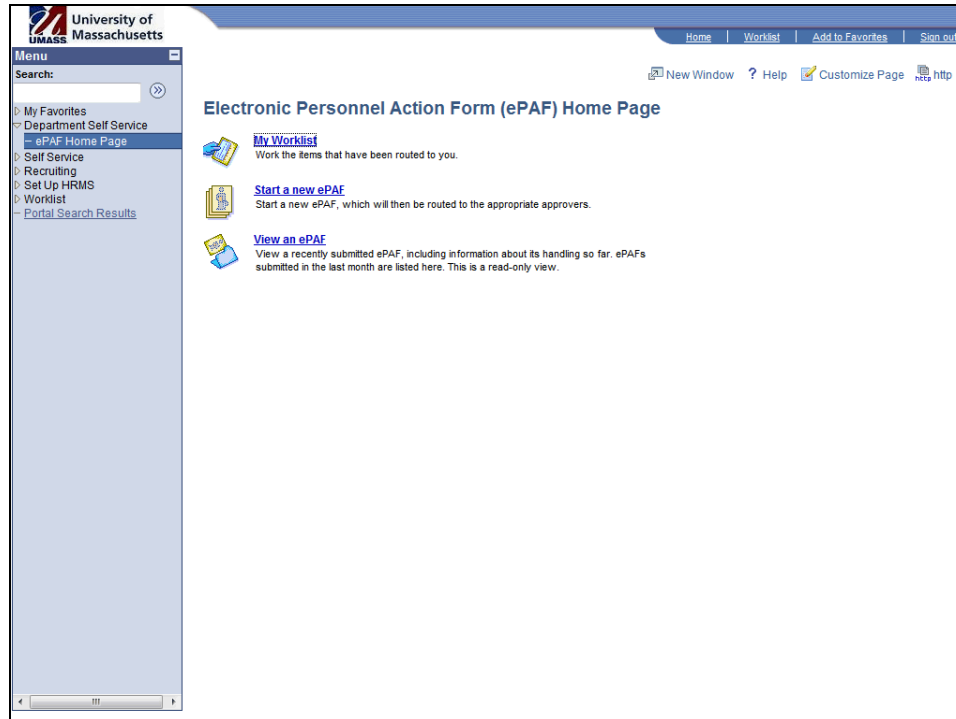
Link: HIRE:Jane Doe



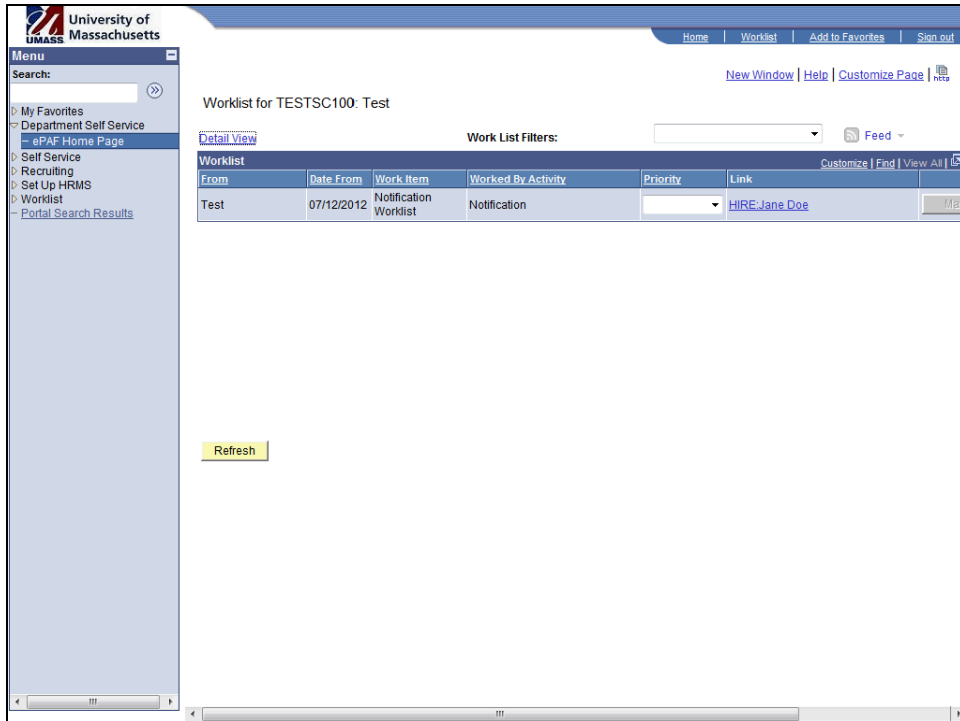
Step	Action
1.	<p>Begin by navigating to the ePAF Home Page.</p> <p>Click the <b>Department Self Service</b> link.</p> <p><a href="#">▶ Department Self Service</a></p>



Step	Action
2.	<p>Click the <b>ePAF Home Page</b> link.</p> <p><a href="#">ePAF Home Page</a></p>



Step	Action
3.	This is the <b>ePAF Home Page</b> , 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 <b>My Worklist</b> link. <a href="#">My Worklist</a>



Step	Action
5.	You have one item in your worklist. You want to review and reprocess Jane Doe's hire form.  Click the <b>HIRE:Jane Doe</b> link. <a href="#">HIRE:Jane Doe</a>
6.	The <b>Evaluate Hire</b> pages contain personal, job data, and compensation data.

**University of Massachusetts**

Home | Worklist | Add to Favorites | Sign out

**Menu**

Search: [ ]

- My Favorites
- Department Self Service
  - ePAF Home Page
  - Self Service
  - Workforce Administration
  - Benefits
  - Compensation
  - Payroll for North America
  - Workforce Development
  - Organizational Development
  - Campus Community
  - Set Up HRMS
  - Worklist
  - Reporting Tools
  - UMass Custom
  - PeopleTools
  - Portal Search Results

**Personal Info**

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

Empl ID: NEW Empl Rcd#: [ ]

**Applicant Data**

Applicant ID [ ] Job Opening ID [ ]

**Job Data**

Effective Date: 08/02/2012

Employee Group: Non-Ben Part-Time Lecturers

Is this a Positioned Job? No

Supervisor ID: [ ]

Department: D101000 Chancellor's Office

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

Location Code: ADMIN Foster Administration **Regular/Temporary**

Standard Hours: 20.00 FTE: 0.500000

Mail Drop ID: [ ]

<< Previous | Next >> | Save for Later

Return to Search

Step	Action
7.	Click the <b>Next</b> button.

Next >>

**University of Massachusetts**

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page | http

Authorized by: GIDEON TAYLOR

### Evaluate Hire

**Step 2 of 4: Compensation**

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

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

eForm ID: 11698

**Personal Info**

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

Empl ID: NEW Empl Rcd#: [ ]

**Compensation Data**

Employee Type: Exception Hourly

Bi-Weekly Rate: 500.000000 Annual Rate: \$13,000.000

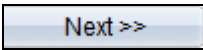
Plan Salary Grade Total Annual Rate 13000.000000

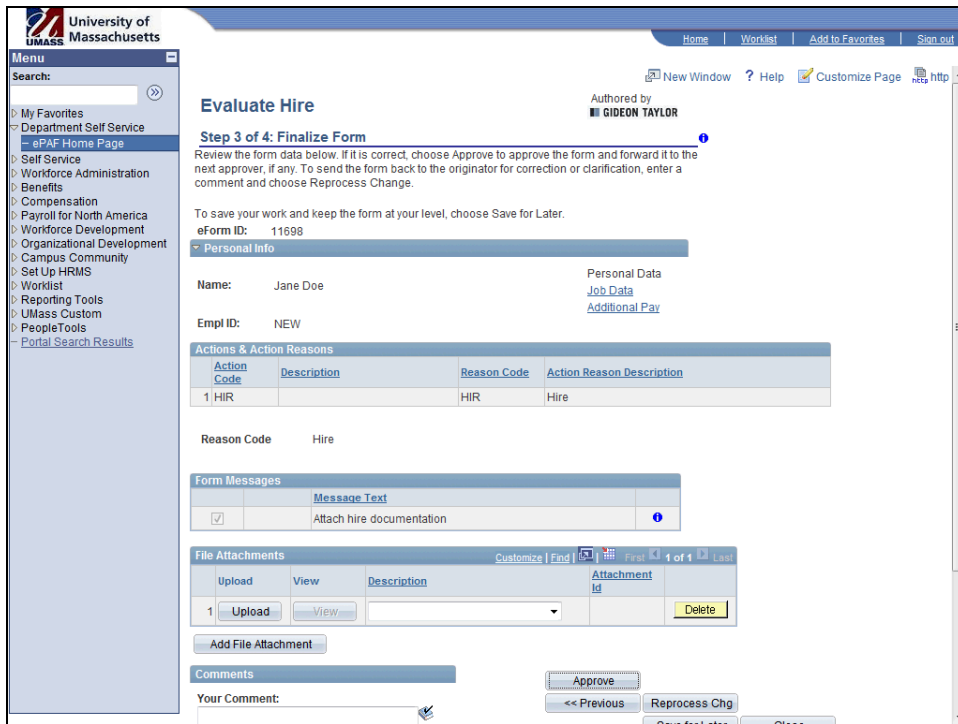
Begin Date 08/02/2012

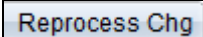
GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
1 A103738	52129	A817000000	B10				

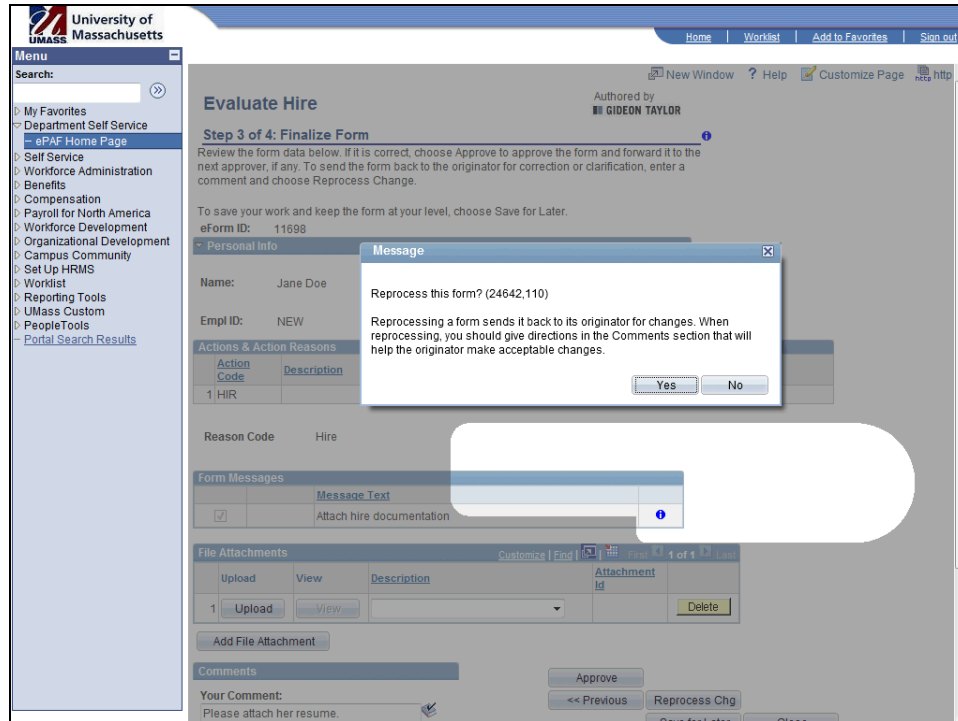
Add Date Range


<< Previous | Next >> | Save for Later | Next Item

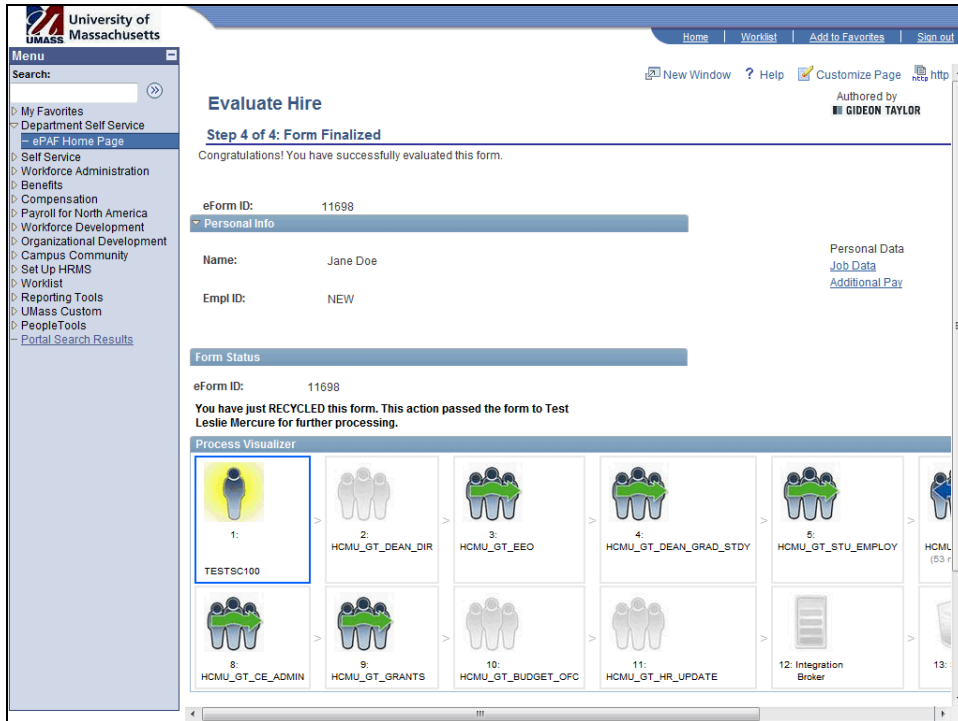
Step	Action
8.	Click the <b>Next</b> button. 



Step	Action
9.	You realize that this hire form should have a resume attached. You decide to reprocess this form and send it back to the initiator for changes. Always be sure to give the initiator guidance on what changes you are looking for, by entering instructions into the <b>Your Comments</b> field.  For this example, enter " <b>Please attach her resume.</b> ".
10.	Click the <b>Reprocess Chg</b> button. 



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



Step	Action
12.	The <b>Form Status</b> 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. <b>End of Procedure.</b>

### Closing an ePAF

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

#### Procedure

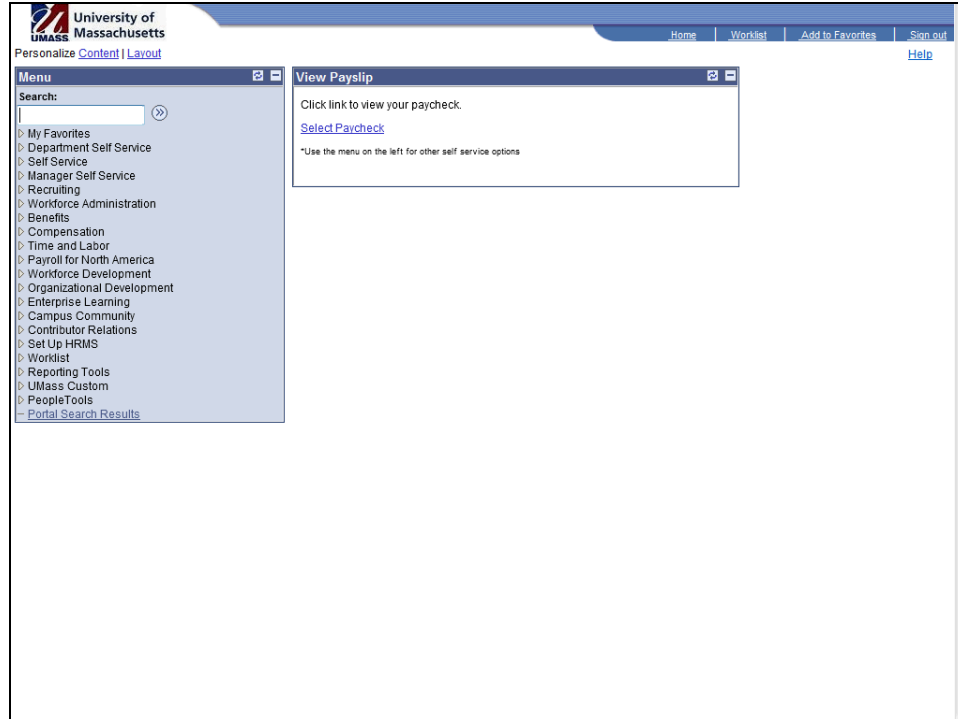
#### Consider this Scenario:

Your goal is to close an ePAF Form.

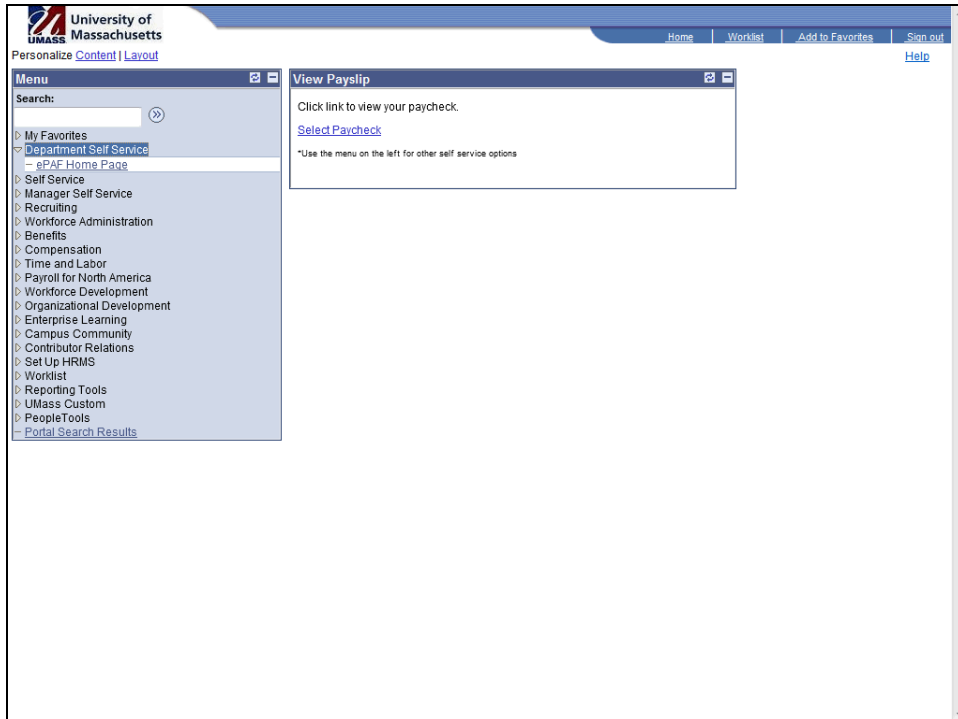
#### Key Information:

Name: Jane Doe





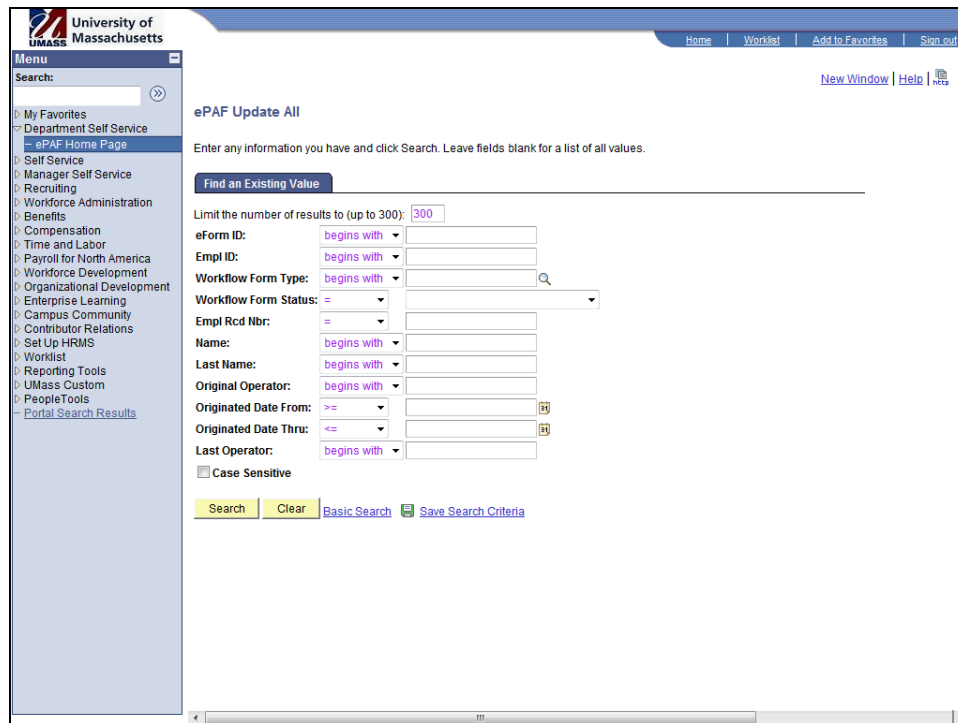
Step	Action
1.	Begin by navigating to the <b>ePAF Home Page</b> .  Click the <b>Department Self Service</b> link. <span style="border: 1px solid black; padding: 2px;">▶ Department Self Service</span>

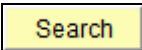


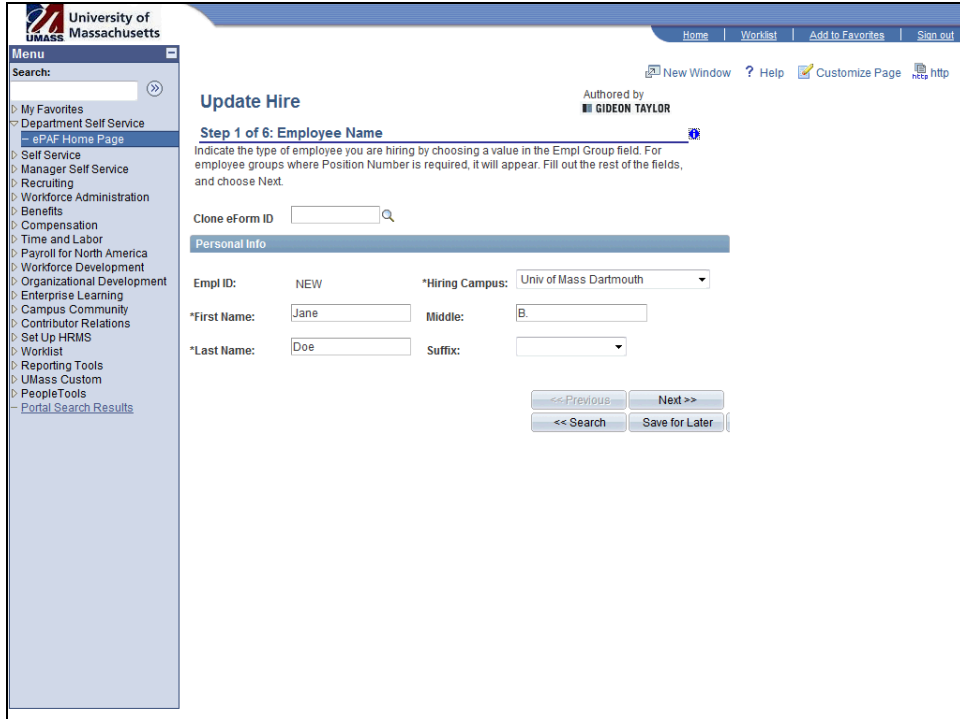
Step	Action
2.	Click the <b>ePAF Home Page</b> link. <span style="border: 1px solid black; padding: 2px;">ePAF Home Page</span>

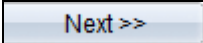


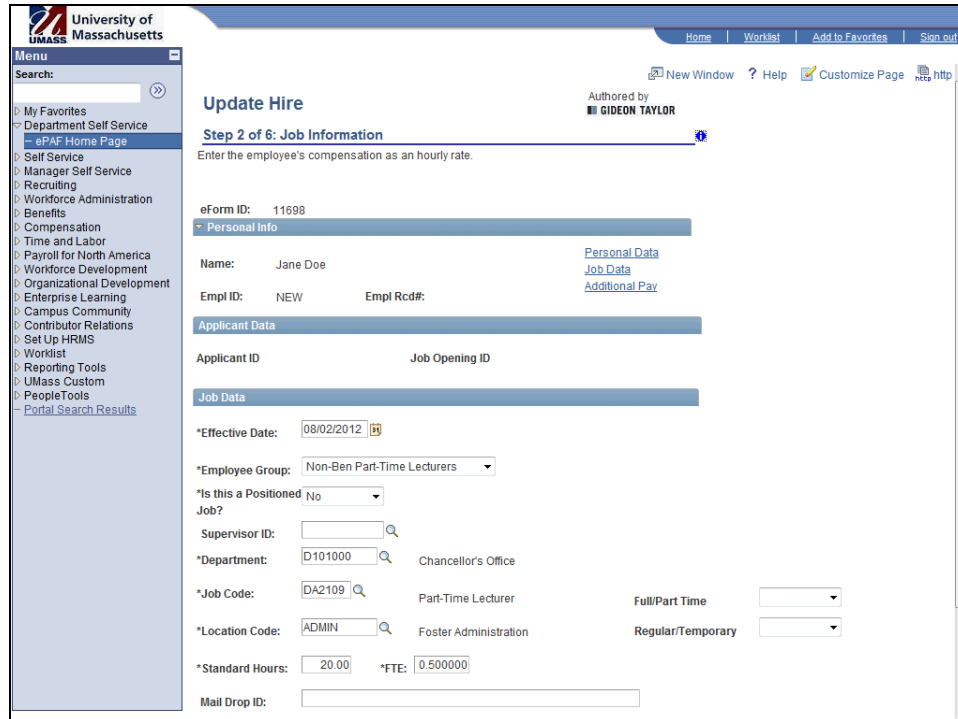
Step	Action
3.	This is the <b>ePAF Home Page</b> , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	You want to close (withdraw) an ePAF form that has already been submitted.  Click the <b>Resubmit,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



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



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



University of Massachusetts

Home | Worklist | Add to Favorites | Sign out

Menu

Search: [ ]

My Favorites

- Department Self Service
  - ePAF Home Page
- Self Service
- Manager Self Service
- Recruiting
- Workforce Administration
- Benefits
- Compensation
- Time and Labor
- Payroll for North America
- Workforce Development
- Organizational Development
- Enterprise Learning
- Campus Community
- Contributor Relations
- Set Up HRMS
- Worklist
- Reporting Tools
- UMass Custom
- PeopleTools
- Portal Search Results

Update Hire

Authorized by  
GIDEON TAYLOR

Step 2 of 6: Job Information

Enter the employee's compensation as an hourly rate.

eForm ID: 11698

Personal Info

Name: Jane Doe [Personal Data](#)

Empl ID: NEW Empl Rcd#: [Job Data](#)

[Additional Pay](#)

Applicant Data

Applicant ID Job Opening ID

Job Data

\*Effective Date: 08/02/2012

\*Employee Group: Non-Ben Part-Time Lecturers

\*Is this a Positioned Job? No

Supervisor ID: [ ]

\*Department: D101000 Chancellor's Office

\*Job Code: DA2109 Part-Time Lecturer Full/Part Time [ ]

\*Location Code: ADMIN Foster Administration Regular/Temporary [ ]

\*Standard Hours: 20.00 \*FTE: 0.500000

Mail Drop ID: [ ]

Step	Action
9.	<p>Verify that this is the person you were searching for by viewing their <b>Personal Information</b>.</p> <p>Click the vertical <b>Scrollbar</b> button.</p>

University of Massachusetts

Menu

Search: [ ]

eForm ID: 11698

Personal Info

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

Empl ID: NEW Empl Rcd#: [ ]

Applicant Data

Applicant ID [ ] Job Opening ID [ ]

Job Data

\*Effective Date: 08/02/2012 [ ]

\*Employee Group: Non-Ben Part-Time Lecturers [ ]

\*Is this a Positioned Job? No [ ]

Supervisor ID: [ ]

\*Department: D101000 [ ] Chancellor's Office

\*Job Code: DA2109 [ ] Part-Time Lecturer Full/Part Time [ ]

\*Location Code: ADMIN [ ] Foster Administration Regular/Temporary [ ]

\*Standard Hours: 20.00 \*FTE: 0.500000

Mail Drop ID: [ ]

<< Previous Next >>  
 Save for Later

Step	Action
10.	Click the <b>Next</b> button.

Next >>

University of Massachusetts

Menu

Search: [ ]

New Window ? Help Customize Page http

Authorized by GIDEON TAYLOR

**Update Hire**

Step 3 of 6: Compensation

Update the employee's compensation information as needed.

eForm ID: 11698

Personal Info

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

Empl ID: NEW Empl Rcd#: [ ]

Compensation Data

Employee Type: Exception Hourly [ ]

Bi-Weekly Rate: 500.000000 Annual Rate: \$13,000.000

Plan [ ] Salary Grade [ ]

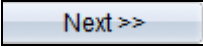
Total Annual Rate 13000.000000

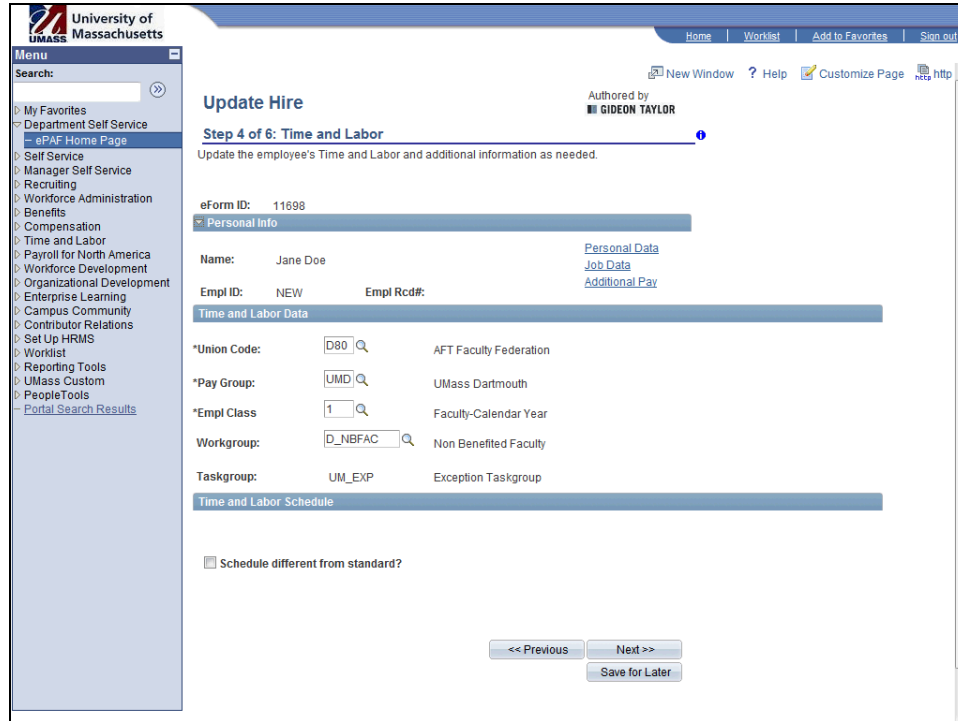
Begin Date 08/02/2012 [ ]

GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
1 A103738 [ ]	52129 [ ]	A81700000 [ ]	B10 [ ]	[ ]	[ ]	[ ]	[ ]

Add Date Range

<< Previous Next >>  
 Save for Later

Step	Action
11.	Click the <b>Next</b> button. 



University of Massachusetts  
 Home | Worklist | Add to Favorites | Sign out

Menu  
 Search: [ ]  
 My Favorites  
 Department Self Service  
 ePAF Home Page  
 Self Service  
 Manager Self Service  
 Recruiting  
 Workforce Administration  
 Benefits  
 Compensation  
 Time and Labor  
 Payroll for North America  
 Workforce Development  
 Organizational Development  
 Enterprise Learning  
 Campus Community  
 Contributor Relations  
 Set Up HRMS  
 Worklist  
 Reporting Tools  
 UMSS Custom  
 PeopleTools  
 Portal Search Results

**Update Hire**  
 Authorized by GIDEON TAYLOR  
**Step 4 of 6: Time and Labor**  
 Update the employee's Time and Labor and additional information as needed.

eForm ID: 11698

**Personal Info**  
 Name: Jane Doe [Personal Data](#)  
 Job Data  
 Additional Pay  
 Empl ID: NEW Empl Rcd#:

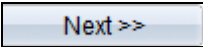
**Time and Labor Data**

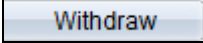
\*Union Code: D80 AFT Faculty Federation  
 \*Pay Group: UMD UMass Dartmouth  
 \*Empl Class: 1 Faculty-Calendar Year  
 Workgroup: D\_NBFAC Non Benefitted Faculty  
 Taskgroup: UM\_EXP Exception Taskgroup

**Time and Labor Schedule**

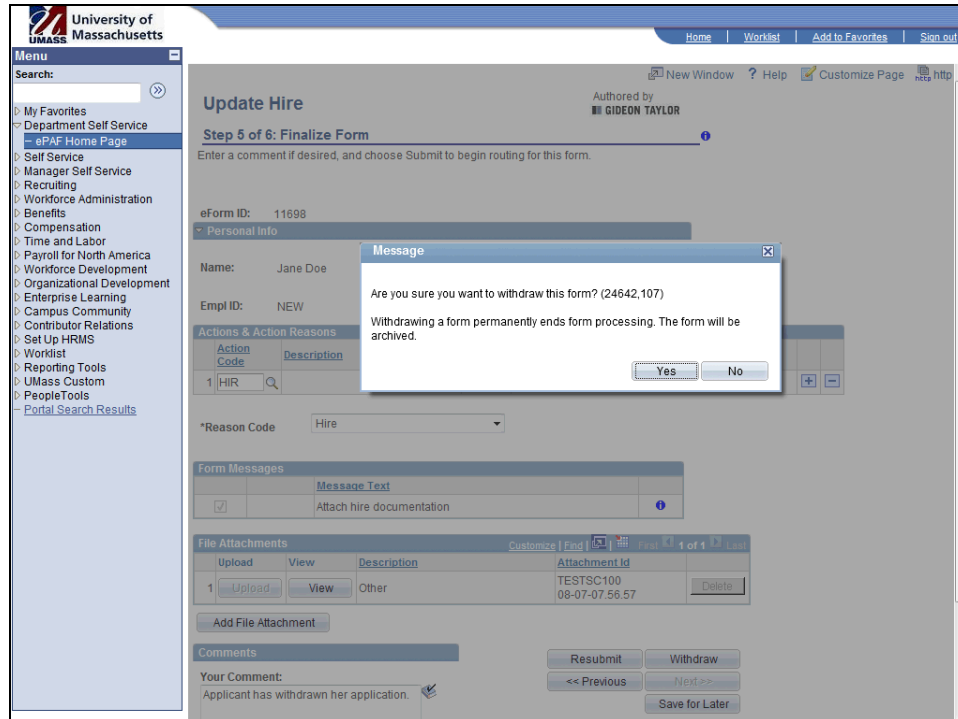
Schedule different from standard?

<< Previous    Next >>  
 Save for Later

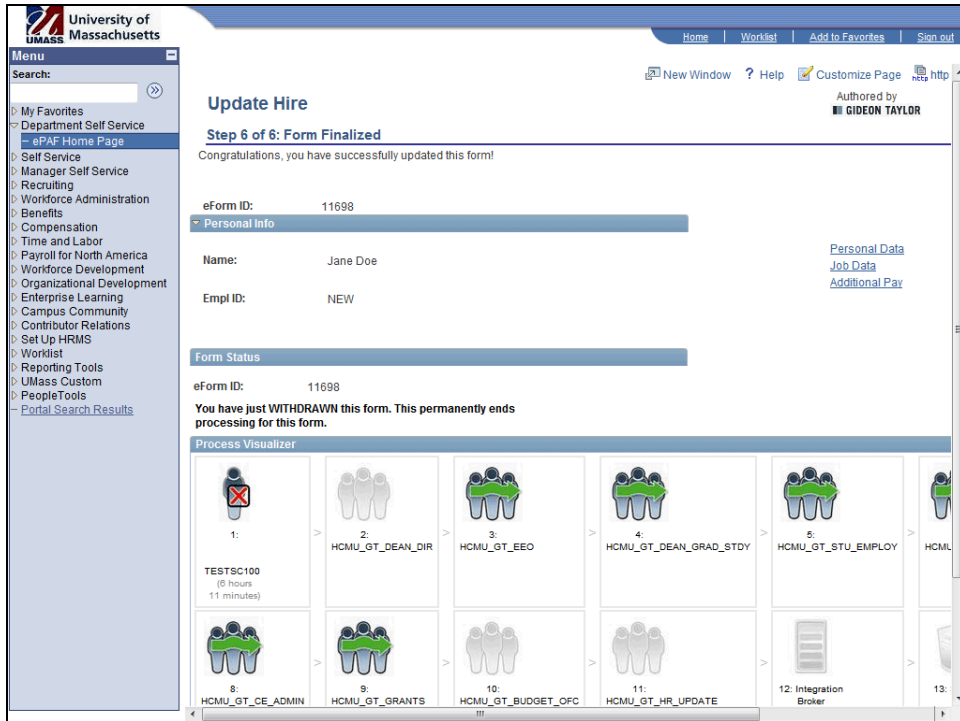
Step	Action
12.	Click the <b>Next</b> button. 

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





Step	Action
15.	If you are sure that you want to end processing and withdraw this form permanently, click the <b>Yes</b> button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">             Yes           </div>



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

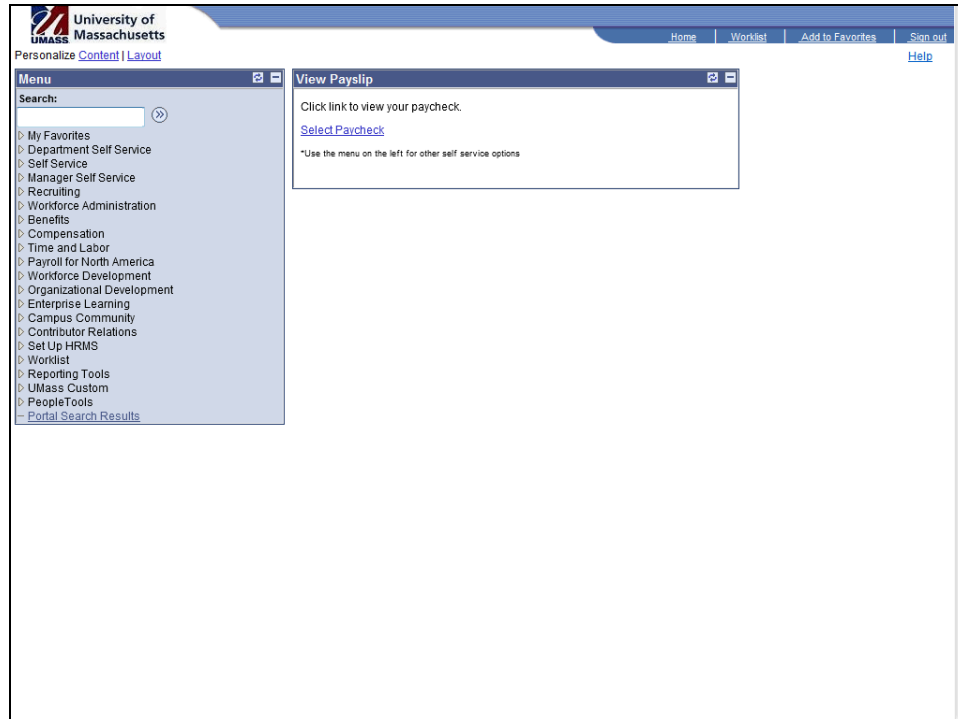
### Adding Attachments to an ePAF Form

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

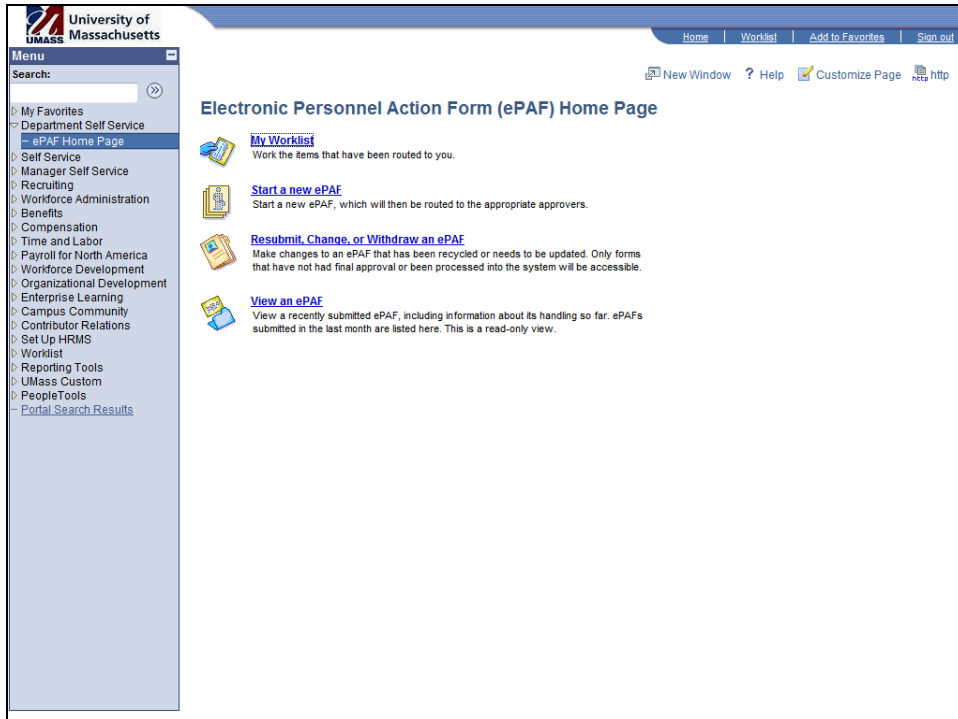
#### Procedure

#### Consider this scenario:

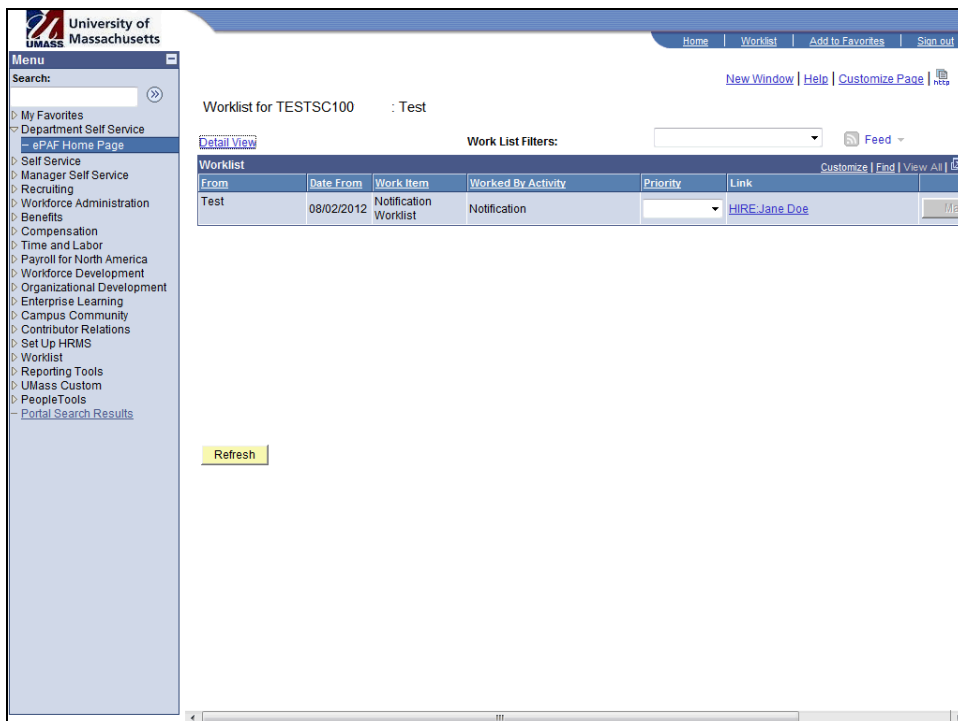
Your goal is to add an attachment to an ePAF form.



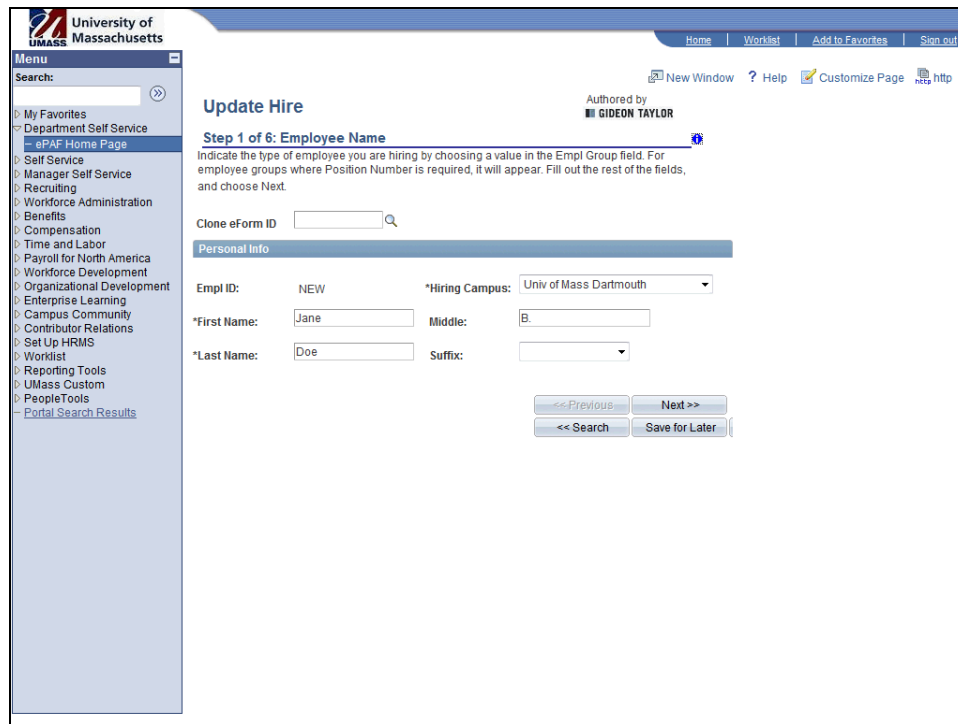
Step	Action
1.	Begin by navigating to your <b>ePAF Home Page</b> .  Click the <b>Department Self Service</b> link. <span style="border: 1px solid black; padding: 2px;">▶ Department Self Service</span>
2.	Click the <b>ePAF Home Page</b> link. <span style="border: 1px solid black; padding: 2px;">ePAF Home Page</span>
3.	This is the <b>ePAF Home Page</b> , 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.



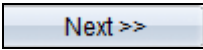
Step	Action
4.	Click the <b>My Worklist</b> link.



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



Step	Action
7.	<p>Click the <b>Next</b> button.</p> <p><a href="#">Next &gt;&gt;</a></p>

Step	Action
8.	Click the vertical <b>Scrollbar</b> .
9.	Click the <b>Next</b> button. 

**Update Hire**  
Authorized by GIDEON TAYLOR

**Step 3 of 6: Compensation**  
Update the employee's compensation information as needed.

eForm ID: 11698

**Personal Info**

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

Empl ID: NEW Empl Rcd#:

**Compensation Data**

Employee Type: Exception Hourly

Bi-Weekly Rate: 500.000000 Annual Rate: \$13,000.000

Plan:  Salary Grade:

Total Annual Rate: 13000.000000

Begin Date: 08/02/2012

GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
1 A103738	52129	A817000000	B10				

Buttons: Add Date Range, << Previous, Next >>, Save for Later

Step	Action
10.	Click the <b>Next</b> button. 

**Update Hire**  
Authorized by GIDEON TAYLOR

**Step 4 of 6: Time and Labor**  
Update the employee's Time and Labor and additional information as needed.

eForm ID: 11698

**Personal Info**

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

Empl ID: NEW Empl Rcd#:

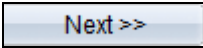
**Time and Labor Data**

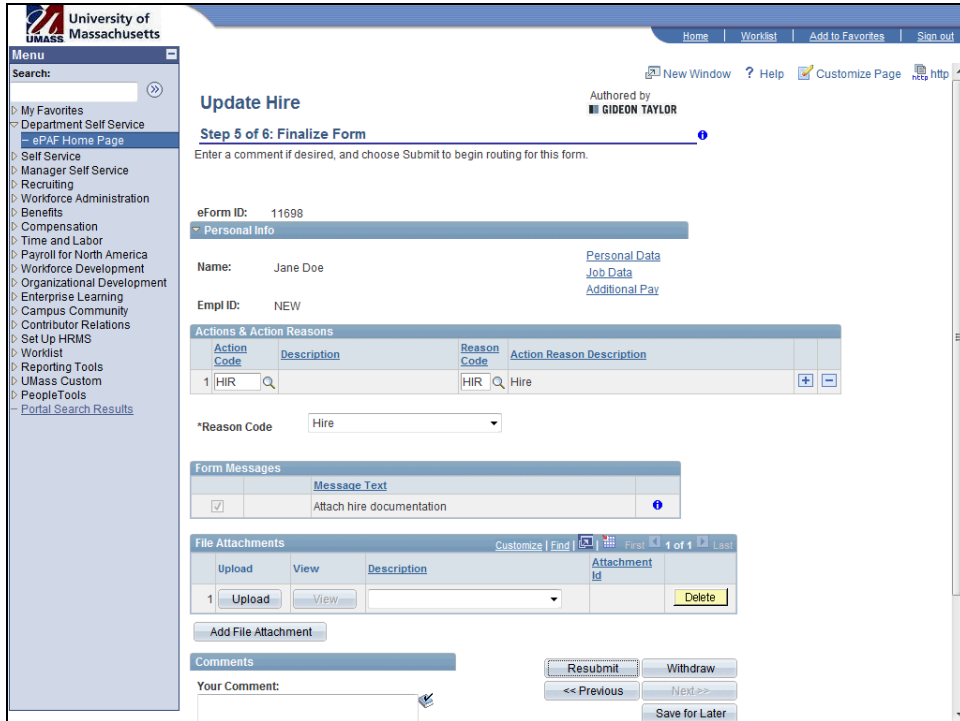
\*Union Code: D80 AFT Faculty Federation  
 \*Pay Group: UMD UMass Dartmouth  
 \*Empl Class: 1 Faculty-Calendar Year  
 Workgroup: D\_NBFAC Non Benefitted Faculty  
 Taskgroup: UM\_EXP Exception Taskgroup

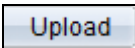
**Time and Labor Schedule**

Schedule different from standard?

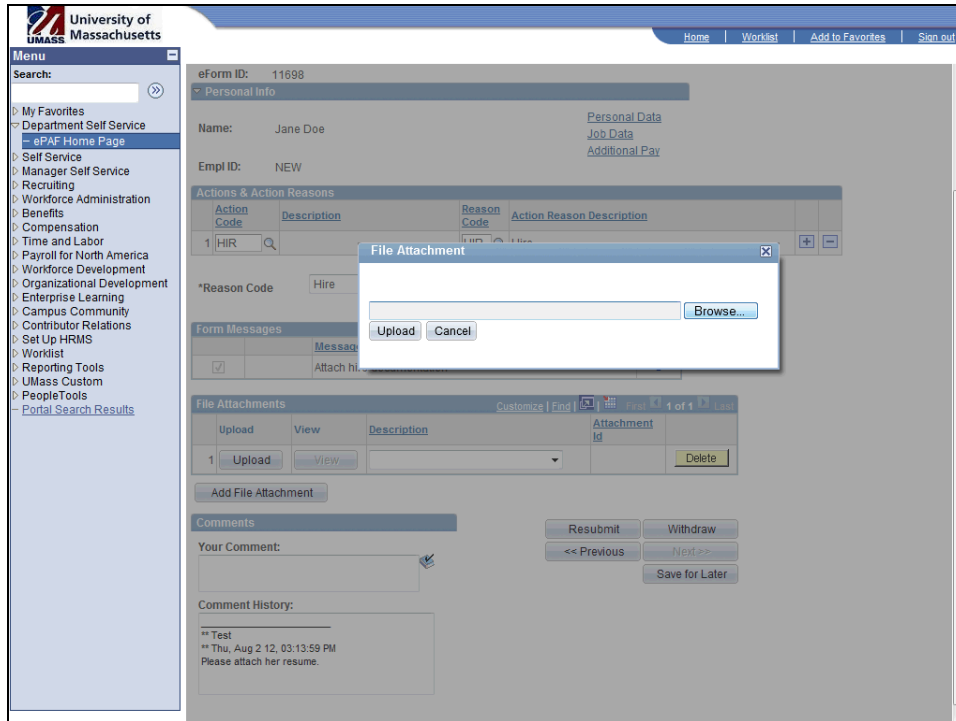
Buttons: << Previous, Next >>, Save for Later

Step	Action
11.	Click the <b>Next</b> button. 

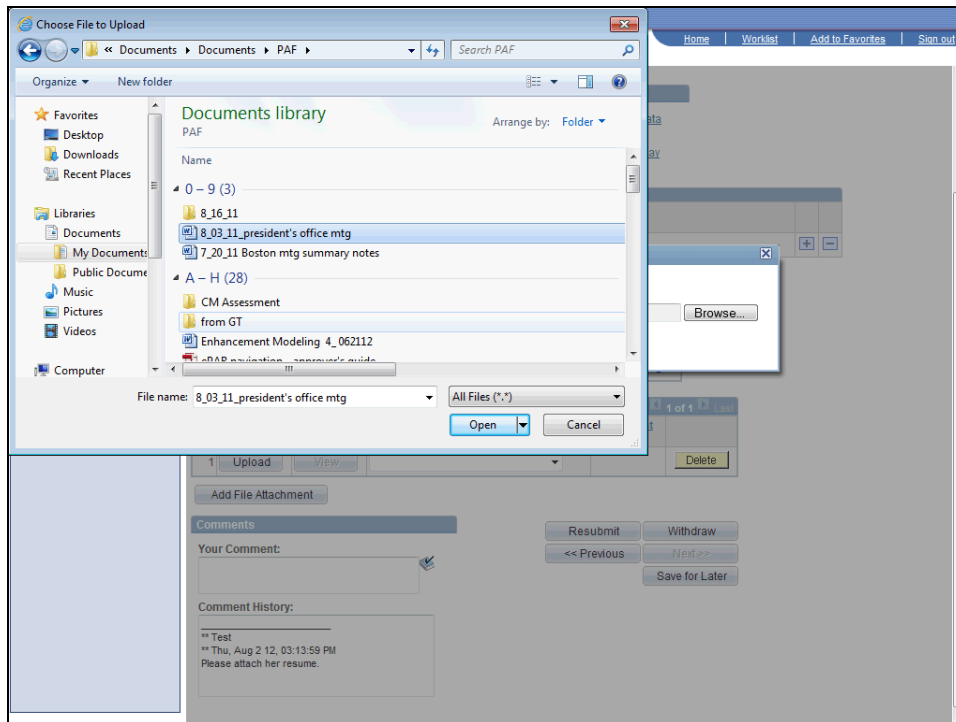


Step	Action
12.	Click the vertical <b>Scrollbar</b> .
13.	This is the <b>File Attachments</b> section.  Click the <b>Upload</b> button. 

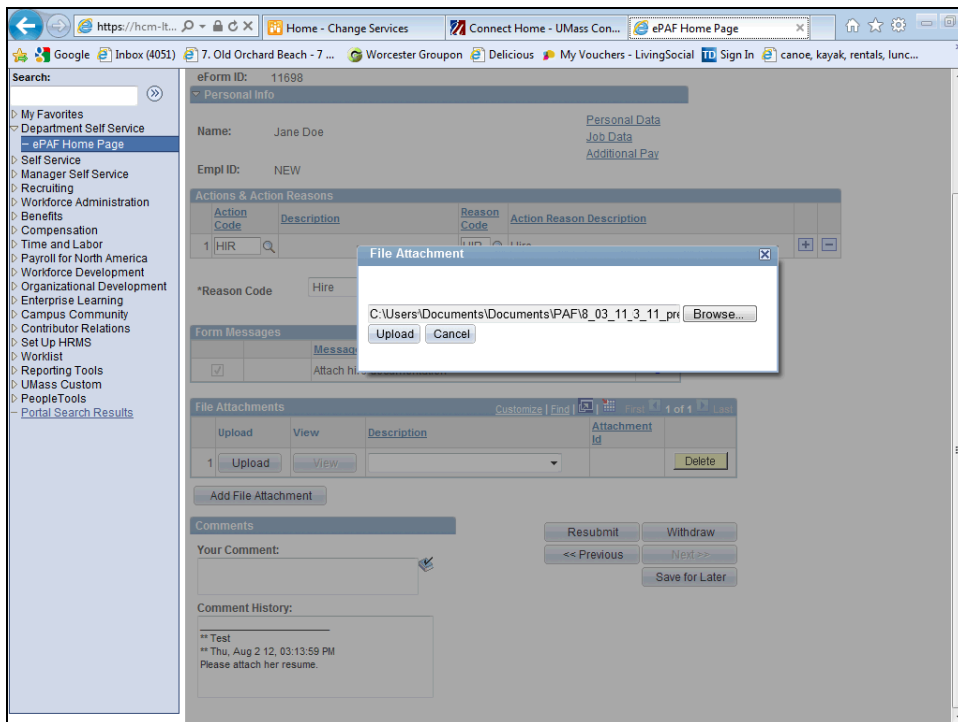


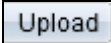


Step	Action
14.	To search for the desired file to upload, click the <b>Browse</b> button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Browse...</div>





Step	Action
15.	Select the document you wish to attach and upload.  Click the <b>8_03_11</b> file.

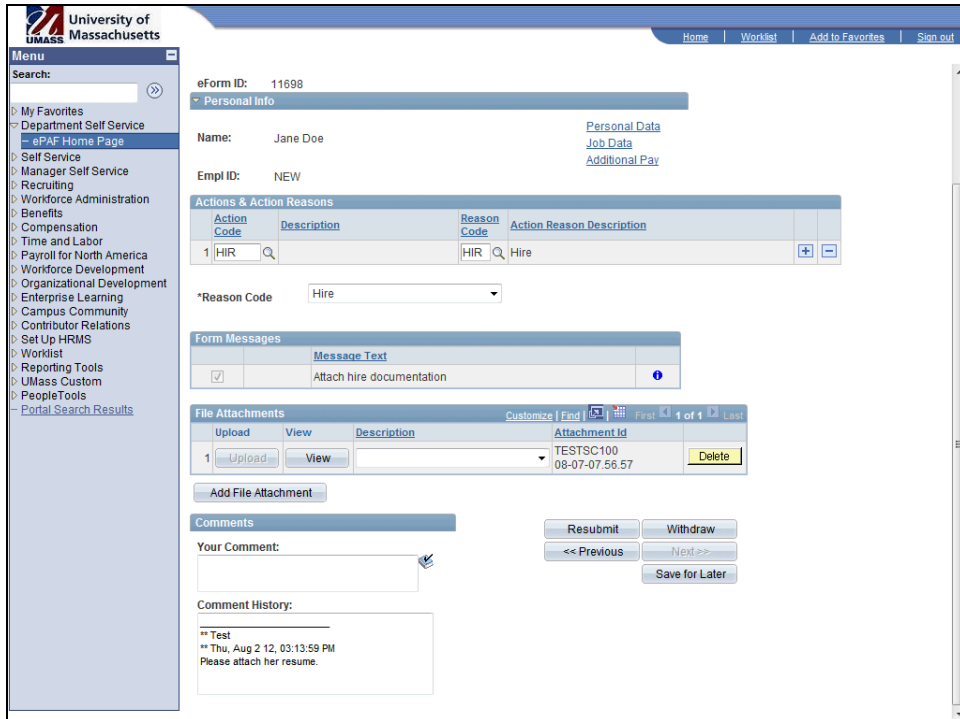


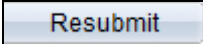

Step	Action
16.	Click the <b>Upload</b> button.  

The screenshot shows the University of Massachusetts ePAF system interface. The main content area displays the following sections:

- Personal Info:** eForm ID: 11698, Name: Jane Doe, Empl ID: NEW. Links for Personal Data, Job Data, and Additional Pay are visible.
- Actions & Action Reasons:** A table with columns for Action Code, Description, Reason Code, and Action Reason Description. One row shows 'HIR' with description 'Hire' and reason code 'HIR'.
- Form Messages:** A table with columns for Message Text and a status icon. One message is visible: 'Attach hire documentation'.
- File Attachments:** A table with columns for Upload, View, Description, Attachment Id, and Delete. One attachment is listed: 'TESTSC100' with description '08-07-07.56.57'. A dropdown menu is open under the 'Description' column, showing options: 'Offer Letter', 'Other', and 'Resume'.
- Comments:** A section for 'Your Comment:' with a text input field and a 'Resubmit' button. Below it is a 'Comment History:' section showing a previous comment: '\*\* Test \*\* Thu, Aug 2 12, 03:13:59 PM Please attach her resume.'

Step	Action
17.	Click the <b>Description</b> list box. 
18.	For this example, click the <b>Other</b> list item. 



Step	Action
19.	To resubmit this eForm with the new attachment, click the <b>Resubmit</b> button. 
20.	If you are ready to resubmit this form with your changes, click the <b>Yes</b> button. 
21.	The <b>Form Status</b> indicates that you have resubmitted this form.
22.	Congratulations! You have added an attachment to an ePAF form. <b>End of Procedure.</b>

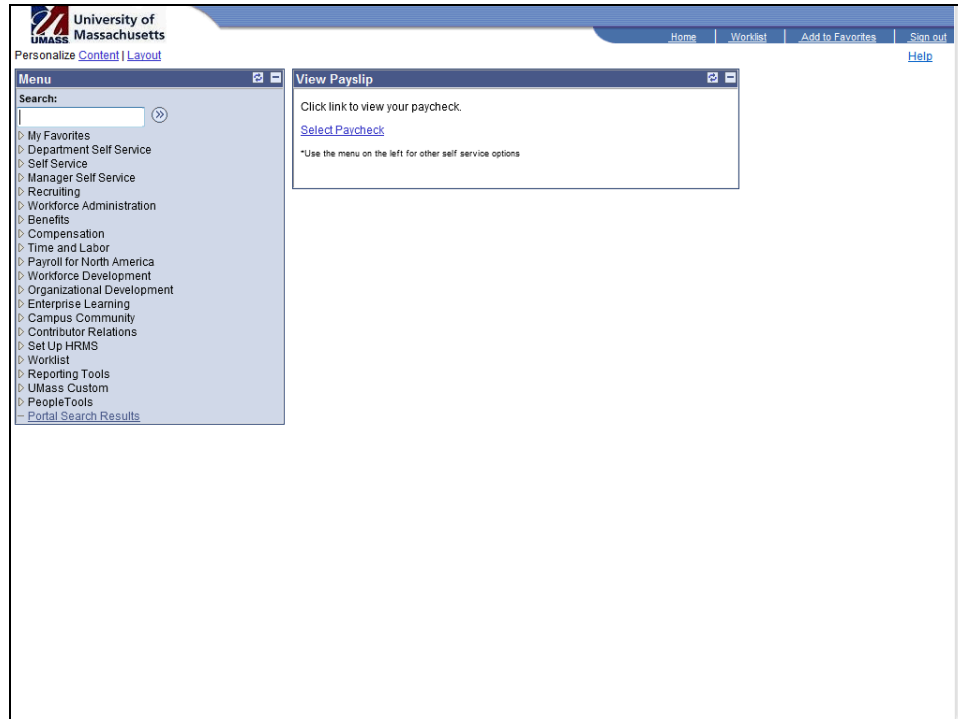
### Adding Comments to an ePAF Form

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

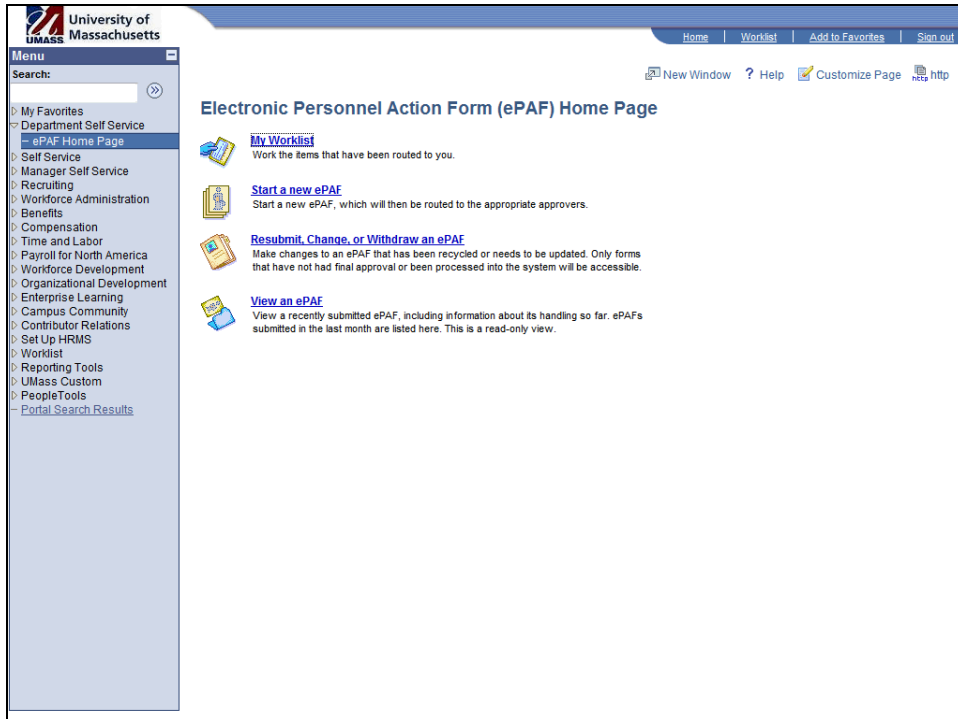
#### Procedure

#### Consider this scenario:

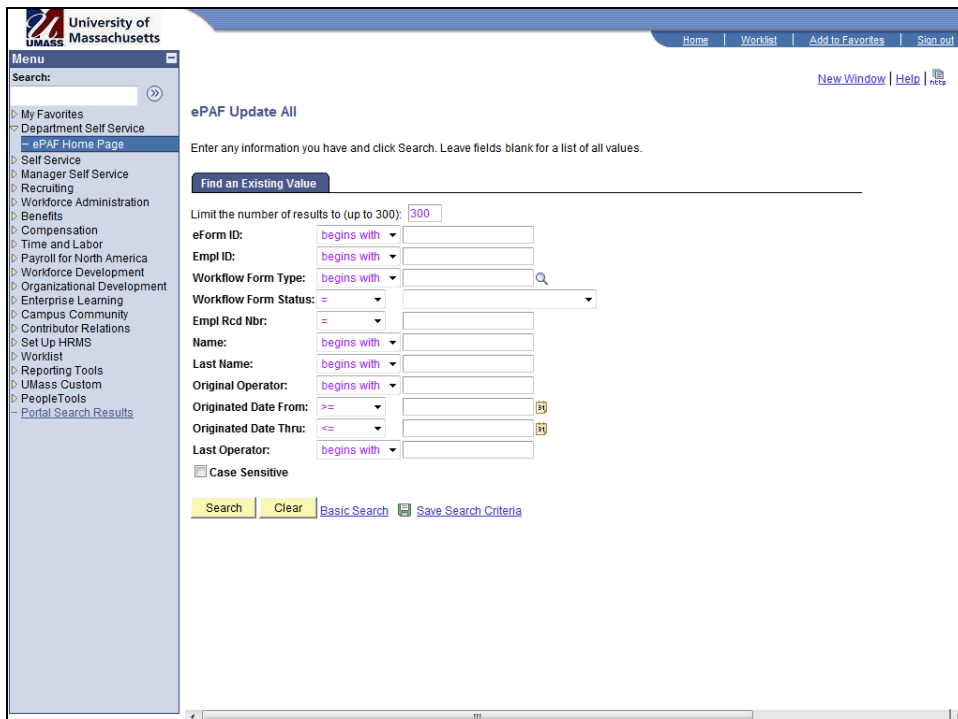
Your goal is to add comments to an ePAF form.

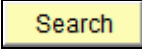


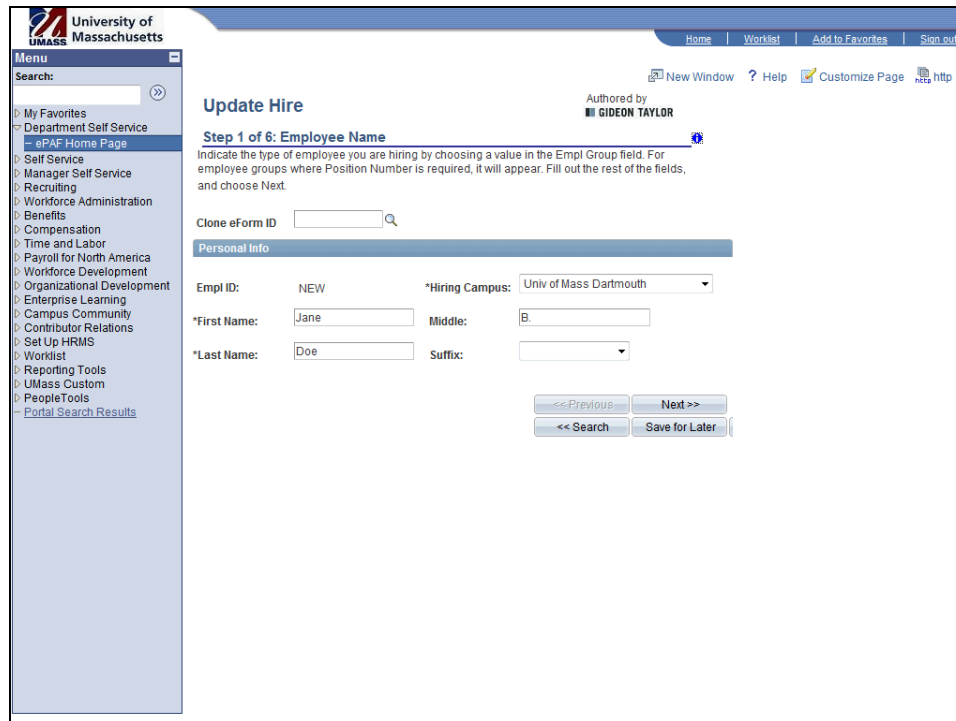
Step	Action
1.	Begin by navigating to the <b>ePAF Home Page</b> .  Click the <b>Department Self Service</b> link. <span style="border: 1px solid black; padding: 2px;">▶ Department Self Service</span>
2.	Click the <b>ePAF Home Page</b> link. <span style="border: 1px solid black; padding: 2px;">ePAF Home Page</span>

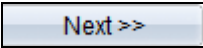


Step	Action
3.	Click the <b>Resubmit, Change, or Withdraw an ePAF</b> link. <span style="border: 1px solid black; padding: 2px;"><a href="#">Resubmit, Change, or Withdraw an ePAF</a></span>



Step	Action
4.	Enter the desired information into the <b>Last Name</b> field.  Enter " <b>Doe</b> ".
5.	Click the <b>Search</b> button. 
6.	The <b>Update Hire</b> page will allow you to update the form and add additional comments.  <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 <b>Next</b> button. 

University of Massachusetts

Home Worklist Add to Favorites Sign out

Menu

Search: [ ]

My Favorites

Department Self Service

ePAF Home Page

Self Service

Manager Self Service

Recruiting

Workforce Administration

Benefits

Compensation

Time and Labor

Payroll for North America

Workforce Development

Organizational Development

Enterprise Learning

Campus Community

Contributor Relations

Set Up HRMS

Worklist

Reporting Tools

UMass Custom

PeopleTools

Portal Search Results

Update Hire

Authorized by GIDEON TAYLOR

Step 2 of 6: Job Information

Enter the employee's compensation as an hourly rate.

eForm ID: 11698

Personal Info

Name: Jane Doe [Personal Data](#)

Empl ID: NEW Empl Rcd#: [Job Data](#)

[Additional Pay](#)

Applicant Data

Applicant ID Job Opening ID

Job Data

\*Effective Date: 08/02/2012

\*Employee Group: Non-Ben Part-Time Lecturers

\*Is this a Positioned Job? No

Supervisor ID: [ ]

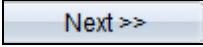
\*Department: D101000 Chancellor

\*Job Code: DA2109 Part-Time

\*Location Code: ADMIN Foster Administration Regu

\*Standard Hours: 20.00 \*FTE: 0.500000

Mail Drop ID: [ ]

Step	Action
8.	Verify that this is the person you were searching for by viewing their <b>Personal Information</b> .  Click the vertical <b>Scrollbar</b> button.
9.	Click the <b>Next</b> button. 



**Update Hire**  
Authorized by GIDEON TAYLOR

**Step 3 of 6: Compensation**  
Update the employee's compensation information as needed.

eForm ID: 11698

**Personal Info**

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

Empl ID: NEW      Empl Rcd#:

**Compensation Data**

Employee Type: Exception Hourly

Bi-Weekly Rate: 500.000000      Annual Rate: \$13,000.000

Plan:       Salary Grade:

Total Annual Rate: 13000.000000

Begin Date: 08/02/2012

GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
1 A103738	52129	A817000000	B10				

Buttons: Add Date Range, << Previous, Next >>, Next Item, Save for Later

Step	Action
10.	Click the <b>Next</b> button.

**Update Hire**  
Authorized by GIDEON TAYLOR

**Step 4 of 6: Time and Labor**  
Update the employee's Time and Labor and additional information as needed.

eForm ID: 11698

**Personal Info**

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

Empl ID: NEW      Empl Rcd#:

**Time and Labor Data**

\*Union Code: D80      AFT Faculty Federation

\*Pay Group: UMD      UMass Dartmouth

\*Empl Class: 1      Faculty-Calendar Year

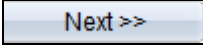
Workgroup: D\_NBFAC      Non Benefitted Faculty

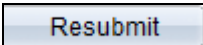
Taskgroup: UM\_EXP      Exception Taskgroup

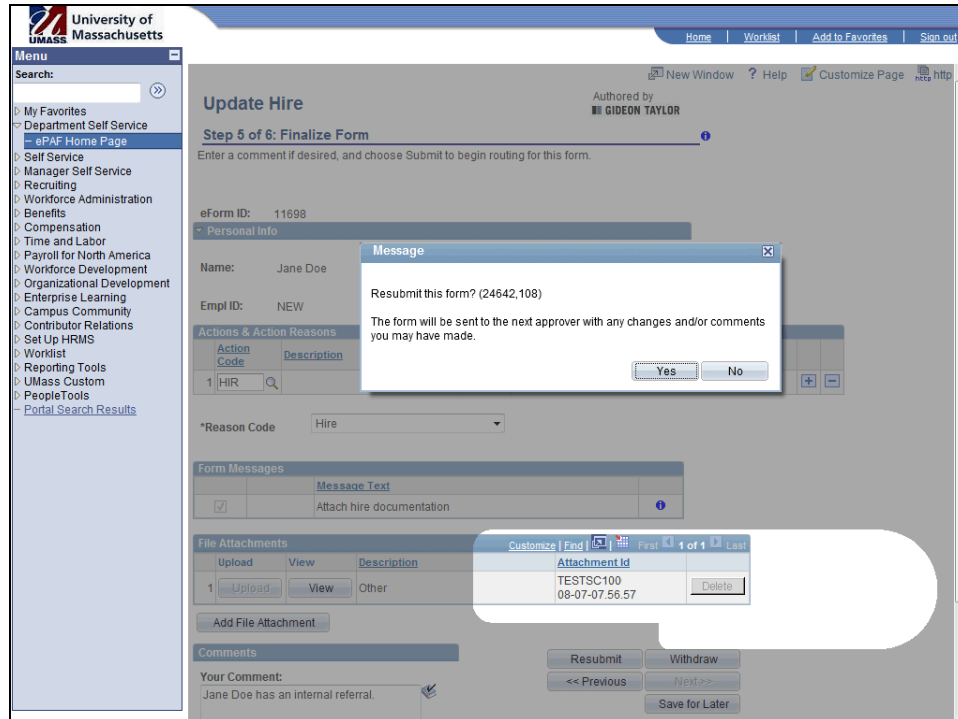
**Time and Labor Schedule**

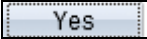
Schedule different from standard?

Buttons: << Previous, Next >>, Save for Later

Step	Action
11.	Click the <b>Next</b> button. 

Step	Action
12.	This is the <b>Comments</b> Section.  Enter the desired information into the <b>Your Comment</b> field.  For this example, enter " <b>Jane Doe has an internal referral.</b> ".
13.	Click the <b>Resubmit</b> button. 



Step	Action
14.	<p>Confirm that you are ready to resubmit this form.</p> <p>Click the <b>Yes</b> button.</p> 
15.	The <b>Form Status</b> indicates that you have Resubmitted this form.
16.	<p>Congratulations! You have added comments to an ePAF.</p> <p><b>End of Procedure.</b></p>

## Creating and Cloning an eForm

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

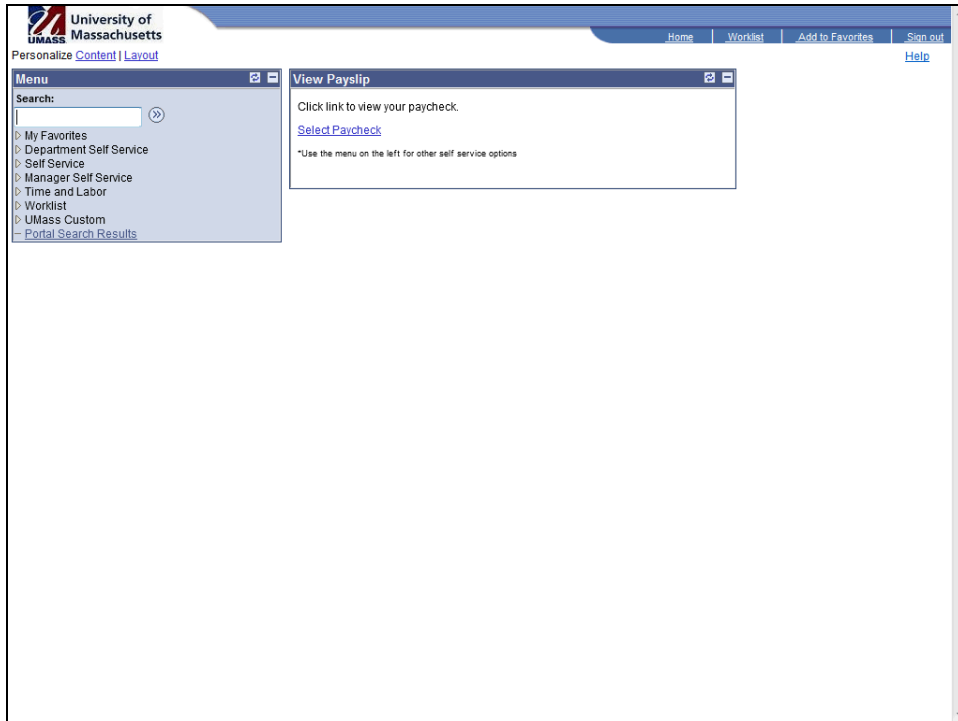
### Procedure

#### Consider this Scenario:

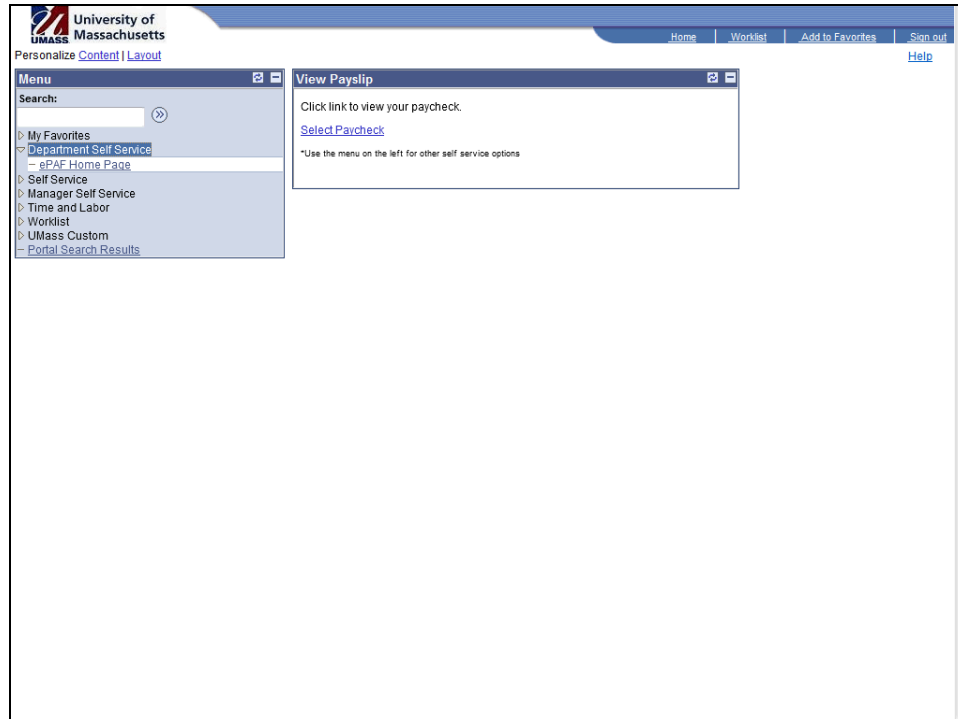
Your goal is to create and clone an eForm.

#### Key Information:

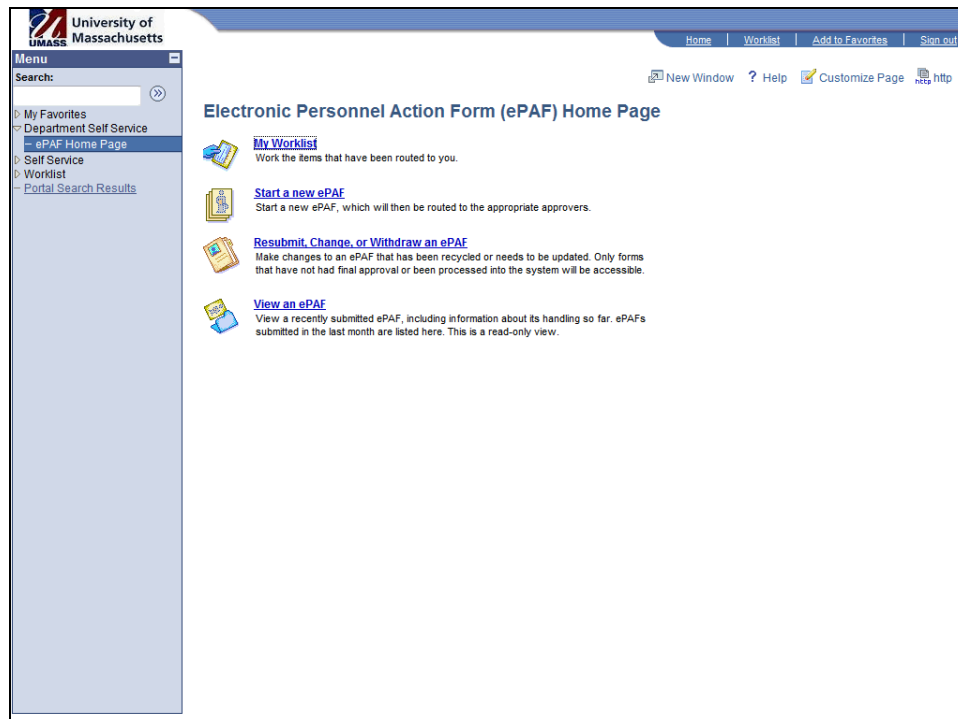
eForm ID: 12683



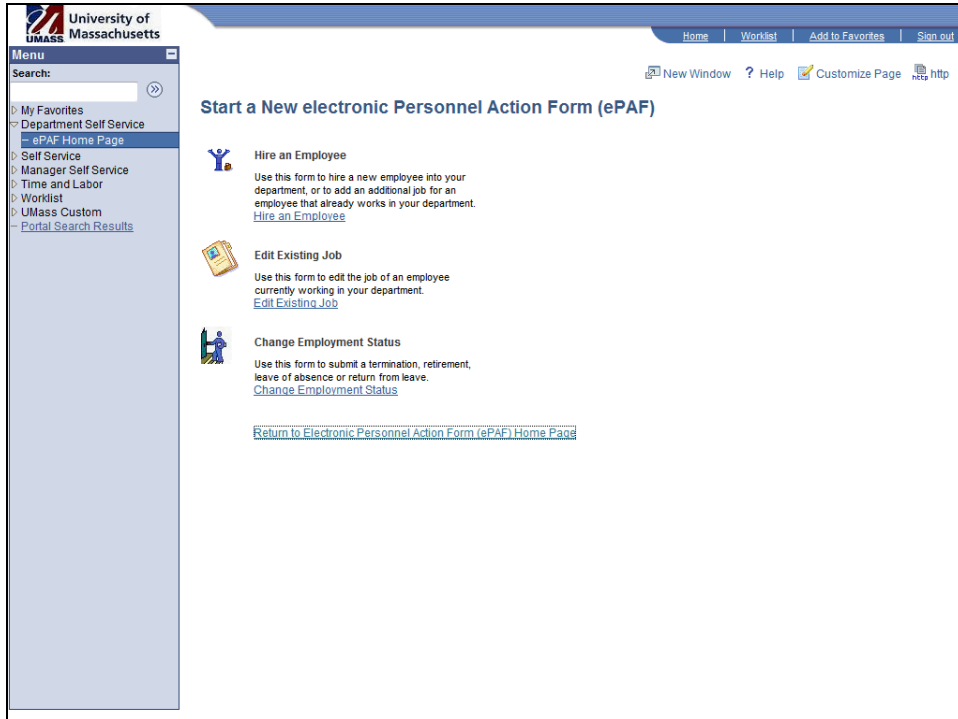
Step	Action
1.	Begin by navigating to the <b>ePAF Home Page</b> .  Click the <b>Department Self Service</b> link. <span style="border: 1px solid black; padding: 2px;">▶ Department Self Service</span>



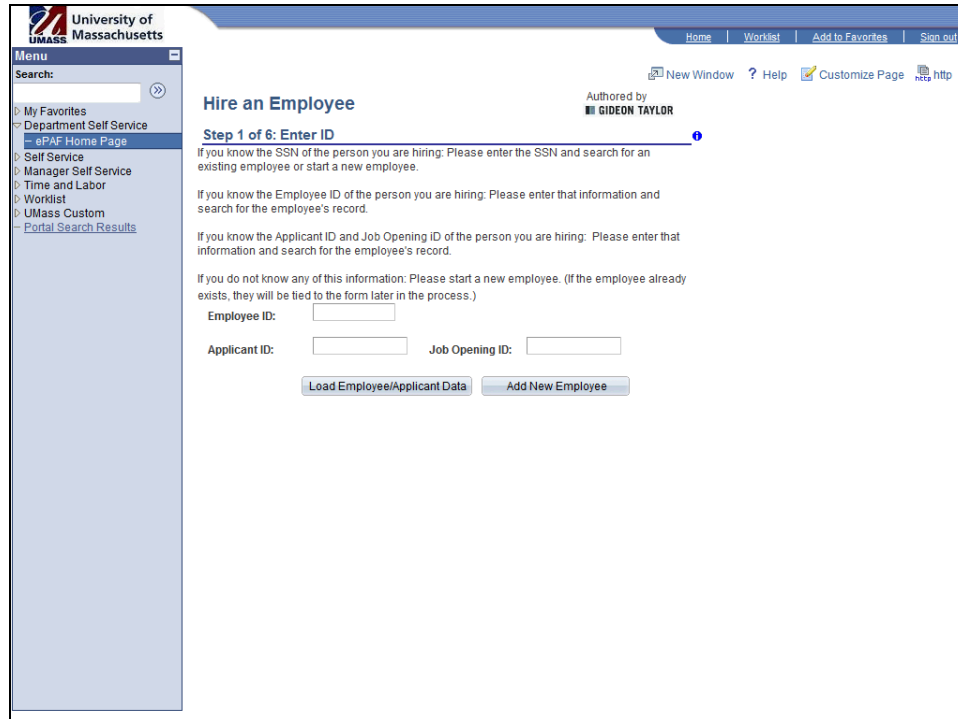
Step	Action
2.	Click the <b>ePAF Home Page</b> link. <span style="border: 1px solid black; padding: 2px;">ePAF Home Page</span>

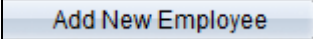


Step	Action
3.	This is the <b>ePAF Home Page</b> , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the <b>Start a new ePAF</b> link. <a href="#">Start a new ePAF</a>

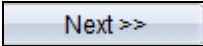


Step	Action
5.	Click the <b>Hire an Employee</b> link. <a href="#">Hire an Employee</a>

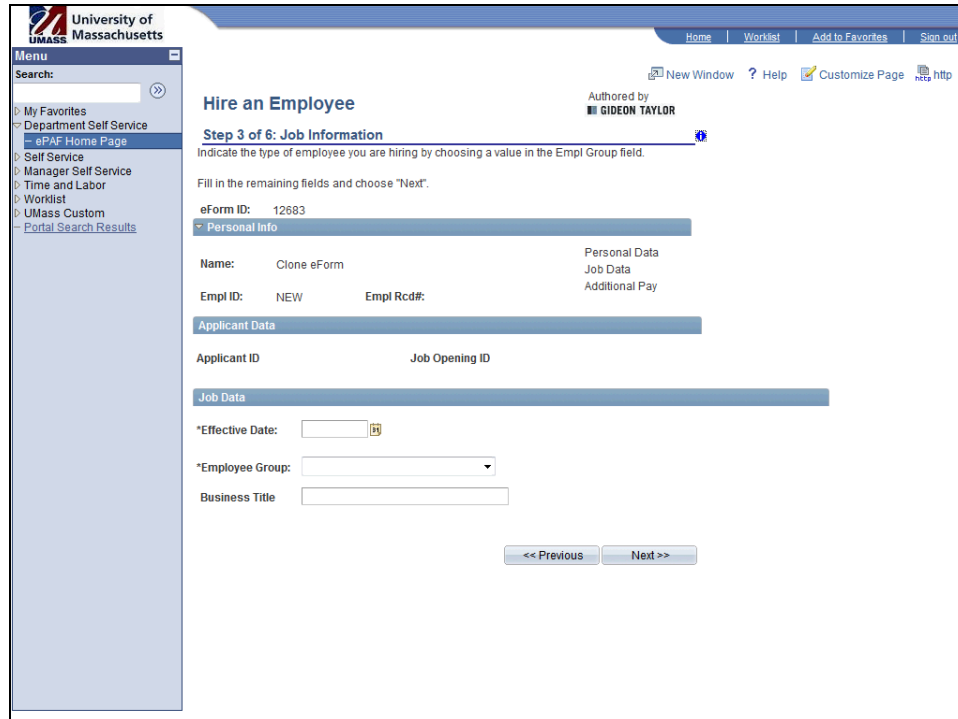





Step	Action
6.	You will use the <b>Hire an Employee</b> form to create an eForm for cloning.
7.	Click the <b>Add New Employee</b> button. 

The screenshot shows the 'Hire an Employee' interface in the University of Massachusetts ePAF system. The page title is 'Hire an Employee' and the current step is 'Step 2 of 6: Employee Name'. The user is logged in as GIDEON TAYLOR. The form includes a search bar for 'Clone eForm ID', a 'Personal Info' section with fields for 'Empl ID' (set to NEW), 'Hiring Campus' (Univ of Mass Lowell), '\*First Name', 'Middle', '\*Last Name', and 'Suffix'. Navigation buttons '<< Previous' and 'Next >>' are visible at the bottom of the form.

Step	Action
8.	Enter the desired information into the <b>First Name</b> field. For this example, enter " <b>Clone</b> ".
9.	Enter the desired information into the <b>Last Name</b> field. For this example, enter " <b>eForm</b> ".
10.	Click the <b>Next</b> button. 





Step	Action
11.	Click the <b>Effective Date</b> look up button. 
12.	For this example, click the September <b>6</b> link. 
13.	Click the <b>Employee Group</b> list. 

Step	Action
14.	For this example, click the <b>Clerical/Technical</b> list item. <input type="text" value="Clerical/Technical"/>
15.	Click the <b>Is this a Positioned Job?</b> list. <input type="text" value="▼"/>

**Hire an Employee**  
 Authorized by GIDEON TAYLOR

**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: 12683

**Personal Info**

Name: Clone eForm Personal Data  
 Empl ID: NEW Empl Rcd#: Job Data  
Additional Pay

**Applicant Data**

Applicant ID Job Opening ID

**Job Data**

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

\*Employee Group: Clerical/Technical

\*Is this a Positioned Job? **No**

Business Title

Step	Action
16.	For this example, click the <b>No</b> list item. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">No</div>

**Hire an Employee**  
 Authorized by GIDEON TAYLOR

**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: 12683

**Personal Info**

Name: Clone eForm Personal Data  
 Empl ID: NEW Empl Rcd#: Job Data  
Additional Pay

**Applicant Data**

Applicant ID Job Opening ID

**Job Data**

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

\*Employee Group: Clerical/Technical

\*Is this a Positioned Job? **No**

Supervisor ID:


\*Department:

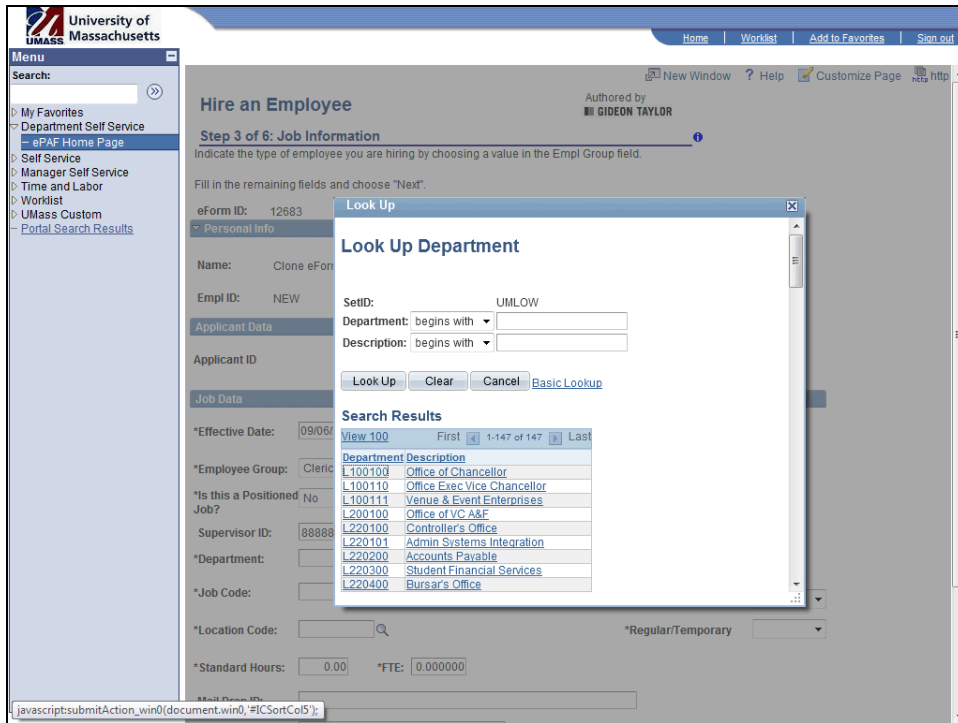
\*Job Code:   \*Full/Part Time


\*Location Code:   \*Regular/Temporary

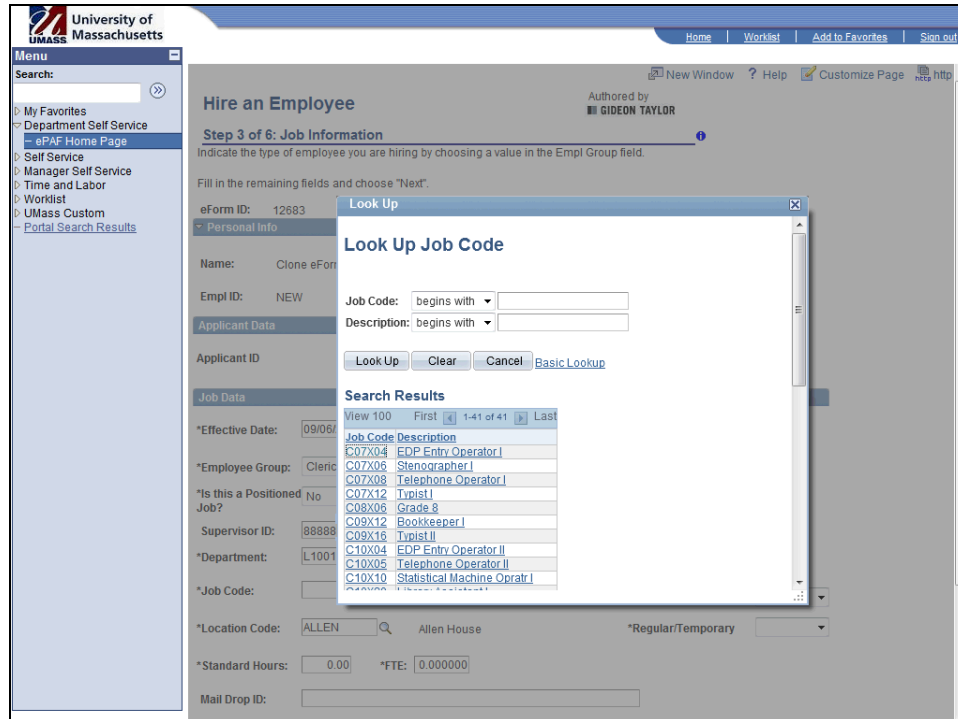
\*Standard Hours:  \*FTE:



Mail Drop ID:

Step	Action
17.	Enter the desired information into the <b>Supervisor ID</b> field.  For this example, enter " <b>88888</b> ".  <i>Note:</i> You can also use the <b>Supervisor ID</b> look up button to search for this value.
18.	Click the <b>Department</b> look up button. 



Step	Action
19.	For this example, click the <b>Office of Chancellor</b> link. <a href="#">Office of Chancellor</a>
20.	Click the <b>Job Code</b> look up button. 



Step	Action
21.	For this example, click the <b>C07X04</b> link. 
22.	Click the <b>Full/Part Time</b> list. 

**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: 12683

**Personal Info**  
 Name: Clone eForm (Personal Data)  
 Empl ID: NEW (Empl Rcd#) (Job Data, Additional Pay)

**Applicant Data**  
 Applicant ID (Job Opening ID)

**Job Data**  
 \*Effective Date: 09/06/2012 (End Date: ) (End Job Automatically)  
 \*Employee Group: Clerical/Technical  
 \*Is this a Positioned Job? No  
 Supervisor ID: 88888 (John Smith)  
 \*Department: L100100 (Office of Chancellor)  
 \*Job Code: C07X04 (EDP Entry Operator I) (\*Full/Part Time)  
 \*Location Code: ALLEN (Allen House) (\*Regular/Temporary)  
 \*Standard Hours: 37.50 \*FTE: 1.000000  
 Mail Drop ID:

Step	Action
23.	For this example, click the <b>Part-Time</b> list item. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Part-Time</div>


**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".

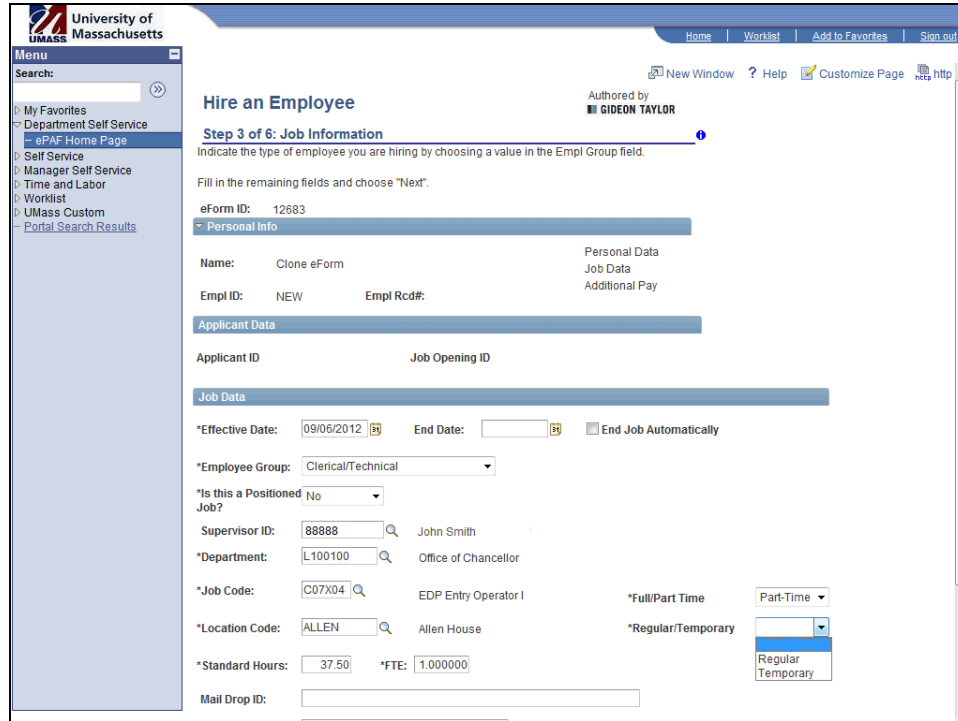
eForm ID: 12683

**Personal Info**  
 Name: Clone eForm (Personal Data)  
 Empl ID: NEW (Empl Rcd#) (Job Data, Additional Pay)

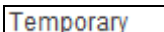
**Applicant Data**  
 Applicant ID (Job Opening ID)

**Job Data**  
 \*Effective Date: 09/06/2012 (End Date: ) (End Job Automatically)  
 \*Employee Group: Clerical/Technical  
 \*Is this a Positioned Job? No  
 Supervisor ID: 88888 (John Smith)  
 \*Department: L100100 (Office of Chancellor)  
 \*Job Code: C07X04 (EDP Entry Operator I) (\*Full/Part Time: **Part-Time**)  
 \*Location Code: ALLEN (Allen House) (\*Regular/Temporary)  
 \*Standard Hours: 37.50 \*FTE: 1.000000  
 Mail Drop ID:

Step	Action
24.	Click the <b>Regular/Temporary</b> list. 



The screenshot shows the 'Hire an Employee' web application. The main heading is 'Hire an Employee' with a sub-heading 'Step 3 of 6: Job Information'. The user is logged in as GIDEON TAYLOR. The form contains several sections: 'Personal Info' with fields for Name (Clone eForm), Empl ID (NEW), and Empl Rcd#; 'Applicant Data' with Applicant ID and Job Opening ID; and 'Job Data' with fields for Effective Date (09/06/2012), End Date, Employee Group (Clerical/Technical), Supervisor ID (88888), Department (L100100), Job Code (C07X04), Location Code (ALLEN), Standard Hours (37.50), and FTE (1.000000). A dropdown menu for '\*Regular/Temporary' is open, showing 'Regular' and 'Temporary' options.

Step	Action
25.	For this example, click the <b>Temporary</b> list item. 
26.	Click the vertical <b>Scrollbar</b> .

University of Massachusetts

Home Worklist Add to Favorites Sign out

Menu Search: [ ]

- My Favorites
- Department Self Service
  - ePAF Home Page
- Self Service
- Manager Self Service
- Time and Labor
- Worklist
- UMass Custom
- Portal Search Results

Personal Info

Name: Clone eForm Personal Data  
Job Data  
Additional Pay

Empl ID: NEW Empl Rcd#: [ ]

Applicant Data

Applicant ID [ ] Job Opening ID [ ]

Job Data

\*Effective Date: 09/06/2012 [ ] End Date: [ ]  End Job Automatically

\*Employee Group: Clerical/Technical [ ]

\*Is this a Positioned Job? No [ ]

Supervisor ID: 88888 [ ] John Smith [ ]

\*Department: L100100 [ ] Office of Chancellor [ ]

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

\*Location Code: ALLEN [ ] Allen House [ ] \*Regular/Temporary: Temporal [ ]

\*Standard Hours: 37.50 [ ] \*FTE: 1.000000 [ ]

Mail Drop ID: [ ]

Business Title [ ]

<< Previous Next >>

Step	Action
27.	Click the <b>Next</b> button.

Next >>

University of Massachusetts

Home Worklist Add to Favorites Sign out

Menu Search: [ ]

- My Favorites
- Department Self Service
  - ePAF Home Page
- Self Service
- Manager Self Service
- Time and Labor
- Worklist
- UMass Custom
- Portal Search Results

Hire an Employee

Authorized by GIDEON TAYLOR

Step 4 of 6: Compensation

Please enter the employee's compensation information below.

eForm ID: 12683

Personal Info

Name: Clone eForm Personal Data  
Job Data  
Additional Pay

Empl ID: NEW Empl Rcd#: [ ]

Compensation Data

Employee Type: Exception Hourly [ ]

Bi-Weekly Rate: 1044.700000 [ ] Annual Rate: \$27,162.200 [ ]

Plan: L92 [ ] Salary Grade: 07 [ ] Step: 1 [ ]

Total Annual Rate: \$27,162.200 [ ]

Begin Date: 09/06/2012 [ ]

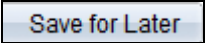
GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	Earnings Code
1 [ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]

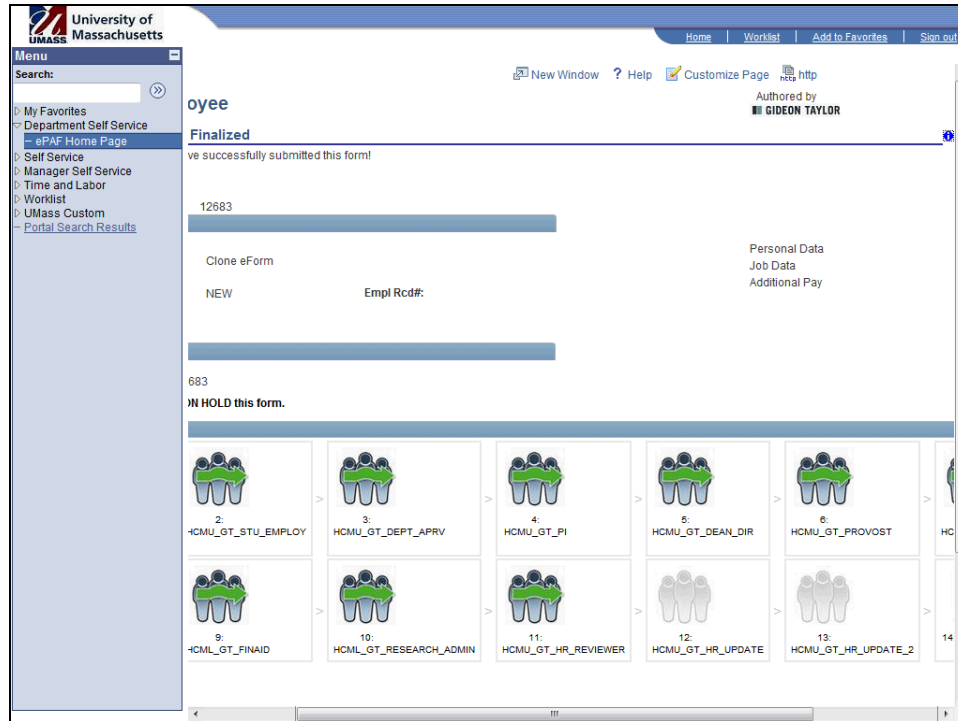
Add Date Range [ ]


<< Previous Next >>

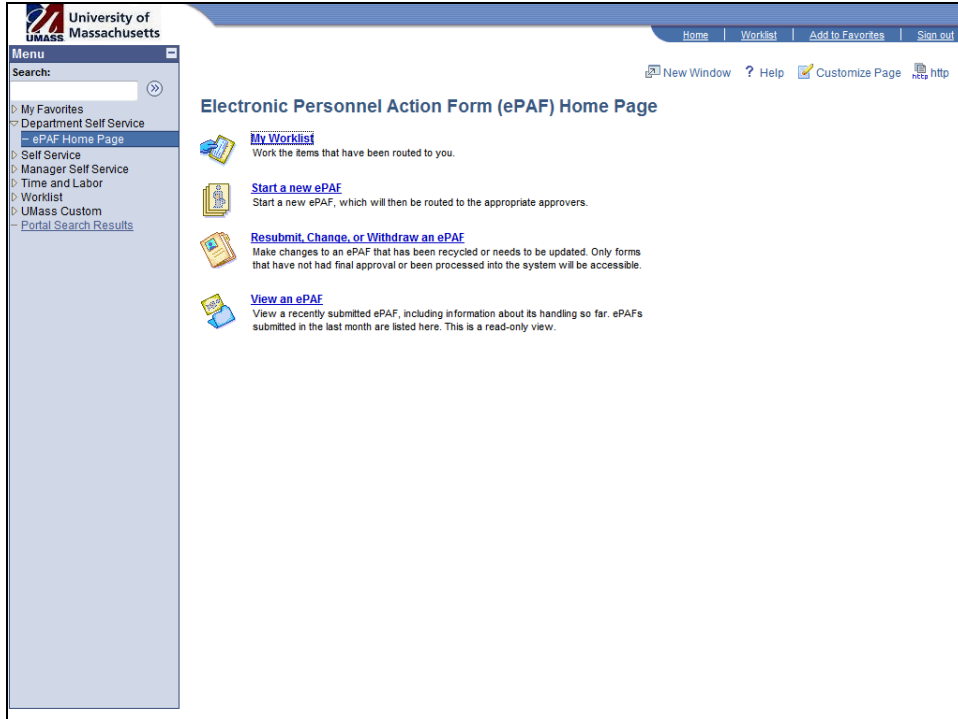
Save for Later [ ]



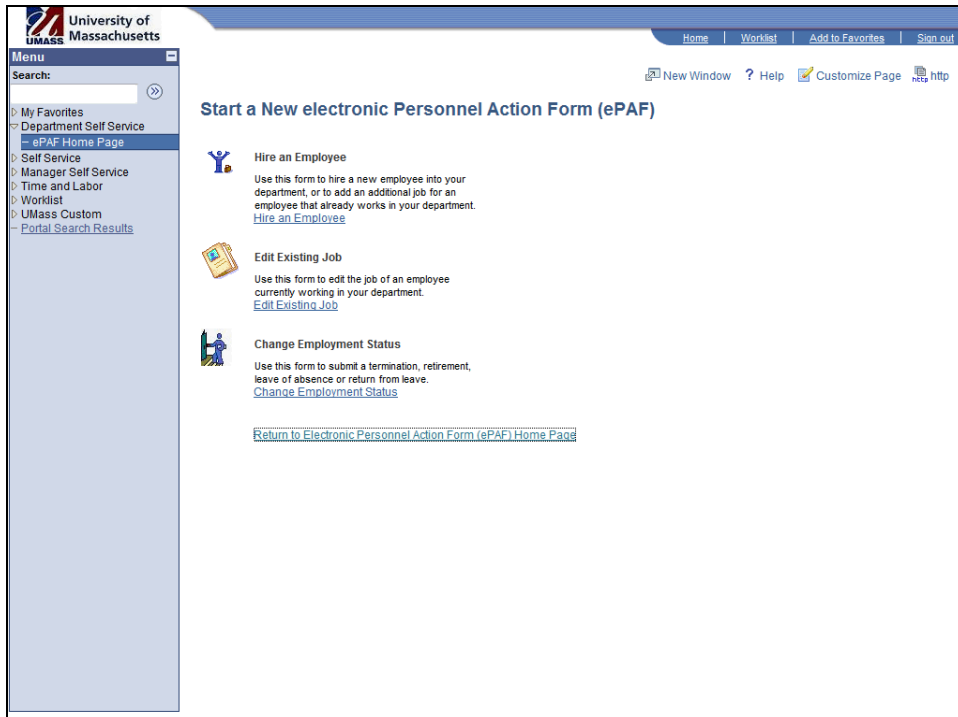
Step	Action
28.	<i>Note:</i> Notice that your new <b>eForm ID</b> is <b>12683</b> . You will need to know this <b>eForm ID</b> when you search for the eForm to clone.
29.	Click the <b>Save for Later</b> button. 




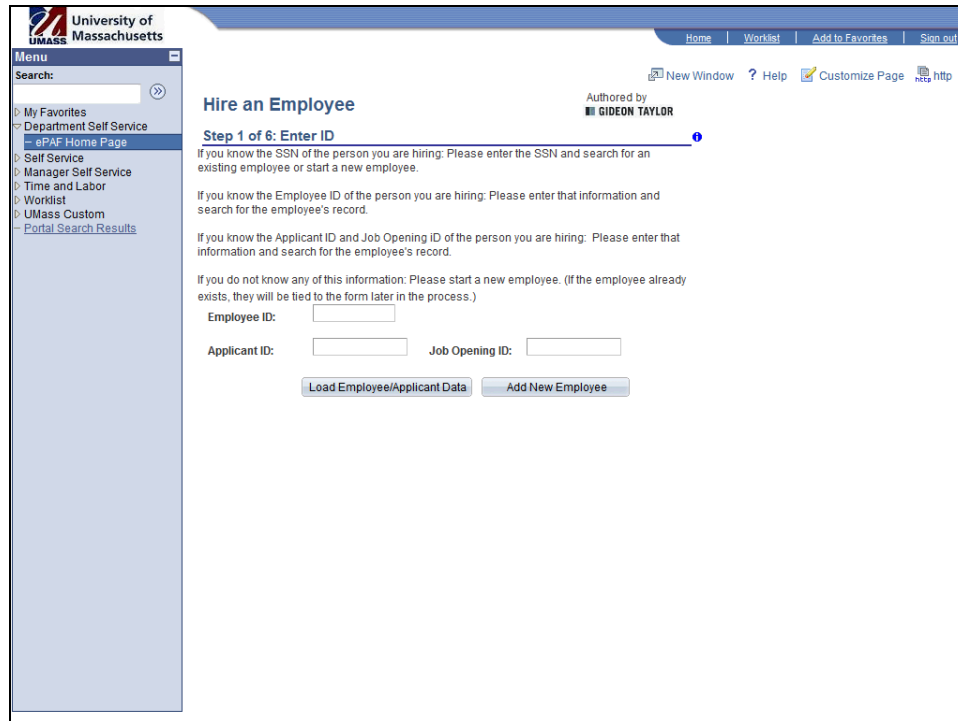
Step	Action
30.	You will now go back and use this eForm as your clone.  Click the <b>ePAF Home Page</b> link. 

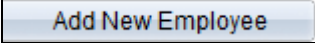


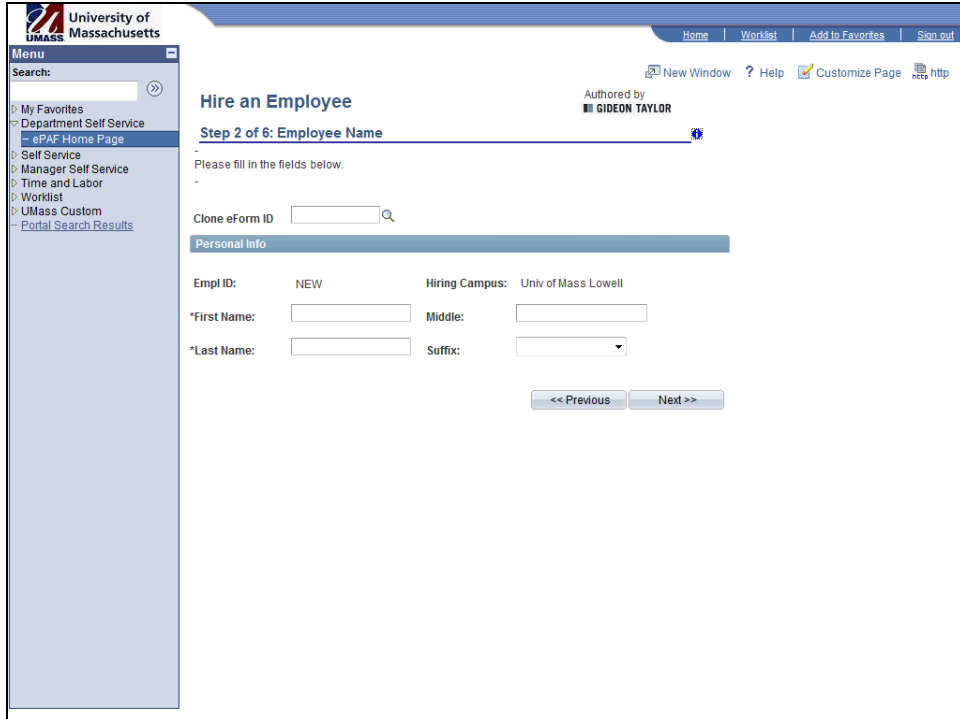
Step	Action
31.	Click the <b>Start a new ePAF</b> link. <span style="border: 1px solid black; padding: 2px;"><a href="#">Start a new ePAF</a></span>




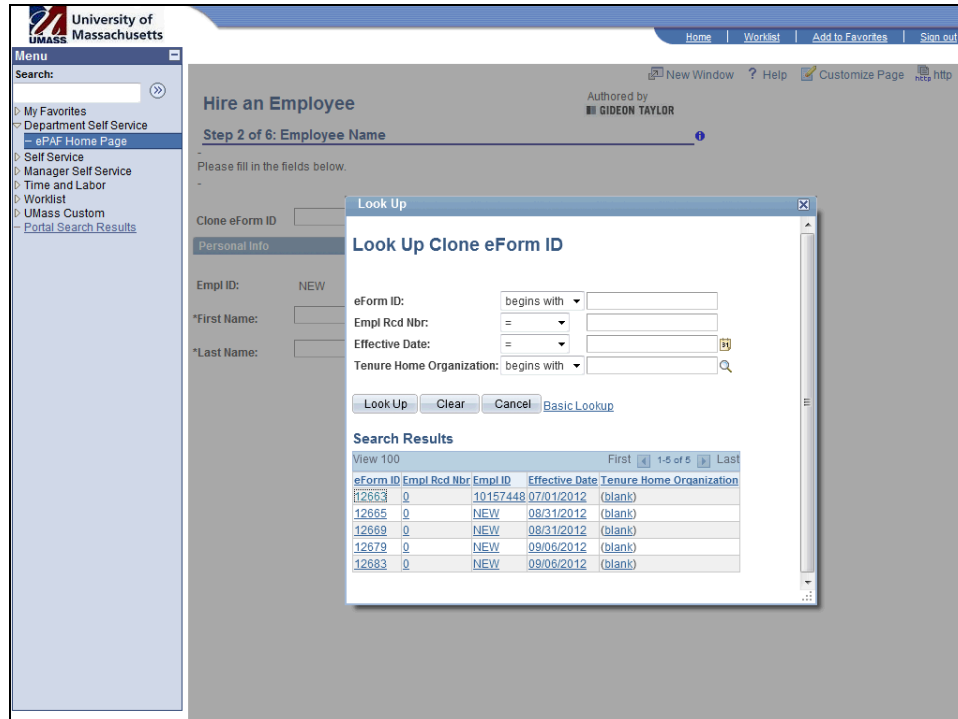
Step	Action
32.	Click the <b>Hire an Employee</b> link. 



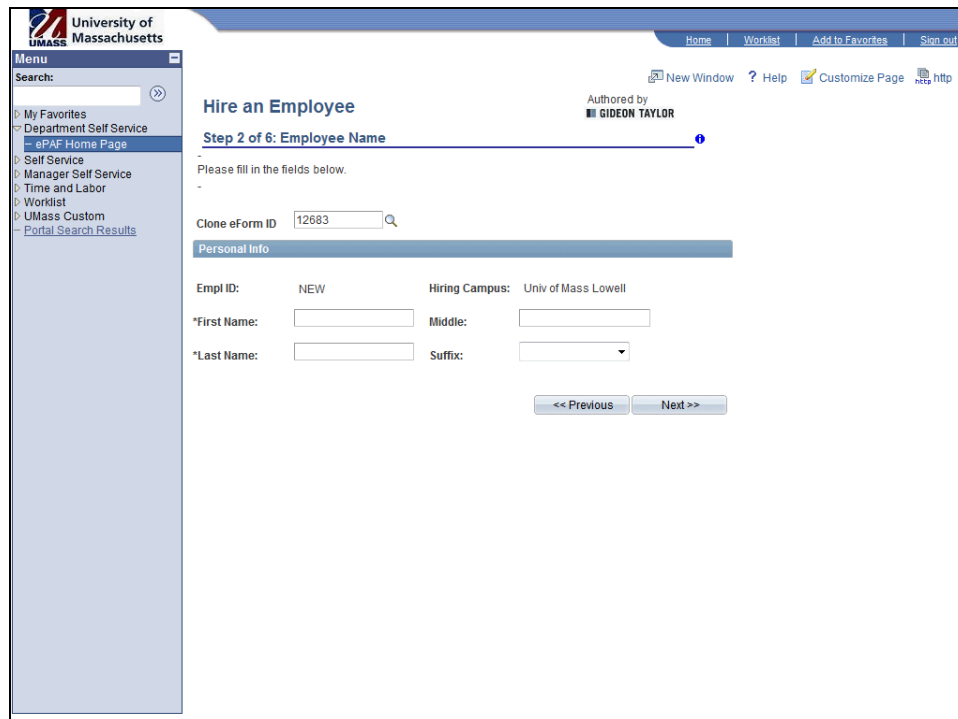
Step	Action
33.	Click the <b>Add New Employee</b> button. 

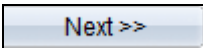


Step	Action
34.	You want to search for the <b>eForm</b> you just created. Click the <b>Clone eForm ID</b> look up button. 



Step	Action
35.	For this example, click the <b>eForm ID 12683</b> link. <u>12683</u>



Step	Action
36.	Enter the desired information into the <b>First Name</b> field.  For this example, enter " <b>Jane</b> ".  <i>Note:</i> This will be the information for the new employee you are hiring.
37.	Enter the desired information into the <b>Last Name</b> field.  For this example, enter " <b>Doe</b> ".
38.	Click the <b>Next</b> button. 

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

## Managing HR Specific Workflow

Upon completion of this section, you will be able to submit an HR approval.

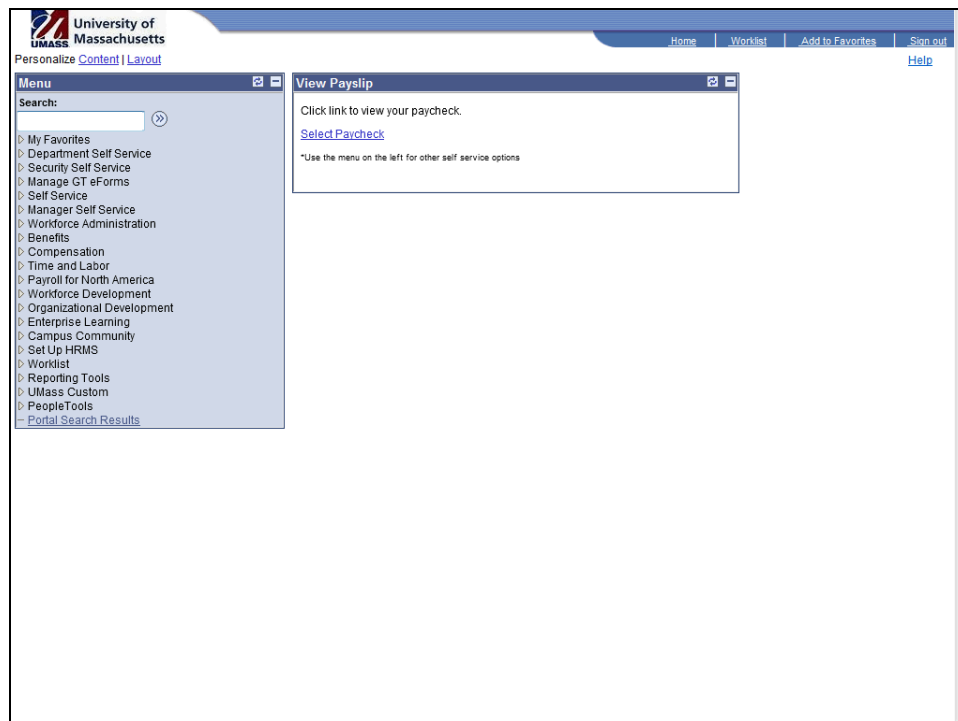
### Submitting an HR Approval

Upon completion of this topic, you will be able to submit an HR approval.

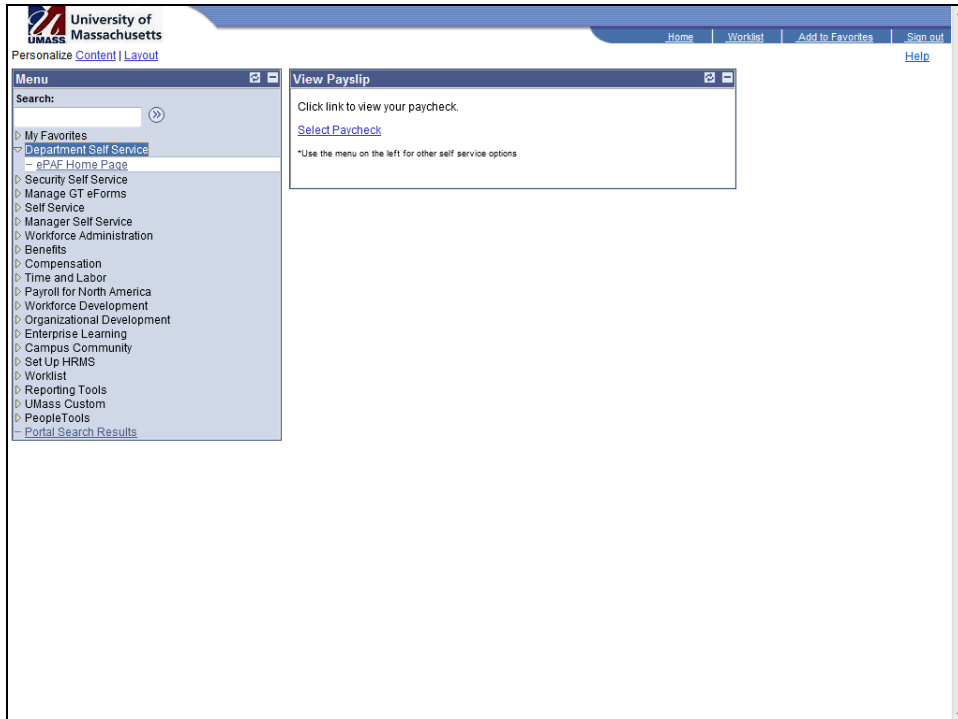
#### Procedure

#### Consider this scenario:

Your goal is to submit an HR approval.



Step	Action
1.	Begin by navigating to the <b>ePAF Home Page</b> .  Click the <b>Department Self Service</b> link. <input type="text" value="▶ Department Self Service"/>

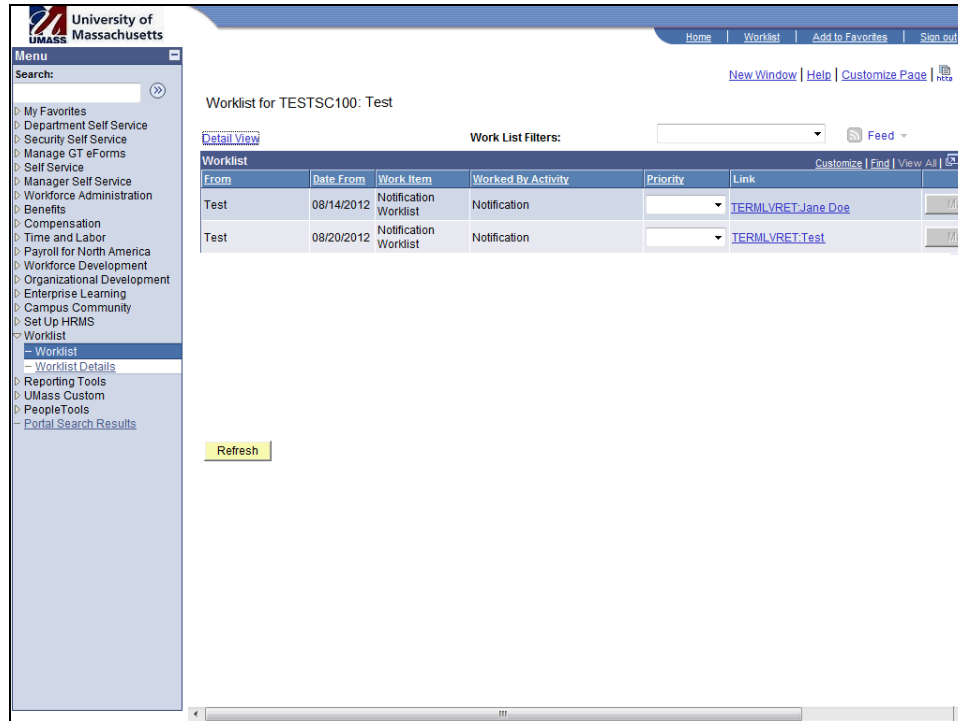


Step	Action
2.	Click the <b>ePAF Home Page</b> link. <span style="border: 1px solid black; padding: 2px;">ePAF Home Page</span>

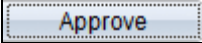


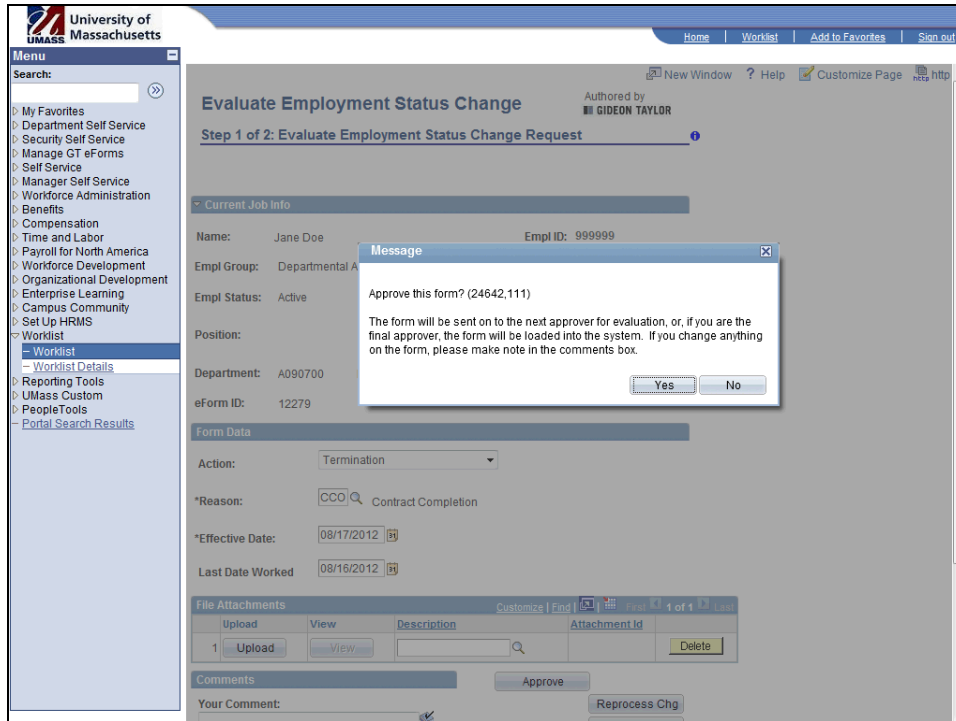



Step	Action
3.	This is the <b>ePAF Home Page</b> , a useful area for managing ePAF. Here you will see links to open your worklist, start a new ePAF, resubmit, change or withdraw an ePAF, or view an ePAF.
4.	Click the <b>Worklist</b> link.

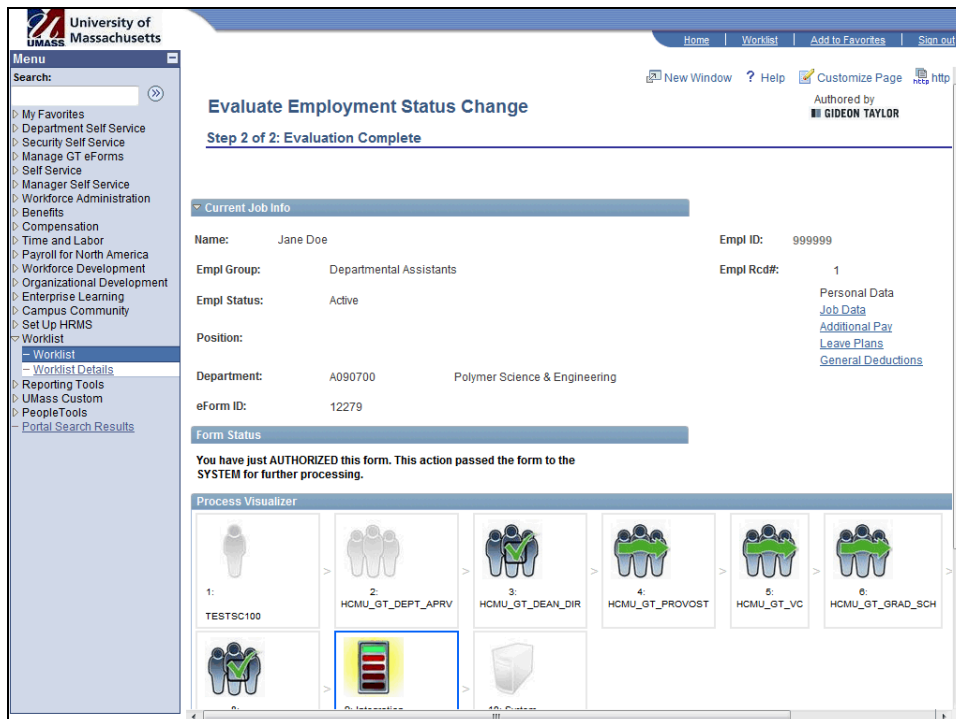


Step	Action
5.	You have several items in your worklist.  For this example, click the <b>TERMLVRET:Jane Doe</b> link. <a href="#">TERMLVRET:Jane Doe</a>
6.	The <b>Evaluate Employment Status Change</b> page contains current job info, form data, file attachments and comments sections.
7.	As the HR Approver, you will have access to update all of the fields on each page.  <i>Note:</i> If you are approving for a job change or a hire, and you choose to change the employee group, it will reset many of the other fields in the subsequent pages.

Step	Action
8.	As the HR Approver, you will review the <b>Form Data</b> information on this page.  <b>Note:</b> If you wanted to upload an attachment to this form, you would use the <b>File Attachments</b> section. If you wanted to add a comment, you would do so in the <b>Your Comment</b> box.
9.	If you are ready to approve, click the <b>Approve</b> button.  



Step	Action
10.	<p>Confirm that you are approving this form and click the <b>Yes</b> button.</p> 



Step	Action
11.	The <b>Form Status</b> indicates that you have authorized this form, and this action has passed the form to the system for further processing.
12.	Congratulations! You have successfully submitted an HR approval. <b>End of Procedure.</b>

## Managing Security (Data Custodian)

After completion of this section, you will be able to update funneled security by using ePAF Dept Security Override.

### Updating Funneled Security

Department Security at an employee level is maintained by your Security Admin through IDM. Funneled Security is used to limit Department Security. The Data Custodian will use ePAF Dept Security Override to update funneled security and give access permissions by department.

Funneled security is used to give a user access rights for a specific department. The user may have access to many different departments, but you want to "funnel" or limit their department access permissions.

Upon completion of this topic, you will be able to update funneled security.

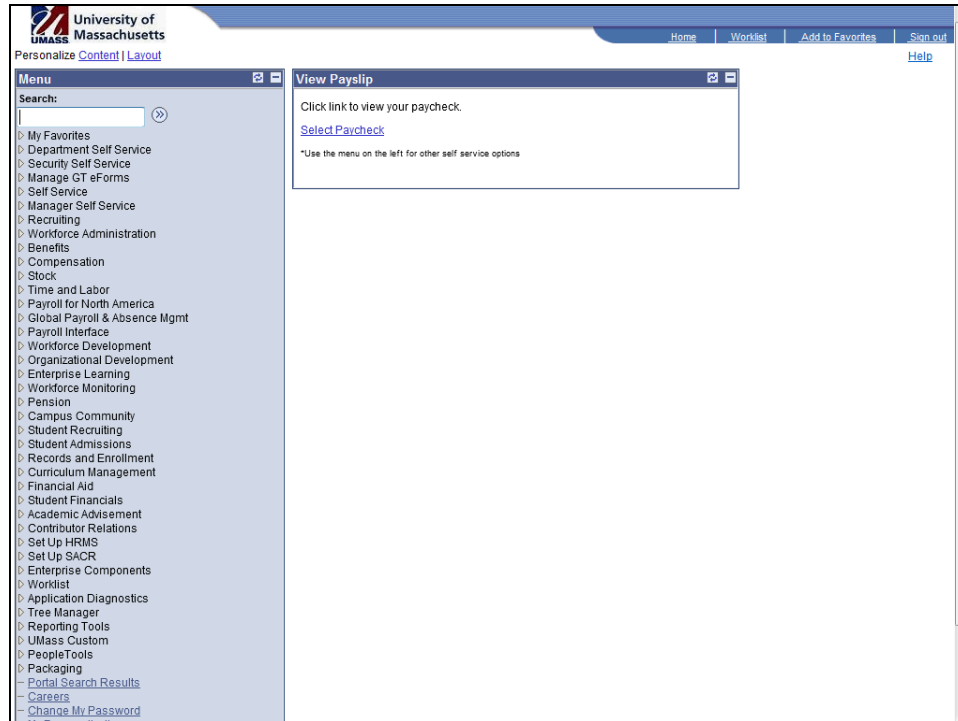
#### Procedure

##### Consider this scenario:

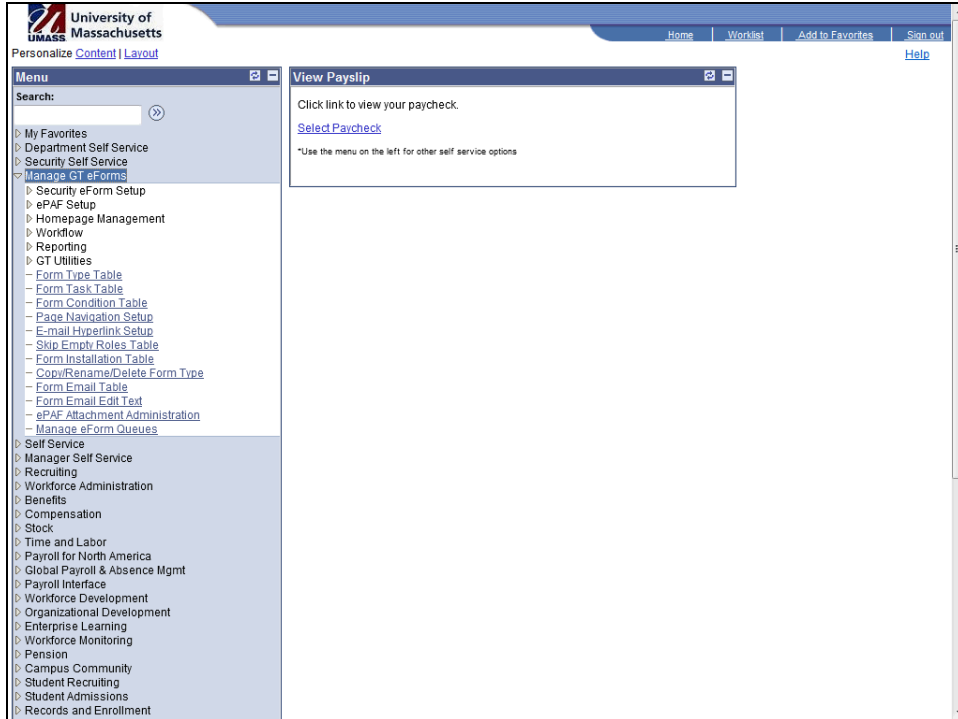
Your goal is to update funneled security using **ePAF Dept Security Override**.

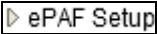
##### Key Information:

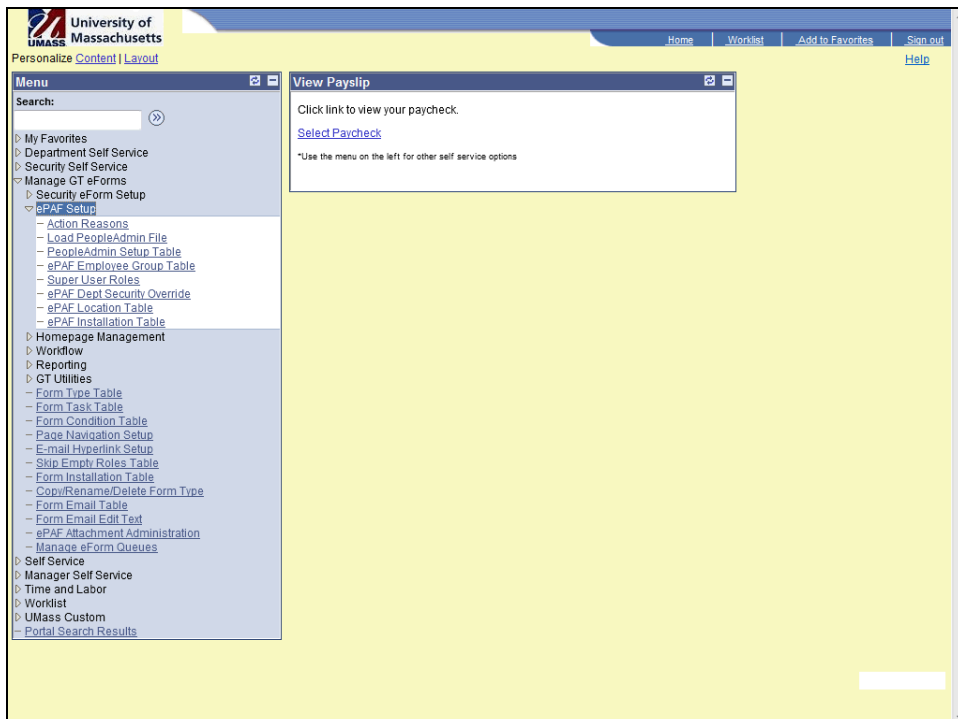
USERID: TESTSC100




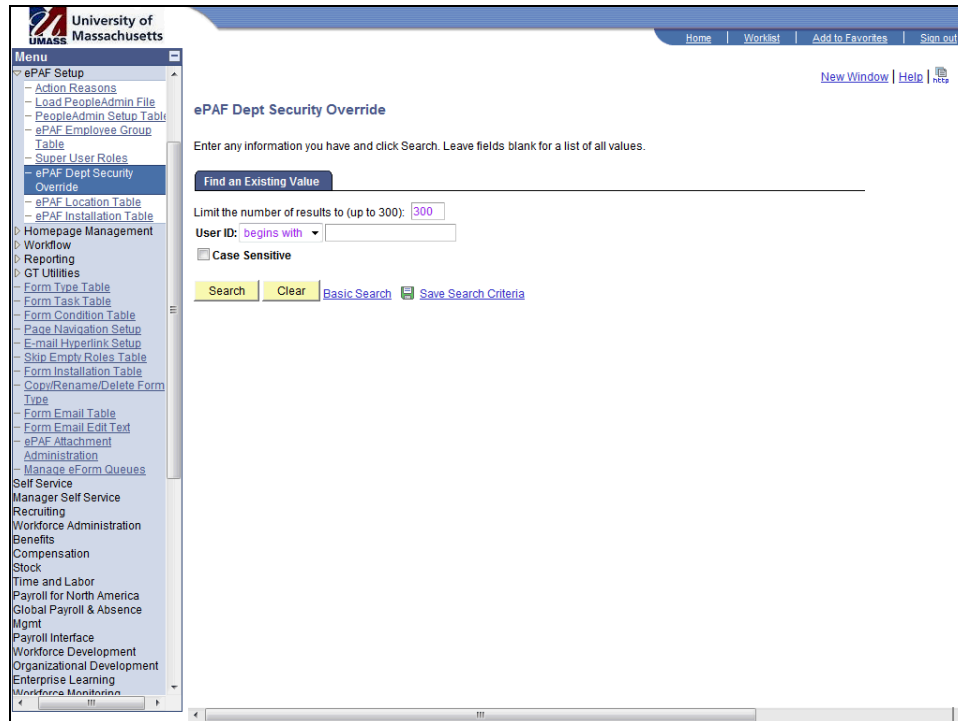
Step	Action
1.	Begin by navigating to the <b>ePAF Dept Security Override</b> page.  Click the <b>Manage GT eForms</b> link. <span style="border: 1px solid black; padding: 2px;">▶ Manage GT eForms</span>



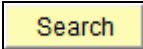
Step	Action
2.	Click the <b>ePAF Setup</b> link. 

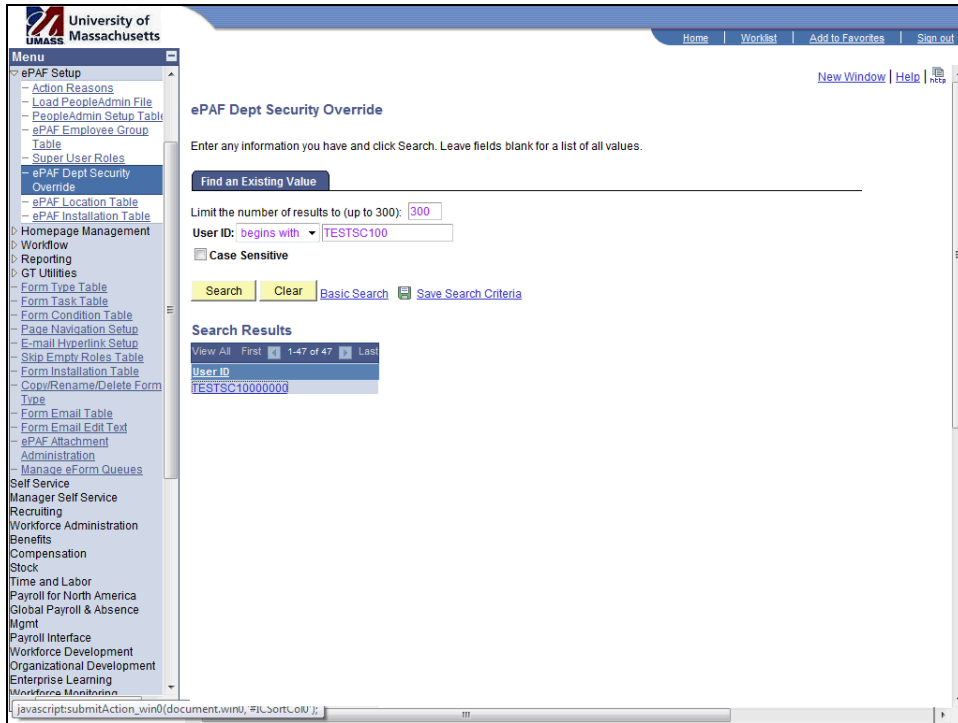



Step	Action
3.	Click the <b>ePAF Dept Security Override</b> link. 



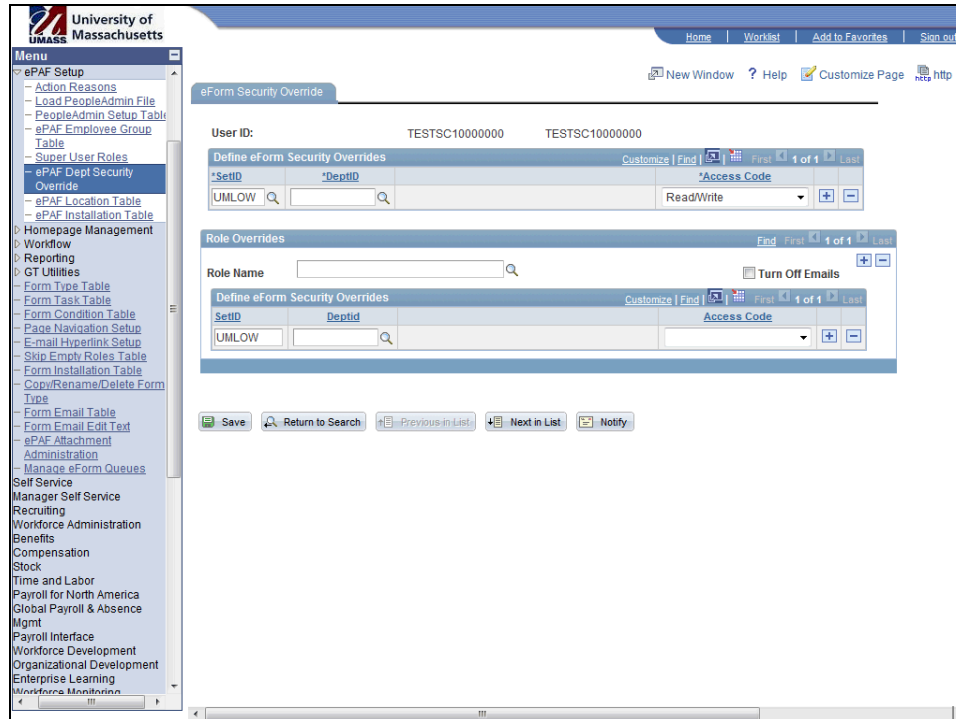
Step	Action
4.	<p>A user must have department security (access) before you can implement funneled security. For funneled security to be effective, the ePAF workflow role assigned must be also be governed by Department Security. Knowledge of that relationship resides with Data Custodians/Campus Leads. Department Security at an employee level is maintained by your Security Admin through IDM.</p> <p>Funneled security is used to give a user access rights for a specific department. The user may have access to many different departments, but you want to "funnel" or limit their department access permissions. This is done by using <b>ePAF Dept Security Override</b>.</p>
5.	<p>Begin by entering the desired information into the <b>User ID</b> field.</p> <p>For this example, enter "<b>TESTSC100</b>".</p>

Step	Action
6.	Click the <b>Search</b> button. 

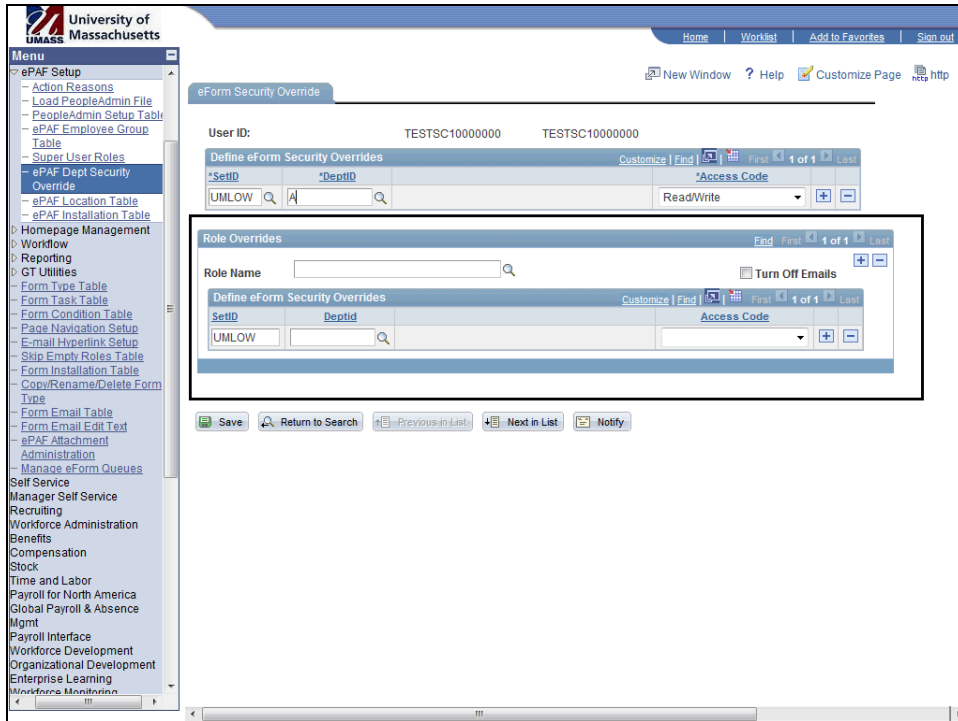


Step	Action
7.	For this example, click the <b>TESTSC10000000</b> link. 





Step	Action
8.	The Data Custodian will use <b>eForm Security Override</b> to update funneled security and give access permissions by department.
9.	<p>The <b>SetID</b> is the Campus Business Unit.</p> <p><b>Note:</b> Campus Business Unit values are:</p> <p>UMAMH – Amherst            UMBOS – Boston            UMCEN – President’s office            UMDAR – Dartmouth            UMLow – Lowell            UMWOR - Worcester</p>
10.	<p>The <b>DeptID</b> will determine the Dept/Dept Node that you want to give the user access to.</p> <p>Enter the desired information into the <b>DeptID</b> field.</p> <p>For this example, Enter "<b>A</b>".</p> <p><b>Note:</b> The campus will determine the values for this field.</p>
11.	The <b>Access Code</b> should be Read/Write.



Step	Action
12.	<b>Note:</b> The <b>Role Overrides</b> section is NOT included in the UMass design and until this feature is deployed, no instruction will be demonstrated.
13.	<b>Note:</b> You will need to use the <b>Save</b> button, before entering another eForm Security Overrides row.
14.	You may add as many rows as you need. Be sure to <b>Save</b> each row.  <b>Note:</b> To use funneled security the role assigned to the user must have been configured to use Department Security. Some examples are: department Initiator, Approver, etc.
15.	Congratulations, you have successfully updated funneled security. <b>End of Procedure.</b>

## Managing Administration (Admin Tool)

Upon completion of this section, you will be able to use the Admin Tool to assist the functional user in managing eForms.

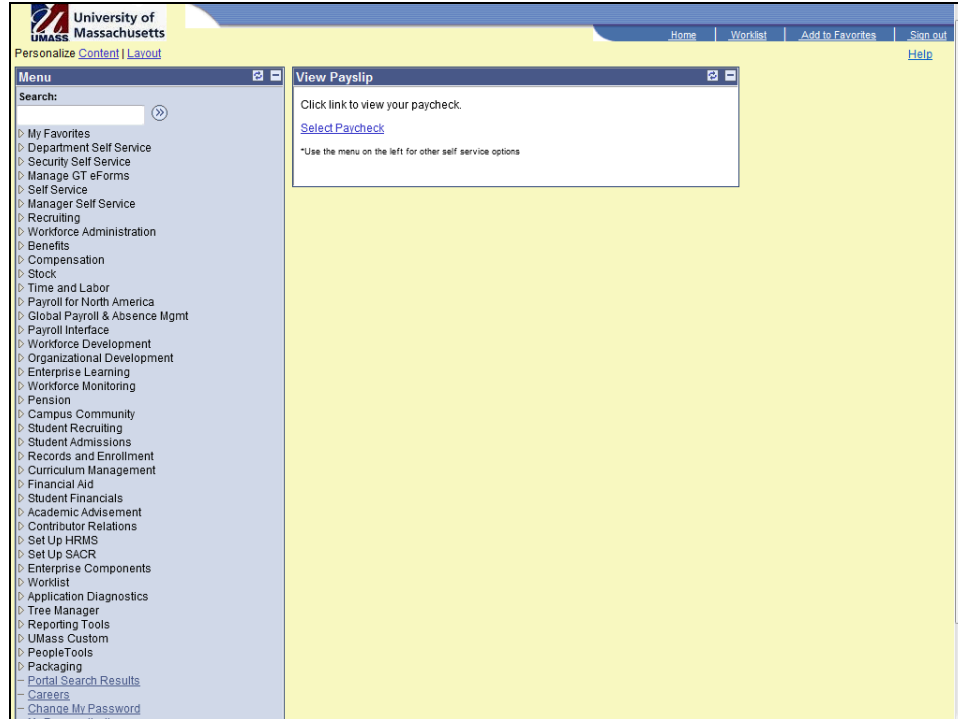
### Using the Admin Tool

Upon completion of this topic, you will be able to use the Admin Tool.

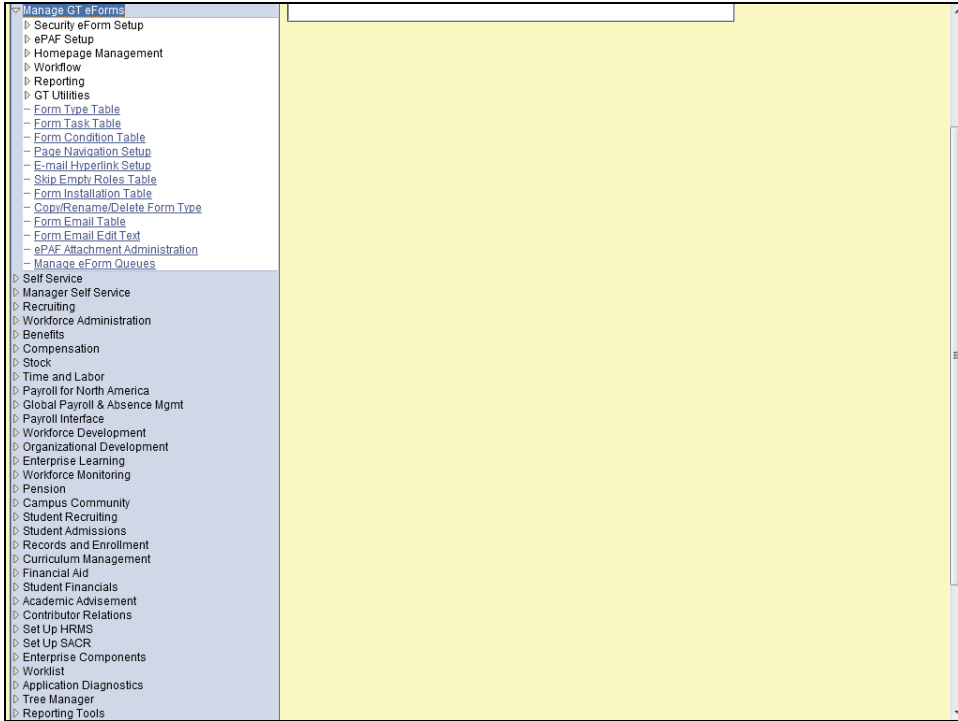
#### Procedure

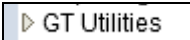
##### Consider this scenario:

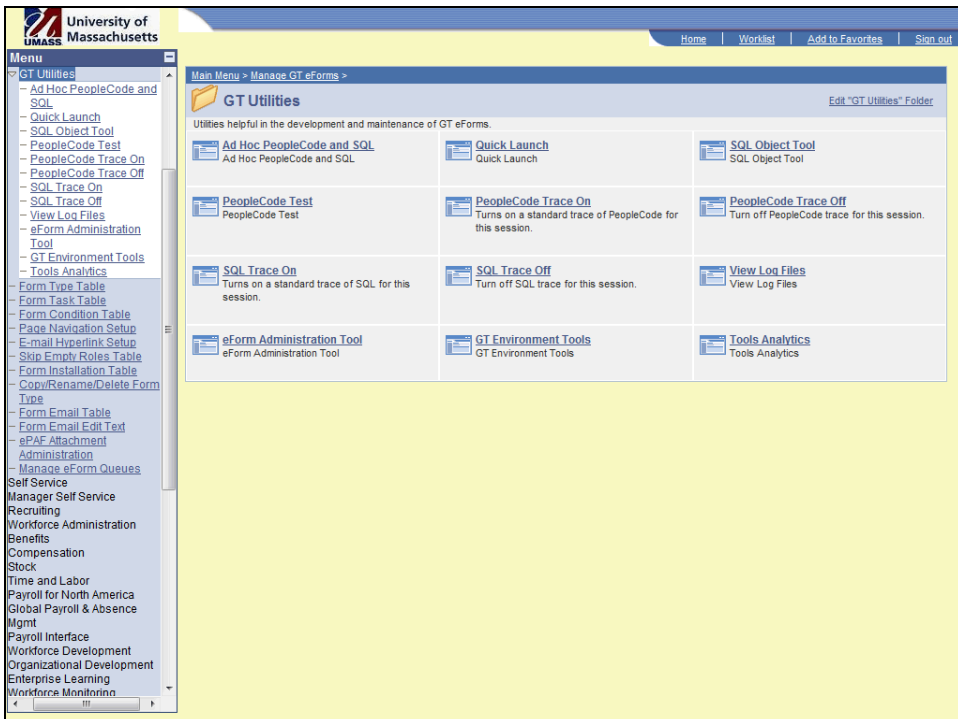
Your goal is to be able to use the Admin Tool.



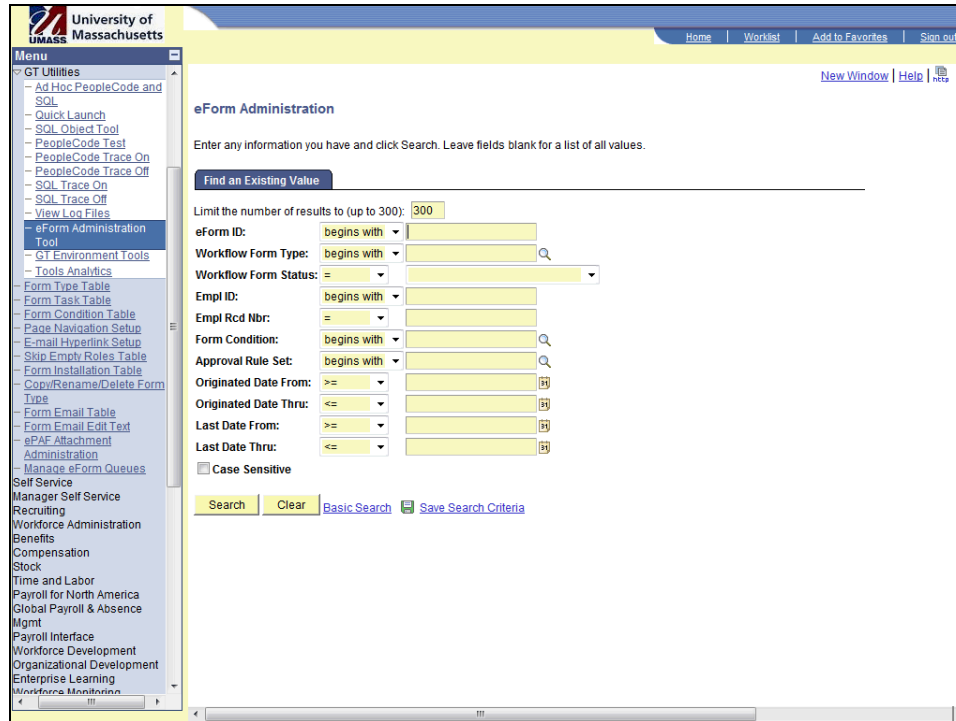
Step	Action
1.	Begin by navigating to the <b>eForm Administration</b> page. Click the <b>Manage GT eForms</b> link. <span style="border: 1px solid black; padding: 2px;">▶ Manage GT eForms</span>

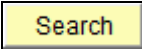



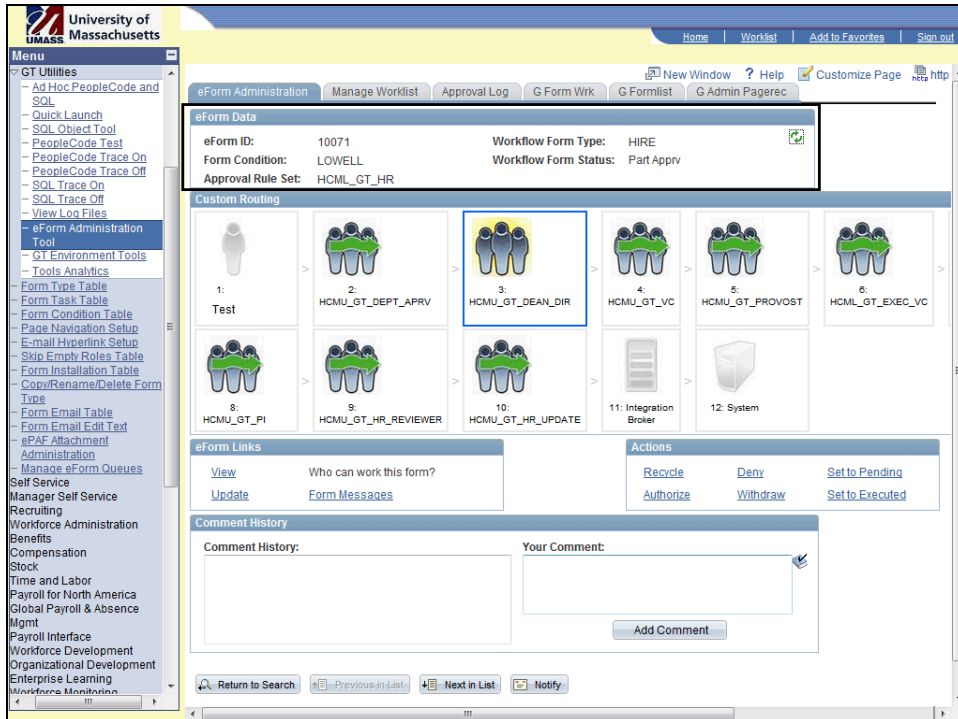
Step	Action
2.	Click the <b>GT Utilities</b> link. 



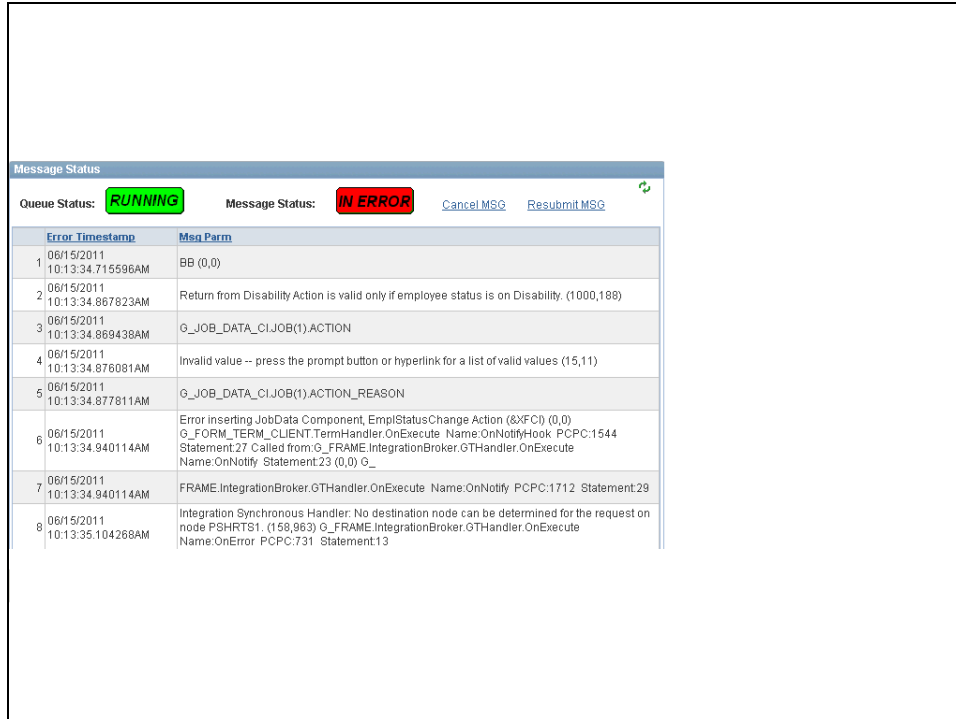
Step	Action
3.	Click the <b>eForm Administration Tool</b> link.



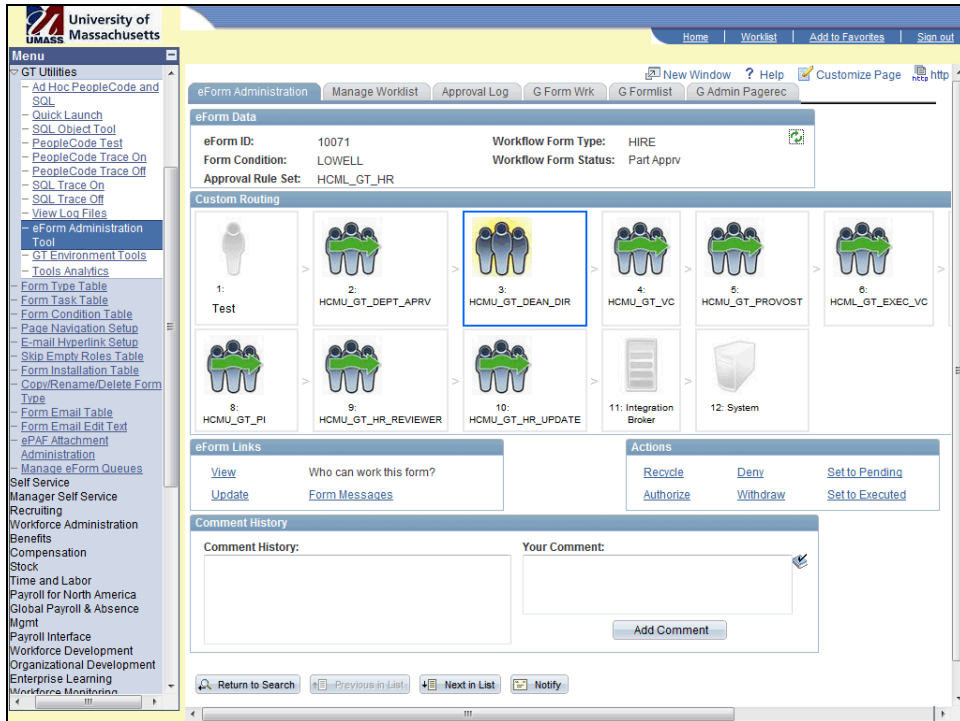
Step	Action
4.	The eForm Administrator tool is used to help manage eForms that need to have their routing changed after being submitted. Or maybe the form is in error and once the error is resolved, the form needs to be reprocessed. <b>eForm Administration</b> is used to help manage the eForm process without technical assistance.
5.	<p>The search area provides the ability to search on eforms by many different types of fields.</p> <p>For this example you want to see all the forms and you choose not to filter the search.</p> <p>Click the <b>Search</b> button.</p> 
6.	<p>For this example, click the <b>10071</b> link.</p> <p><b>Note:</b> You may also click on any of the other hyperlinks, in this line, to open eForm ID 10071.</p> 



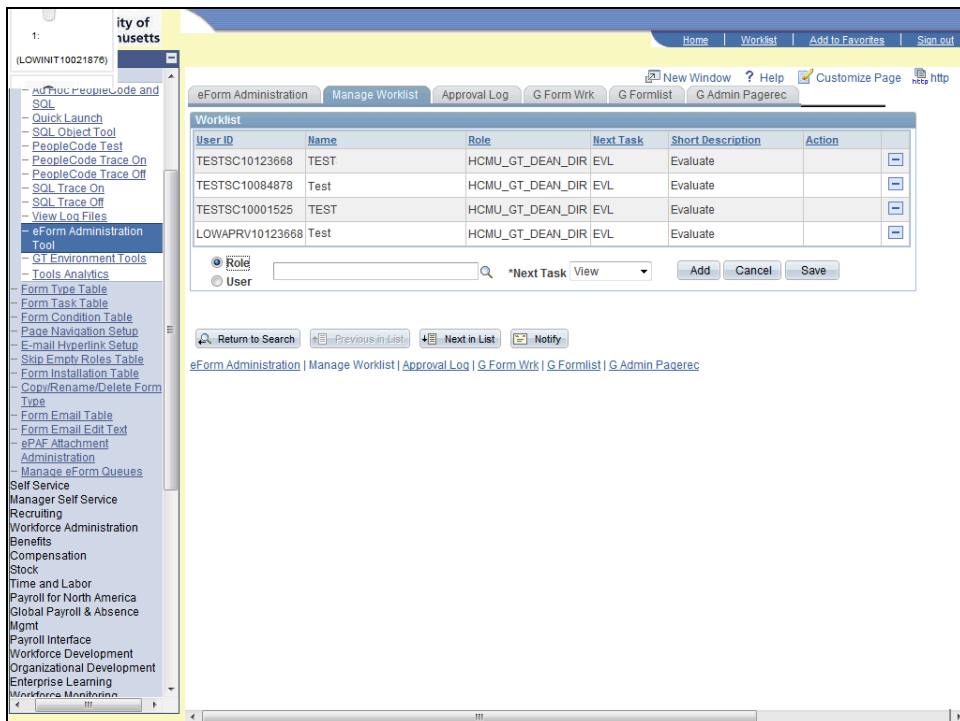
Step	Action
7.	<p>The <b>eForm Administration</b> tab has four sections.</p> <p>The first section is <b>eForm Data</b>, which displays only the key fields that assist you in identifying that you have accessed the correct eForm.</p>
8.	<p>The <b>Custom Routing</b> section is where you can change routing. It shows the workflow routing of the eForm and the step that the form has completed.</p> <p><i>Note:</i> By double clicking on one of the routing steps, sends the approval back to that step in the review process workflow. Simply double click the role you wish to repeat/reassign. This is helpful when there has been a disconnect with workflow assignments due to terminations or transfers.</p>
9.	<p>The <b>eForm Links</b> section allows you to link to the form view and perform actions.</p>
10.	<p>The <b>Actions</b> section has links that perform actions on the eForm.</p> <p><i>Note:</i> The availability of functions would be tied to the user's security.</p>
11.	<p>The <b>Comment History</b> section displays the comment history of the form and provides a section for you to add your comment.</p> <p><i>Note:</i> To add your comment, use the <b>Your Comment</b> field and then select the <b>Add Comment</b> button to save it.</p>



Step	Action
12.	<p><b>Note:</b> If the workflow status of the form is "In Error" the <b>Message Status</b> section will display. The <b>Error Timestamp</b> will display the error(s) on the form.</p> <p>Error messages are from PeopleSoft and can be generated by a variety of reasons. Normally, the error is a data issue and the message will identify the problematic record and field.</p> <p>Once the errors have been researched and resolved you can either <b>Cancel</b> or <b>Resubmit</b> the message to reprocess the system update.</p>

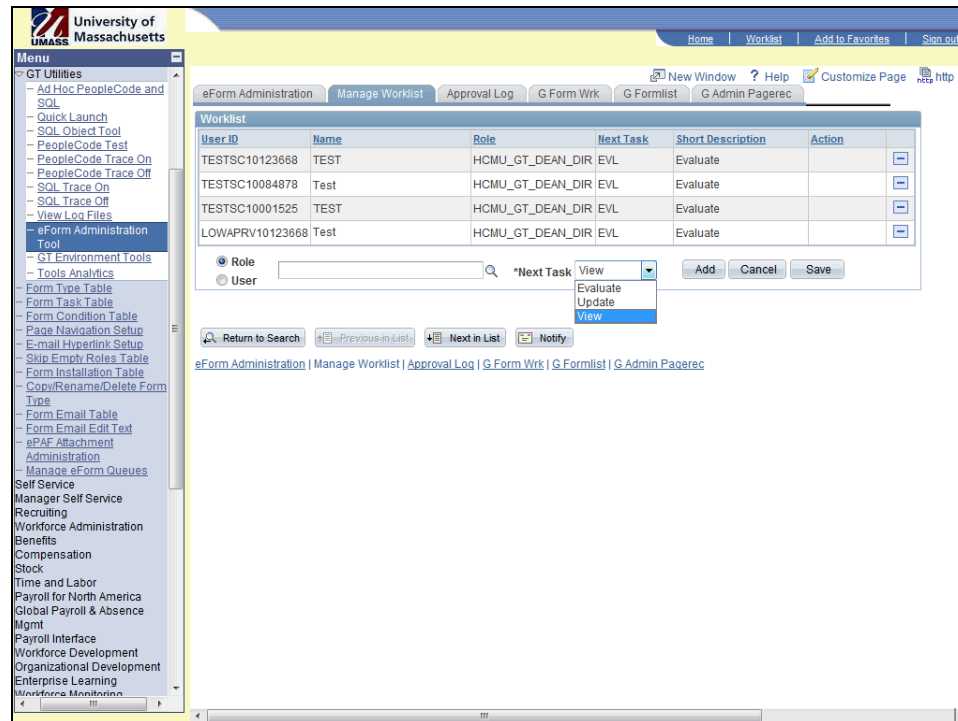


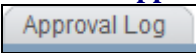
Step	Action
13.	Click the <b>Manage Worklist</b> tab. <div style="border: 1px solid gray; padding: 5px; display: inline-block; margin-top: 5px;">Manage Worklist</div>

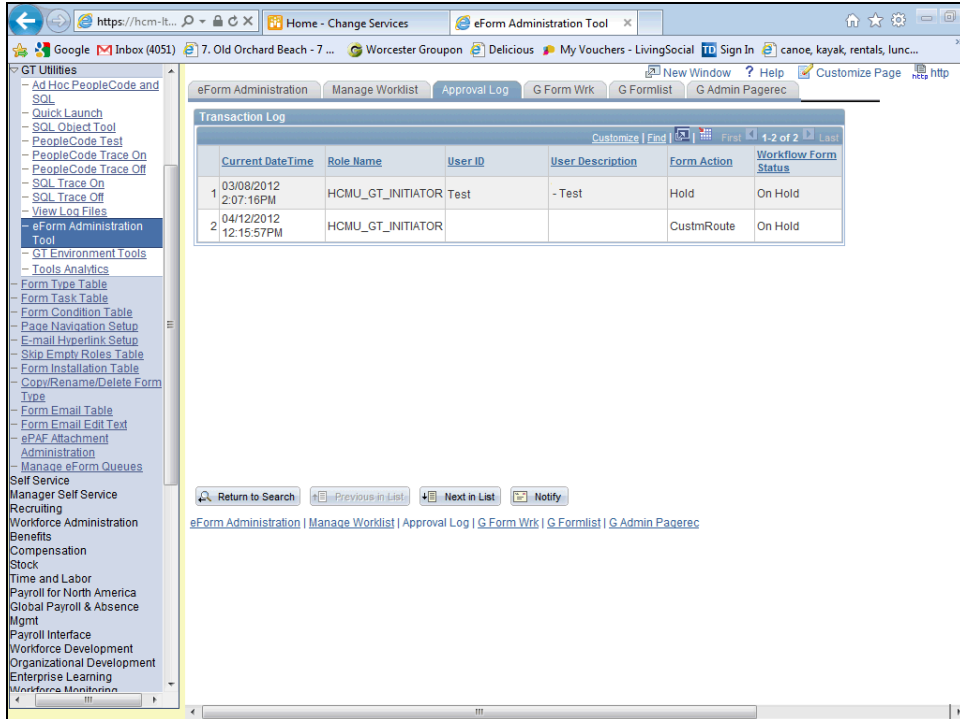




Step	Action
14.	The <b>Manage Worklist</b> tab will allow you to custom route the form.
15.	For example, if you want to delete this transaction from the TESTSC10123668 user's worklist, you would use the "-".
16.	Select the radio button to add a role or user to the form.



Step	Action
17.	Select the <b>Next Task</b> list if you want give the user View, Update or Evaluate options on the form.
18.	Select the <b>Add</b> button and the Worklist display will add the users you have identified.
19.	If the added list is not correct, use the <b>Cancel</b> button to revert back to the original list.
20.	If your list is correct and you have added the correct role/user, then you will use the <b>Save</b> button and the worklist item will be added to the identified users.
21.	Click the <b>Approval Log</b> tab. 



Step	Action
22.	The <b>Approval Log</b> tab displays a view of the approval log for the transaction.
23.	Congratulations! You have successfully used the eForm Administration Tool. <b>End of Procedure.</b>