



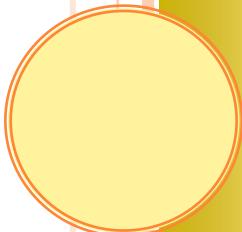
## **EPAF APPROVAL PROCESS - USER MANUAL**

***Initiator User Manual for the “Approval Process”***

This manual provides step by step information on the approval process.

**Developed by:**  
**Learning & Development Group**  
**Human Resources Diversity & Inclusion**

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# EPAF Approval Process - User Manual

## EPAF AUTOMATED FORM

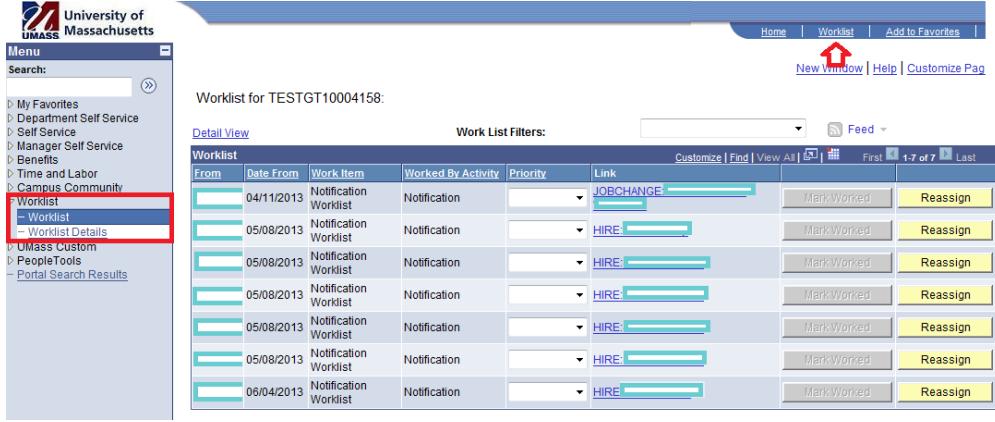
EPAF (electronic personnel action form) is a module within PeopleSoft that allows for paperless employment transactions such as hiring an employee, job changes and employment status changes. The EPAF is initiated by a department initiator then it is electronically routed for appropriate approvals, notifications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

### Approving an EPAF

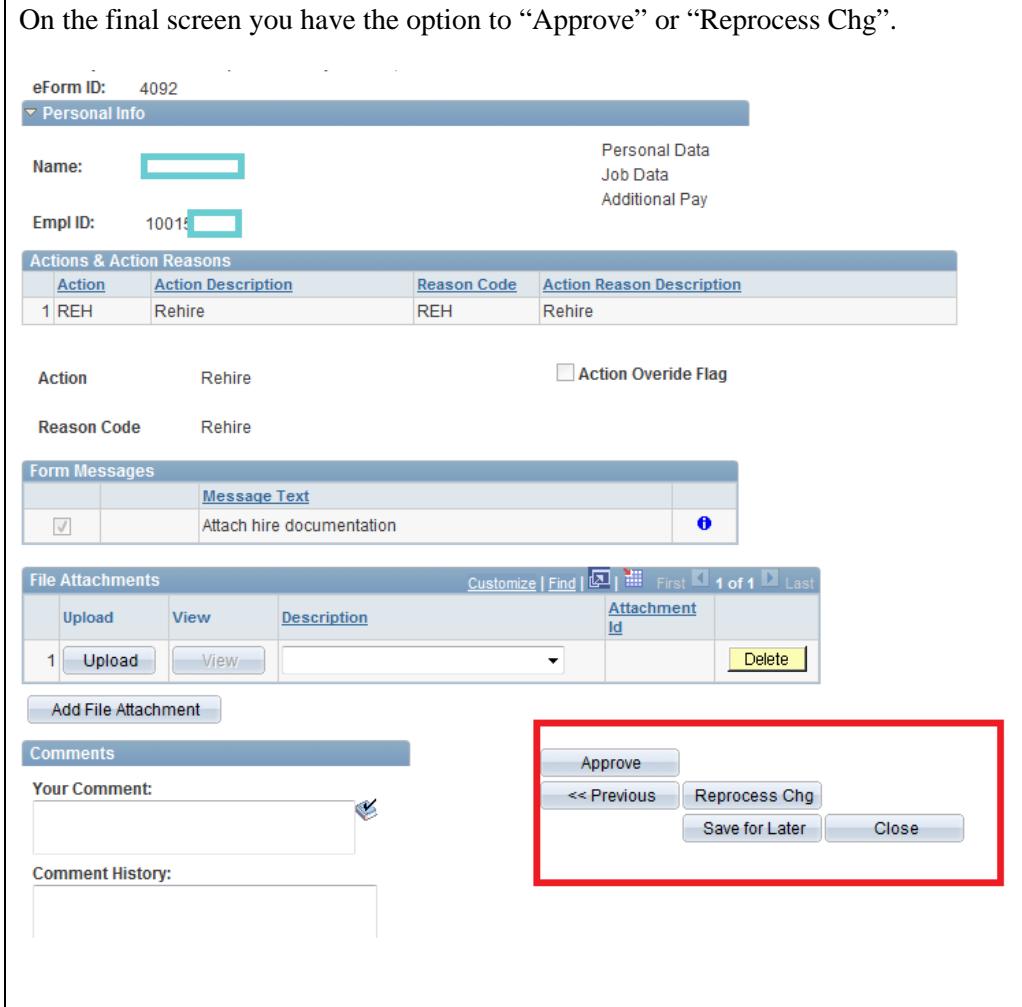
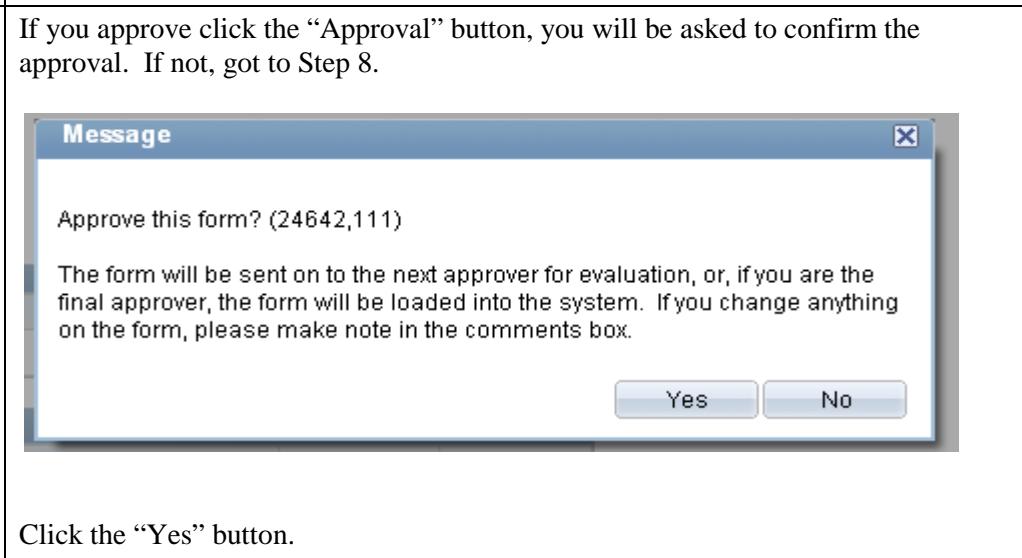
Upon completion of this section, you will be able to:

- Approve an EPAF

Step	Action
1.	<p>Begin by logging into <a href="#">HR Direct</a></p>  A screenshot of the HR Direct login page. The page has a header with 'Human Resources' and 'HR Direct'. Below the header is a navigation bar with links for 'HR Direct', 'Immigration Services', 'Learning & Development', 'Compensation', and 'Employee Relations'. The main content area is titled 'Welcome to HR Direct' and features a photo of a woman smiling at a computer. A button labeled 'HR Direct Login' is prominently displayed. Below the button, text reads 'Click the button below to access HR Direct'. At the bottom of the page, there is a note: 'The self-service application available to all UMASS Medical School employees to manage their human resource and payroll information.' <p>Quick Links</p> <ul style="list-style-type: none"><li>• <a href="#">2011 W-2 Emp</a></li><li>• <a href="#">View and Print</a></li><li>• <a href="#">View and Print</a></li><li>• <a href="#">View and Updat</a></li><li>• <a href="#">View and Updat</a></li><li>• <a href="#">2012 Payroll Ca</a></li><li>• <a href="#">Finance Login</a></li><li>• <a href="#">Summit Login</a></li><li>• <a href="#">Finance/Summ</a></li></ul>

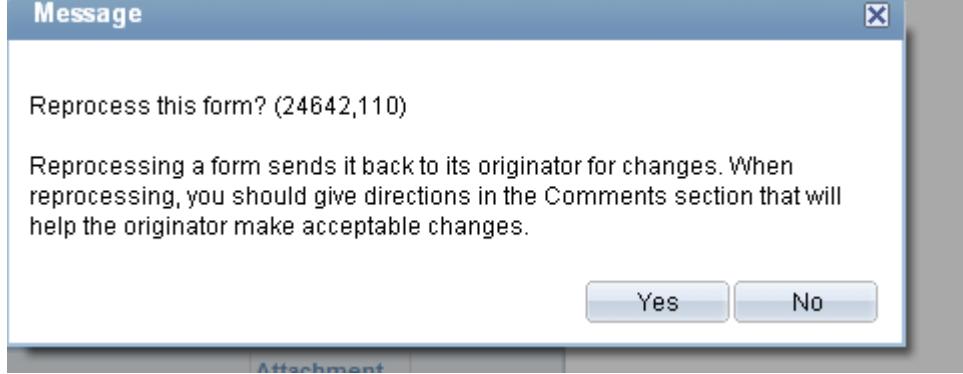
Step	Action
2.	<p>After logging into HR Direct, click on the worklist link. This will bring up everything in your list to approve.</p> 
3.	<p>In the Link column, select the <b>EPFA</b> to review.</p> 

Step	Action
4.	<p>All the information on the form should be reviewed for accuracy before approval. Click on “Next” to scroll between screens.</p> <p>Form ID: 4092</p> <p><b>Personal Info</b></p> <p>Name: <input type="text"/> Personal Data Empl ID: <input type="text"/> Empl Rcd#: Job Data Additional Pay</p> <p><b>Applicant Data</b></p> <p>Applicant ID Job Opening ID</p> <p><b>Job Data</b></p> <p>Effective Date: 04/28/2013</p> <p>Employee Group: Professional (W60) Non Unit</p> <p>Is this a Positioned Job? No</p> <p>Supervisor ID: 1000 <input type="text"/> <input type="text"/> Department: W404500 Neurobiology</p> <p>Job Code: MA0015 Library Assistant III Full/Part Time Part-Time</p> <p>Location Code: MED SCHOOL Medical School Regular/Temporary Regular</p> <p>Standard Hours: 20.00 FTE: 0.500000</p> <p>Mail Drop ID: IM1</p> <p style="text-align: right;"><a href="#">&lt;&lt; Previous</a> <a href="#">Next &gt;&gt;</a> <span style="color: red;">←</span> <a href="#">Save for Later</a></p>

Step	Action
5.	<p>On the final screen you have the option to “Approve” or “Reprocess Chg”.</p>  <p>The screenshot shows the final step of an eForm. It includes fields for Name and Empl ID, a table of Actions &amp; Action Reasons (1 REH Rehire), and a Form Messages section with a note to attach documentation. Below these are File Attachments and a Comments section. A red box highlights the Approval buttons: Approve, &lt;&lt; Previous, Reprocess Chg, Save for Later, and Close.</p>
6.	<p>If you approve click the “Approval” button, you will be asked to confirm the approval. If not, got to Step 8.</p>  <p>The dialog box contains the text: "Approve this form? (24642,111)" and "The form will be sent on to the next approver for evaluation, or, if you are the final approver, the form will be loaded into the system. If you change anything on the form, please make note in the comments box." It has "Yes" and "No" buttons.</p> <p>Click the “Yes” button.</p>

Step	Action
7.	<p>The next workflow approver role will show in the “Process Visualizer” section.</p> <p><b>Evaluate Hire</b></p> <p><b>Step 4 of 4: Form Finalized</b></p> <p>onratulations! You have successfully evaluated this form.</p> <p>Form ID: 4092</p> <p><b>Personal Info</b></p> <p>Name: Brian Bishop</p> <p>Empl ID: 10015016</p> <p>Personal Data Job Data Additional Pay</p> <p>Form Status</p> <p>Form ID: 4092</p> <p>You have just APPROVED this form. This action passed the form to HCMU_GT_PI for further processing.</p> <p><b>Process Visualizer</b></p> <pre> graph LR     1[1. Holdelli, Colleen (TESTGT10084781)] --&gt; 2[2. HCMU_GT_DEPT_APRV]     2 --&gt; 3[3. HCMU_GT_CE_ADMIN]     3 --&gt; 4[4. HCMU_GT_PI]     4 --&gt; 5[5. HCMW_GT_FIN_DEPT_HD]     5 --&gt; 6[6. HCMW_GT_FIN_DEPT_HD2]     6 --&gt; 7[7. HCMU_GT_GRANTS]     7 --&gt; 8[8. HCMU_GT_HR_REVIEWER]     8 --&gt; 9[9. HCMU_GT_HR_UPDATE]     9 --&gt; 10[Integration Broker]     10 --&gt; 11[System]     </pre>
8.	<p>If not approving, please put a note in the “Comments” section and click the “Reprocess Chg” button. This will send the EPAF form back to its originator for changes and will start the approval process from the beginning.</p> <p><b>Comments</b></p> <p>Your Comment: <input type="text"/></p> <p>Comment History: <input type="text"/></p> <p>Approve</p> <p>&lt;&lt; Previous Reprocess Chg</p> <p>Save for Later Close</p>



Step	Action
9.	<p>Once you click the “Reprocess Chg” button a second verification screen will pop up to verify. Click “Yes”.</p> 
10.	<p>The next workflow approver role will show in the “Process Visualizer” section</p> 