

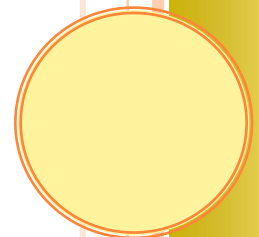


EPAF APPROVAL PROCESS - USER MANUAL

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
11/20/2012**



EPAF Approval Process - User Manual

EPAF AUTOMATED FORM

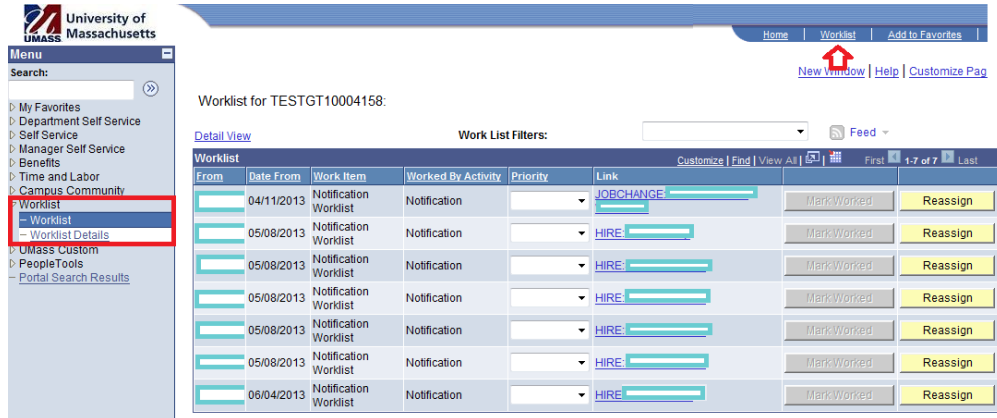
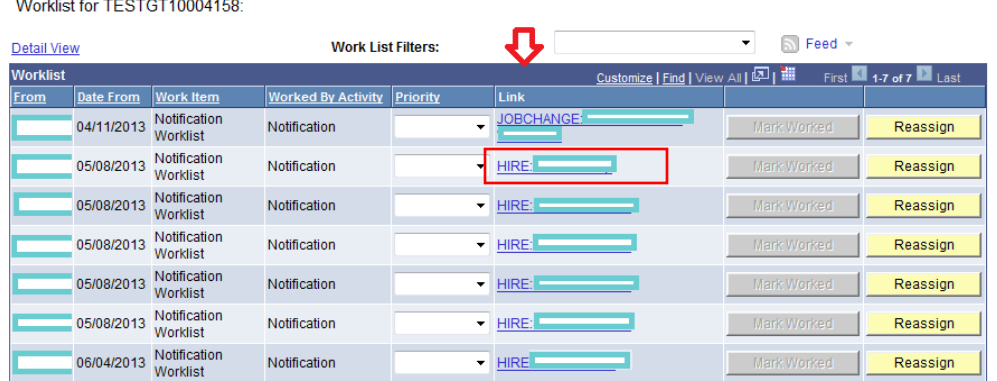
EPAF (electronic personnel action form) is a module within PeopleSoft that allows for paperless employment transactions such as hiring an employee, job changes and employment status changes. The EPAF is initiated by a department initiator then it is electronically routed for appropriate approvals, notifications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


Approving an EPAF

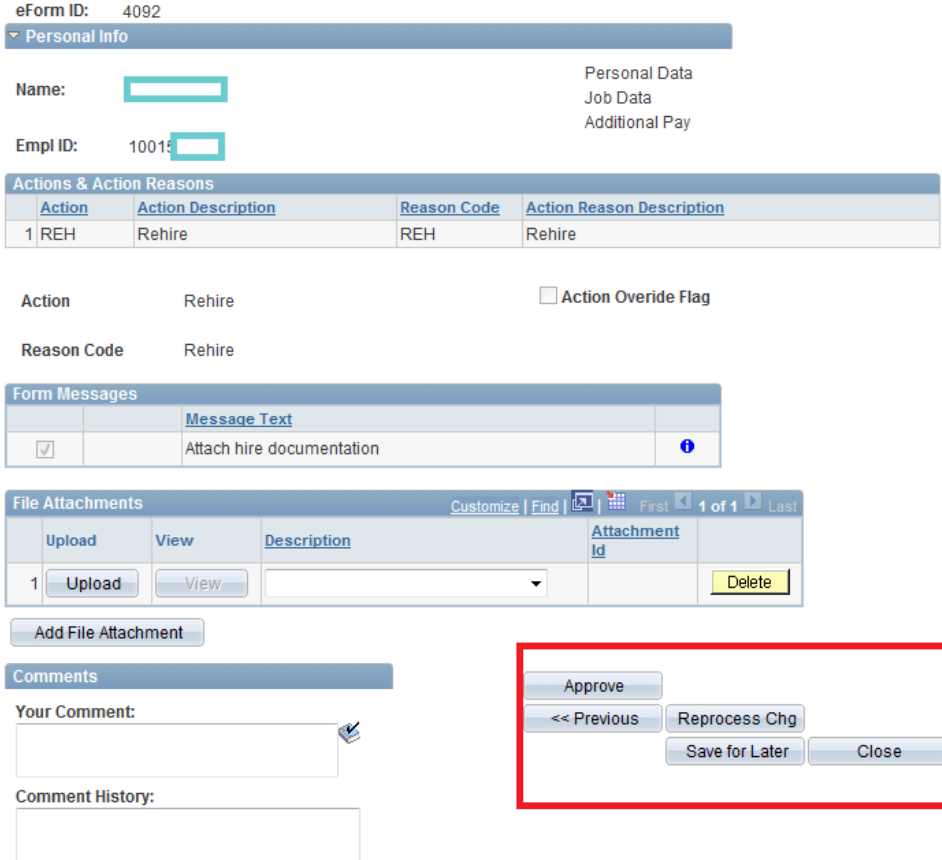
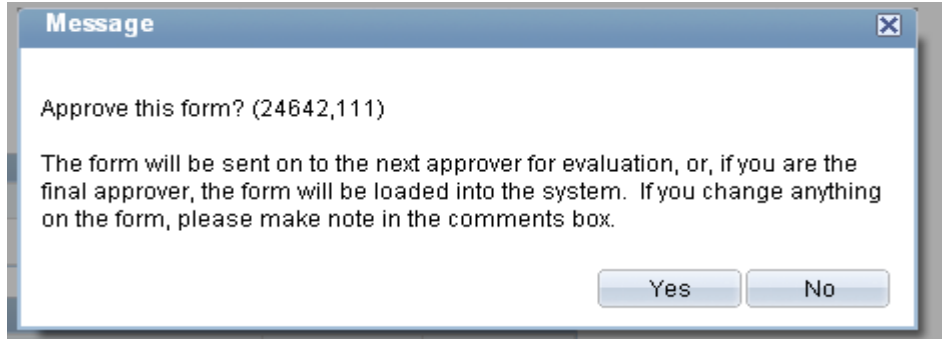
Upon completion of this section, you will be able to:

- Approve an EPAF

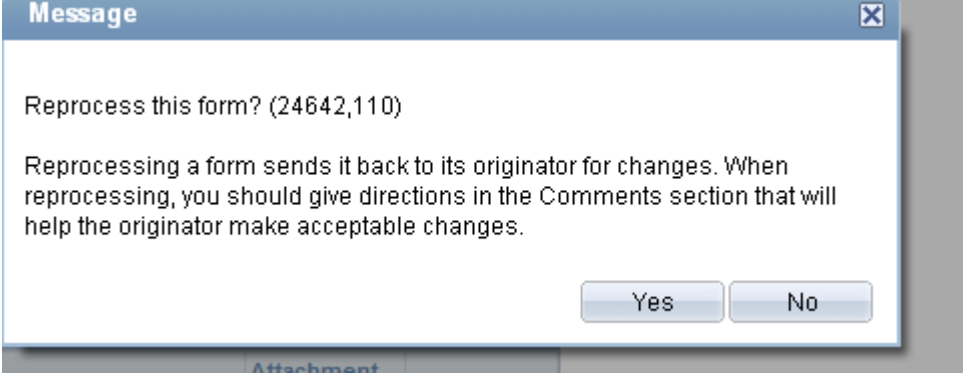
Step	Action
1.	<p>Begin by logging into HR Direct</p>  <p>The self-service application available to all UMASS Medical School employees to manage their human resource and payroll information.</p>

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> <div></div>
3.	<p>In the Link column, select the EPFA to review.</p> <div></div>

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>Personal Info</p> <p>Name: <input type="text"/> Personal Data Job Data Additional Pay</p> <p>Empl ID: <input type="text"/> Empl Rcd#: <input type="text"/></p> <p>Applicant Data</p> <p>Applicant ID: <input type="text"/> Job Opening ID: <input type="text"/></p> <p>Job Data</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"/></p> <p>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;"> <input data-bbox="927 1367 1081 1398" type="button" value=" << Previous "/> <input data-bbox="1089 1367 1243 1398" type="button" value=" Next >> "/> <input data-bbox="1089 1402 1243 1434" type="button" value=" Save for Later "/>  </p>

Step	Action
5.	<p>On the final screen you have the option to “Approve” or “Reprocess Chg”.</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>Click the “Yes” button.</p>

Step	Action
7.	<p>The next workflow approver role will show in the “Process Visualizer” section.</p> <div data-bbox="394 384 1385 1029"> <div> <div>Evaluate Hire</div> <div> <div>Step 4 of 4: Form Finalized</div> <div> <div>Authoring by</div> <div>GIDEON TAYLOR</div> </div> </div> <div> <div>Form ID: 4092</div> <div>Personal Info</div> </div> <div> <div>Name: Brian Bishop</div> <div>Impl ID: 10015016</div> </div> <div> <div>Form Status</div> <div> <div>Form ID: 4092</div> <div>You have just APPROVED this form. This action passed the form to HCMU_GT_PI for further processing.</div> </div> </div> <div> <div>Process Visualizer</div> <div> <div>1: Jaldelli, Colleen J TESTGT10084761</div> <div>2: HCMU_GT_DEPT_APRV (34 days 2 hours 26 minutes)</div> <div>3: HCMU_GT_CE_ADMIN</div> <div>4: HCMU_GT_PI</div> <div>5: HCMW_GT_FIN_DEPT_HD</div> <div>6: HCMW_GT_FIN_DEPT_HD2</div> <div>7: HCMU_GT_GRANTS</div> <div>8: HCMU_GT_HR_REVIEWER</div> <div>9: HCMU_GT_HR_UPDATE</div> <div>10: Integration Broker</div> <div>11: System</div> </div> </div> </div> </div>
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> <div data-bbox="394 1255 1339 1451"> <div> <div>Comments</div> <div> <div>Your Comment:</div> <div></div> </div> <div> <div>Comment History:</div> <div></div> </div> </div> <div> <div>Approve</div> <div><< Previous</div> <div>Reprocess Chg</div> <div>Save for Later</div> <div>Close</div> </div> </div>

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> 