



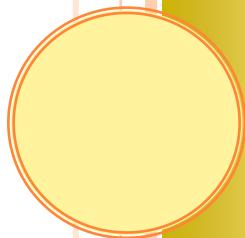
EPAF HIRING PROCESS - USER MANUAL

Initiator User Manual for “Hiring Process”

This manual provides step by step information on how to enter a New Hire.

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

11/20/2012



10

EPAF Hiring Process - User Manual

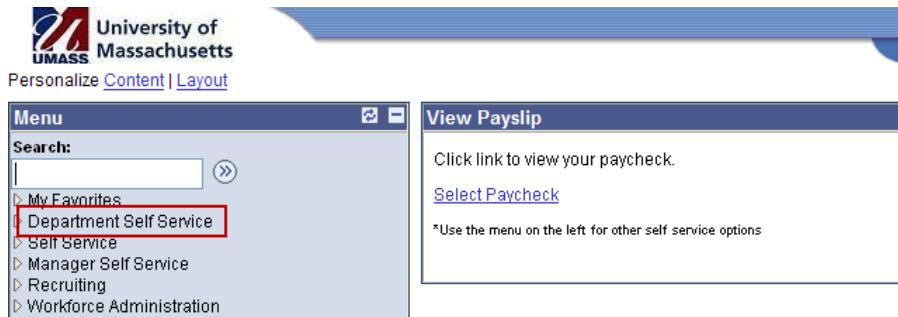
EPAF AUTOMATED FORM

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.

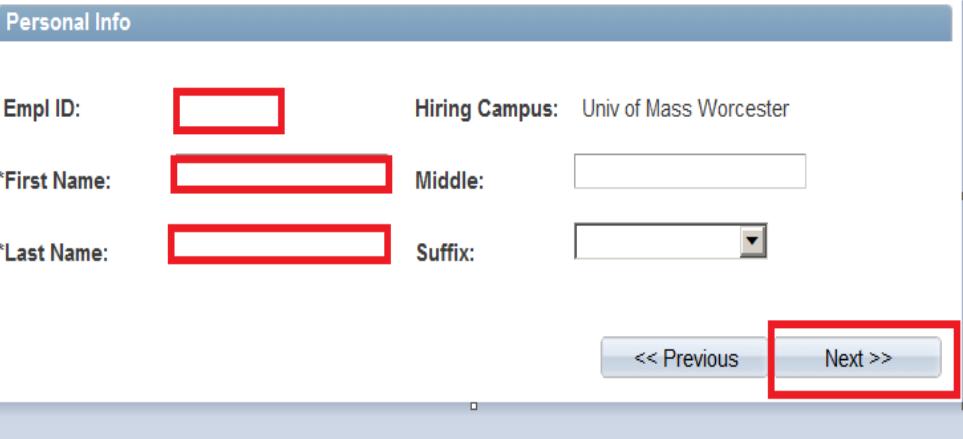
Hiring a Person (Initiator)

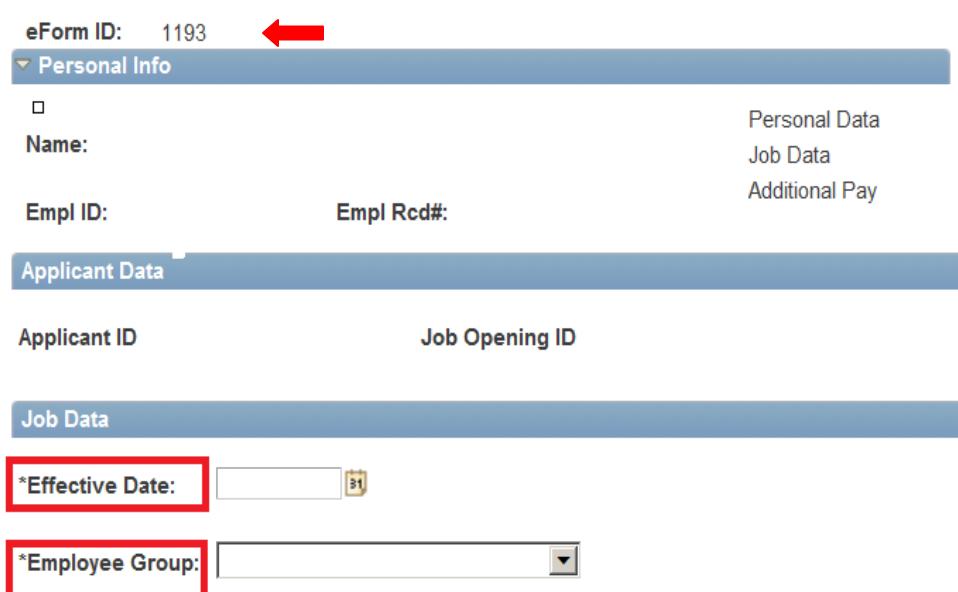
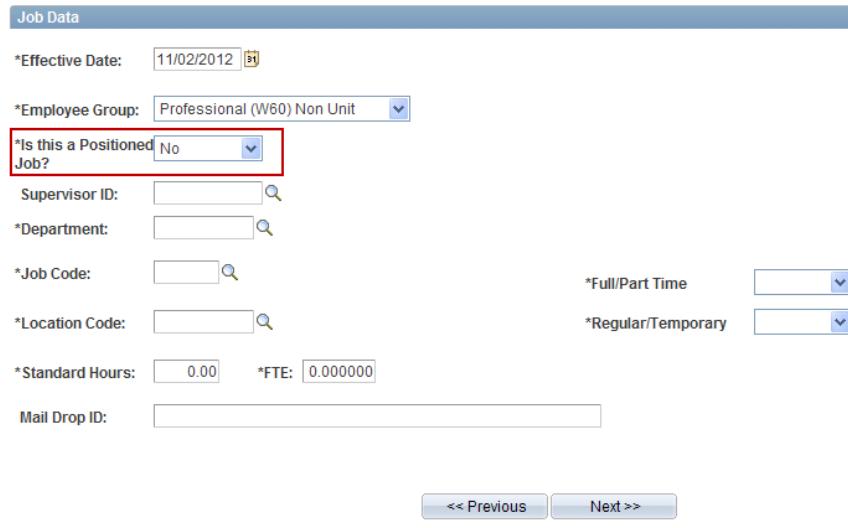
Upon completion of this section, you will be able to:

- Hire an employee into a job

Step	Action
1.	<p>Begin by logging into HR Direct</p> 
2.	<p>After logging into HR Direct, click on the Department Self Service link.</p> 

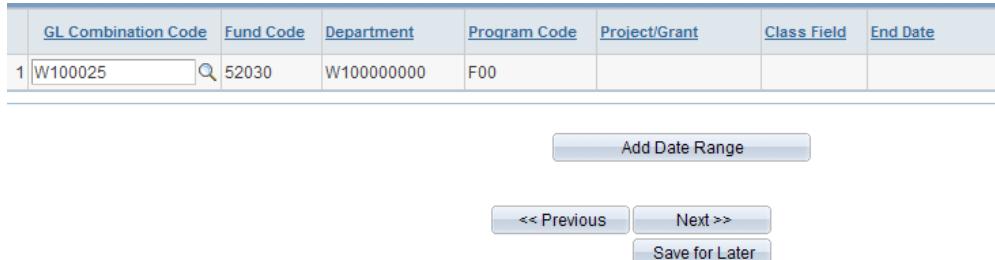
Step	Action
3.	<p>Click the EPAF Home Page link.</p> <p>The EPAF Home Page is a useful area for managing PA Forms. Here you will see links to open your <u>worklist</u>, <u>start a new EPAF</u>, <u>resubmit, change or withdraw an EPAF</u>, or <u>view an EPAF</u>.</p> <p>Click the Start a new EPAF link.</p> 
4.	<p>Click on the Hire an Employee link.</p> 

Step	Action
5.	<p>For a rehired employee, please contact the HR Service Center (X65260) to retrieve the rehired employee's ID and record number. For a new hire, your Talent Specialist should have notified you through an Icims (applicant tracking system) notification of the employee ID and record number.</p> <p>Enter the Employee ID, Click Load Employee/Applicant Data button</p> 
6.	<p>Employee ID and name will populate. Click Next</p> 

Step	Action
7.	<p>You will notice that your PA Form has an eForm ID assigned to it. Note the eForm ID number to help track the PA Form after completion if needed.</p> <p>Enter the Effective Date, tab out of field.</p> <p>Select the appropriate Employee Group</p> 
8.	<p>For the field "Is this a positioned job?" Use the following guide:</p> <p>If employee is in a positioned job, select "Yes" and enter position number. All fields will populate. If employee is not in a positioned job, select "No" and complete all fields.</p> 

Step	Action
9.	<p>Highlighted fields show what will auto populate for a positioned job.</p> <p>Job Data</p> <p>*Effective Date: <input type="text" value="11/02/2012"/> </p> <p>*Employee Group: Professional (W60) Non Unit </p> <p>*Is this a Positioned Job? No </p> <p>Supervisor ID: <input type="text" value="10021872"/>  </p> <p>*Department: <input type="text" value="W875000"/>  Information Services</p> <p>*Job Code: <input type="text" value="MB2021"/>  Web Content Manager </p> <p>*Location Code: <input type="text" value="SOUTH ST"/>  South Street </p> <p>*Standard Hours: <input type="text" value="40.00"/> *FTE: <input type="text" value="1.000000"/> </p> <p>Mail Drop ID: <input type="text"/></p> <p style="text-align: center;"><< Previous Next >></p> <p>.</p>
10.	<p>In the Mail Drop ID field enter IM1 Click Next</p> <p>*Job Code: <input type="text" value="MB2021"/>  Web Content Manager </p> <p>*Location Code: <input type="text" value="SOUTH ST"/>  South Street </p> <p>*Standard Hours: <input type="text" value="40.00"/> *FTE: <input type="text" value="1.000000"/></p> <p>Mail Drop ID: <input type="text" value="IM1"/></p> <p style="text-align: center;"><< Previous Next >></p>

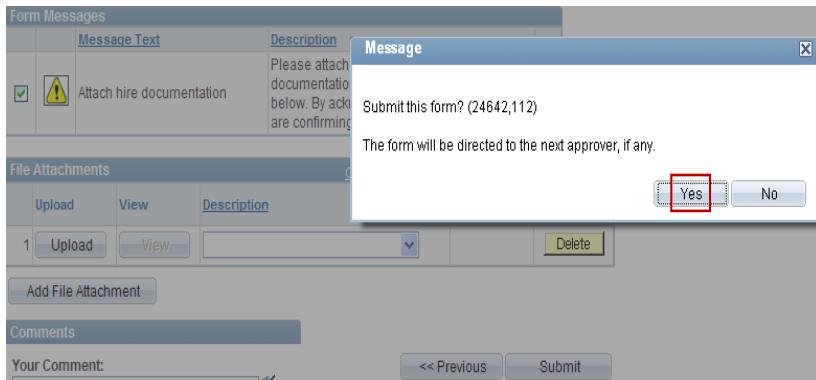
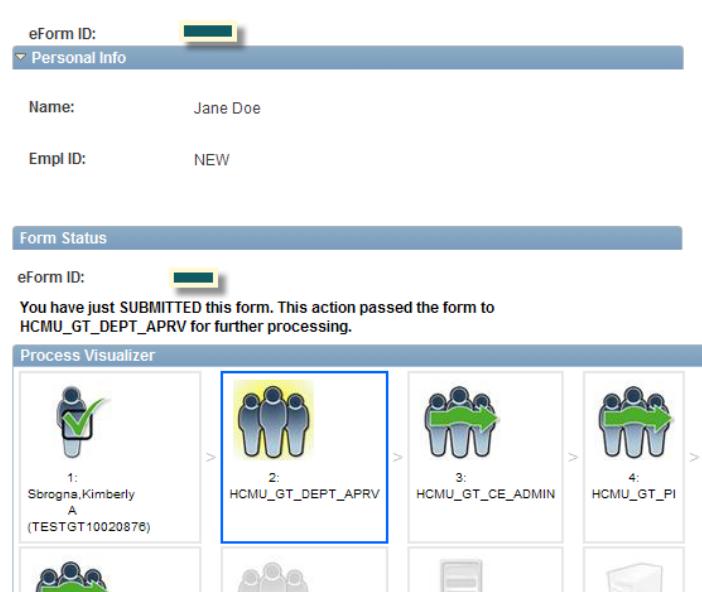
Step	Action
11.	<p>In the Employee Type, choose Exceptional Hourly (same as Biweekly) or Hourly.</p> <p>Enter either the Biweekly or Hourly Rate</p> <p>eForm ID: 17710</p> <p>Personal Info</p> <p>Name: Jane Doe</p> <p>Empl ID: NEW Empl Rcd#:</p> <p>Compensation Data</p> <p>Employee Type: Exception Hourly</p> <p>Bi-Weekly Rate: Exception Hourly Annual Rate: \$0.000</p> <p>Plan Hourly W60 Salary Grade 45</p> <p><input type="checkbox"/> Add Additional Components of Pay?</p> <p>Total Annual Rate \$0.000</p>
12.	<p>Additional Components of Pay is for few employees that receive Premium Pay (in addition to their regular salary). For most employees, this box is left unchecked.</p> <p>Compensation Data</p> <p>Employee Type: Exception Hourly</p> <p>Bi-Weekly Rate: 2000.000000 Annual Rate: \$0.000</p> <p>Plan W60 Salary Grade 45</p> <p><input type="checkbox"/> Add Additional Components of Pay?</p> <p>Total Annual Rate \$0.000</p>

Step	Action																											
13. For more detailed info on funding input, please see funding manual.	<p>Enter the GL Combination Code or use Look up icon to find the code and select.</p> <p>Note: Always search for “W” for Worcester campus.</p>  <p>Employee Type: Exception Hourly Weekly Rate: 2000.000000 Plan W60 Salary Grade 45</p> <p><input type="checkbox"/> Add Additional Components of Pay? Total Annual Rate</p> <p>Begin Date 11/02/2012</p> <p>Look Up GL Combination Code</p> <p>GL Combination Code: begins with <input type="text" value="W"/> Description: begins with <input type="text"/> Short Description: begins with <input type="text"/></p> <p>Look Up Clear Cancel Basic Lookup</p> <p>Search Look up (Alt+1)</p> <p>Only the first 300 results of a possible 6509 can be displayed. View 100 First 1-300 of 300 Last</p> <table border="1"> <thead> <tr> <th>GL Combination Code</th> <th>Description</th> <th>Short Description</th> </tr> </thead> <tbody> <tr><td>W100025</td><td>W100025</td><td>W100025</td></tr> <tr><td>W102526</td><td>W102526</td><td>W102526</td></tr> <tr><td>W102527</td><td>W102527</td><td>W102527</td></tr> <tr><td>W102528</td><td>W102528</td><td>W102528</td></tr> <tr><td>W102530</td><td>W102530</td><td>W102530</td></tr> <tr><td>W102531</td><td>W102531</td><td>W102531</td></tr> <tr><td>W102532</td><td>W102532</td><td>W102532</td></tr> <tr><td>W102533</td><td>W102533</td><td>W102533</td></tr> </tbody> </table>	GL Combination Code	Description	Short Description	W100025	W100025	W100025	W102526	W102526	W102526	W102527	W102527	W102527	W102528	W102528	W102528	W102530	W102530	W102530	W102531	W102531	W102531	W102532	W102532	W102532	W102533	W102533	W102533
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14.	<p>Once you select your code, the Fund Code, Department, Program Code will populate.</p> 																											

Step	Action
15.	<p>Scroll to the right to enter the Percent and Fund End Date (if applicable)</p>  <p>Note: The Worcester campus will always leave the Earnings Code blank.</p>
16.	<p>The Percent field MUST equal 100%.</p> <p>The Commitment Amount is an automatically calculated field.</p>   <p>Note: To add additional rows, use the plus sign. To delete rows, use the minus sign</p>
17.	<p>Click Next</p>

Step	Action
18.	<p>Review Union Code and update if needed.</p> <p>Personal Info</p> <p>Name: Jane Doe</p> <p>Empl ID: NEW Empl Rcd#:</p> <p>Time and Labor Data</p> <p>Union Code: W60 Non-Unit Professional</p> <p>*Pay Group: UMW UMass Worcester</p> <p>*Empl Class 2 Professional</p> <p>Workgroup: W_PROF Professional</p> <p>Taskgroup: UM_EXP Exception Taskgroup</p> <p>Time and Labor Schedule</p>
19.	<p>Scroll to bottom of page to Time and Labor Schedule section. If schedule is different from standard (M-F 8 hrs a day), check the Schedule Different box and note the schedule in the description box. Click Next</p> <p>Time and Labor Schedule</p> <p><input checked="" type="checkbox"/> Schedule different from standard?</p> <p>Schedule Description: Employee schedule will be two days a week, 10 hours a day</p>

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20.	<p>Action and Reason Code will prepopulate. NOTE: make sure action reason is correct.</p> <p>Actions & Action Reasons</p> <table border="1"> <thead> <tr> <th>Action</th> <th>Action Description</th> <th>Reason Code</th> <th>Action Reason Description</th> </tr> </thead> <tbody> <tr> <td>1 HIR</td> <td>Hire</td> <td>HIR</td> <td>Hire</td> </tr> </tbody> </table>	Action	Action Description	Reason Code	Action Reason Description	1 HIR	Hire	HIR	Hire																																			
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21.	<p>You must acknowledge Form Messages box by selecting the check box <input checked="" type="checkbox"/></p> <p>Form Messages</p> <table border="1"> <thead> <tr> <th></th> <th>Message Text</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td> Attach hire documentation</td> <td>Please attach all necessary hire documentation in the Attachments section below. By acknowledging this message, you are confirming the completion of this task.</td> </tr> </tbody> </table> <p>The File Attachments section is used only if you selected the Schedule Different check box in Step 19. If so, you need to upload the schedule form.</p> <p>You need to have the schedule form completed and saved. Click on the Upload button, browse to where the schedule form is saved, select file, Click Open Click Upload. The Attachment Id will populate. In the Description select “Other”.</p> <p>File Attachments</p> <table border="1"> <thead> <tr> <th colspan="4">File Attachments</th> <th>Customize</th> <th>Find</th> <th>First</th> <th>1 of 1</th> <th>Last</th> </tr> <tr> <th></th> <th>Upload</th> <th>View</th> <th>Description</th> <th colspan="5">Attachment Id</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Upload</td> <td>View</td> <td>Other</td> <td colspan="5">TESTGT101437782013-01-28-12.40.00</td> </tr> <tr> <td colspan="4"></td> <td>Delete</td> <td colspan="5"></td> </tr> </tbody> </table> <p>Add File Attachment</p> <p>Comments</p> <p>Your Comment:</p> <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> <p>Save for Later</p> <p>Submit</p> <p><< Previous</p> <p>Note: Please include ICIM's requisition number in the comment section.</p> <p>Click Submit</p>		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				Customize	Find	First	1 of 1	Last		Upload	View	Description	Attachment Id					1	Upload	View	Other	TESTGT101437782013-01-28-12.40.00									Delete					
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Step	Action
22.	<p>Confirm the pop up message. Click Yes</p> 
23.	<p>The Form Status indicates that you have submitted this form.</p> <p>Hire an Employee</p> <p>Step 6 of 6: Form Finalized</p> <p>Congratulations, you have successfully submitted this form!</p> 
24.	<p>Congratulations! You have added entered a new hire.</p> <p>End of Procedure.</p>

Step	Action																																												
25.	<p>To check the status of your form go to View an ePAF</p> <div data-bbox="393 375 638 734"> <ul style="list-style-type: none"> ▷ My Favorites ▽ Department Self Service <ul style="list-style-type: none"> – ePAF Home Page ▷ Self Service ▷ Manager Self Service ▷ Benefits ▷ Time and Labor ▷ Campus Community ▷ Worklist ▷ UMass Custom ▷ PeopleTools – Portal Search Results </div> <p>Electronic Personnel Action Form (ePAF) Home Page</p> <div data-bbox="654 375 1334 734"> <p> My Worklist Work the items that have been routed to you.</p> <p> Start a new ePAF Start a new ePAF, which will then be routed to the appropriate approvers.</p> <p> Resubmit, Change, or Withdraw an ePAF Make changes to an ePAF that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.</p> <p> View an ePAF View a recently submitted ePAF, including information about its handling so far. ePAFs submitted in the last month are listed here. This is a read-only view.</p> </div>																																												
26.	<p>Enter eForm ID or search by any of the categories.</p> <p>ePAF Employee History</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <div data-bbox="409 967 1225 1664"> <p>Find an Existing Value</p> <p>Limit the number of results to (up to 300): <input type="text" value="300"/></p> <table border="0"> <tr> <td>eForm ID:</td> <td><input type="text" value="began with"/></td> <td><input type="button" value="▼"/></td> <td><input style="width: 150px; height: 20px; border: 1px solid black; margin-left: 10px;" type="text"/></td> </tr> <tr> <td>Empl ID:</td> <td><input type="text" value="began with"/></td> <td><input type="button" value="▼"/></td> <td><input style="width: 150px; height: 20px; border: 1px solid black; margin-left: 10px;" type="text"/></td> </tr> <tr> <td>Empl Rcd Nbr:</td> <td><input type="text" value="="/></td> <td><input type="button" value="▼"/></td> <td><input style="width: 150px; height: 20px; border: 1px solid black; margin-left: 10px;" type="text"/></td> </tr> <tr> <td>Name:</td> <td><input type="text" value="began with"/></td> <td><input type="button" value="▼"/></td> <td><input style="width: 150px; 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27.	<p>A summary screen will come up. At the bottom of the page hit next. This screen will show you the status of workflow and who can work this form (a list of personnel for approval).</p> <p>View Hire</p> <p>Authored by GIDEON TAYLOR</p> <p>Step 2 of 2: Form History</p> <p>View the form data below. Click Next for the Form History page.</p> <p>FormList Fields</p> <table border="1"> <tr> <td>eForm ID: 4333</td> <td>Workflow Form Status: On Hold</td> <td></td> </tr> <tr> <td colspan="3">Workflow Form Type: HIRE</td> </tr> <tr> <td colspan="3">Original Operator: TESTGT10084761Colleen J Baldelli</td> </tr> <tr> <td colspan="3">Original Date/Time: 05/21/2013 2:38:17PM</td> </tr> <tr> <td colspan="3">Last Operator: TESTGT10084761Colleen J Baldelli</td> </tr> <tr> <td colspan="3">Last By Alternate Operator:</td> </tr> <tr> <td colspan="3">Last Date/Time: 05/21/2013 2:38:17PM</td> </tr> <tr> <td colspan="3">Next Approving Role/User:</td> </tr> <tr> <td colspan="3">Next Approving Role Name:</td> </tr> <tr> <td colspan="3">Who can work this form?</td> <td></td> </tr> </table> <p>Process Visualizer</p> <p>Transaction Log</p> <table border="1"> <thead> <tr> <th>Current Date/Time</th> <th>Role Name</th> <th>User ID</th> <th>User Description</th> <th>Form Action</th> <th>Workflow Form Status</th> </tr> </thead> <tbody> <tr> <td>05/21/2013 2:38:17PM</td> <td>HCMU_GT_INITIATOR</td> <td>TESTGT10084761</td> <td>Colleen J Baldelli</td> <td>Hold</td> <td>On Hold</td> </tr> </tbody> </table> <p>Form Messages</p> <p>Comments</p> <p>Your Comment: <input type="text"/></p> <p><< Previous Next >></p> <p><< Search Close</p> <p>Comment History:</p>	eForm ID: 4333	Workflow Form Status: On Hold		Workflow Form Type: HIRE			Original Operator: TESTGT10084761Colleen J Baldelli			Original Date/Time: 05/21/2013 2:38:17PM			Last Operator: TESTGT10084761Colleen J Baldelli			Last By Alternate Operator:			Last Date/Time: 05/21/2013 2:38:17PM			Next Approving Role/User:			Next Approving Role Name:			Who can work this form?				Current Date/Time	Role Name	User ID	User Description	Form Action	Workflow Form Status	05/21/2013 2:38:17PM	HCMU_GT_INITIATOR	TESTGT10084761	Colleen J Baldelli	Hold	On Hold
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