



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**

EPAF Hiring Process - User Manual


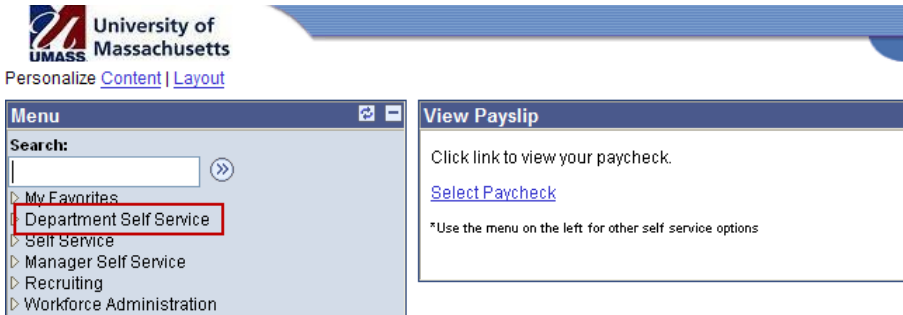
EPAF AUTOMATED FORM



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)












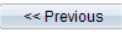
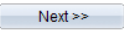
Upon completion of this section, you will be able to:

- 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> <div data-bbox="440 627 1312 1142">  </div>
4.	<p>Click on the Hire an Employee link.</p> <div data-bbox="440 1249 1408 1812">  </div>

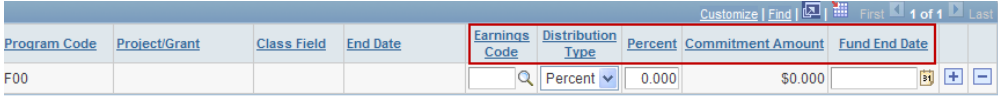


Step	Action
5.	<p>For a rehired employee, please contact the HR Service Center (X65260) to retrieve the rehired employee's ID and record number. For a new hire, your Talent Specialist should have notified you through an Icims (applicant tracking system) notification of the employee ID and record number.</p> <p>Enter the Employee ID, Click Load Employee/Applicant Data button</p> <div data-bbox="402 583 1144 1039"> <p>Hire an Employee</p> <p>Step 1 of 6: Enter ID</p> <p>If you know the SSN of the person you are hiring: Please enter the SSN and search for an existing employee or start a new employee.</p> <p>If you know the Employee ID of the person you are hiring: Please enter that information and search for the employee's record.</p> <p>If you know the Applicant ID and Job Opening ID of the person you are hiring: Please enter that information and search for the employee's record.</p> <p>If you do not know any of this information: Please start a new employee. (If the employee already exists, they will be tied to the form later in the process.)</p> <p>Employee ID: <input type="text"/></p> <p>Applicant ID: <input type="text"/> Job Opening ID: <input type="text"/></p> <p>Load Employee/Applicant Data <input type="button" value="Add New Employee"/></p> </div>
6.	<p>Employee ID and name will populate. Click Next</p> <div data-bbox="402 1171 1377 1612"> <p>Personal Info</p> <p>Empl ID: <input type="text"/> Hiring Campus: Univ of Mass Worcester</p> <p>*First Name: <input type="text"/> Middle: <input type="text"/></p> <p>*Last Name: <input type="text"/> Suffix: <input type="text"/></p> <p><input type="button" value="Previous"/> <input type="button" value="Next"/></p> </div>

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> <p>eForm ID: 1193 </p> <p>Personal Info</p> <p><input type="checkbox"/> Personal Data</p> <p>Name: Job Data</p> <p>Empl ID: Empl Rcd#: Additional Pay</p> <p>Applicant Data</p> <p>Applicant ID Job Opening ID</p> <p>Job Data</p> <p>*Effective Date: <input type="text"/> </p> <p>*Employee Group: <input type="text"/></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> <p>Job Data</p> <p>*Effective Date: <input type="text"/> </p> <p>*Employee Group: Professional (W60) Non Unit </p> <p>*Is this a Positioned Job? No </p> <p>Supervisor ID: <input type="text"/> </p> <p>*Department: <input type="text"/> </p> <p>*Job Code: <input type="text"/> </p> <p>*Full/Part Time <input type="text"/> </p> <p>*Location Code: <input type="text"/> </p> <p>*Regular/Temporary <input type="text"/> </p> <p>*Standard Hours: <input type="text"/> 0.00 *FTE: <input type="text"/> 0.000000</p> <p>Mail Drop ID: <input type="text"/></p> <p> </p>







Step	Action
9.	<p>Highlighted fields show what will auto populate for a positioned job.</p> <div data-bbox="402 380 1284 978"> <div>Job Data</div> <div>*Effective Date: 11/02/2012 </div> <div>*Employee Group: Professional (W60) Non Unit </div> <div>*Is this a Positioned Job? No </div> <div>Supervisor ID: 10021872 </div> <div>*Department: W875000 Information Services</div> <div>*Job Code: MB2021 Web Content Manager</div> <div>*Full/Part Time: Full-Time </div> <div>*Location Code: SOUTH ST South Street</div> <div>*Regular/Temporary: Regular </div> <div>*Standard Hours: 40.00</div> <div>*FTE: 1.000000</div> <div>Mail Drop ID: <input type="text"/></div> <div><< Previous Next >></div> </div>
10.	<p>In the Mail Drop ID field enter IM1 Click Next</p> <div data-bbox="402 1236 1382 1583"> <div>*Job Code: MB2021 Web Content Manager</div> <div>*Full/Part Time</div> <div>*Location Code: SOUTH ST South Street</div> <div>*Regular/Temp</div> <div>*Standard Hours: 40.00</div> <div>*FTE: 1.000000</div> <div>*Mail Drop ID: IM1</div> <div><< Previous Next >></div> </div>

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 Personal Data</p> <p>Empl ID: NEW Empl Rcd#: Job Data</p> <p>Additional Pay</p> <p>Compensation Data</p> <p>Employee Type: Exception Hourly</p> <p>Bi-Weekly Rate: Exception Hourly 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>
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> <div><div>Begin Date11/02/2012</div><table><tr><th></th><th>GL Combination Code</th><th>Fund Code</th><th>Department</th><th>Program Code</th><th>Project/Grant</th><th>Class</th></tr><tr><td>1</td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table><div>Add Date Range</div><div><< PreviousNext >></div><div>Save for Later</div></div> <div><div><div>Employee Type:Exception Hourly</div><div>Weekly Rate:2000.000000</div><div>PlanW60Salary Grade45</div><div>Add Additional Components of Pay?</div><div>Total Annual Rate</div><div>Begin Date11/02/2012</div><table><tr><th></th><th>GL Combination Code</th><th>Fund Code</th><th>Department</th></tr><tr><td>1</td><td></td><td></td><td></td></tr></table></div><div><div>Look Up</div><div>Look Up GL Combination Code</div><div>GL Combination Code:begins withW</div><div>Description:begins with</div><div>Short Description:begins with</div><div>Look UpClearCancelBasic Lookup</div><div>SearchLook up (Alt+1)</div><div>Only the first 300 results of a possible 6509 can be displayed.</div><div>View 100First1-300 of 300Last</div><table><tr><th>GL Combination Code</th><th>Description</th><th>Short Description</th></tr><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></table></div></div>		GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class	1								GL Combination Code	Fund Code	Department	1				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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W102533	W102533	W102533																																																
14.	<p>Once you select your code, the Fund Code, Department, Program Code will populate.</p> <div><table><tr><th></th><th>GL Combination Code</th><th>Fund Code</th><th>Department</th><th>Program Code</th><th>Project/Grant</th><th>Class Field</th><th>End Date</th></tr><tr><td>1</td><td>W100025</td><td>52030</td><td>W10000000</td><td>F00</td><td></td><td></td><td></td></tr></table><div>Add Date Range</div><div><< PreviousNext >></div><div>Save for Later</div></div>		GL Combination Code	Fund Code	Department	Program Code	Project/Grant	Class Field	End Date	1	W100025	52030	W10000000	F00																																				
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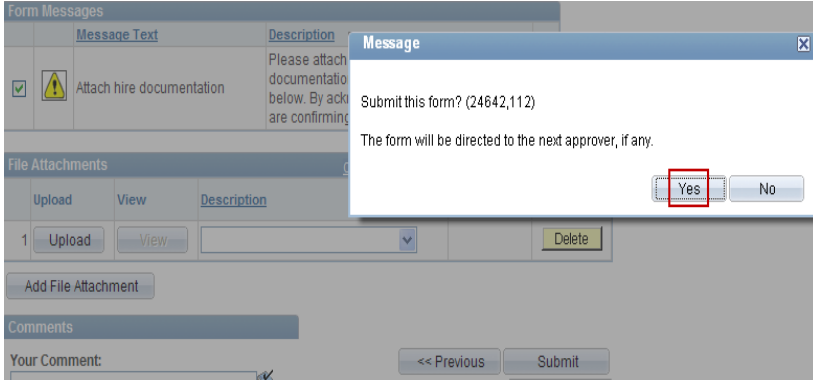
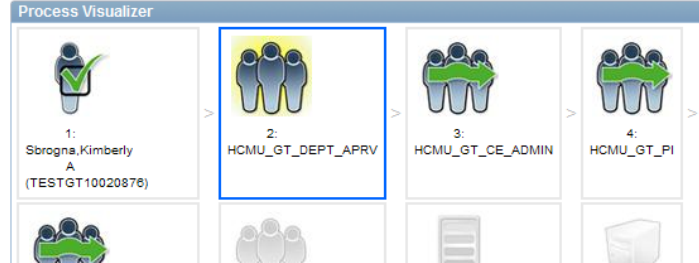
Step	Action
15.	<p>Scroll to the right to enter the Percent and Fund End Date (if applicable)</p>  <p>Note: The Worcester campus will always leave the Earnings Code blank.</p>
16.	<p>The Percent field MUST equal 100%.</p> <p>The Commitment Amount is an automatically calculated field.</p>   <p>Note: To add additional rows, use the plus sign. To delete rows, use the minus sign</p>
17.	Click Next





Step	Action
18.	<p>Review Union Code and update if needed.</p> <div> <div>Personal Info</div> <div> <div>Name: Jane Doe</div> <div>Empl ID: NEW Empl Rcd#:</div> </div> <div>Time and Labor Data</div> <div> <div>Union Code: W60 Non-Unit Professional</div> <div>*Pay Group: UMW UMass Worcester</div> <div>*Empl Class: 2 Professional</div> <div>Workgroup: W_PROF Professional</div> <div>Taskgroup: UM_EXP Exception Taskgroup</div> </div> <div>Time and Labor Schedule</div> </div>
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> <div> <div>Time and Labor Schedule</div> <div> <input checked="" type="checkbox"/> Schedule different from standard? </div> <div> Schedule Description: Employee schedule will be two days a week, 10 hours a day </div> </div>

Step	Action																				
20.	<p>Action and Reason Code will prepopulate. NOTE: make sure action reason is correct.</p> <div><div>Actions & Action Reasons</div><table><tr><th>Action</th><th>Action Description</th><th>Reason Code</th><th>Action Reason Description</th></tr><tr><td>1 HIR</td><td>Hire</td><td>HIR</td><td>Hire</td></tr></table></div>	Action	Action Description	Reason Code	Action Reason Description	1 HIR	Hire	HIR	Hire												
Action	Action Description	Reason Code	Action Reason Description																		
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21.	<div><div><input checked="" type="checkbox"/></div><p>You must acknowledge Form Messages box by selecting the check box</p><div><div>Form Messages</div><table><tr><th></th><th></th><th>Message Text</th><th>Description</th></tr><tr><td><input type="checkbox"/></td><td></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></table></div><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><div><div><div>File Attachments</div><div>Customize Find   First 1 of 1 Last</div><table><tr><th></th><th>Upload</th><th>View</th><th>Description</th><th>Attachment Id</th><th></th></tr><tr><td>1</td><td><input type="button" value="Upload"/></td><td><input type="button" value="View"/></td><td>Other</td><td>TESTGT101437782013-01-28-12.40.00</td><td><input type="button" value="Delete"/></td></tr></table><div><input type="button" value="Add File Attachment"/></div><div><div>Comments</div><div>Your Comment:</div><div><input type="text"/></div><div></div></div><div><div><< Previous</div><div>Submit</div><div>Save for Later</div></div></div></div></div>			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.		Upload	View	Description	Attachment Id		1	<input type="button" value="Upload"/>	<input type="button" value="View"/>	Other	TESTGT101437782013-01-28-12.40.00	<input type="button" value="Delete"/>
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Note: Please include ICIM’s requisition number in the comment section.

Click **Submit**

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> <p>eForm ID: [redacted]</p> <p>Personal Info</p> <p>Name: Jane Doe</p> <p>Empl ID: NEW</p> <p>Form Status</p> <p>eForm ID: [redacted]</p> <p>You have just SUBMITTED this form. This action passed the form to HCMU_GT_DEPT_APRV for further processing.</p> <p>Process Visualizer</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="394 373 638 730"> <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> <div data-bbox="667 373 1325 716"> <h3>Electronic Personnel Action Form (ePAF) Home Page</h3> <div>  My Worklist Work the items that have been routed to you. </div> <div>  Start a new ePAF Start a new ePAF, which will then be routed to the appropriate approvers. </div> <div>  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. </div> <div>  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. </div> </div>

