



EPAF LEAVE OF ABSENCE PROCESS - USER MANUAL

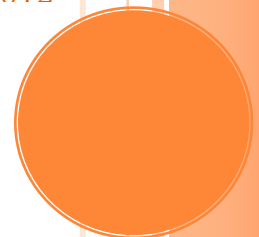
Initiator User Manual for Change in Employment Status

Leave of Absence Process (Unpaid) and Paid Leave of Absence

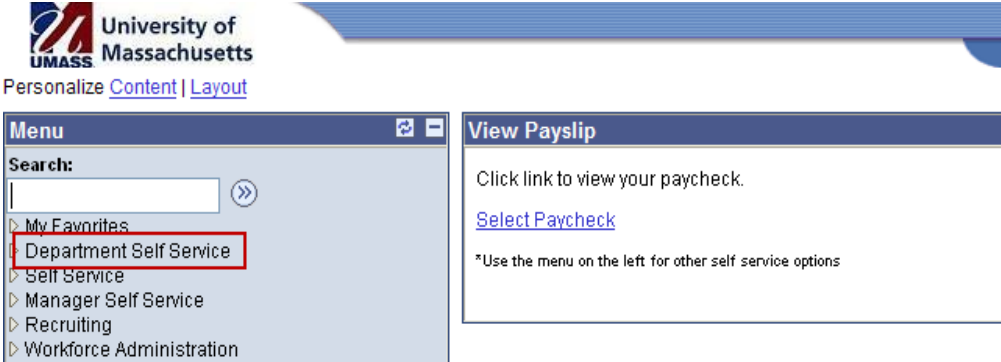
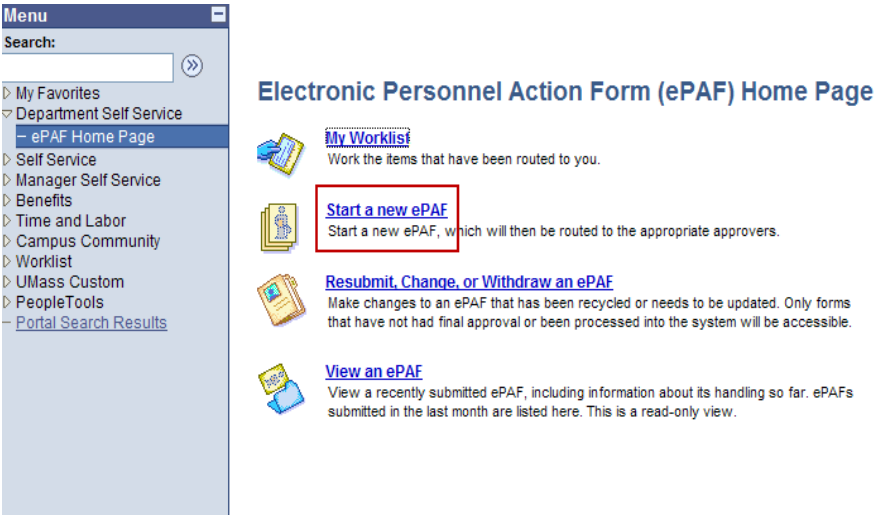
This manual provides step by step information on how to enter a Leave of Absence.

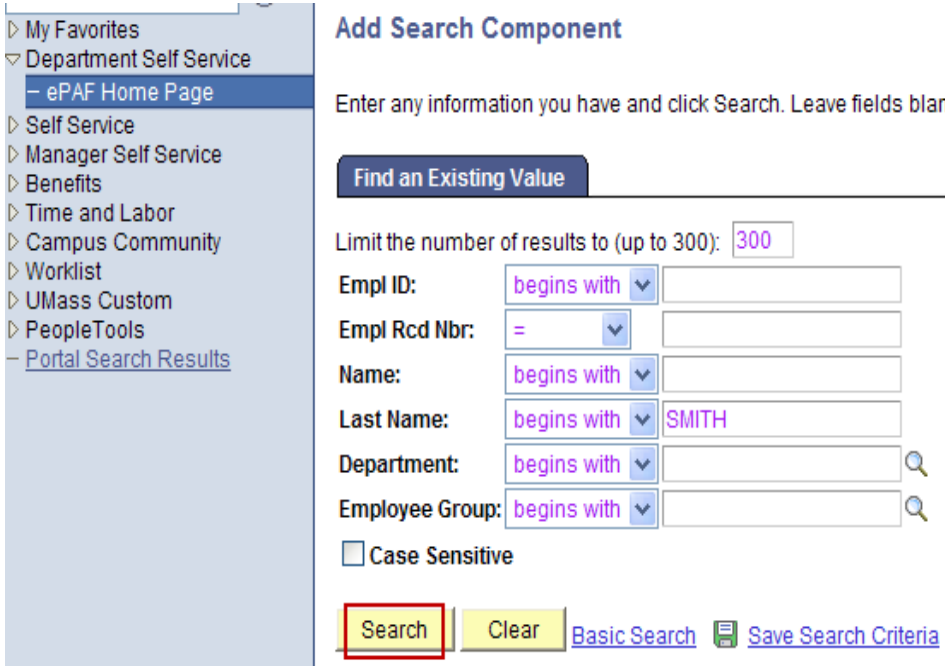
**Developed by:
Learning & Development Group
Human Resources Diversity & Inclusion**

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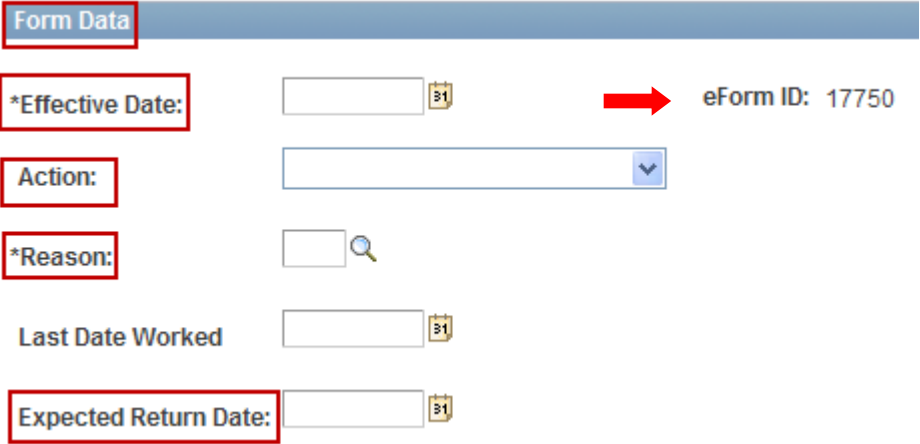


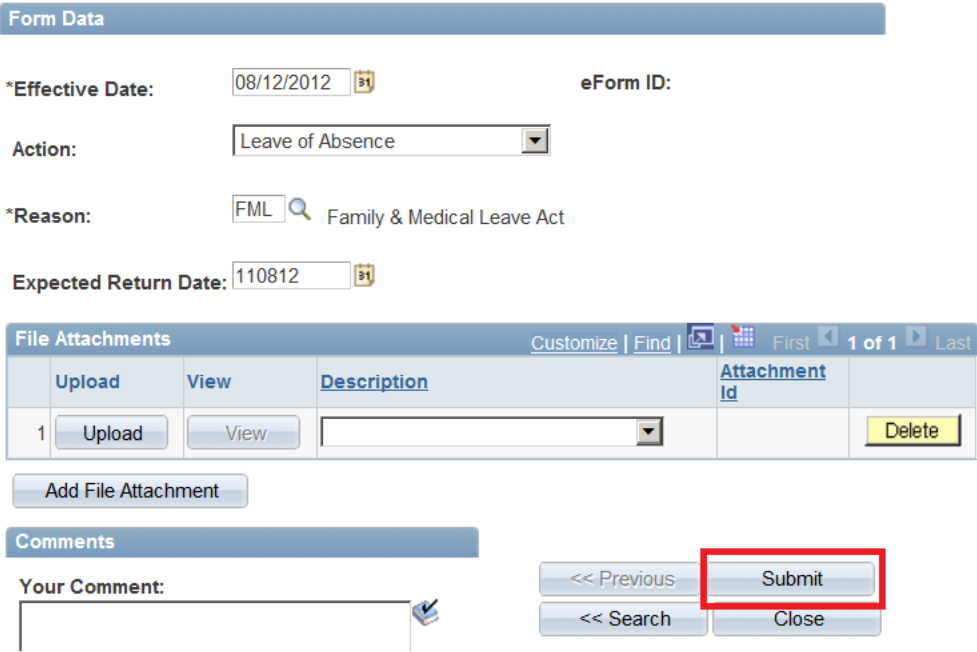
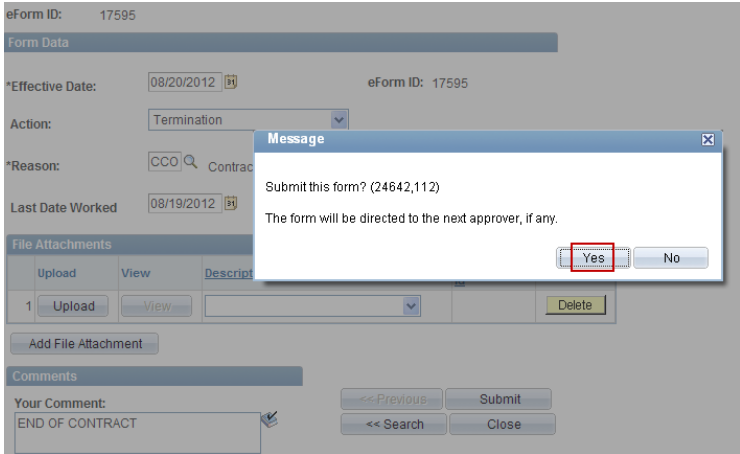
EPAF Leave of Absence Process - User Manual

Step	Action
1.	After logging into PeopleSoft, click on the Department Self Service link.  The screenshot shows the University of Massachusetts PeopleSoft interface. On the left, a 'Menu' sidebar contains a search bar and a list of links: 'My Favorites', 'Department Self Service' (highlighted with a red box), 'Self Service', 'Manager Self Service', 'Recruiting', and 'Workforce Administration'. On the right, a 'View Payslip' section contains the text 'Click link to view your paycheck.' and a link 'Select Payslip'. A note below the link states: '*Use the menu on the left for other self service options'.
2.	Click the ePAF Home Page link. 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</u>, <u>change or withdraw an ePAF</u>, or <u>view an ePAF</u>. Click the Start a new ePAF link.  The screenshot shows the 'Electronic Personnel Action Form (ePAF) Home Page'. On the left, a 'Menu' sidebar contains a search bar and a list of links: 'My Favorites', 'Department Self Service' (expanded to show 'ePAF Home Page' highlighted with a red box), 'Self Service', 'Manager Self Service', 'Benefits', 'Time and Labor', 'Campus Community', 'Worklist', 'UMass Custom', 'PeopleTools', and 'Portal Search Results'. The main content area is titled 'Electronic Personnel Action Form (ePAF) Home Page' and contains four sections: My Worklist: Work the items that have been routed to you. Start a new ePAF (highlighted with a red box): Start a new ePAF, which will then be routed to the appropriate approvers. 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. 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.

3.	To submit a Leave of Absence, click the Change Employment Status link.  The screenshot shows the ePAF Home Page. On the left is a 'Menu' with a search bar and a list of links: My Favorites, Department Self Service (expanded), ePAF Home Page (selected), Self Service, Manager Self Service, Benefits, Time and Labor, Campus Community, Worklist, UMass Custom, PeopleTools, and Portal Search Results. The main content area is titled 'Start a New electronic Personnel Action Form (ePAF)' and contains three options: 'Hire an Employee', 'Edit Existing Job', and 'Change Employment Status'. The 'Change Employment Status' option is highlighted with a red rectangular box. Below the options is a link to 'Return to Electronic Personnel Action Form (ePAF) Home Page'.
4.	You can search by Empl ID, Name, Department or Employee Group. The example below shows a search by Last Name. If employee has more than one job record, ensure you are selecting the correct record. Click the Search button.  The screenshot shows the 'Add Search Component' search form. On the left is the same 'Menu' as in the previous screenshot. The main content area is titled 'Add Search Component' and contains a section for 'Find an Existing Value'. It includes a text input field for 'Limit the number of results to (up to 300):' with the value '300' entered. Below this are several search criteria fields: 'Empl ID:', 'Empl Rcd Nbr:', 'Name:', 'Last Name:', 'Department:', and 'Employee Group:'. Each field has a dropdown menu with 'begins with' selected. The 'Last Name' field has 'SMITH' entered. The 'Department' and 'Employee Group' fields have search icons. Below the search criteria is a checkbox for 'Case Sensitive'. At the bottom are three buttons: 'Search' (highlighted with a red box), 'Clear', and 'Basic Search'. To the right of the 'Basic Search' button is a link to 'Save Search Criteria'.

Step	Action
5.	Click on the employee name link from the search results. The Change Employment Status page appears. The fields under the Current Job Info will populate. Change Employment Status Step 1 of 2: Enter Status Change Information Please fill out the form below. Current Job Info Name: Empl ID: Empl Group: Professional (W60) Non Unit Empl Rcd#: 0 Empl Status: Active Position: 00022556 Database Administrator Sr. Department: W875000 Information Services eForm ID: 17750 Personal Data Job Data Additional Pay Leave Plans General Deductions

Step	Action
6.	In the Form Data section, enter the Effective Date and tab out of field. Note Form ID #. Click the Action list drop down menu and choose Leave of Absence for an unpaid Leave of Absence or choose <u>Paid Leave of Absence</u> if the employee will be using accruals. In the Reason field, select appropriate Reason.  Note: Once the action of Leave of Absence or Paid Leave of Absence is selected, You need to enter the Expected Return Date. Last Day Worked will be removed once you select the one of the leave actions.

Step	Action
7.	Note: No comments or file attachments will be entered on EPAF Leave form. Click Submit 
Step	Action
15.	Click Yes when the pop up shows up, to confirm that you are ready to submit this form. 

Step	Action
16.	The Form Status indicates that you have submitted this form. <u>Step 2 of 2: Form Finalized</u> Current Job Info Name: [REDACTED] Empl ID: [REDACTED] Empl Group: Professional (W60) Non Unit Empl Rcd#: 0 Empl Status: Active Position: 00022443 [REDACTED] Department: W875000 Information Services eForm ID: 17595 Form Status You have just SUBMITTED this form. This action passed the form to HCMU_GT_HR_UPDATE for further processing. Process Visualizer  <pre> graph LR 1[1: Sbrogna, Kimberly A (TESTGT10020876)] --> 2[2: HCMU_GT_HR_REVIEWER] 2 --> 3[3: HCMU_GT_HR_UPDATE] 3 --> 4[4: HCMU_GT_HR_UPDATE_2] 4 --> 5[5: Integrat Broker] </pre>
17.	Congratulations! You have successfully submitted a Leave of Absence or Paid Leave of Absence". End of Procedure.