EPAF Transfer – No Department Access - User Manual

Initiator User Manual for "Transfer Process"

This manual provides step by step information on how to process a Transfer.

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EPAF Automated Form

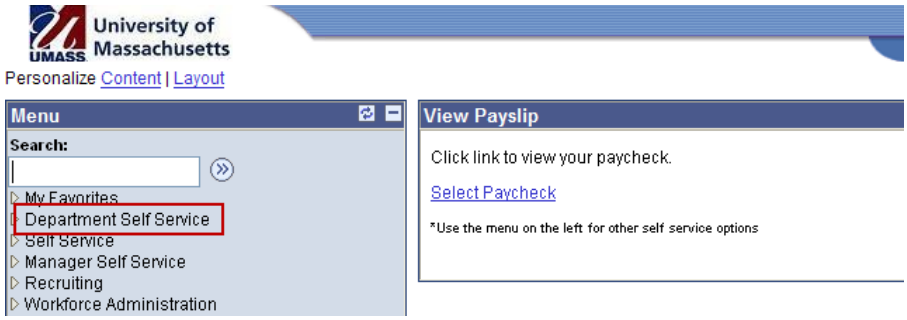
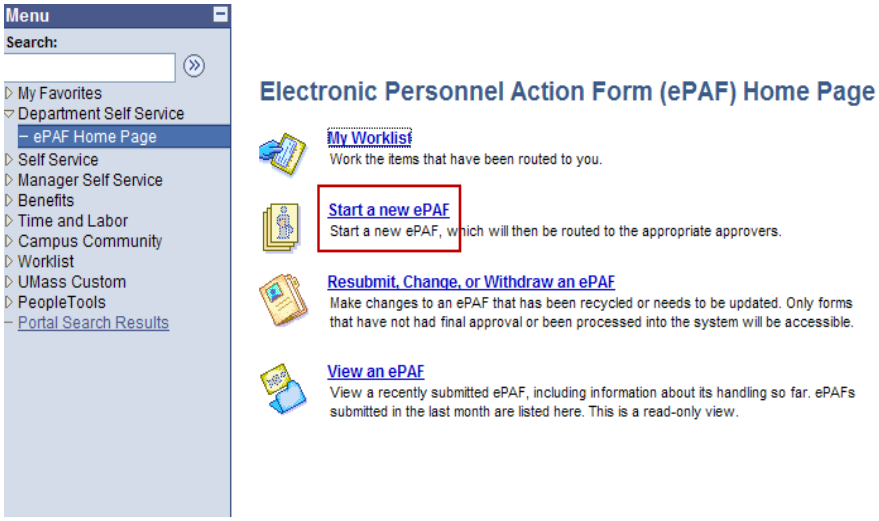
EPAF (electronic personnel action form) is a module within PeopleSoft that allows for paperless employment transactions such as transfer of an employee. The EPAF is initiated by a department initiator then it is electronically routed for appropriate approvals, notifications and finally entered by HR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

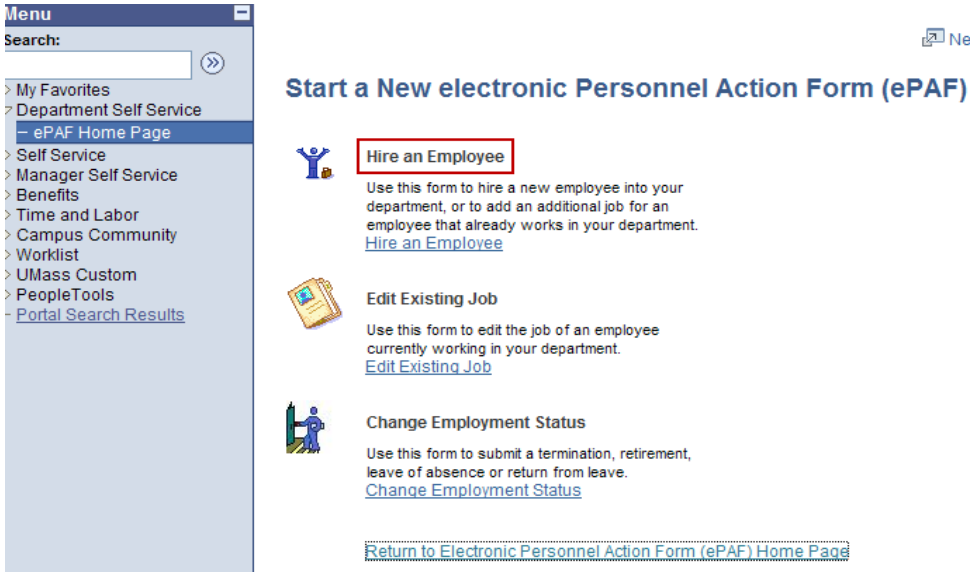
Transfer a Person (Initiator)

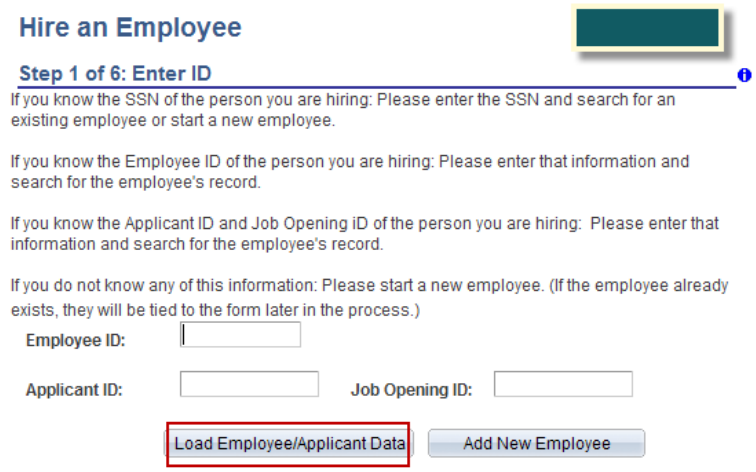
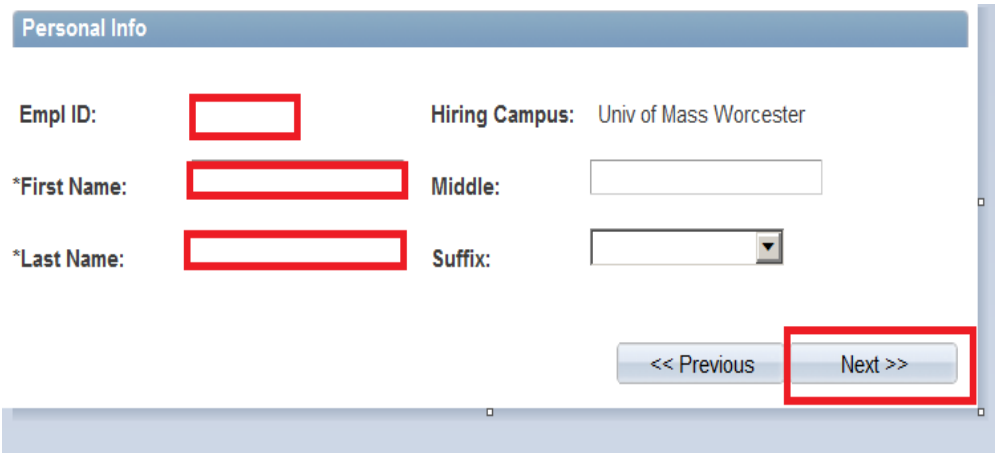
Upon completion of this section, you will be able to:

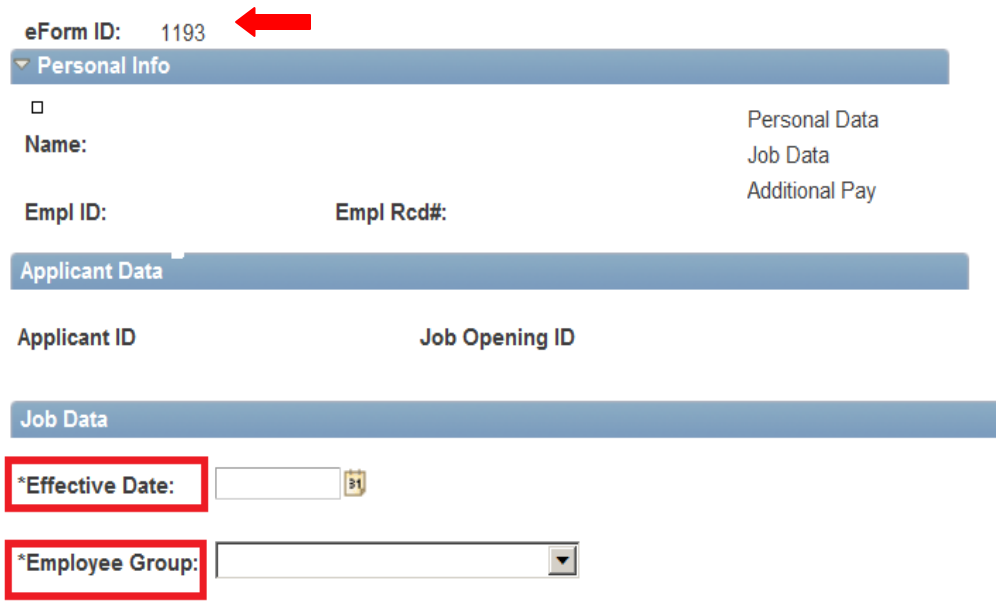
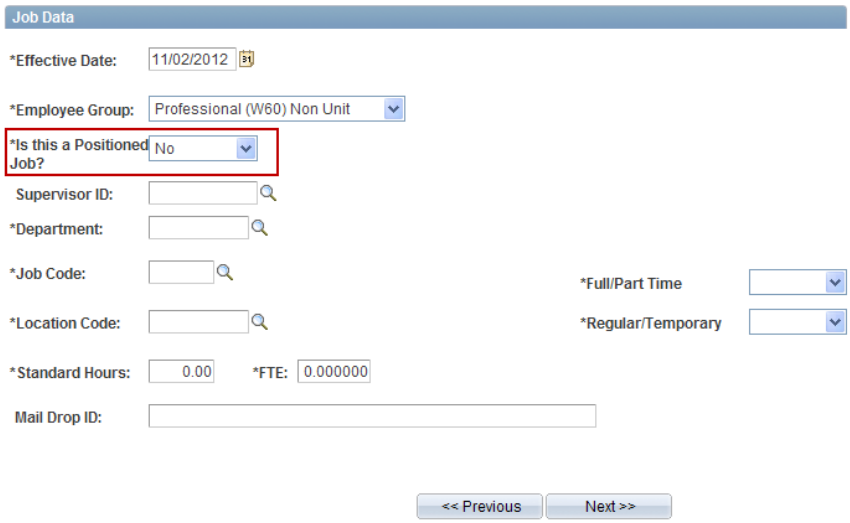
- Transfer an employee into a new department / job

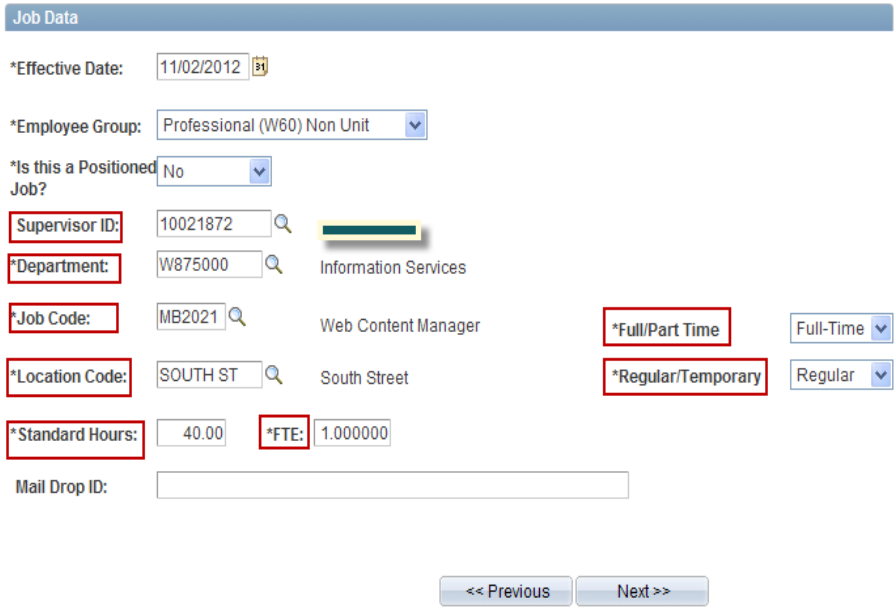
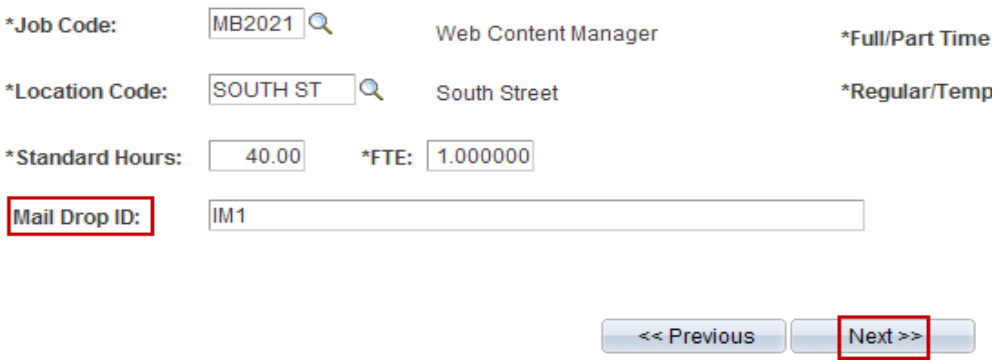
Step	Action
1.	Begin by logging into **HR Direct**

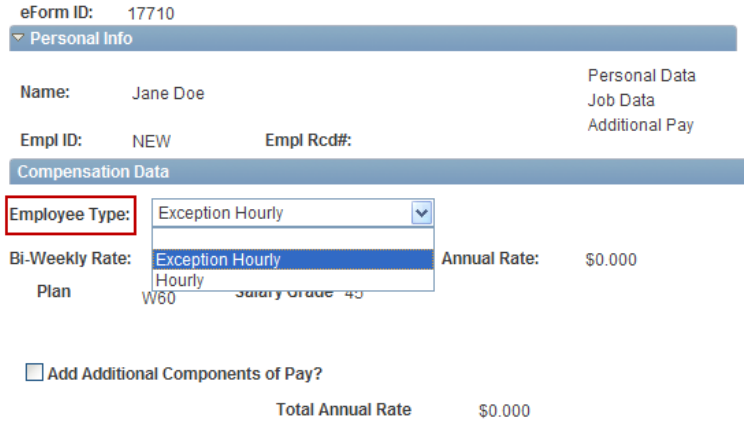
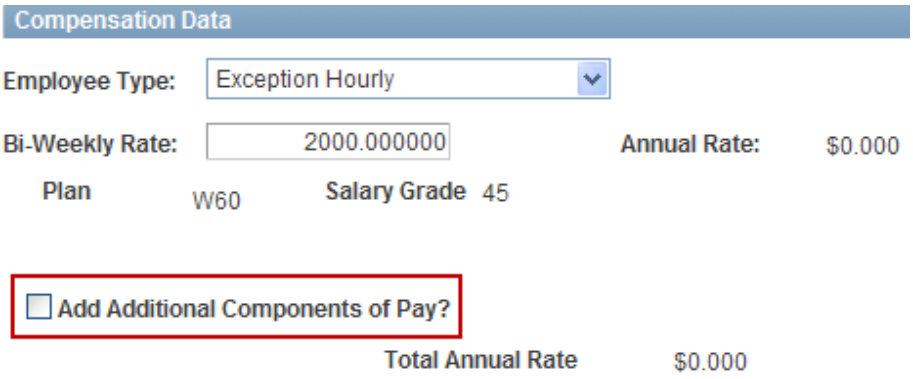
Step	Action
2.	After logging into HR Direct, click on the **Department Self Service** link. 
3.	Click the **EPAF Home Page** link. The **EPAF Home Page** is a useful area for managing PA Forms. Here you will see links to open your worklist, start a new EPAF, resubmit, change or withdraw an EPAF, or view an EPAF. Click the **Start a new EPAF** link. 

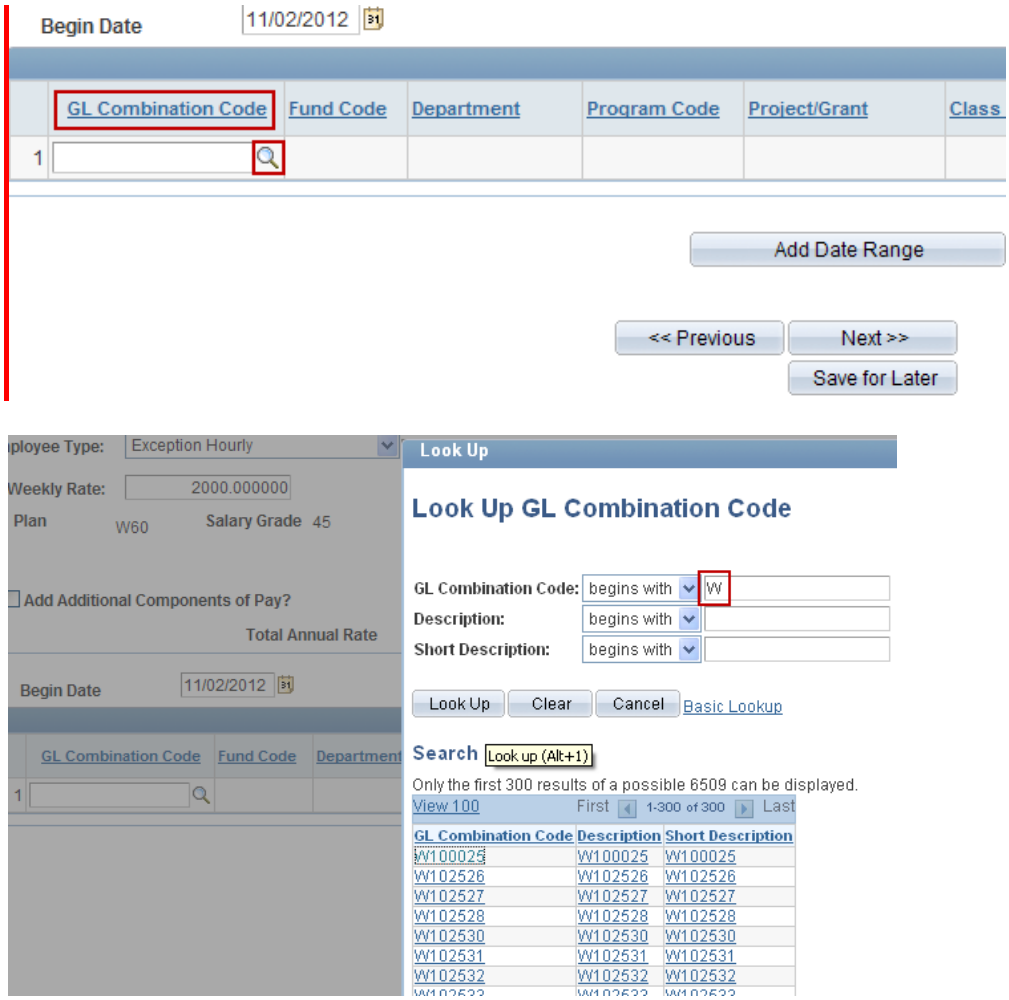
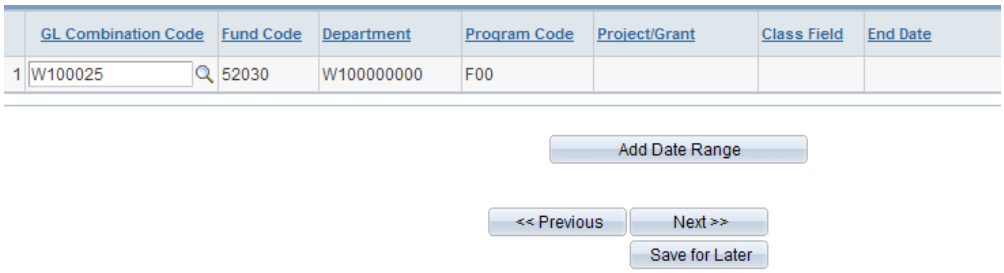
Step	Action
4.	Click on the **Hire an Employee** link. Use this link if you do not have access to the employee's department, otherwise use "Department Change" procedure". 

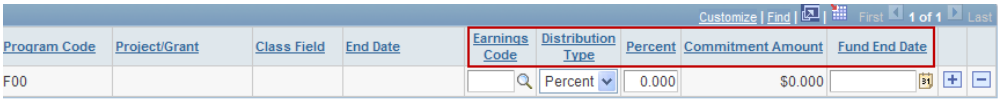
Step	Action
5.	For a transfer of an employee to a new department, please contact the HR Service Center (X65260) to retrieve the employee's ID and record number. Enter the **Employee ID,** Click **Load Employee/Applicant Data** button 
6.	Employee ID and name will populate. Click **Next** 

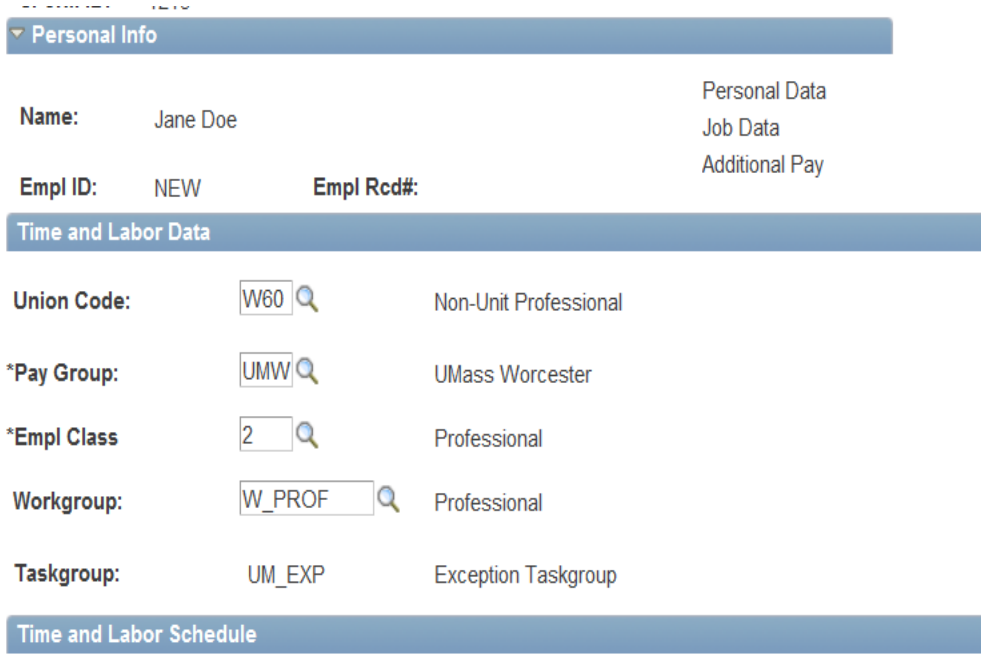
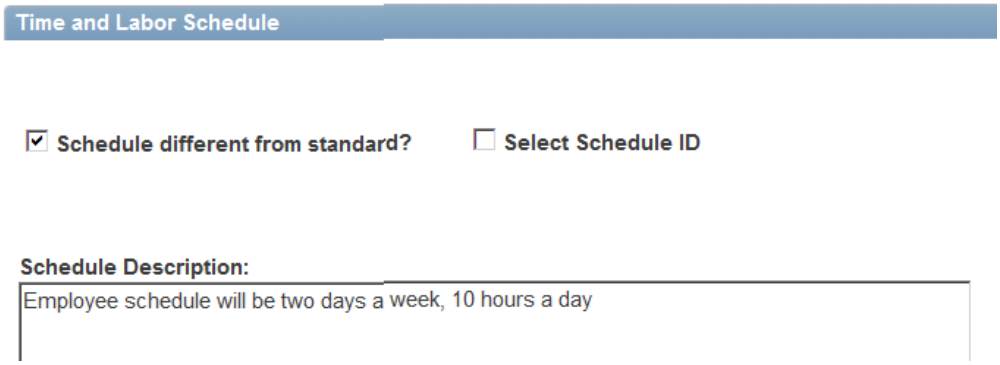
Step	Action
7.	You will notice that your PA Form has an **eForm ID** assigned to it. Note the **eForm ID** number to help track the PA Form after completion if needed. Enter the **Effective Date,** tab out of field. Select the appropriate **Employee Group** 
8.	For the field "**Is this a positioned job?**" Use the following guide: 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. 

Step	Action
9.	Highlighted fields show what will auto populate for a positioned job.  .
10.	In the **Mail Drop ID** enter **IM1** Click **Next** 

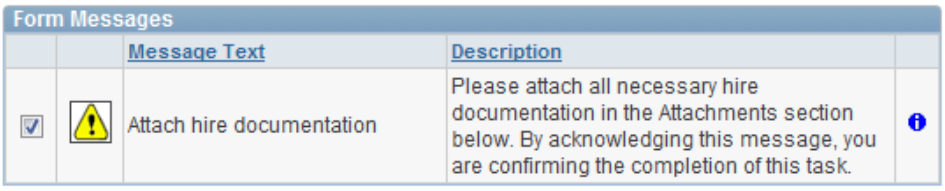
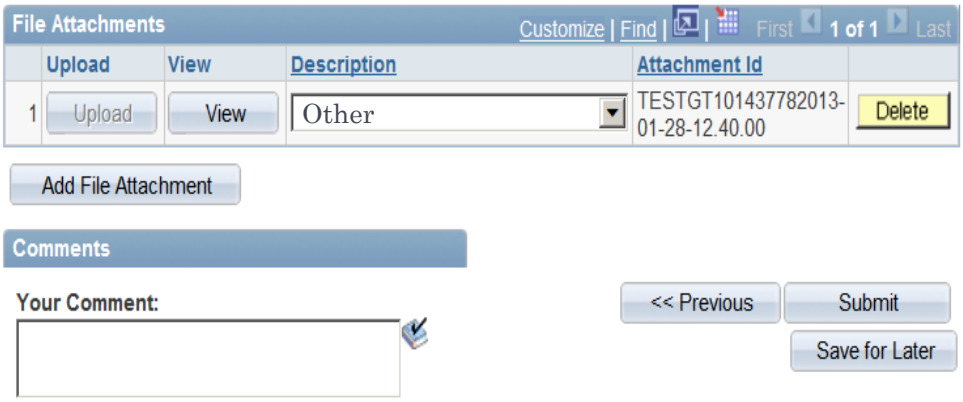
Step	Action
11.	Verify the **Employee Type**, choose Exceptional Hourly (same as Biweekly) or Hourly. Enter either the **Biweekly or Hourly Rate** 
12.	**Additional Components of Pay** is for few employees that receive Premium Pay (in addition to their regular salary). For most employees, this box is left unchecked. 

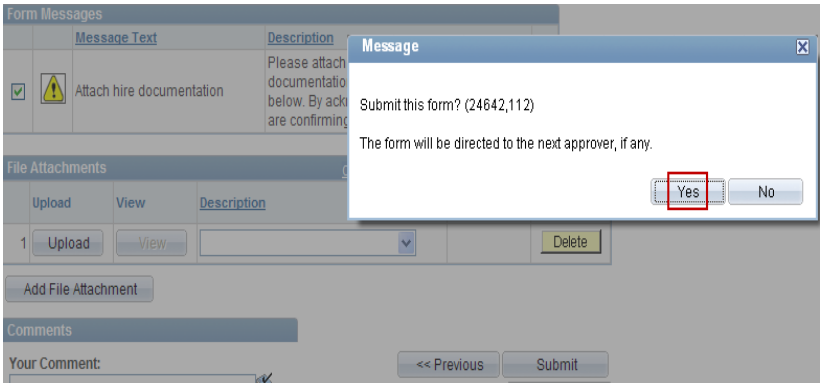
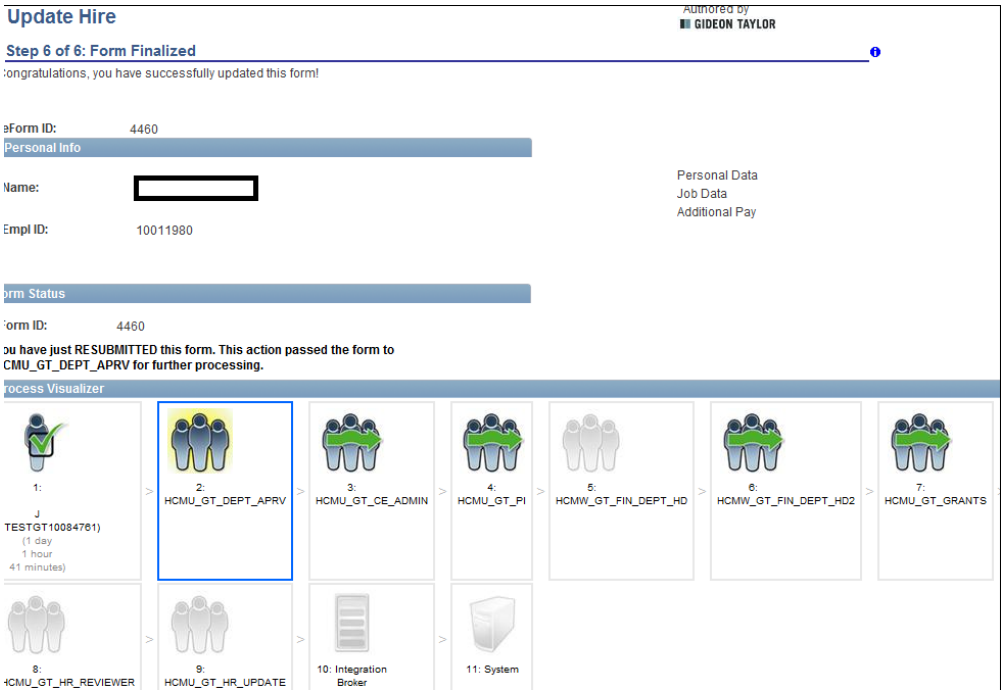
Step	Action
13. For more detailed info on funding input, please see funding manual.	Enter the **GL Combination Code** or use **Look up icon** to find the code and select. **Note:** Always search for "W" for Worcester campus. 
14.	Once you select your code, the **Fund Code**, **Department**, **Program Code** will populate. 

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

Step	Action
18.	Review **Union Code** and update if needed. 
19.	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** 
20.	Click **Next**

Step	Action
21.	**Check** the box for **Leaving Current Job** **Other Job Actions** If the employee will be leaving a current UMass job for this position, please check the "Leaving Current Job?" box. ☑ **Leaving Current Job?** Please select the job that the employee will be leaving. This will open a pre-populated dialog box **Job Transferring From** **Job Transferring From** ☑ Rcd: 0 — Job Code Description: HRIS Analyst — Department Description: HR Systems & Service Center
22.	**Action** will pre-populate **Actions & Action Reasons** 1 — Action: XFR — Action Description: Transfer — Reason Code: — Action Reason Description: Action: Transfer — ☐ Action Overide Flag *Reason Code: Use the dropdown to select the **Reason Code**

Step	Action
23.	You must acknowledge **Form Messages** box by selecting the check box  Form Messages Message Text: Attach hire documentation Description: Please attach all necessary hire documentation in the Attachments section below. By acknowledging this message, you are confirming the completion of this task. 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. 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".**  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 Add File Attachment Comments Your Comment: << Previous | Submit | Save for Later **Note:** No comments will be entered on EPAF form. Click **Submit**

Step	Action
24.	Confirm the pop up message. Click **Yes** 
25.	The **Form Status** indicates that you have submitted this form. 
26.	Congratulations! You have added entered a transfer. **End of Procedure.**