



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.

**Developed by:
Learning & Development Group
Human Resources Diversity & Inclusion
11/20/2012**

EPAF Transfer – No Department Access - User Manual

EPAF AUTOMATED FORM

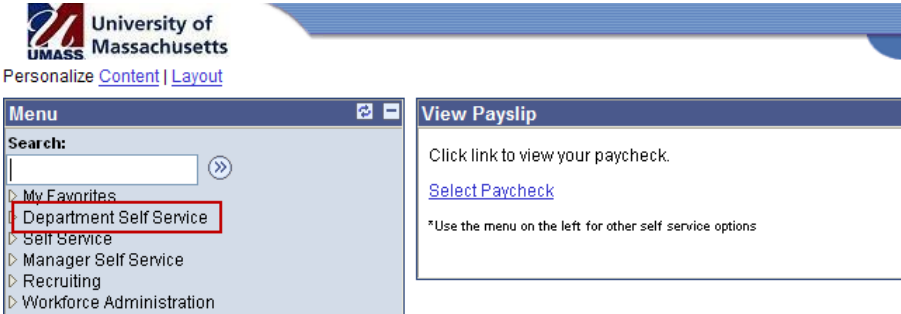
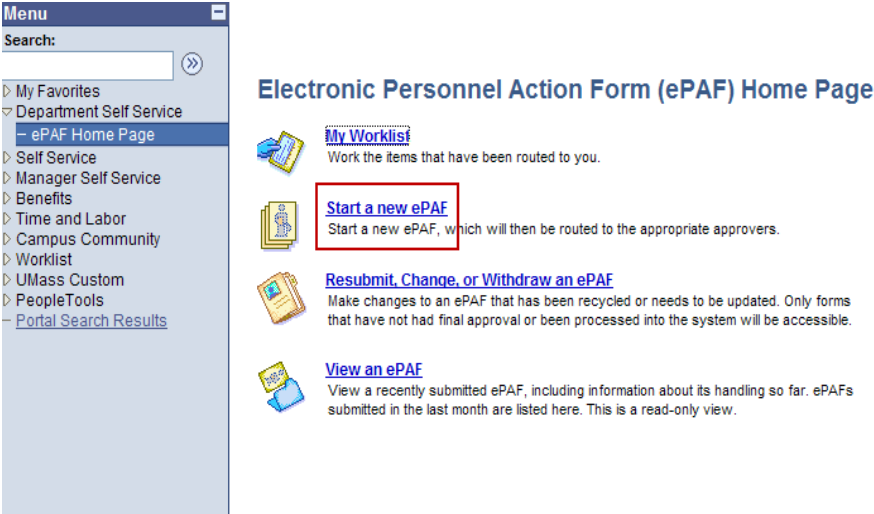
EPAF (electronic personnel action form) is a module within PeopleSoft that allows for paperless employment transactions such as transfer of an employee. The EPAF is initiated by a department initiator then it is electronically routed for appropriate approvals, notifications and finally entered by HR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

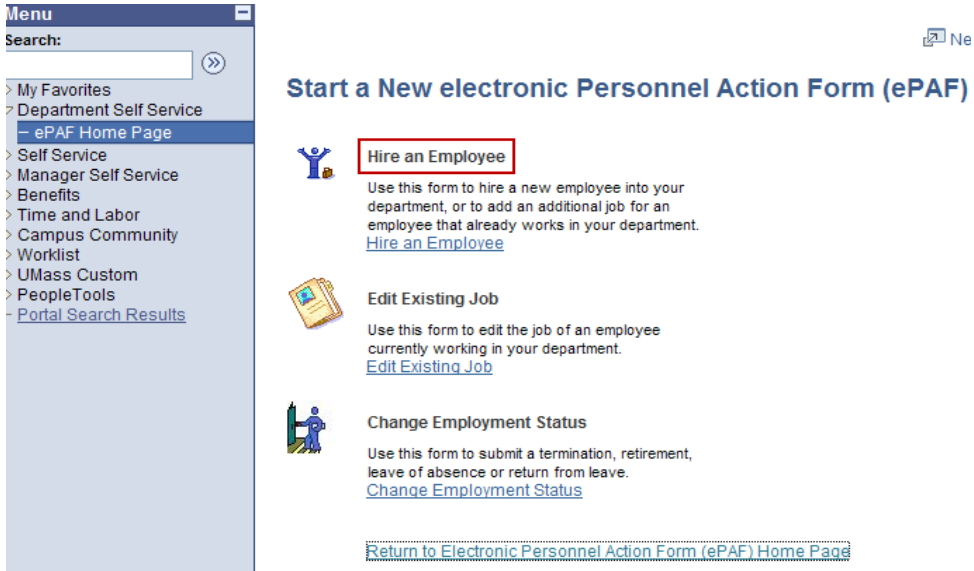
Transfer a Person (Initiator)

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  The self-service application available to all UMASS Medical School employees to manage their human resource and payroll information.

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 <u>worklist</u>, <u>start a new EPAF</u>, <u>resubmit</u>, <u>change</u> or <u>withdraw an EPAF</u>, or <u>view an EPAF</u>. Click the Start a new EPAF link. 

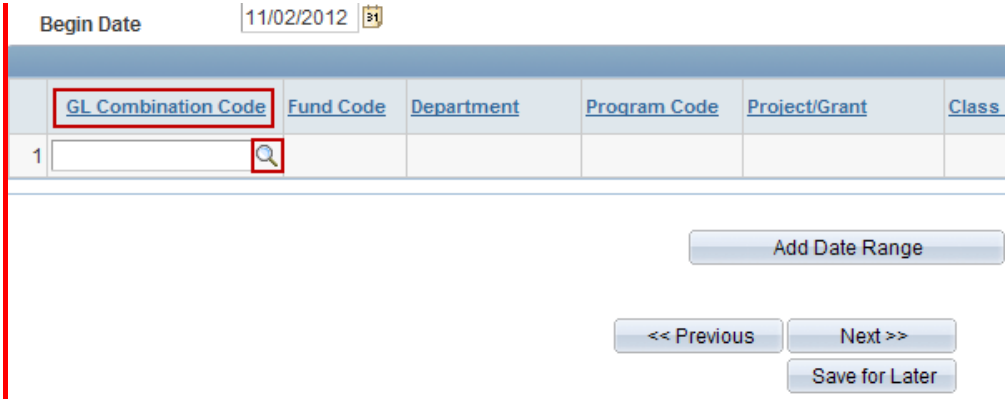
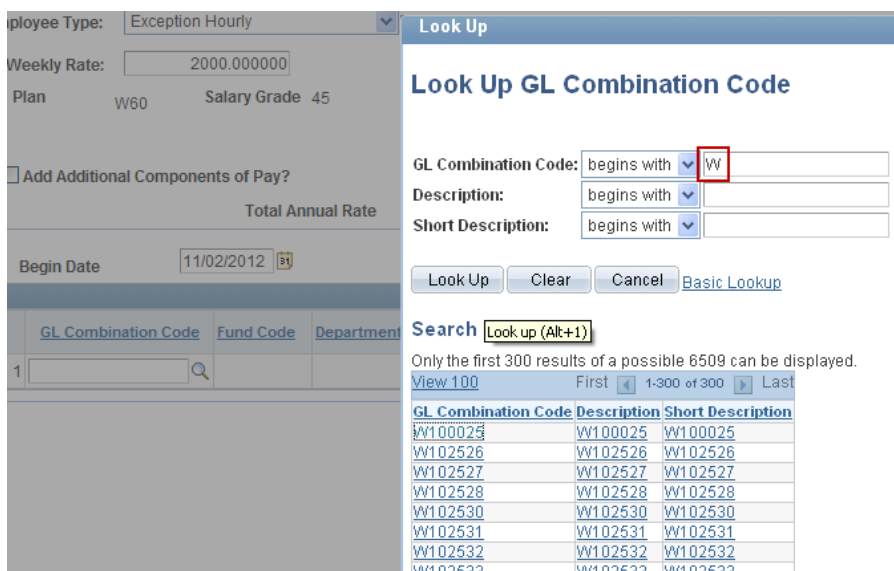
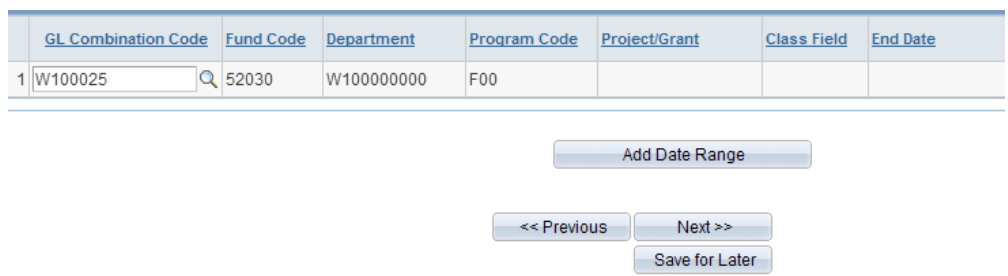
Step	Action
4.	Click on the Hire an Employee link. Use this link if you do not have access to the employee's department, otherwise use "Department Change" procedure".  The screenshot displays the 'ePAF Home Page' interface. On the left is a 'Menu' with a search bar and a list of links: My Favorites, Department Self Service, ePAF Home Page (highlighted), 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 features three options: 'Hire an Employee' (with a person icon and a red box around the title), 'Edit Existing Job' (with a document icon), and 'Change Employment Status' (with a person icon). Each option includes a brief description and a link. At the bottom, there is a link to 'Return to Electronic Personnel Action Form (ePAF) Home Page'.

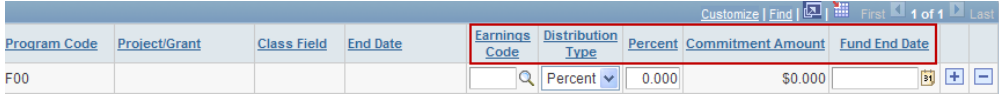
Step	Action
5.	For a transfer of an employee to a new department, please contact the HR Service Center (X65260) to retrieve the employee's ID and record number. Enter the Employee ID, Click Load Employee/Applicant Data button Hire an Employee Step 1 of 6: Enter ID If you know the SSN of the person you are hiring: Please enter the SSN and search for an existing employee or start a new employee. If you know the Employee ID of the person you are hiring: Please enter that information and search for the employee's record. 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. 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.) Employee ID: Applicant ID: Job Opening ID: Load Employee/Applicant Data Add New Employee
6.	Employee ID and name will populate. Click Next Personal Info Empl ID: Hiring Campus: Univ of Mass Worcester *First Name: Middle: *Last Name: Suffix: << Previous 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 eForm ID: 1193  Personal Info ☐ Personal Data Name: Job Data Empl ID: Empl Rcd#: Additional Pay Applicant Data Applicant ID Job Opening ID Job Data *Effective Date:  *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. Job Data *Effective Date: 11/02/2012  *Employee Group: Professional (W60) Non Unit  *Is this a Positioned Job? No  Supervisor ID:  *Department:  *Job Code:  *Full/Part Time  *Location Code:  *Regular/Temporary  *Standard Hours: 0.00 *FTE: 0.000000 Mail Drop ID: << Previous Next >>

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

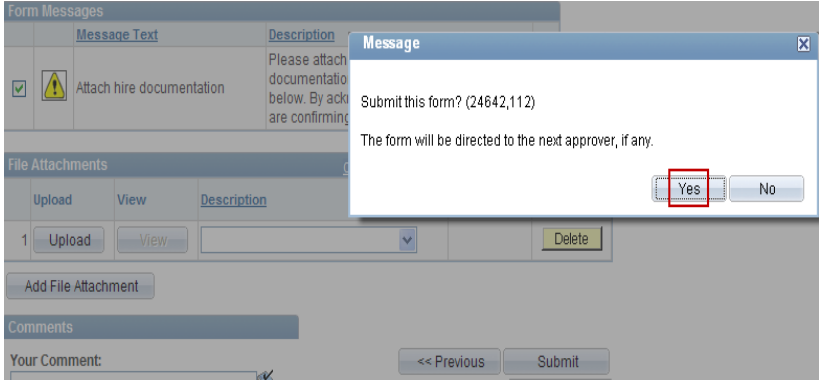
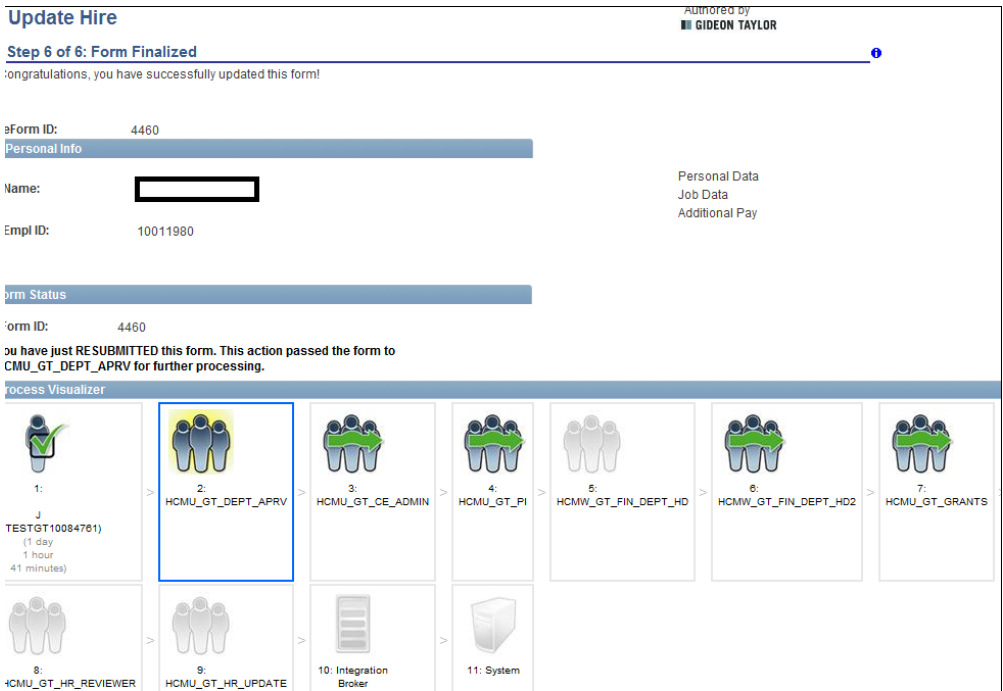
Step	Action
11.	Verify the Employee Type, choose Exceptional Hourly (same as Biweekly) or Hourly. Enter either the Biweekly or Hourly Rate eForm ID: 17710 ▼ Personal Info Name: Jane Doe Personal Data Empl ID: NEW Empl Rcd#: Job Data Additional Pay Compensation Data Employee Type: Exception Hourly Bi-Weekly Rate: Exception Hourly Annual Rate: \$0.000 Plan W60 Salary Grade 45 ☐ Add Additional Components of Pay? Total Annual Rate \$0.000
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. Compensation Data Employee Type: Exception Hourly Bi-Weekly Rate: 2000.000000 Annual Rate: \$0.000 Plan W60 Salary Grade 45 ☐ Add Additional Components of Pay? Total Annual Rate \$0.000

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. Personal Info Name: Jane Doe Personal Data Empl ID: NEW Empl Rcd#: Job Data Time and Labor Data Union Code: W60 Non-Unit Professional *Pay Group: UMW UMass Worcester *Empl Class: 2 Professional Workgroup: W_PROF Professional Taskgroup: UM_EXP Exception Taskgroup Time and Labor Schedule
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 Time and Labor Schedule ☒ Schedule different from standard? ☐ Select Schedule ID Schedule Description: Employee schedule will be two days a week, 10 hours a day
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 <table><tr><th colspan="3">Job Transferring From</th></tr><tr><th></th><th><u>Rcd</u></th><th><u>Job Code Description</u></th><th><u>Department Description</u></th></tr><tr><td>☒</td><td>0</td><td>HRIS Analyst</td><td>HR Systems & Service Center</td></tr></table>	Job Transferring From				<u>Rcd</u>	<u>Job Code Description</u>	<u>Department Description</u>	☒	0	HRIS Analyst	HR Systems & Service Center
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22.	Action will pre-populate Actions & Action Reasons <table><tr><th><u>Action</u></th><th><u>Action Description</u></th><th><u>Reason Code</u></th><th><u>Action Reason Description</u></th></tr><tr><td>1 XFR</td><td>Transfer</td><td></td><td></td></tr></table> Action Transfer ☐ Action Override Flag *Reason Code Use the dropdown to select the Reason Code	<u>Action</u>	<u>Action Description</u>	<u>Reason Code</u>	<u>Action Reason Description</u>	1 XFR	Transfer					
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1 XFR	Transfer											

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.