PAF003: ePAF Approver Training

PeopleSoft HR 9.2
Human Resources
Contents

OVERVIEW ................................................................................................................................................. 3
EPAF INTRODUCTION ............................................................................................................................... 4
OVERVIEW OF FORMS ................................................................................................................................ 5
EPAF ROLES AND WORKFLOW ................................................................................................................ 7
EPAF BASICS ............................................................................................................................................... 9
GETTING STARTED ....................................................................................................................................... 10
VIEW AN EPAF ........................................................................................................................................... 15
VIEW AN ARCHIVED EPAF ......................................................................................................................... 18
EPAF PAY ACTIONS FOR EPAF APPROVERS ....................................................................................... 21
ADDITIONAL RESOURCES ....................................................................................................................... 22
ePAF Approver Training

Overview

This guide will introduce you to Electronic Personnel Action Forms (ePAF). The ePAF forms are data-entry pages that allow a user, or Originator, to complete various human resources actions, such as initiate a hire and perform job-related entries.

Objectives

By the end of this chapter, you will:

- Describe the advantages of the ePAF forms
- Describe the approval workflow
- Understand how to approve and view an ePAF
ePAF Introduction

The ePAF was implemented to simplify the data-entry procedures that are required to initiate various HR actions in the PeopleSoft system. Multiple actions can be processed using on ePAF form. Once initiated, the HR actions are processed through an electronic approval workflow.

The ePAF forms are easy to use, as most values populate automatically in the fields as you make your selections. This reduces the possibility of data-entry errors which can lead to overpayments, underpayments, and an overall increase in processing time of HR actions.

Security to approve ePAF will be granted upon successful completion of the ePAF Approver Training (PAF 003) and once the HR Security Request eform has been processed by your department and approved by Human Resources.
ePAF currently offers five forms than can be used to initiate the most common HR actions:

- The **Hire an Employee** form is used to initiate the processing of all new hires, including hires between departments, and rehires. If the hire is an existing employee at UCF, but he or she is new to your department, then the **Hire an Employee** form is used. This form should also be used to promote, transfer, or demote an employee from another department to your department.

International (non-resident alien) employees must visit the International Service Center (ISC) with their authorization documents before they can work on campus. Under no circumstances should an international employee be allowed to work prior to verification by ISC until the new employee sign-in process has been completed. Once the hiring paperwork is completed by ISC, it will be forwarded to the department. Upon receipt of the hiring paperwork, the department should create the **Hire an Employee** ePAF.
- The **Edit Existing Job** form is used to initiate all job-related actions. Job-related actions include promotions within your department, pay rate changes, and funding department changes. This form can only be used to make changes for employees that are currently active in the department for which you have security rights.

- The **Change Employment Status** form is used to initiate a change in employment for an employee currently active in the department for which you have security rights. Employment status changes include placing an employee on leave of absence, returning an employee from a leave of absence, and terminating an employee.

- The **Position Change** form is used to change or update vacant positions or to request new position numbers.

- The **Supplemental Form** is used for the rare occasions when an HR action must be initiated that the above forms cannot accommodate. Examples include retroactive actions that require correction to an employee’s job data history (e.g. a retroactive pay rate change).
ePAF Roles and Workflow
The Originator will use the ePAF forms to initiate various HR actions. Once the ePAF is submitted, you will receive an email notification that there is an item on your worklist. You must check your worklist to view the ePAFs needing approval. It’s very important that you review and approve ePAFs in a timely manner. Once you approve the action, it moves through the workflow process to the next appropriate approver or to HR-Records.

<table>
<thead>
<tr>
<th>Department/College ePAF Roles</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ePAF Originator</strong></td>
<td>Mandatory Role: Initiate the ePAFs at the Department/College Level.</td>
</tr>
<tr>
<td><strong>Director/Chair Role</strong></td>
<td>Optional Role: Approve ePAFs at the Department/College Level.</td>
</tr>
<tr>
<td><strong>VP/Dean Role</strong></td>
<td>Mandatory Role: Approve ePAFs at the Department/College Level.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Workflow Approver Roles</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Office of Research and Commercialization</strong></td>
<td>Approve ePAFs that are funded from Contract and Grant accounts.</td>
</tr>
<tr>
<td><strong>Regional Campuses</strong></td>
<td>Approve ePAFs that are funded from regional campus accounts.</td>
</tr>
<tr>
<td><strong>College of Graduate Studies</strong></td>
<td>Approve ePAFs for Graduate Assistantship employees.</td>
</tr>
<tr>
<td><strong>Academic Affairs Administration</strong></td>
<td>Approve ePAFs for job changes to line faculty employees.</td>
</tr>
<tr>
<td><strong>HR-Compensation</strong></td>
<td>Approve position change ePAFs and job actions for USPS and A&amp;P employees.</td>
</tr>
<tr>
<td><strong>HR-Records</strong></td>
<td>Final Approver before ePAFs are loaded into PeopleSoft.</td>
</tr>
</tbody>
</table>
Once an Originator has submitted an HR action such as a hire, the VP/Dean and other approvers have the option to choose one of the following actions:

<table>
<thead>
<tr>
<th>Approver Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve</td>
<td>Sends the form to the next approver for evaluation.</td>
</tr>
<tr>
<td>Deny</td>
<td>Permanently ends form processing. The form will be archived.</td>
</tr>
<tr>
<td>Recycle</td>
<td>Sends it back to its Originator for changes.</td>
</tr>
<tr>
<td>Hold</td>
<td>Holds request temporarily.</td>
</tr>
</tbody>
</table>

Comments are very important when denying, recycling, or holding the ePAF.

Throughout the approval workflow, as approvals are made, emails are sent to the Originator to inform him or her of the status of the ePAF. The Originator, or any approver who has taken action on the ePAF, may check on the status of an ePAF.

Once, an ePAF has been approved by a VP/Dean level approver, the Originator cannot update or make any changes to the ePAF request. He or she must contact the Approver so the ePAF request can be recycled and sent back to Originator.
ePAF Approver Training

ePAF Basics

To access the ePAF system, you must follow the navigation shown below:

Log into myUCF – Staff Applications – Human Capital Management – Main Menu – Department Self Service – ePAF Home Page

From the ePAF Home Page, you, as an approver, can select one of three options:

- **My Worklist:** Shows any ePAF that needs approval before it can be passed to the next approver. A user will receive an email notification when there is an item waiting on the worklist.

- **View an ePAF:** View any ePAF that was created or approved within the last 30 days within your workflow.

- **Look Up an Archived ePAF:** Look up an ePAF that was created or approved within your workflow that is more than 30 days old.
Getting Started

1. On the ePAF Home Page, click the **My Worklist** link (or click the **Worklist** link located on the top right of the PeopleSoft screen). You will be directed to a page that lists outstanding worklist items.

2. Choose a worklist item by clicking on a link under the **Link** column.

3. Review the fields on the form. Changes made to the form will be highlighted in yellow.
When sections on the page do not have changes, they are collapsed to save space. Notice that “New Job Detail” and “Current Job Detail” sections, they have been collapsed to save space on the page, whereas "New Position" and "Current Position" sections are not collapsed.

4. If the form meets your approval, click **Approve**. If the form should not be executed, click **Deny**, which will stop the processing of the form. If you want the Originator to make changes and resubmit the form, enter an explanatory note in the Comments box and click **Recycle**. If you wish to put the form on hold click **Hold**.
If you click...

Approve, you will be taken to the following screen:

"Approve this form? The form will be sent on to the next approver for evaluation, or, if you are the final approver, the form will be loaded into the system. Please use the comments box for any additional information."

- Click Yes to confirm.
- On the confirmation page, under Form Status, it will state where the form will be routed next. In the example below, the form will be sent to HR-RECORDS.
Deny, you will be taken to the following screen:

"Are you sure you want to deny this form? Denying an action permanently ends form processing. The form will be archived."

- Click Yes to confirm.
Recycle, you will be taken to the following screen:

"Recycle this form? Recycling a form sends it back to its originator for changes. When recycling, you should give directions in the Comments section that will help the Originator make acceptable changes."

- Click Yes to confirm.

Hold, you will be taken to the following screen:

"You have just PLACED ON HOLD this form."

No further action is required of you.
View an ePAF

The View an ePAF feature is a great tool to use in tracking the progress of an ePAF that was submitted within the 30 day period prior to the current date. The progress can be reviewed at any time up to the point of entry into PeopleSoft. Although an email will be received when the action has been processed, there may be times when you will want to track the status. The original form can be easily and quickly retrieved to determine exactly where it is in the electronic approval process.

1. On the ePAF Home Page, click View an ePAF.

2. On the View an ePAF page, select the type of ePAF that you would like to view. (Per the last example, we will continue to use Edit Existing Job).
3. On the **View a Job Change** search page, you can search by several values including eForm ID, EmplID, Employee Last Name and First Name, and even by the Originator Operator (Originator's NID). In this example, let's use the eForm ID: **229554**, click **Search**.

If none of the search values are known, clicking on the **Search** button will return all the ePAFs that are available for viewing within the chosen form type. Only those forms processed within the user's security role will be displayed.
4. Scroll down to the bottom of the ePAF, click on Next.

![](image1)

5. You can view the next approver. This will let you know where the ePAF is in the approval workflow. If you want to send an email to the next approver, click on the link, “Who can work this form,” to find out their name and email address.

![](image2)

6. You can also view the Process Visualizer to see the actual route the ePAF took or will take during the approval process. Under each role, after approval, the number of days or hours the ePAF remains in that particular worklist is displayed.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image3" alt="Icon" /></td>
<td>Indicates that the ePAF has been approved or submitted by the particular role.</td>
</tr>
<tr>
<td><img src="image4" alt="Icon" /></td>
<td>Indicates the role was skipped or will be skipped during the routing process.</td>
</tr>
<tr>
<td><img src="image5" alt="Icon" /></td>
<td>Indicates that the ePAF is on the worklist of this individual who has the role.</td>
</tr>
<tr>
<td><img src="image6" alt="Icon" /></td>
<td>Indicates that this role is in the routing process, and the ePAF has not yet arrived at this role.</td>
</tr>
</tbody>
</table>
7. You can view the transaction log to see all the actions taken on the ePAF. Under the transaction log, once the form action shows executed, it means the ePAF has been loaded into the PeopleSoft system and the ePAF approval is complete.

![Transaction Signature Log](image)

**View an Archived ePAF**

The **Look Up an Archived ePAF** feature may be used to review ePAFs that were processed more than 30 days prior to the current date.

1. On the ePAF Home Page, click **Look Up an Archived ePAF**.
2. On the **Look Up Archived an ePAF** page, select the type of ePAF that you would like to view. In this example, we will use **Hire an Employee**.

![Look Up Archived ePAF](image1)

3. On the **View Archived Hire Form** search page, you can search by several values including eForm ID, EmplID, Employee Last Name and First Name, and even by the Originator Operator (Originator's NID). In this example, we will use **EmplID: 2423114** click **Search**.

![View Archived Hire Form](image2)
4. Scroll down to the bottom of the ePAF, click on Next.

5. You can view the status of the ePAF. In this example, the ePAF workflow is complete. You will notice a green check mark icon next to the system, and also that the ePAF status shows executed.
ePAF Pay Actions for ePAF Approvers

General Information
ePAF users are typically required to approve ePAFs for employees other than themselves. However, there will be times when an ePAF action is required for the users’ record.

Best Practice
Any ePAF approver that is receiving a pay rate change should have another ePAF Originator and ePAF Approver within the department or college/division originates and approve the ePAF.

Required Documentation
If there is not another readily available approver within the department or college/division to approve the pay rate change ePAF action, a justification document signed by the appropriate next level of authority or an approval email from the appropriate next level of authority must be attached to the ePAF.

Summary
- The ePAF was implemented to simplify the data-entry procedures that are required to initiate various HR actions in the PeopleSoft system.
- The Originator will use the ePAF forms to initiate various HR actions.
- An Approver will receive an email notification when there is an item on the worklist.
- Changes made to the form are highlighted in yellow.
- Additional information about the ePAF can be added to the comment box if needed.

Please contact records@ucf.edu with any ePAF questions.
Additional Resources

There are several additional resources available to assist you.

- Human Resource Website:
  www.hr.ucf.edu

- ePAF Resources
  http://hr.ucf.edu/liaisons-and-managers/epaf/

- Sign-In Paperwork Checklists

- Academic Affairs Administration
  http://provost.ucf.edu

- College of Graduate Studies
  http://www.graduate.ucf.edu/

- Office of Research & Commercialization
  www.research.ucf.edu

- International Affairs and Global Strategies
  www.international.ucf.edu