ePAF Originator Processing Manual

Hire Paperwork

ePAF Processing

Updated 01/06/2017
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ePAF Originator Manual Revised 01/06/2017
Manual written to accompany the ePAF Originator Online Course (PAF002). The course must be completed prior to the Electronic HR Security Access eFORM is submitted to request ePAF access.

This manual does not cover the Electronic I9 or the processes related to that. The course name REC 001 must be typed to obtain security access to the Electronic I9 system.

Contact records@ucf.edu with any questions or comments regarding the information contained within this manual.

Forms and other documents found within this manual can be found at www.hr.ucf.edu or www.provost.ucf.edu.
PAF002: ePAF Originator Manual: Introduction

PeopleSoft HR 9.0
Human Resources

Introduction

Welcome to the Electronic Personnel Action Form (ePAF) Originator Training course! This manual will assist Originators in learning the skills that will be necessary to complete the employee onboarding process at UCF.

This manual forms the basis for the ePAF Originator Training. During the official Originator Training, attendees will have access to videos and other supporting training guides, some of which have been made available on the University's Human Resources website. ePAF Originator access is received once all of the appropriate trainings are completed and security access has been requested and approved.

The goal of this training is for all attendees to understand and apply the procedures detailed herein to meet the Federal, State, and University onboarding requirements.

Please note that this manual has been separated into two distinct sections:

1. Employee Sign-in Procedures (Modules 1-5)
2. ePAF Originator Processes (Modules 6-10)

Each section has been grouped in a manner that will best deliver the core competencies that will be needed to perform your duties with regards to the hire paperwork and the digital ePAF system.

Modules 1-5: Employee Sign-in Procedures

The objectives of the Modules 1-5 are:

- Enable the prompt and accurate completion of employee sign-in
- Facilitate a smooth transition into “active” employment status
- Support a “first pass” ePAF / hiring paperwork approval standard

It is important to note that when documents are properly completed the first time and the ePAF is done accurately, then the employee's onboarding process will go smoothly on its "first pass" through the approval process. This “first-pass” approval means the new employee will be able to effortlessly move into what is known as "active" status. This "active" status means that the employee is in the system and is eligible to receive his or her paycheck and all of the benefits that are part of his or her employment agreement.

To facilitate a faster "first pass," starting as of April 15th, 2013 sign-in paperwork (excluding the W-4 and Direct Deposit forms) must be attached to the hire ePAFs. This eliminates the waiting time
associated with sending the hire documents via inter-campus mail. With this new process, Employment Services & Records has the opportunity to immediately review and process the ePAF upon receiving it.

Module 6 - 11: ePAF Originator Processes

The objectives of the Modules 6-11 are:

- Introduce the ePAF creation process
- Provide Originators with the tools to successfully create the range of ePAFs necessary to request appropriate personnel actions
- Present Originators with efficient methods to track ePAFs through to completion

The ePAF portion of the Originator Manual outlines for Originators the necessary tools and resources that are used to successfully complete ePAFs for current and future employees of the University.

Each Module within this section of the manual will focus on a different aspect of the ePAF process and will demonstrate how you will move through each requisite screen to complete the desired actions.

It will be important to remember the following information about the ePAF system:

- All ePAFs that are generated by an Originator are accessible via a "View" feature to facilitate tracking the forms and ensuring they are moving towards final approval at an appropriate rate.
- Each ePAF that has been created by an Originator will need to pass through multiple ePAF Approvers to ensure the accuracy of the information.
- All ePAFs must receive final approval at the Human Resources Department prior to the information loading in the personnel system, PeopleSoft.
- Those ePAFs that have made it through the entire approval process and have been authorized into the system, or are more than 30 days old, can also be viewed by Originators at a later date to provide assistance or reminders of past actions completed on each employee’s job record.

Please remember that the HR-Employment Services & Records Team is able to assist Originators with any questions or concerns that may arise while completing the ePAFs.
Module 1: Human Resources Basics

Minimum Wage

As of January 1st, 2016 the State of Florida Minimum Wage is $8.10/hr. All hourly employees must be paid $8.10/hr. or higher.

Standard Hours and FTE

Standard hours equals the hours the employee works under the employment agreement.

FTE is short for the term "Full Time Equivalency." The FTE is the hours worked by the employee expressed as a decimal number.

A “Full Time Equivalent” of 1.0 is equal to 40 hours a week.

Calculating Standard Hours and FTE

To calculate FTE from Standard Hours:

Standard Hours divided by 40

(Example: 20 hours divided by 40 = .50 FTE)

To calculate Standard Hours from FTE

FTE multiplied by 40

(Example: .50 FTE multiplied by 40 = 20 Standard Hours)

Additional resources

Academic Administration:  
http://www.provost.ucf.edu/  
Graduate Studies website:  
http://www.graduate.ucf.edu/

Jobs with UCF website:  
www.jobswithucf.com

My UCF Portal:  
www.my.ucf.edu

ORC website:  
www.research.ucf.edu  
ORC Compliance website:  
http://www.research.ucf.edu/Compliance/faq_effort.html

Human Resources Website:  
http://www.hr.ucf.edu

Regional Campus website:  
http://regionalcampuses.ucf.edu
Module 2: Types of Employees

Employee Types and Paperwork Requirements Guide

Brand New Line Employees

Administrative & Professional (A&P)

Position that is exempt from overtime
   Regular
   Visiting
   Interim

Executive Service

Assigned by the President
Position that is exempt from overtime

Faculty (FAC)

Position that is exempt from overtime
   12 Month Regular or Visiting
   9 Month Regular or Visiting

University Support Personnel System (USPS)

Position that is either exempt or non-exempt from overtime
   Probationary
   Regular
   Time-Limited – please see more information regarding ePAFs in Module 9

Post-Doctoral Associates (Post-Doc)

Contracted employee that is eligible for limited benefits

Brand New OPS (Other Personnel Services)

Undergraduate Students (OPSSTU)

- Temporary jobs that are either subject to or exempt from FICA taxes.
- Federal Work Study or Non-Work Study

Graduate Students (OPSGRD, 918#)
Temporary jobs that may have a specified end date.

- Contracted (9181 - 9187) with specified end date
- Hourly (OPSGRD) without a specified end date

**OPS Non-Students**

- Hourly employees with a USPS Job Code
- Adjuncts
- OPSCG Job Code should be used for all non-student hires working on a C&G project

**OPS to Line Employees**

Employees moving from an OPS job to a Line Position

**Student to Non-Student**

Employees moving from a student job code to a non-student job code

**International employees**

ALL international employees must be sent to UCF Global before being hired.

- This includes any employee who is NOT a U.S. citizen, naturalized citizen, or permanent resident.
- Such employees cannot begin work until an approval is received from the UCF Global
- UCF Global completes ALL hiring paperwork for international employees.
- Once the approval and the hiring paperwork are received, the ePAF Originator should create the hire ePAF.

An international employee WILL have a work authorization end date and must go to UCF Global to update their work authorization.

**Rehires**

Employees who previously worked at UCF and are being rehired into any type of position at UCF

An employee is considered a rehire if any of the following apply:

- Employment ended less than 120 days / one semester in the past.
- Employment ended more than 120 days / one semester BUT less than one year ago.
- Have been separated from the University for more than one year.
Module 3: Hire Paperwork, Part 1

This module will introduce the UCF Payroll Sign-In documents that are required to be attached to the ePAF. Common errors will also be addressed.

**Paperwork**

- For employees separated from UCF for **less than one semester**, a rehire packet is not required only a hire ePAF (and any agreement or contract if applicable) is needed.

- A **rehire packet** (in addition to a hire ePAF) must be submitted for employees separated from UCF for **over one semester** (or 120 days).

- **New hire paperwork** (in addition to a hire ePAF) must be submitted to put all new UCF employees and all UCF employees who have been **separated from UCF for more than 12 calendar months** on active status.

- **OPS to Line paperwork** (in addition to a hire ePAF) must be submitted for any current OPS employee being hired into a line position.
  - If the employee was hired into the OPS position within the last 120 days only the Orientation Notice and Agreement (if applicable) is needed.

- **Student to Non-Student paperwork** (in addition to a Edit Existing Job ePAF) is needed when students are no longer in an active UCF degree program and are going to remain an OPS hourly employee.

**Human Resources Hiring Checklists**

See below for all the current Hiring Checklist links for various classifications of employees.

*If Applicable:* The Hiring Checklists may indicate certain paperwork as “*if applicable.*” This means that if your particular hiring situation requires the document(s), Human Resources will also need the “*if applicable*” document(s) to approve the Hire ePAF.

<table>
<thead>
<tr>
<th>Full Hiring Document Checklist</th>
<th>OPS to Line</th>
</tr>
</thead>
<tbody>
<tr>
<td>A&amp;P and Faculty</td>
<td>Graduate Hourly</td>
</tr>
<tr>
<td>Adjunct Faculty</td>
<td>Post Doctoral Associate</td>
</tr>
<tr>
<td>Graduate Assistantship</td>
<td>Rehiring an Employee</td>
</tr>
<tr>
<td>International/Non-Resident Aliens</td>
<td>Student to Non-Student</td>
</tr>
<tr>
<td>Line to OPS Non-Student</td>
<td>Undergraduate Students</td>
</tr>
<tr>
<td>Non-Students</td>
<td></td>
</tr>
</tbody>
</table>
Instructions on how to correctly amend an error on a document:

Correction tape is not to be used on any documents in the hiring packet.

If a correction is needed the appropriate procedure is this:

The individual that made the error must draw a single line through each error and initial the correction. The individual making the correction will then squeeze the correct information above the error (within the same line).

Please remember to check for updated forms on a regular basis from the Human Resources or Provost websites as relevant.

**UCF Sign-In Forms for attachment to the ePAF**

**3-in-1 Form**

The 3-in-1 form is comprised of the State of Florida Loyalty Oath, Public Officers Declaration, the notification of Social Security Number collection and usage, and the UCF Regulations and Policies. The form is notarized by a notary on the bottom quarter of the form. This certification of the form validates the loyalty oath.

Instructions on the accurate completion of the 3-in-1 Form:

**State of Florida Loyalty Oath:**

1. The employee’s name should be indicated as his or her legal name as it appears on the Social Security Card.
2. Permanent Residents may cross through and initial the word citizen and write resident. International employees may cross through and initial the word citizen and write non-resident.
3. The form requires the employee’s home address **county**.
   A. A common error is entering USA or America.

**Public Officers Section:**

The employee is to select yes OR no

1. A common error is checking both boxes.
2. If an employee checks that they do hold /have held such an office, refer to the Guideline on the form.

**Notification of Social Security Number Collection and Usage:**

The employee must check this box indicating that they have read and accepted the SSN collection and usage statement.

**UCF Regulations and Policies:**
Employee to initial.

1. A common error is the line being left blank.
2. The employee should review the Regulations and Policies websites.

**Employee Signature Section:**

**NOTICE:** Employee is not to enter information in this section until in the presence of a Notary.

1. Employee prints their name and signs the document in the presence of a Notary.
2. The Notary is to complete the rest of this section.
   A. A common error is the employee enters the date the form was completed.
   B. A common error is the Notary not checking one of the identification boxes.
   C. If the Notary indicates that identification was produced they must identify the type of identification.
3. The Notary must affix their official stamp or seal to notarize the document
   A. In Florida, the stamp MUST be an ink stamp legibly showing the Notary's commission number and expiration date.
   B. If a Non-Florida notary notarizes the form, their seal must adhere to their state’s requirements

**Employee Acknowledgment**

This document informs the employee of the proper procedures to be followed in the event of a workplace injury.

**Instructions on the accurate completion of the Employee Acknowledgment Form:**

1. The employee prints their name, signs and dates the document
2. The Employer Representative must also sign the form.
   A. A common error is that the representative does not sign the document.

**Retirement Status Notification Form**

All employees, regardless of age, MUST complete this form.

The Retirement Status Notification Form allows the employee to notify the University of their Retiree Status. It also informs the employee of the restrictions on their employment with the University if they are a stated class of retiree. The employee would use this form to notify UCF of any employment held within the last two years.

**Instructions for the accurate completion of the Retirement Status Notification Form:**

1. The employee enters their EmplID in the top right of the form.
2. Only ONE box is to be checked by the employee in Section 2.
   A. A common error is to check both boxes. To correct this error, please have the employee circle the correct box and initial.
**Personal Data Sheet**

As the name implies, the Personal Data Sheet calls for the employee’s personal biographical information. This document has many parts that MUST be completed by the employee.

After initial hiring is complete, the employee is able to edit all information other than a name change and marital status through the employee self-service link on myUCF. *(If your employee needs to make a name change or marital status change please have them complete this form. You will submit it to the HR-Employment Services & Records Department along with a copy (made by you) of their Social Security Card showing the name change.)*

**Instructions for the accurate completion of the Personal Data Sheet Form:**

1. At the direction of Computer Services, the personal email address is to be entered on the “Personal Email Address” line. It should be an address OTHER than an “@ucf.edu” or other UCF-based email.

2. The name **MUST** be the employee’s name as it appears on their Social Security Card.

3. Citizenship: The employee checks the box for their citizenship status.
   - If native is **not** the selection made by the employee then the Citizenship Information should also be completed (E.G. Citizenship Country, Visa, Work Authorization Expiration Date).

4. The employee must select their Ethnic group(s).
   - *The employee must select either Non-Hispanic or Hispanic in the Step 1 box.*
   - *The employee must then select their Ethnic group(s) from the Step 2 box.*
   
   Additional information on the description of each Ethnic group can be found on the second page that prints with the Personal Data Sheet.

5. Florida Statute 119: The employee would most often know if they are a protected class under the Florida Statute 119. This section of the form must be marked yes OR no.

6. If an employee has a relative that is employed by the University, they MUST notify the University in this part of the form.
   - *If the employee is working in the same department as the relative, BOTH must have an Employment of Relatives form submitted as instructed in Module 4.*

**Other Common Issues With This Form:**

1. **Home address cannot be a mail box, post box, or P.O. Box.**
   - The employee may provide the mail, post, or P.O. Box as their mailing address.

2. **Emergency contact information is not completed.**

3. **Form is not signed and/or dated.**
Module 4: Hire Paperwork, Part Two

Due to the sensitive information of the information submitted on the Direct Deposit and W-4 Form they should not be submitted through ePAF workflow. Do not attach these items to the ePAF. The employee will receive an email, as of their hire date and once the Hire ePAF loads to the system, to log into myUCF and complete their Direct Deposit and W-4 information.

I-9 Form

The University of Central Florida has moved to the use of Electronic I-9 Forms. As an Originator, you may be responsible for completing sign-in paperwork for employees, including the I-9 Form.

Prior to requesting access to the Electronic I-9 Website, the I-9 Form Training (Course Name: REC001) and the Electronic I-9 Security Access Form must be successfully completed.

Please wait three to five business days after completion to gain access to the Electronic I-9 Website.

For more information, please contact an Employment Services & Records Team Member in the Human Resources Department.
More Forms

**Health Insurance Marketplace Form**

UCF is required to furnish the Health Insurance Marketplace notification (Form OMB No. 1210-0149) to all new employees in compliance with the Affordable Care Act (ACA) amendment to the Fair Labor Standards Act.

Accordingly, the attached notice provides the following information:

- Information About Health Coverage Offered by the State of Florida
- Contact Information for People First, SOF’s third-party benefits administrator

General questions regarding State of Florida benefit options can be directed to People First, at 1-866-663-4735 or by visiting [http://www.myflorida.com/mybenefits/](http://www.myflorida.com/mybenefits/).

Questions regarding UCF’s implementation efforts for the Affordable Care Act (ACA) legislation can be sent to healthcarecompliance@ucf.edu.

**This document must be provided to ALL new hires. It should not be sent to HR.**

**SSA - 1945**

The first three pages of this four page document are to provide an explanation of the Effect of Plan Participation on Social Security Benefits when an employee is working in an hourly, OPS Non-Student position, as an Adjunct, and as a Post-Doctoral Associate.

The form is to be completed by any employee working in an hourly OPS Non-Student position, as an Adjunct, and as a Post-Doctoral Associate (Students are not required to complete this form).

The employee is to enter their name and EmplID at the top of the form (the fourth page), then sign and date the bottom of the form once they have read the information on the page.

*If any of this information is not entered the document is considered invalid and will delay the completion of the sign-in process.*

**Background Check Procedures**

Some employees being hired will need to have a background check completed before they are offered and begin working the job. Please note this currently applies to Faculty, A&P, Post Doctoral, USPS, OPS Non-Student, Adjuncts, Graduate Contracted and Graduate Hourly students. Please view the Background Check Procedures at the link above.

All Background Check documents should be forwarded to Recruitment. Departments can submit the ePAF/Sign-In paperwork once the employee submits their information online via Truescreen for the background check.

**Orientation Notice**

The orientation notice is completed for new employees being hired into a line position. It enrolls the employee into the New Employee Orientation. The employee must also agree to several conditions of employment.
Instructions on the accurate completion of the Orientation Notice Form:

1. This top section is completed by the hiring department. The orientation schedule is every other Friday, on the Fridays that employees are paid.

2. The center section of the form is to be completed by all new benefited employees. They must initial, sign, and date in the appropriate areas.

3. The bottom section of the form is to be completed ONLY by the new A&P and Faculty employees.

   **Employment of Relatives Form**

An Employment of Relatives (EoR) Form is needed when an employee is working in the same department, unit, or college as a relative.

   *For the purposes of this form, a relative is anybody related to an employee including (adopted, step-, grand-, half-, in-law, or great-), persons who intend to marry or with whom the employee intends to form a domestic partnership or other intimate relationships.*

The employee CANNOT complete this form; it MUST be completed by the hiring department.

- Signature for supervisor
- It has to be signed by one other person (whomever is the Academic, Research, or Administrative Unit representative)
- An organizational chart must be included which demonstrates the chain of command for both individuals.

If an EoR form is required then the hiring process is “held” until the form is completed and delivered to Human Resources with all requisite signatures attached. **HR will sign off on the form for OPS hourly student employees, hourly non-student employees, A&P, and USPS. Faculty Relations will sign off on the others.**

If a relative already works for the University and the new hire is related to the existing employee, EoR forms must be completed for EACH employee.
Module 5: Agreements

There are a number of agreements that will be required to complete the hiring process for employees.

For Students:
The Graduate Contract – this document is managed by the College of Graduate Studies. The hiring department is responsible for creating the Graduate Contacts for their employees.

For A&P employees:
The A&P Employment Agreement is generated during the recruitment approval process. A&P hiring is managed by the Human Resources Recruitment Department. Information related to this type of hire can be found on the Managers & Liaisons Section of the Human Resources website. Human Resources is responsible for creating the agreements and providing them to the hiring department for signature.

For Faculty:
The Adjunct and Post Doctoral agreements are created by the department. The forms and hiring guides are located on the Provost’s website. The hiring department is responsible for creating these types of agreements for their employees.
The 9-Month and 12-Month Faculty agreements are managed by the Office of Academic Affairs. The hiring guides are located on the Provost’s website. Academic Affairs is responsible for creating these agreements and providing them to the hiring department for signature.
Module 6: Introduction to ePAFs

What is an ePAF?

ePAF stands for Electronic Personnel Action Form. ePAFs are a set of data entry forms used to initiate job actions for current and future employees. The approval workflow begins after the form is submitted by the Originator. The ePAF is intuitively routed to the appropriate Approvers based upon the information included on the electronic form.

Five Types of ePAF Forms

There are five types of ePAFs, which will be explained in depth in the following.

**Hire an Employee ePAF Form**

The Hire ePAF Form is used to process hires, rehires, and transfers. Actions requested via the Hire ePAF Form may not be more than 90 days in the future. If today is January 1st, a Hire ePAF cannot be made to hire someone starting July 1st.

Some examples of when a Hire ePAF Form is used: your department is hiring a new employee, your department hires a current UCF employee that works in another department, or your department rehires a former Adjunct Faculty employee.

**Edit Existing Job ePAF Form**

The Edit Existing Job ePAF Form is used to process all job actions for employees within your department. This means the employee is already on your department’s payroll. This eFORM will allow the Originator to request more than one change to the job record at the same time. Just like the Hire ePAF Form, actions may not be more than 90 days in the future.

Some examples of when an Edit Existing Job ePAF Form is used: to request a pay rate change, funding department change, and/or, Full Time Equivalency (FTE) change. Less common instances include requesting to reclassify a line employee, change a Home Department Number, and request a Special Pay Increase.
Change Employment Status ePAF Form

The Change Employment Status ePAF Form is used to process a change in employment status for employees in your department. Employees receiving regular pay checks have an Active Status with the University. Just like the other eFORMS, actions may not be more than 90 days in the future.

Some examples when a Change Employment Status ePAF Form is used: to process a change of Leave (moving from Paid to Unpaid), request a Return from Leave of Absence, or submit a Termination for an employee.

Position Change ePAF Form

The Position Change ePAF Form is used to request a brand new position number (after all assigned position numbers have been utilized), or update a vacant position. The final Approver of this specific ePAF is HR-Compensation. All Position Descriptions and other source documentation must be forwarded to HR-Compensation. Just like the other eFORMS, actions may not be more than 90 days in the future.

Some examples of items that could be requested via the Position Change ePAF Form are the reclassification of a vacant 12M faculty position to a 9M faculty position or moving a vacant position from one home department to another home department.

Supplemental ePAF Form

The Supplemental ePAF Form is used for unusual actions that cannot be completed on one of the other four ePAF forms. The Supplemental ePAF Form requires that all information be manually entered by the Originator. Just like the other eFORMS, actions may not be more than 90 days in the future.

An example when a Supplemental ePAF Form would be used is in correcting the hire date of an ePAF that has received final approval and has loaded into PeopleSoft.

Originators

Upon the successful completion of this course and security access is granted you will become an Originator. ePAF Originators create ePAFs for various HR actions via the ePAF Home Page within the PeopleSoft system. The navigation to the ePAF Home Page is as follows: MyUCF > Staff Applications > Human Capital Management > Department Self Service > ePAF Home Page. On the ePAF Home Page there are several different actions that can be done.

Once an Originator officially submits an ePAF, the eFORM moves through the workflow to the Director/Chair Approver or the VP/Dean Approver (if the department does not have a Director/Chair as it is an optional level). It must receive approval before moving on to the next level approver.

If an ePAF needs to be corrected and has not received final approval by Employment Services & Records (or HR-Compensation for Position Changes), the ePAF must be recycled to the Originator for corrections to be made. After the corrections are made, the eFORM can be resubmitted into the workflow for approval.

As Originators, notification emails will be sent to the UCF email address. These Workflow Emails will specify if the ePAF has been approved to the next level, recycled for correction/withdrawal, or sent to the system.
Approvers

After the Originator submits the ePAF, it will flow to the appropriate Approver. Approvers review the ePAF to verify accuracy.

The first Approver after the ePAF is submitted by the Originator is the Director/Chair of the department/college. This level is an optional approval role and not all departments/colleges elect to have it active.

The official Approver for the department/college is the VP/Dean Approver. When the VP/Dean approves the ePAF, it will leave the department/college and move onto the appropriate Workflow Approver(s).

The ePAF has the opportunity to travel through many different Workflow Approvers. The information included on the ePAF will determine to which of the Workflow Approvers it will automatically route. The ePAF may route through one or several of the Workflow Approvers.

The Workflow Approvers are:

- College of Graduate Studies (Financial Assistance)
- Regional Campuses
- Office of Research & Commercialization (Compliance)
- Academic Affairs Administration (Provost)
- Human Resources (Compensation)
- Human Resources (Employment Services & Records)

Each Approver has four choices to select from when reviewing an ePAF. The first is Approve, which will move the ePAF on to the next Workflow Approver. The second is Deny, which will stop the ePAF permanently and no further action can be taken. If a correction must be made to the ePAF, the Approver can Recycle the ePAF, which will send it back to the Originator. The Originator can then correct and resubmit the ePAF. The final option is Hold, which temporarily stops the progression of the ePAF. The Approver may be waiting for more information, paperwork, or confirmation.

Workflow Approvers: Business Processes

The ePAF will travel through different Workflow Approvers based upon what information is included in the ePAF. Each of the Workflow Approvers has specific business processes (ePAF requirements) that are accepted as standard. Each is briefly reviewed below.

**Academic Affairs – Administration**

Academic Affairs produces the new, summer, and continuing (fall) faculty agreements. Upon receiving an ePAF, Academic Affairs Administration creates faculty agreements (if applicable) and forwards them to the department for the employee’s signature.

**College of Graduate Studies**

College of Graduate Studies reviews and approves all Graduate Contract employees. All assistantship contracts must be attached to the ePAF by the department. College of Graduate Studies enters graduate assistantships in
PeopleSoft Checklist Management. If the information on the ePAF and the Graduate Contract do not match, College of Graduate Studies will recycle the ePAF for correction.

**Regional Campuses**

All ePAFs created from Regional Campuses must receive approval by the Dean (or dean designee). Regional Campus departments are to provide course numbers for Adjuncts and GTAs in Comments box.

**Office of Research & Commercialization – Compliance**

The Office of Research & Commercialization – Compliance must review all ePAFs with Contract & Grant (C&G) funding department(s). The C&G funding source may be identified by the fifth (5th) digit of the eight-digit funding department number. Funding sources with a fifth digit of five (5) or higher will cause the ePAF to automatically route through ORC for approval. ORC will verify the C&G funding department(s) end date i.e. when the employee will be removed from the project. An additional box will populate within the ePAF for this date to be entered.

**Human Resources – Compensation**

Human Resources–Compensation reviews and approves all Position Change ePAFs. Supporting documents for this type of ePAF must be attached via the Position Change ePAF. Please **do not** forward the hard copy documents. Some of the supporting documentation departments would provide to Compensation includes position descriptions and applications as required for position changes and pay rate increase requests (i.e. out of cycle pay increase requests). The second type of ePAF that Compensation reviews are Edit Existing Jobs that involve reclassification or Special Pay Increases of A&P and USPS employees. Departments must provide justification for reclassifications, Special Pay Increases, etc. in the Comments section of ePAFs. If additional supporting documents are included, the files must be attached in the .pdf format.

**Human Resources – Employment Services & Records**

Human Resources-Employment Services & Records is the final approver for all ePAFs except for Position Change ePAFs. Departments/Colleges are responsible for completing new employee sign-ins for all employees. Departments/Colleges forward all hire packets, resignation letters, contracts, and other source documents accompanying ePAF(s) to HR-Employment Services & Records. Some source documents such as agreements, hire paperwork (except for the Direct Deposit and W-4 Forms), and resignation letters may be scanned and attached to the ePAF. All attachments MUST be in PDF format and follow the attachment guidelines as instructed in Module 10. Employment Services & Records keeps a log of all supporting documents that have been dropped off or sent via interoffice mail to Employment Services & Records, and the ePAF Source Documents Log, is sent out weekly. In order to receive the ePAF Source Documents Log please send an email to records@ucf.edu requesting to be added as a recipient.

**General Tips**

The ePAF system will allow only one (1) ePAF to be created per employee record number at a time. Keep track of all ePAF numbers along with the form type for ePAFs created. One of the duties of an Originator is to follow up on all ePAFs created to ensure all ePAFs are approved in a timely manner. Changes to current employee records should not be made in the middle of a pay cycle. Examples of such items include requesting funding department/home department number changes or pay plan changes (changing from Hourly to Contract; changing from OPS to Staff, etc.).
Module 7: Types of ePAFs: Hire an Employee

This module will demonstrate the uses and features of the ePAFs. The exercises included in this training guide focus on the actions made by the Originator. The exercise is performed based on a general scenario, as many different scenarios are possible, and is only an example. For privacy reasons, certain information has been removed from the example screenshots and replaced by generic field details.

Please note: One ePAF form can be used to process multiple HR actions at one time. However, only one ePAF form can be processed per employee/employee record number at a time. For example, if an ePAF is pending for an employee’s record number 0, another ePAF for record number 0 cannot begin until after the pending ePAF is approved or denied.

Hire an Employee ePAF

The “Hire an Employee” ePAF form is used to initiate the processing of all new hires, transfers between departments, rehires, promotions, and demotions. If the hire is an existing employee at UCF, but the employee is new to your department, then the Hire an Employee form is used.

For employees new to UCF or new to your department, the Hire ePAF includes inputting the employee’s personal and contact information. The employee’s personal and contact information can be found on the employee’s Personal Data Sheet, as part of the employee’s New Hire Packet. For current UCF employees, some fields will already be entered, and will need to be checked and/or changed for updates.

Departments must ensure that the name on the employee’s Social Security Card is what is entered on the Hire ePAF, as the IRS requires that all employees be paid in the name as it appears on the Social Security Card.
How to create a Hire ePAF:

Navigation: Log in to myUCF>Staff Applications>Human Capital Management>Main Menu>Department Self Service>ePAF HomePage>Start a new ePAF>Hire ePAF

1. For all “Hire an Employee” ePAF job actions, Originators must first conduct a search to verify if the employee exists in the PeopleSoft system. In order to prevent the creation of duplicate Employee ID Numbers (EmplIDs), either the EmplID or all fields with asterisks must be entered. The fields with asterisks include the employee’s Social Security Number, First Name, Last Name, and Date of Birth.

2.A. If the employee does not exist in the PeopleSoft system, an “Add” button will appear. Click the “Add” button to begin entering their personal information.
2.B. If the employee exists in the PeopleSoft system, results will appear in the “Person Results” table at the bottom of the page (image example below).

i. You may see multiple rows for the same employee (the EmplID are all the same) if the employee has been employed in multiple departments at the University (Rcd#’s could be 0, 4, 5, 6, 7, 8+, or 500).

ii. You may also see multiple name matches. In this instance, check the EmplID and Date of Birth before choosing an employee.

**Person Results**

<table>
<thead>
<tr>
<th>Person Results</th>
<th>Customize</th>
<th>Find</th>
<th>First</th>
<th>1-4 of 4</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>EmplID</td>
<td>Name</td>
<td>Date of Birth</td>
<td>National ID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1090371</td>
<td>Golden Knight</td>
<td>02/18/1984</td>
<td>(Not Displayed)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1651070</td>
<td>Golden Knight</td>
<td>03/20/1989</td>
<td>(Not Displayed)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1651070</td>
<td>Golden Knight</td>
<td>03/26/1989</td>
<td>(Not Displayed)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006046</td>
<td>Golden Knight</td>
<td>06/18/1975</td>
<td>(Not Displayed)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3. Contact Information: After choosing the employee or record number for hiring, enter the employee’s personal information, located on the employee’s Personal Data Sheet.

**Search Results Columns**
In this table the Person Results column names are explained.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR</td>
<td>This column indicates if HR Personal Data exists.</td>
</tr>
<tr>
<td>Job</td>
<td>This column indicates if Job Data exists.</td>
</tr>
<tr>
<td>Act</td>
<td>This column indicates if the employee’s job record is active.</td>
</tr>
<tr>
<td>EmplID</td>
<td>This column gives the employee’s UCF Employee ID Number.</td>
</tr>
<tr>
<td>Rcd#</td>
<td>This column gives the employee’s job record number(s).</td>
</tr>
</tbody>
</table>

**Search Results Icons**
In this table the Person Results symbols are explained.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>This icon indicates: (1) no HR Personal Data exists (HR); (2a) no Job Data exists (Job); or, (3) the existing Job Data is Inactive (Act).</td>
</tr>
<tr>
<td>![Icon]</td>
<td>This icon indicates: (1) HR Personal Data exists (HR); (2a) Job Data exists (Job); or, (3) the existing Job Data is Active (Act).</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Click this icon to find out more information about the employee’s job data.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Click this icon next to the individual or record number you wish to choose for hiring.</td>
</tr>
</tbody>
</table>

**Employee Job Record Numbers**
In this table the Person Results Rcd#’s are explained.

<table>
<thead>
<tr>
<th>Job Record Number (Rcd#)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Line Employees: A&amp;P, USPS, Faculty, Post Doctoral Associates</td>
</tr>
<tr>
<td>4 or higher</td>
<td>OPS Employees: Undergraduate and Graduate Students, Non-Students, Dual Compensation, Adjunct Faculty, etc.</td>
</tr>
<tr>
<td>500</td>
<td>Student Record not related to HR. If only a 500 record is available, choose the 500 record, and a Job Record will be created</td>
</tr>
</tbody>
</table>

**Hire an Employee**

*Step 2 of 8: Contact Information*
Enter the personal and contact information for the individual being hired.

**Personal Info**
- **Empl ID:** NEW
- **Prefix:**
- **First Name:** Golden
- **Middle:**
- **Last Name:** Knight
- **Suffix:**
- **Email Address:** golden.knight@fsu.edu

**Home Address and Phone**
- **Country:** USA
- **Address 1:** 1234 South Alafia Trail
- **Address 2:**
- **City:** Orlando
- **State:** FL
- **Postal:** 32827
- **County:** ORAN
- **Home Phone:** 407-655-4826
- **Cell Phone:** 407-655-4826
4. Emergency Contact: On the same page, enter the employee’s emergency contact information, located on the employee’s Personal Data Sheet, and click “Next.”

5. Identity Information: Enter the employee’s identity information, located on the employee’s Personal Data Sheet. Mark whether employee will be receiving a UCF email address.

You have the option to:
- “Save and Stop”: Saves the employee’s personal information and issues an EmplID.
- “Save and Next”: Saves the employee’s personal information, issues an EmplID, and continues to the next page to begin hiring the employee.

6. Job Information: After entering all of the employee’s personal information, you will now begin the hiring of the employee.
   - Enter the date of hire in the “Effective Date” field.
o Choose “Position” (positions with a position number) or “Non-Position” (OPS employees who are not issued a position number).

o Choose the appropriate Employee Group, Pay Group, and Empl (employee) Class. Some fields will default based on your previous choices.

o Note that an eFORM ID number has now been assigned to the ePAF and is located across from the Effective Date. To continue to the next page, click “Next.”

The first Hire ePAF example will be hiring a Position (Line) Employee

7. Position Information: When choosing a position (line) employee, you will enter the following information:

   o Enter the employee’s position information. All position numbers are preceded by three zero’s (000). Only open position numbers within your department will be available.

   o Note that the Job Code, Position Title, Short Title, Department, Location Code, Regular/Temporary, Reports To (if applicable), Authorized FTE, Liability Dept, and Admin Code fields are automatically filled. Verify these against the Agreement or Contract.

   o Make any necessary changes if applicable.

   o To continue to the next page, click "Next".
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number</td>
<td>00038259</td>
</tr>
<tr>
<td>Position As Of</td>
<td>02/20/2009</td>
</tr>
<tr>
<td>Position Title</td>
<td>Appl Syst Analy Program Lead</td>
</tr>
<tr>
<td>Job Code</td>
<td>2503</td>
</tr>
<tr>
<td>Short Title</td>
<td>Appl Syst</td>
</tr>
<tr>
<td>Department</td>
<td>COMP SVCS ADMIN-PAYROLL</td>
</tr>
<tr>
<td>Location Code</td>
<td>Main Campus (Orlando)</td>
</tr>
<tr>
<td>Regular/Temporary</td>
<td>Regular</td>
</tr>
<tr>
<td>Reports To</td>
<td>00037504</td>
</tr>
<tr>
<td>Authorized FTE</td>
<td>1.000000</td>
</tr>
<tr>
<td>Liability Dept</td>
<td>COMP SVCS ADMIN-PAYROLL ADM</td>
</tr>
<tr>
<td>Admin Code</td>
<td>N1</td>
</tr>
<tr>
<td>Salary Admin Plan</td>
<td>21</td>
</tr>
<tr>
<td>Grade</td>
<td>10</td>
</tr>
</tbody>
</table>
8. Position Compensation: When choosing a position (line) employee, you will enter the following compensation information:

- Enter the hours the employee will work per week in the “Standard Hours” field.
- Enter the annual rate of pay in the “Compensation Rate” field. (NAANNL stands for North American Annual.)
- Enter the funding department in the “Funding Department” field, or click the magnifying glass next to the “Funding Department” field to choose the funding department(s) from which the employee will be paid.
  - If the employee is to be paid from only one department, click the “Primary” box and enter “100” in the “Percentage of Distribution” field.
  - If the employee will be paid from more than one account, use the + button to add additional Funding Department fields. The total of all distributions must equal 100%, and one department must be chosen as the primary department.
  - Please note that if you enter a Contract and Grant (C&G) funding department number, an “End Date” box will appear for you to enter the date the employee is expected to be removed from the grant.
- To continue to the next page, click “Next.”
The second Hire ePAF example will be hiring a Non-Position (OPS) Employee

9. Non-Position Information: When choosing a non-positioned (OPS) employee, you will enter the following information:

- Enter the Home Department in the "Department" field.
  - Note that the Home Department number is not the Funding Department number, and only the Home Department(s) for which you have security rights will be available.
- The "Location Code" field defaults with the Home Department selection.
- Enter the job code in the "Job Code" field, or click the magnifying glass next to the "Job Code" field to look up a valid job code.
- The "Supervisor ID" is a required field.
- To continue to the next page, click "Next".

Hire an Employee

Step 5 of 8: Non-Position Information
Complete the fields below with the appropriate job information for the individual being hired.

**Personal Info**

- Name: Knight, Golden
- Empl ID: 3358814
- Cit Status: Native
- Email Address: goldenknight@fakeemail.com

**Hire Form Data**

- Department: 01012001 PRES-PAYROLL
- Location Code: MAIN Main Campus (Orlando)
- Job Code: 160 Program Assistant
- Supervisor ID: 3305449 Supervisor Name

<< Previous Next >>
10. A. Non-Position Compensation Hourly: When choosing a non-positioned (OPS) employee that is not fixed bi-weekly, you will enter the following compensation information:

- Enter the hours the employee will work per week in the "Standard Hours" field.
- Enter the hourly rate of pay in the "Compensation Rate" field.
  - (NAHRLY stands for North America Hourly.)
- Enter the funding department in the "Funding Department" field, or click the magnifying glass next to the "Funding Department" field to choose the funding department(s) from which the employee will be paid.
  - If the employee is to be paid from only one department, click the "Primary" box and enter "100" in the "Percentage of Distribution" field.
  - If the employee will be paid from more than one account, use the + button to add additional Funding Department fields. The total of all distributions must equal 100%, and one department must be chosen as the Primary Department.
  - Please note that if you enter a Contract and Grant (C&G) Funding Department number, an "End Date" box will appear for you to enter the date the employee is expected to be removed from the grant.
- To continue to the next page click "Next".
10. B. Non-Position Compensation Contracted: When choosing a non-positioned (OPS) employee that is fixed bi-weekly (Graduate Contract/Adjunct/Dual Compensation), you will enter the following compensation information.

- Enter the begin date, end date, total salary, and FTE located on the contract in the ePAF Calculator.
  - The calculator will automatically default the standard hours and compensation rate based on the information inputted in the ePAF Calculator.
- Enter the Funding Department in the "Funding Department" field, or click the magnifying glass next to the "Funding Department" field to choose the Funding Department(s) from which the employee will be paid.
  - If the employee is to be paid from only one department, click the "Primary" box and enter "100" in the "Percentage of Distribution" field.
  - If the employee will be paid from more than one account, use the + button to add additional Funding Department fields. The total of all distributions must equal 100%, and one department must be chosen as the Primary Department.
  - Please note that if you enter a Contract and Grant (C&G) Funding Department number, an "End Date" box will appear for you to enter the date the employee is expected to be removed from the grant.
- To continue to the next page click "Next".

![Image of ePAF Calculator](image-url)
The following steps apply to both Non-Position and Position Hire ePAFs.

11. Edit Existing Job: For current employees, you will be asked if the employee is leaving their current position for the position in your department. If so, check the box next to “Edit Existing Job?” to indicate that you want to terminate the UCF job listed.

*Note that it’s the Originator’s responsibility to be in contact with the employee’s current department to ensure that the department is aware of the termination.* For new employees, the “Edit Existing Job?” box will not appear.

12. Finalize Form: Before submitting the ePAF, please note the following:

- Attach any documents required. The Hire/Rehire paperwork (excluding the Direct Deposit and W4 Forms) must be attached.
  - Please review the Attachment Guidelines below, before attaching documents to ensure compliance.
- Include any comments required.
- To submit the form, click "Submit".
13. Submit this Form?: You will be asked if you wish to submit the form. Click “yes” to submit the form and send the ePAF to the first Approver.

![Message]
Submit this form? (20002.27)
The form will be directed to the next approver, if any.
_______________
Yes       No

14. Form Finalized: You have successfully submitted the ePAF and the ePAF has been sent to the first Approver. Make note of the eFORM ID number and eFORM Type for future reference or this page can be printed and kept in the employee’s department file. It is optional to click the “View this form” link after submitting, however it would be beneficial to review the form to ensure all requests were entered accurately.

![Hire an Employee]
Step 8 of 8: Form Finalized
You have successfully created the form. Review the messages below for routing information and choose one of the links to leave this page.

- Personal Info
  - Name: Knight, Golden
  - Empl ID: 3359814
  - Cit Status: Native
  - Email Address: goldenknight@fakeemail.com

- Form Status
  - eForm ID: 155706
  - You have just AUTHORIZED this form. This action passed the form to the SYSTEM for further processing.

FTE Calculation: Teaching Adjuncts/Teaching Dual Compensation.

For employees in Teaching Adjunct Job Codes (9001A-9005) or Teaching Dual Compensation Job Codes (9001X-9005X), a FTE Calculator must be used to accurately calculate their FTE and standard hours for compliance with the Affordable Care Act (ACA) reporting to the state of Florida.

**HIRE ePAF Instructions**

When submitting a HIRE ePAF for a teaching adjunct or teaching dual compensation employees, the following steps will need to be taken.

1) Obtain the employee’s course information, including credit hours and number of sections.
2) Input the information in the Teaching Adjunct/Teaching Dual Compensation FTE Calculator.
3) Take the result from the PeopleSoft FTE field and input it in the Hire ePAF.
4) A copy of the Teaching Adjunct/Dual Compensation FTE Calculator does not need to be submitted to HR. However, we recommend printing a copy for your records.

For additional information, please see [FTE Calculation: Teaching Adjunct/Dual Compensation](#).

**Employee NID Look Up**

24 hours after the ePAF has been submitted, the ePAF Originator can look up the employees Network Identification Number (NID). In PeopleSoft the Originator would click: Main Menu: UCF CC Custom: NID Lookup. The EmplID number will be needed to search for the employee.
Module 8: Types of ePAFs:
Edit Existing Job and Change Employment Status

Edit Existing Job and Change Employment Status ePAF

The following demonstrates the uses and features of the Edit Existing Job and Change Employment Status ePAF forms. The exercises included in this training guide focus on the actions made by the Originator. The exercises are preformed based on a general scenario, as many different scenarios are possible, and is only an example. For privacy reasons, certain information has been removed from the example screenshots and replaced by generic field details.

Please note: One ePAF form can be used to process multiple HR actions at one time. However, only one ePAF form can be processed per employee/employee record number at a time. For example, if an ePAF is pending for an employee’s record number 0, another ePAF for record number 0 cannot begin until after the pending ePAF is approved or denied.

Edit Existing Job ePAF

The “Edit Existing Job” ePAF form is used to initiate all job-related actions, including promotions within your department, changes in employee class, 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.

Please note: One ePAF form can be used to process multiple HR actions at one time. However, only one ePAF form can be processed per employee/employee record number at a time. For example, if an ePAF is pending for an employee’s record number 0, another ePAF for record number 0 cannot be created until after the pending ePAF is approved or denied.

How to create an Edit Existing Job ePAF:
1. Select an Employee: Note that this search page is different from the “Hire an Employee” ePAF search page. You have the option of searching for the employee by the EmplID, Employee Record Number (Empl Rcd Nbr), Name (First Name), Last Name, Department, and Employee Group. All fields perform an exact match search based on the information you enter. Click Search will request the system to search for the employee.

2. Change Job Data: Enter the effective date of the ePAF in the “Effective Date” field. The effective date will default to the date that you are creating the ePAF. The accurate effective date must be entered. On this page, you have the following options to change:
   - The employee group
   - The pay group
   - The empl (employee) class
   - To continue to the next page, click "Next."
3. A. When editing the existing job of a non-positioned (OPS) employee, you can change the following information:

- The Home Department. Note that the Home Department is not the Funding Department.
- The Location Code will automatically default with the Home Department selection.
- The Supervisor ID.
- To continue to the next page, click "Next."

3. B. Compensation: When editing the existing job of a non-positioned (OPS) employee, you can change the following information:

- The Standard Hours.
- The Hourly Rate.
  - For fixed bi-weekly employees, the ePAF Calculator will not appear as it does in a Hire ePAF. Please use the ePAF Hourly Rate Calculator located on the Human Resources-website to determine the new hourly rate.
  - An example of ePAF Hourly Rate Calculator is below.
- The Funding Department.
- To continue to the next page, click "Next."
ePAF Hourly Rate Calculator

All employees hired via an Adjunct Agreement, Graduate Contract, or Dual Compensation will have an automatic ePAF Hourly Rate Calculator pop up within the Hire ePAF.

However, if there is a change to the agreement or contract after the initial Hire ePAF is authorized, an Edit Existing Job ePAF would be used. The Edit Existing Job ePAF does not have the ePAF Hourly Rate Calculator feature.

Therefore, Employment Services & Records has created the excel spreadsheet ePAF Hourly Rate Calculator. This ePAF Hourly Rate Calculator is used to calculate the hourly rate for OPS contracted employees when their salary is increasing or decreasing for the current contract. The file is located on the Human Resources website at this link.

![ePAF Calculator](image)

**ePAF Hourly Rate Calculator – Example**

The employee being hired is a GRA with a contract from 08/20/2012-012/13/12 for a total salary of $5000 at 20 hrs/week. The hire ePAF was processed and has already loaded into the system; therefore no changes can be made to that ePAF.

The employee successfully passes a test and is awarded a $1000 salary increase retroactive to 08/20/2012. The new contract for this employee is for a total salary of $6000 at 20 hours from 8/20/12 through 12/13/2012.

As the Hire ePAF was already processed, an Edit Existing Job ePAF would have to be created. The department would use the ePAF calculator to determine the new hourly rate.

![ePAF Calculator](image)

Based upon the calculation in the ePAF Hourly Rate Calculator, the department would complete the Edit Existing Job ePAF to include the new hourly rate of $17.857143 (all decimals must be entered). The new Graduate Contract must also be attached to the ePAF for verification of the increase.
The second Edit Existing Job ePAF example will be a Position Employee

7. A. When editing the existing job of a position (line) employee, you can change the following information:

- The Position Number. Note that, like on the “Hire an Employee” ePAF, all of the remaining fields will automatically default.
  - If the Position Number is changing, verify that all the information matches the agreement.
- The Position Title is also known as the “Functional Title”. If a change to the Position Title was approved through Compensation, the “Functional Title” must be entered every time an ePAF is created for the employee.
- The “Reports To” field can be updated to a new Position Number dependent upon who the position reports to.
  - The “Reports To” field must match the one listed on the Position Description. The new Position Description must be forwarded to Human Resources Compensation via email.
- To continue to the next page, click “Next.”

8. B. Compensation: When editing the existing job of a position (line) employee, you can change the following information:

- The Standard Hours
- The Annual Rate.
- The Funding Department.
- To continue to the next page, click “Next.”
5. Finalize Form: Before submitting the Edit Existing Job ePAF, please note the following:

- Attach any documents required. Please review the Attachment Guidelines in Module 10 before attaching documents to ensure compliance.
- Include any comments required.
- To submit the form, click “Submit.”

![Change Job Data](image)

6. Submit this Form?: You will be asked if you wish to submit the form. Click “yes” to submit the form and send the ePAF to the first Approver.

![Message](image)

7. Form Finalized: You have successfully submitted the ePAF and the ePAF has been sent to the first Approver. Make note of the eFORM ID number and eFORM Type for future reference. It is optional to click “View this form” link after submitting, however it would be beneficial to review the form to ensure all requested changes were entered accurately.

![Change Job Data](image)
**ePAF Processing Tips from HR-Compensation**

When processing an Edit Existing Job ePAF, please keep these tips in mind:

- **Effective date** – The effective date should be future dated. Please allow sufficient time for processing as it typically takes 10 business days from the time the ePAF is submitted to VP office for approval of the effective date.
  - Shift Differential – the effective date must be the date the shift occurred.
  - All others – the effective date must be the first date of a pay period, following the date the action receives final approval by HR Compensation.
- **Position Title** – also known as the “Functional Title”. Changes to the Position Title must be approved through Compensation. All ePAFs created after their approval requires the “Functional Title” be entered in the Position Title field.
- **Position Reason** – typical: Position Data Update, Reclass, Conversion, etc.
- **Job Reason** – typical: Temporary Increase, Special Pay Increase, Shift Differential, etc.
- **Location Code** – please verify this is correct and update if necessary
- **Reg/Temporary** – typically positions are regular. Temp can be used if it meets the following criteria
  - For the duration of a specific project
  - Used for 8xxxx position numbers (for overlap of a position with another for purposes of training or transitional reassignment situations)
- **Reports To** – please update as it should match the information on the Position Description
- **Admin Code** – Depends upon if USPS or A&P
  - USPS – use 99 as there are no administrative functions
  - A&P – use appropriate code (ex. N1 – Coordinator, T1 Director, etc)
- **Attachments** – Must be attached in PDF format
- **Comments** – Please include justification for position/job reason. Compensation needs more information than “submitted”.
- **Other**
  - When submitting supporting documents, such as position descriptions, employment applications, agreements, etc, please note which unit the documents should go to as well as the position number.
  - Originators & Approvers – It is inappropriate to submit or approve actions for oneself. All departments should have at least one backup Originator and Approver.
  - Positions cannot be established and filled on the same day. Post Doc positions must be established prior to submitting the Hire ePAF
  - President Hitt’ approval is required on pay increases resulting in an employee’s salary increasing by 15% or more, unless the salary increases come about as a result of appointment following an open search, for salary increases to direct reports, and to anyone making more than $150,000.

New A&P Agreements will be issued **ONLY** in the following situations:

- **PeopleAdmin A&P On-Line Hires**
- **ePAFs involving** –Any change in an IN-UNIT A&P position
  - Change to a new pay plan (pay plan conversion)
    - ex. Reclass from USPS to A&P or A&P to Executive Service
  - Change in budget entity, involves change in position # and agreement clause(s)
    - ex. Position going from E&G to C&G or E&G to Local
  - FTE change
  - Demotion
  - Break in service/employment
    - ex. Employee returns to work after retirement
Change Employment Status ePAF

The “Change Employment Status” ePAF 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 leave of absence, returning from a leave of absence, short work break, returning from a short work break, sabbaticals, and terminating an employee.

Please note that a resignation letter or form is required for all line and OPS employees when the termination reason of RES (Resignation) is used. For additional information, please see the termination checklist.

Please note: One ePAF form can be used to process multiple HR actions at one time. However, only one ePAF form can be processed per employee/employee record number at a time. For example, if an ePAF is pending for an employee’s record number 0, another ePAF for record number 0 cannot be created until after the pending ePAF is approved or denied.

If this eFORM is being used to terminate an employee with the coding “ineligible for rehire” that would flag the employee as unable to ever work for the University in any capacity in the future. To use this classification of termination the following steps must be completed before creating the ePAF.

- If the employee is a Faculty, Post Doc, or Adjunct employee, the Faculty Relations office must be contacted to review and approve the use of “ineligible for rehire”.
- If the employee is an A&P or USPS employee, Human Resources Employee Relations must be contacted to review and approve the use of “ineligible for rehire”.
- If the employee is a student employee, the Office of Student Conduct must be contacted to review and approve the use of “ineligible for rehire”.
- If the employee is an OPS Non-Student Hourly employee, the Human Resources Employee Relations officer has agreed to review and approve the use of “ineligible for rehire” in these situations.
How to create a Change Employment Status ePAF:

Navigation: Log in to myUCF>Staff Applications> Human Capital Management>Main Menu>Department Self Service>ePAF HomePage>Start a new ePAF>Change Employment Status

1. Select an Employee: Note that this search page is different from the “Hire an Employee” ePAF search page. You have the option of searching for the employee by the EmplID, Employee Record Number (Empl Rcd Nbr), Name (First Name), Last Name, Department, and Employee Group. All fields perform an exact match search based on the information you enter.

2. Enter Term/Leave/Retire Information: Only three actions are available on the “Change Employment Status” ePAF:

   o Enter the effective date in the “Effective Date” field.
     ▪ For Terminations: Effective date is the date immediately following the last date worked.
     ▪ For Return from Leave of Absence: Effective date is the date the employee returns to work.
   o Enter the job action acronym (three letters) in the “Action” field, or click the magnifying glass next to the “Action” field to choose the appropriate job action. When choosing “Termination,” a “Last Date Worked” field automatically appears, and populates the day before the effective date.
   o Enter the Reason acronym (three letters) in the “Reason Code” field, or click the magnifying glass next to the “Reason Code” field to choose the appropriate Reason.
   o If selecting the reason code of RES, a resignation letter or form MUST be attached to the ePAF.
   o Attach any documents required. Please review the Attachment Guidelines in Module 10 before attaching documents to ensure compliance.
   o Include any comments required.
   o To submit the form, click “Submit.”
3. Submit this Form?: You will be asked if you wish to submit the form. Click “yes” to submit the form and send the ePAF to the first Approver.

4. Form Finalized: You have successfully submitted the ePAF and the ePAF has been sent to the first Approver. Make note of the eFORM ID number and eFORM Type for future reference.
Module 9: Types of ePAFs: Position Change and Supplemental

ePAF Examples – Position Change and Supplemental

This module will demonstrate the uses and features of the Position Change and Supplemental ePAF forms. The exercise included in this training guide focuses on the actions made by the Originator. The exercise is preformed based on a general scenario, as many different scenarios are possible, and is only an example. For privacy reasons, certain information has been removed from the example screenshots and replaced by generic field details.

*Please note:* One ePAF form can be used to process multiple HR actions at one time. However, only one ePAF form can be processed per employee/employee record number at a time. For example, if an ePAF is pending for an employee’s record number 0, another ePAF for record number 0 cannot begin until after the pending ePAF is approved or denied.

**Position Change ePAF**

The “Position Change” ePAF form is used to change or update vacant positions, or to request new position numbers. HR Compensation is the final approver for these ePAFs.

How to create a Position Change ePAF:

Navigation: Log in to myUCF>Staff Applications>Human Capital Management>Main Menu>Department Self Service>ePAF HomePage>Start a new ePAF>Position Change
1. Enter Position Change Details
   
   o Enter the effective date in the "Effective Date" field.
     - The effective date must be future dated and not the same as the expected hire date.
   o Enter the Position Number in the "Position Number" field, or click the magnifying glass next to the "Position Number" field to choose the appropriate Position Number. Notice that the "Employee Group" and "Pay Group" automatically populate.
   o To continue to the next page, click "Next."

2. Enter Position Information: Notice that all fields are automatically populated on this page based on the information entered on the previous page. All of the information can be changed, including Job Code, Position Title, Short Title, Location Code, Regular/Temporary, Reports To, FTE, Liability Department, Full-Time Budget Rate, and Salary Admin Plan. (Home) Department can only be changed if the department is within your scope of responsibility. To continue to the next page, click “Next.”
   
   o The “Location Code” must match the actual location of the Position.
   o The “Reports To” must match the most current Position Description.
     - If this information is changing the new Position Description must be attached to the ePAF in PDF format.
   o Always verify the Liability Number is accurate.
   o The Full-Time Budget Rate is the position minimum. The employee may eventually be hired at a higher annual salary.
3. Finalize Form:

- All appropriate documentation must be attached to the ePAF in PDF format.
  - This includes position descriptions, justifications, etc.
- Include justification for position/job reason in the comments section.
- To submit the form, click "Submit."

4. Submit this Form?: You will be asked if you wish to submit the form. Click “yes” to submit the form and send the ePAF to the first approver.

5. Form Finalized: You have successfully submitted the ePAF and the ePAF has been sent to the first approver. Make note of the eFormID number for future reference. It is optional to click the “View this Form” link after submitting, however it would be beneficial to review the form to ensure all requested changes were entered accurately.
ePAF Processing Tips from HR-Compensation

When processing a Position Change ePAF please keep these tips in mind:

- **Effective date** – The effective date should be future dated. Please allow sufficient time for processing as it typically takes 10 business days from the time the ePAF is submitted to VP office for approval of the effective date.
  - Shift Differential – the effective date must be the date the shift occurred.
  - All others – the effective date must be the first date of a pay period, following the date the action receives final approval by HR Compensation.
- **Position Title** – also known as the “Functional Title”. Changes to the Position Title must be approved through Compensation. All ePAFs created after their approval requires the “Functional Title” be entered in the Position Title field.
- **Position Reason** – typical: Position Data Update, Reclass, Conversion, etc
- **Job Reason** – typical: Temporary Increase, Special Pay Increase, Shift Differential, etc
- **Location Code** – please verify this is correct and update if necessary
- **Reg/Temporary** – typically positions are regular. Temporary can be used if it meets the following criteria
  - For the duration of a specific project
  - Used for 8xxxx position numbers (for overlap of a position with another for purposes of training or transitional reassignment situations)
- **Reports To** – please update as it should match the information on the Position Description
- **Admin Code** – Depends upon if USPS or A&P
  - USPS – use 99 as there are no administrative functions
  - A&P – use appropriate code (ex. N1 – Coordinator, T1 Director, etc)
- **Attachments** – Must be attached in PDF format
- **Comments** – Please include justification for position/job reason. Compensation needs more information than “submitted”.
- **Other**
  - When submitting supporting documents, such as position descriptions, employment applications, agreements, etc, please note which unit the documents should go to as well as the position #.
  - Originators & Approvers – It is inappropriate to submit or approve actions for oneself. All departments should have at least one backup Originator and Approver.
  - Positions cannot be established and filled on the same day. Post Doc positions must be established prior to submitting the Hire ePAF
  - President Hitt approval is required on pay increases resulting in an employee's salary increasing by 15% or more, unless the salary increases come about as a result of appointment following an open search, for salary increases to direct reports, and to anyone making more than $150,000.

New A&P Agreements will be issued **ONLY** in the following situations:
- **PeopleAdmin A&P On-Line Hires**
- **ePAFs involving** – Any change in an IN-UNIT A&P position
  - Change to a new pay plan (pay plan conversion)
    - ex. Reclass from USPS to A&P or A&P to Executive Service
  - Change in budget entity, involves change in position # and agreement clause(s)
    - ex. Position going from E&G to C&G or E&G to Local
  - FTE change
  - Demotion
  - Break in service/employment
    - ex. Employee returns to work after retirement
Supplemental ePAF

The “Supplemental” ePAF form is used for the rare occasions when an HR action must be initiated that the previous eForms cannot accommodate. For example, a correction to an ePAF that was previously submitted and approved, and cannot be corrected by submitting an Edit Existing Job ePAF.

Please note: One ePAF form can be used to process multiple HR actions at one time. However, only one ePAF form can be processed per employee/employee record number at a time. For example, if an ePAF is pending for an employee’s record number 0, another ePAF for record number 0 cannot be created until after the pending ePAF is approved or denied.

The “Supplemental” form is used for the rare occasions when an HR action must be initiated that the other four forms cannot accommodate, and HR-Employment Services & Records manually keys the form. If HR-Employment Services & Records receives a “Supplemental” form that can be completed on one of the other four forms, the form will be recycled back to the Originator so the appropriate form can be completed.

The Supplemental eFORM is also used to request a yearly renewal for USPS Time-Limited positions and Post Doctoral employees.

How to create a Supplemental ePAF:

Navigation: Log in to myUCF>Staff Applications>Human Capital Management>Main Menu>Department Self Service>ePAF HomePage>Start a new ePAF>Supplemental

1. Enter Employee and Job Details: HR-Employment Services & Records manually keys all “Supplemental” ePAFs. Therefore, a “Function Description” box is used for Originators to explain exactly what job action is requested. Please be as specific and thorough as possible.
   - Enter the effective date of the action.
     - Must be the date the action is happening
     - If Termination, the effective date must be the date immediately after the last date worked.
   - Enter the employee’s ID number in the “EmplID” field
   - Enter the Employee Record Number in the “Empl Rcd” field.
   - Enter the Position Number, if applicable.
     - Faculty, A&P, USPS Post Doc
- Enter the Job Code.
  - All employee types
- Choose an ePAF function from the “Function” drop-down box.
- In the “Function Description” box, enter exactly what job action is being requested. Please be as specific and thorough as possible.
- Attach any documents required. Please review the Attachment Guidelines before attaching documents to ensure compliance.
- Include any comments required.
- To submit the form, click “Submit.”

2. Submit this Form?: You will be asked if you wish to submit the form. Click “Yes” to submit the form and send the ePAF to the first Approver.
3. Form Finalized: You have successfully submitted the ePAF and the ePAF has been sent to the first Approver. Make note of the eFORM ID number and eFORM Type for future reference. When utilizing the View an ePAF or View an Archived ePAF, please note the Supplemental ePAF cannot be located without the eFORM ID number.
Module 10: Attaching Documents to ePAFs

Attachment Guidelines

The ePAF attachment feature was designed to provide departments with the ability to attach selected supporting documents to ePAFs. This feature will reduce the processing time encountered when certain supporting documents are required to approve ePAFs. All documents must be attached in PDF format. Only the person attaching the document to the ePAF can remove the document.

The following is a list of forms that are required to be attached based on the ePAF form type:

- **Hire ePAFs**
  - Agreements
  - Graduate Assistantship Paperwork (Teaching Qualifications, Agreements, and Supplemental Assignment Forms) must be attached to ePAF separately per College of Graduate Studies.
  - Hire/Rehire Sign-In Paperwork excluding Direct Deposit and W-4 Form.
    - The Direct Deposit and W-4 Form CANNOT be attached to the ePAF. The employee will need to fax the documents to Employment Services & Records at 407-823-3507
    - Copies of Social Security Cards and Driver’s Licenses are no longer required to be submitted to Human Resources as part of the sign-in paperwork documents and CANNOT be attached to the ePAF.
    - File Name must be HR_HIRE_Emplid_Name (Please see next page for additional details)
    - Example: HR_HIRE_1212121_Smith
  - Request for Dual Compensation Forms

- **Job Change ePAFs**
  - Agreements
  - Graduate Assistantship Paperwork (Teaching Qualifications, Agreements, and Supplemental Assignment Forms) must be attached to ePAF separately per College of Graduate Studies.
  - Organizational Chart (for reclassifications/conversions/pay rate changes)
  - Position Descriptions (for reclassifications/conversions)
  - Written Justifications (for reclassifications/conversions/pay rate changes)

- **Change Employment Status ePAFs**
  - Resignation Letter/Form
    - File Name must be HR_RESIGN_Emplid_Name
    - Example: HR_RESIGN_1212121_Smith

- **Supplemental ePAFs**
  - Supporting documents as listed above

- **Position Change ePAFs**
  - Position descriptions (for reclassifications/conversions)
Guidelines for Attaching Hire/Rehire Sign-In Paperwork to ePAFs

In an effort to streamline and expedite the processing of Hire ePAFs, Employment Services & Records’ Hire/Rehire Sign-In Paperwork (Excluding the Direct Deposit and W-4 Form) must be attached to the Hire ePAF.

1) Attach the Hire/Rehire Sign-In Paperwork (Excluding the Direct Deposit and W-4 Form) to the Hire ePAF for each employee in one PDF file with the file name of HR_HIRE_Emplid_Name. (The word HIRE and HR must be in all caps)
   a. Example: HR_HIRE_3590300_Jovi

2) The Direct Deposit and W-4 Form CANNOT be attached to the Hire ePAF and must be faxed attention to HR-Employment Services & Records at 407-823-3507. We ask that employees use the enclosed cover sheet for faxing the Direct Deposit and W-4 Forms and check the appropriate Employment Services & Records’ Point of Contact.

Please note that for Graduate Assistantship Paperwork, you will still need to attach Graduate Assistantship paperwork separately as instructed by College of Graduate Studies.

Copies of Social Security Cards/Driver Licenses are no longer required to be sent to Human Resources and SHOULD NOT be attached to the Hire ePAF.

Guidelines for Attaching Resignation Letter/Form to ePAFs

1) Attach the resignation letter or form in PDF format with the file name of HR_RESIGN_Emplid_Name

   (The word RESIGN and HR must be in all caps)

   a. Example: HR_RESIGN_1234567_Jolie
How to Attach Documents to the ePAF

The ePAF attachment was designed to provide departments with the ability to attach supporting documents to the ePAF. Please see the Attachment Guidelines, [http://hr.ucf.edu/files/ePAFAttachmentGuidelines.pdf](http://hr.ucf.edu/files/ePAFAttachmentGuidelines.pdf), for additional information.

- Click on Add File Attachment.

- Click on Upload.

- Click on the Browse button and double-click your selected document.

- Click Upload.

- The document has been uploaded. If you need to add more attachments, click on Add File Attachment. If you need to delete the attachment, click on the Delete button.
Module 11: Resubmit, Change, or Withdraw an ePAF

The “Resubmit, Change, or Withdraw an ePAF” link allows Originators to make changes, resubmit, or withdraw an ePAF that has been recycled back to them. Only ePAFs that have not received final approval, or have not loaded into PeopleSoft, will be accessible.

In order to resubmit, change, or withdraw an ePAF, the form must be recycled by the current Approver that ePAF is awaiting approval from. Originators should not try to resubmit, change, or withdraw an ePAF that is not on their Worklist. Once the ePAF is on the Originator’s Worklist, the form can be resubmitted, changed, or withdrawn. It is suggested that all fields should be re-verified to ensure that all previously marked changes are correctly requested.

1. Choose the appropriate ePAF form needing correction or withdrawal.

   - For this example, an "Edit Existing Job" ePAF form was chosen.
2. On the search page, you have the option of searching for the ePAF by the eForm ID, Workflow Form Status, EmplID, Name (First Name), or Last Name. If none of the search values are known, clicking on the search button will return all the ePAFs within the chosen form type that are available for viewing. Only those forms processed within the user’s security role will be available.

3. Job Information: Note that the format of the “Resubmit, Change, or Withdraw an ePAF” is the same format as when creating an “Edit Existing Job” ePAF. All of the fields on this page can be updated if needed.
   
   - To continue to the next page, click "Next".
4. Update Job Information: All of the fields on this page can be updated if needed.
   - To continue to the next page, click "Next".

5. Update Job Compensation: All of the fields on this page can be updated if needed.
   - To continue to the next page, click "Next".
6. Finalize Form: Attach any documents required. Please review the Attachment Guidelines before attaching documents to ensure compliance. Include any comments required.

   o To place the ePAF on hold, click "Hold".
   o To resubmit the ePAF and continue the ePAF through the Workflow, click "Resubmit".
   o To withdraw the ePAF, click "Withdraw"

7. When placing the ePAF on hold, the ePAF will stay on your Worklist until you either resubmit or withdraw the ePAF. When resubmitting or withdrawing an ePAF, you will be asked if you wish to resubmit or withdraw the ePAF. Click “Yes.”

8. Form Finalized: You have successfully resubmitted or withdrawn the ePAF.
Viewing ePAFs

There are two options to view ePAFs: “View an ePAF” or “Look Up an Archived ePAF.” The “View an ePAF” link will search for ePAFs created within the last 30 days. The “Look Up an Archived ePAF” link will search for ePAFs created 30 days ago and older. The “View an ePAF” and “Look Up an Archived ePAF” follow the same format listed below.

After the Originator submits an ePAF, it is the Originator’s responsibility to keep track of the ePAF to ensure that the ePAF is approved in a timely manner. Viewing ePAFs allows Originators to see which Approver has the ePAF on their worklist. If the Originator finds the ePAF has not been approved after a few days, the following process can be completed to find out who currently can access the ePAF. The Originator can ask them to either approve the ePAF or recycle it for corrections if needed.

1. Choose the appropriate ePAF form. For this example, a “Hire an Employee” ePAF form was chosen.
2. On the search page, you have the option of searching for the ePAF by the eFORM ID, Department, EmplID, Employee Record Number (Empl Rcd Nbr), Name (First Name), or Last Name. Remember when searching for a Supplemental eFORM the only search option is by eFORM ID.

3. Form Contents and Comments: Once the appropriate ePAF is opened, to see the actions taken on the ePAF, or to see who currently has the ePAF on their Worklist, click “Next.”

4. Form History: This page shows the Original Operator (Originator), the Last Operator (Approver), and the Next Approver, along with a log of the different actions taken on the ePAF. To see who currently has the ePAF on their Worklist, click the “Who can work this form?” link.
5. “Who can work this form?”: This page shows who currently has the ePAF on their Worklist. This can be only one person or a list of people, if you have multiple Approvers that share the same Worklist. This page shows the name of the Approver(s) and their email address(es).