Financial Operations
Payroll

ePAF Training Manual
2017
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Introduction

Electronic Personnel Action Forms (ePAF) is used as online forms and workflow approvals for an employee’s hires and payroll changes. This electronic workflow process creates greater institutional efficiencies as well as reducing the carbon footprint.

You can use E-PAF for hires that do not need to be posted, such as students, staff positions of less than 3 months duration, staff leave replacements, and honorary faculty appointments and re-appointments.

e-PAF is designed to be used for:

- New hires and Re-hires
- Terminations
- Job code changes
- Account code changes
- Leaves

If you need assistance with ePAF
Please contact the Payroll dept HRMS Helpdesk: ubcpps-g-hrmshelp@mail.ubc.ca
HIRING EMPLOYEES

Accessing ePAF

Sign onto HRMS with your normal CWL (http://www.msp.ubc.ca).

Select Department Self Service
  » Click on ePAF Home Page:

Click on Start a New ePAF

This option is used for starting any of the 3 forms (Hire an Employee, Job Change Existing Job form or Change Employment Status form)
FOR ALL JOBS THAT NEED TO BE POSTED, YOU MUST USE eRECRUIT.

What jobs don’t need posting?
- Student Hires/Rehires
- Staff Positions of less than 3 months
- Staff Leave Replacements
- Faculty honorary appointments and reappointments

Select Hire an Employee. This is used for Hiring, Rehiring or Reappointing someone into your dept that does NOT require a job posting.

Candidate Search: Checking if the person already exists on HRMS
The first step in hiring an employee is to check if they already exist on the HRMS. For existing employees, check by Employee ID Number. For new hires, enter the Social Insurance Number, Name and Birthdate

Hire an Employee

Search Fields

- Employee ID:
- *First Name:
- *Last Name:
- *Date of Birth:
- *Social Insurance Number:

When searching for an employee, these fields may be used together or independently.

Search by emplid if you have it (existing employees).

If not, search by SIN + name +
1. Enter Employee ID for Existing Employees
   - If you have their employee id, enter it, and it will bring up their current active and inactive job records.
   - *Exception:* If an emplid # has been assigned using Early ID assignment but the employee is not yet in HRMS, the system will *not* find the employee at this point. You need to enter Name, SIN and Birthdate (see below)
     - However, it will grab the correct number from Early ID once the e-form has been saved and submitted for approval by matching the SIN you enter.
     - There is no need to go to Early ID assignment -- this procedure will do it for you.

2. Check by Social Insurance Number + Name + Birthdate
   - If you are hiring a new employee, you must have their SIN.
   - If SIN brings up no match, it is possible that they were employed under a different SIN (a temporary one, for example), therefore the last step is:
     - First (at least Initial) & Last Names are mandatory for a name search.
     - You may use the % sign as a wildcard under either field.

Sample Results:

Your search will display any existing employees that match your criteria.

**Partial Matches (SIN+Name+Birthdate Search)**

SIN+Name + Birthdate searches will not display a SIN if there is no SIN match – it will show name and birthdate, however. If the name and birthdate match, then it is possible that:

- You have the wrong SIN – contact your new employee to verify
- Your employee exists on HRMS with a temporary SIN (ie was here on a work permit). Obtain the new SIN and Permanent Resident papers from the employee, and send them to Payroll for processing.

**Matches: Selecting An Employee**

For each person matched, it will list each job record on HRMS, both active and inactive.
In the example, the filled box (green) indicates an active job:

The unfilled boxes (red/white) indicate inactive jobs. The last entry has no emplid # assigned – this indicates a new hire in process.

Click on the in the Results column to see more information about that job to assist you in selecting one.

Click on the triangle in the Person Column to select a job to be rehired. The following will be displayed:

Do you want to proceed? (24642,854)

Yes

No

Click on Yes

(Note: If you select a line with a green box, the system will skip the personal data and take you directly to Step 2 – Job Information.)

The system will take you to the HIRE page and display the name that was entered on the search page.

Carefully check the Names and Date of Birth for a match!

Our database has over 125000 people in it – the possibility of a match on name alone is high – please check birthdate, and SIN too, to confirm that it actually is the same person.

ePAF and the Early Assignment of Employee ID system

If an emplid # has been assigned using Early ID assignment but the employee is not yet in HRMS, the system will not find the employee, because they have no record in HRMS.

What happens is this:

Once you complete the ePAF form and Submit it, ePAF will look up the employee in the Early ID system, and will grab the correct emplid by matching the SIN you enter.
No Matches:
If no one appears from your search result, or the results that do appear are not your hire, click the **Add** button:

---

**SINs and Honorary Appts**

Honorary faculty are not required to supply a SIN, as UBC is not paying them. However, if the employee supplies the SIN, it should be entered as:
- **Aids in identification**
- **Is already in the system if a payment does need to be made**
- **If Early ID was used, you must enter the SIN in ePAF**

**Honorary Appts and the Early Assignment of Employee ID system**

If you enter the SIN into Early ID, you *must* enter it into ePAF. Otherwise ePAF will not find the original emplid and will assign a new one.
Contact Information

Hire an Employee

Step 2 of 8: Contact Information
Enter the Contact Information below.

Personal Info / Contact Info

EmplID: NEW
Prefix: Mr
*First Name: Student
*Last Name: Hire
Primary Email: student.hire@ubc.ca
Primary Phone: 604/922-9999

Current Home Address

*Country: CAN, Canada
*Address 1: 123 Campus Road
City: Vancouver, *Province: BC

Save for Later

If there is more than one e-mail &/or phone, check the “Add” boxes and enter the data

NOTE: If the Contact info is not in Canada, the field names (Province and Postal Code) will not change to that country’s format

Enter the rest of the personal information. Fields marked with an asterisk are required fields.

Identity:
Upon Clicking Next, one of two different panels will be displayed depending on whether the employee has a permanent or temporary SIN #.
For a permanent SIN # - the following will be displayed:

**Hire an Employee**

**Step 3 of 8: Identity Information**
Enter identifying information below.

**Personal Info**
- **Name:** Hire, Student
- **EmpID:** NEW

**Identity Info**
- **Gender:** Male
- **Date of Birth:** 05/02/1990
- **SIN:** 477-191-385

Select the Gender and click on .

The following message will be displayed

**Save this information? (24642, 113)**
If you are not ready to move on, please select "No" and you will be taken back to the Personal Data. You can then make changes or select the "Save for Later" button to come back to this form at a later time.
- **Yes**
- **No**

Click on **Yes**
For a temporary SIN (SINs starting with a 9) - the following extra box will be displayed:

Hire an Employee

Step 3 of 8: Identity Information
Enter identifying information below.

Personal Info
Name: Hire, Staff
EmplID: NEW

Identity Info
*Gender: Female  *Date of Birth: 06/07/1988
SIN: 925-249-450

Citizenship and Visa Info
*Citizenship Country: GBR United Kingdom
*Visa/Permit Type: TM Work Permit
*Visa #: BB 123456789
*Issue Date: 1/1/10  *Expiration Date: 12/31/12

Save for Later

Click on Next >>

Enter the Citizenship & Visa Info. All fields are required.

Dates of employment must be within the period of the work visa. In other words:
The appt dates must match the dates of the job
OR
be later than the visa issue date and before the visa expiration date.

Click on Next >>

The following message will be displayed

Save this information? (24642, 113)
If you are not ready to move on, please select "No" and you will be taken back to the Personal Data. You can then make changes or select the "Save for Later" button to come back to this form at a later time.

Click on Yes
Job Information

 Depending on the employee selected, as well as the field data selected on the form, various fields will appear or disappear (such as Step, FTE, and Extension and Recall options).

Enter data into all the fields with asterisks or use the drop down boxes.

If you enter the Position# (which is optional for student appointments), then the next 5 fields are defaulted in for you

The Job Families displayed are dependent on the Empl Group chosen
The job codes displayed in the drop-down are dependent on the Job Family chosen:

Note: TAs have additional rules re: FTE. See the included section/handout on student appts

CLONING

When hiring several employees into the same job type, using the Clone feature will save time.

Once one employee in your dept has been hired, you may “clone” the job information from that form.

Create and enter a new employee, and enter the personal information.

When arriving at Step 2 (this page), enter the eForm # of the data you want to copy.

The screen will automatically populate the “Job Data” and “Compensation and Funding” fields for you when you tab out of the Clone field.

Any of the fields may be then overwritten if required (for example, if everything is the same except the Speedchart, the information can be cloned, and then the Speedchart can be changed)

Position Numbers: Cloning will not copy the position number.
For honorary appointments, such as Adjunct or Clinical Faculty, check the Honorary Non-Paid Appointment option. This will cause the eform to skip over the Compensation screens.

If you select Faculty as the “Empl Category” in error and have also accidently checked the “Honorary Non-Paid Appointment?” box, ENSURE that the box is unclicked before you correct your Empl Category. If you correct the Empl Category first, the box disappears but stays clicked on. This will cause it to error when Payroll tries to authorize it. The form will need to be recycled back to the initiator for correction.

CAUTION

Compensation

For the employee’s compensation, there are 2 options for a salaried employee – if they are on a set salary scale (eg CUPE 2950), the Monthly Rate is defaulted in.

If they are not on a set salary scale (eg M&P), then enter the rate:
“Per Period” Amounts
There are some jobcodes (faculty and certain student jobs) that allow you to designate a fixed amount for the period of the job. The system will calculate the monthly salary that will equal the per period amount over this period of time.

- Check the “Per Period” box
- Enter the “Per Period Amount”

Note that the dates it uses are the date of the job from the previous panel, not the dates of the individual funding lines.

Funding Information:
Enter the Begin (and End date if it is a term appt) of the funding source. If there is only one distribution line, the Begin (and End if applicable) dates will always be the same as the Appt Start & End Date.

Enter the Earnings Code & Speedchart (note that the Account defaults) and then enter either
- the percent (100% if only one distribution line)
  OR
- the dollar amount (same as monthly rate if only one distribution line).

Multiple Distribution Lines
If the employee is to be paid from more than one Speedchart for exactly the same period, then click on the plus sign next to the annual rate and enter the next earns code and speedchart. Click on the minus sign to delete any extra rows within the date range.

Amount: Lines must total the Monthly rate.
Percent: Lines must total 100%.
Differences: The Total PCT line will show that if you have correctly distributed the amount for the date range and display a difference if there is one.

You will not be able to move on if there is a difference. A quick way to resolve differences is to click on the reconcile button next to one of the lines. This will increase or decrease the line Percent/Amount to make everything add up to the total.

If you have more than one date range, each range needs to be reconciled.

Adding Earnings Periods
If the employee is to be paid at a different rate, or from different Speedchart(s), then additional date ranges can be inserted at this point.

Click the **Add Date Range** box:

The dates must:
- have no overlaps
- no gaps
- be within the start and end dates of the job

If you need to delete a row, click on the garbage can icon.

When you are finished, click on **Next >>**

Additional Pay
If an employee is to receive additional money for a Car Allowance or an Industrial First Aid Certificate, please check the appropriate box. The system
will open up dialog boxes for Start Date, End Date and Rate:

**Hire an Employee**

**Step 4 of 6: Other Employment Details**

<table>
<thead>
<tr>
<th>Personal Info</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name:</strong> Staff Hire</td>
</tr>
<tr>
<td><strong>eForm ID:</strong> 2219</td>
</tr>
</tbody>
</table>

**Additional Pay**

- [ ] New/Changed Car Allowance?
- [ ] New/Changed Industrial First Aid?

If not applicable, click on **Next**.

**Finalizing the Form**

Hire an Employee

**Step 5 of 6: Finalize Form**

Enter a comment if desired, and choose Submit to begin routing for this form.

<table>
<thead>
<tr>
<th>Personal Info</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name:</strong> Student Hire</td>
</tr>
<tr>
<td><strong>eForm ID:</strong> 935</td>
</tr>
</tbody>
</table>

**Actions & Action Reasons**

<table>
<thead>
<tr>
<th>Action Code</th>
<th>Description</th>
<th>Reason Code</th>
<th>Action Reason Description</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 HR</td>
<td>Hire</td>
<td>NEW</td>
<td>New Hire</td>
<td>01/01/2010</td>
</tr>
<tr>
<td>2 TER</td>
<td>Termination</td>
<td>EOU</td>
<td>End of Job</td>
<td>01/01/2010</td>
</tr>
</tbody>
</table>

**Form Messages**

- **World/Study Permit Statement**
  - I understand that, before submitting the form, I must attach a copy of this employee’s World/Study Permit in the ‘File Attachments’ section below.

**File Attachments**

- **Upload**
- **View**

**Comments**

- **Your Comments:**
- **Comment History:**

On this page, the Action & Reason codes that will be added to HRMS are displayed.

If the employee has a SIN # beginning with ‘9’ (indicating it is temporary), then this Message will appear. You must acknowledge that you will upload a copy of the Work Permit.
Attaching Documents

Certain documents may be required with a hire or rehire:

- **CUPE2278 Compression Agreement**: UBC-V only
- **CUPE2278 Union Agreement**: UBC-V only
- **Curriculum Vitae**: Required for new Faculty Hires
- **Photocopy of SIN card**: not required, but recommended (the employer must be shown the SIN card by law)
- **Direct Deposit**: Mandatory condition of employment. Have the employee fill out this form, otherwise their first cheque will be mailed to their home. An email will be sent to the Dept and the employee requesting direct deposit information.
- **Work / Study Permit**: If the employee has a SIN beginning with ‘9’, the system will require a Work/Study permit be uploaded
- **Offer Letter**: (For Faculty only)
- **TD1**: Employee’s taxation form

If documents need to be added, scan them and save them to a file on your computer or local server.

Select the Description of the file **before** attaching it.

Pressing the Upload button will allow you to select the file (click on Browse). Once the file is selected, press Upload again:

![File Attachment Example]

More than one may be added if necessary.
Comments
Add any needed comments (these are available for everyone to see):

If you are finished your form, click on submit.

The following message will appear.

Submit this form? (24642,112)
The form will be directed to the next approver, if any.

Yes No

If ready, click on Yes.

The following message will be displayed:


HRMS assigns the Emplid # and the CWL signup PIN #

Click on the Return to Hire link.

Don’t forget to pass along the employee ID and PIN to your new employee!

They will need it to set up their CWL account

Congratulations - you are now finished this form.

To start a new one, click on Go To ePAF Home Page.
WORKFLOW: What Happens Next

When a form is submitted, a notification will automatically be e-mailed to the next approver (unless the approver requests “No Notification” on their access application form).

If the Approver clicks on “recycle” or “deny”, the initiator will receive an email notification. A “recycled” ePAF will show on the initiator’s worklist.

If you want to see who the form has actually been sent to - click on View This Form – HRMS will display a 2 page form:

Click on [Next >>]

Then click on Who can work this form? to see the actual names of the Dept Approvers:

<table>
<thead>
<tr>
<th>MGOLD</th>
<th>444 - Gold, Michael</th>
<th><a href="mailto:hrmsotforms@finance.ubc.ca">hrmsotforms@finance.ubc.ca</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>SPALICHU</td>
<td>DU + Early ID</td>
<td><a href="mailto:hrmsotforms@finance.ubc.ca">hrmsotforms@finance.ubc.ca</a></td>
</tr>
</tbody>
</table>
TEACHING ASSISTANTS – Steps, FTE and Compensation

As per their Collective Agreement – Teaching Assistants are to be paid under the agreed pay scales and therefore should not be paid as “Per Period” amounts (see next page however). When entering a TA appt into an ePAF, the rate will default for you from the salary table after the Step and FTE have been entered.

Please note that for job codes 279903 & 279904, ePAF will display the 80% REG & 20% FEL lines for you. If you go back and change the FTE, when this page is displayed again, the percentages will not be correct and you will need to reset to 80/20. If you forget, the system will display an error when you hit NEXT.

If hiring an hourly TA, the system will split the hourly rate into the 80/20 % split.
“Per Period” amounts for TAs

While technically TAs are not be paid as “Per Period” amounts, departments often hire with a specific amount of funds available, and wish to pay the TA for hours up to this amount.

Payroll has built an FTE calculator to assist with these - click on the calculator icon next to the FTE field:

*Job Code: 279903
Graduate Teaching Asst 1(UBCO)

*Stop:
1

*FTE: 0.250000

Enter the dollar amount or total hours to be worked for the period, select the TA level, start & end dates and hit Calculate. The correct FTE will be displayed. This is the FTE to be entered onto the ePAF.

FTE Calculator

To calculate the FTE of your Student workers enter either the total dollars OR the total hours for the period of their employment.

If the salary or hours of your student are not fixed in advance, then they must be hired as hourly.

Calculation

Total Wages for the period: $5000 OR Total Hours for the period: ____________

Classification: UBCO GTA 1

Start Date: Wed Sep 1 2010
mm/dd/yyyy

End Date: Sat Apr 30 2011
mm/dd/yyyy

FTE: 0.437253

Enter the dates in mm/dd/yyyy format. The calculator transforms it to a text format after you enter it (so you can verify that it is correct).

Calculations are based on the current BCGEU (Letter of Understanding #2 – Teaching Assistants) and on a fulltime work week of 12 hours.

If you wish to use the calculator separately from ePAF, then use the link below.

http://www.finance.ubc.ca/payroll/admin/salarycalculator.htm
SAVE FOR LATER

While working on an ePAF, you may hit the Save for Later button.

Only you, as the initiator, may continue the form at a later time.

When you want to return to a form you have Saved for Later, go back to the original Start a New ePAF link, enter the SIN# or name (for a brand new employee since if you Saved for Later they don’t yet have an employee ID) or an emplid # for an existing/previous employee:

**WARNING:**

Save for Later should *only* be used for just that: saving an incomplete form for later.

Do NOT: Save forms that you have submitted or have been recycled to you. It puts the form into a dual Saved/Submitted status that the system cannot resolve.

Click on the ▶ and the following will appear:

Click on **Proceed**.
REAPPOINTMENTS, EXTENSIONS, AND CONCURRENT JOBS

- Rehiring an employee back into the same job is considered a Rehire or Extension
- Hiring an employee who is active in one department into another is a transfer if the original appointment is to be terminated.
- If you are hiring an employee into a position where they are not terminating their existing position, it is an Additional Hire into a concurrent job.

Begin the ePAF as you would a normal Hire:

Go to (Department Self Service>ePAF Home Page>Start a New EPAF>Hire an Employee)

Enter the emplid # of the employee being extended/transferred/hired concurrently.

- If the Act (Active) box is (green), the employee is still active and the system will bypass the personal data.
- If the Act box is white (the employee is not active as of today), it will require you to verify/amend the personal information.

Enter the Start Date, Appt End Date (if applicable) and the Empl Category. ePAF will open up an Other Job Actions dialog box:

- Extending an appointment (no break in service)?
  - This employee has one or more active appointments. Are they leaving a current position (promotion, secondment, transfer, etc.)? If yes, please check box.
- Moving to another Position?

*Department: 

*Start Date: 04/16/2011  Appt End Date: 05/15/2011

*Empl Category: Staff Monthly
Extensions

If you click on “Extending an appointment”, the system will respond with one of 2 options:

- If the employee only has one employment record, the system will default in most of the job information from that position.
- If the employee has more than one employment record, the system will display any jobs eligible for reappointment regardless of Empl Category:

Weekends

ANY break in service (even one day) can affect seniority, vacation entitlements, etc.

If the job ends on a weekend, then you should start the new job with no break in service. (Don’t worry - HRMS is smart enough to only pay Staff Appointments from Monday to Friday.)

Transfers (Moving to Another Position)

If you click on “Moving to another position”, the system will open some dialog boxes and display any active positions as of the start date you entered. (Positions terminated as of this date do not display as they would need to be “rehired” and not transferred.)

Be Careful With Start Dates!

A break in service (even one day) should be a Rehire action, not an Extension.

*Example:* If the previous job ended Feb 28 and it doesn’t re-start until Mar 9, DO NOT check the “extension box” or ePAF will default in Mar 1.

Weekends

ANY break in service (even one day) can affect seniority, vacation entitlements, etc.

If the job ends on a weekend, then you should start the new job with no break in service. (Don’t worry - HRMS is smart enough to only pay Staff Appointments from Monday to Friday.)

*Blue circled* employees show a “B” under the Empl Class field. The correct salary for that employee is displayed, but it does not match the Grade/Step table for that Union. You may not change the rate – contact your HR Advisor for any questions.
If more than one employment record displays, select the one that is transferring.

Click on Temporary Promotion or Secondment if appropriate.

The system will read the information entered and determine whether the action will be Transfer or Promotion.

The action of Recall will only be displayed when the employee is unionized and currently in a layoff status.

**Adding a Concurrent Job**

If the job you are hiring the employee into is to be in addition to their existing positions (i.e. they are not leaving an existing position), then leave both “Extending an appointment” and “Moving to another position” blank.

Complete the rest of the job information in the same way as a Hire and submit the form.
### Changing Existing Jobs

The Change Existing Job Form is used to change an employee’s current job. Examples would be:
- Temporary Promotions
- Pay Rate Changes
- FTE changes
- Increased Workload
- Job Reclass

Staff Job Change Form is only to be used for ACTIVE employees.

Navigate to Department Self Service > ePAF Home Page > Start a New ePAF > Change Existing Job:

**Don’t use the Change Form to change End Date of someone’s job**

If you are extending someone past their original end date, then you need to use the Hire form, and submit an Extension.

Enter an EMPLID #, SIN # or Name, just as you would for a Hire.

If an employee cannot be located, it may be because they are no longer active (an employee is no longer active when the Termination Date is less than the current date).

If there is only one active job then ePAF will display it. Otherwise, a list will be presented. Click on the job you are changing.
1. Enter the Start date (and End date if required)
2. Click on any of the applicable boxes under *Other Job Actions* if appropriate - these boxes are used to help determine the Action/Reason.
   - These additional actions are not applicable to student positions, and will not display
3. Click on 

---

**Be Careful With End Dates!**

An employee who has an end-date to their job (ie a term employee), must have the End Date entered, and it should be the same as the end date of the job.

However, an ongoing employee should *not* have the end date entered unless it is a Temporary Promotion. If an end date is entered for any other action, it will cause their job to be Terminated as of the End Date!
Enter:
- current or new Monthly Rate
- Begin date
- End date (if required)
- amend the Speedchart info if this is an earnings distribution change.

Click on Next >>

The system will determine the Action based on what you have entered:

If there is a pay rate change, a Pay Reason drop down will appear. You need to specify a reason from the drop down box:

Students cannot have FTE changes

Do not select ‘FTE Change’ for Student employees.

Student employees (except Teaching Assistants) do not have FTEs other than 1 and are not changeable. If you select ‘FTE Change’ epaf will error because the FTE has not actually been changed.
Viewing a Change Form

When viewing a Change Form – the top area “Current Job Info” is the current HRMS status as of today’s date. The “Current Job Information” shown under the Actions & Reasons, is that status as of the effective date.

ePAF will display the Action & Reason for the Job Change and highlight the fields that have been changed:

<table>
<thead>
<tr>
<th>Current Job Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
</tr>
<tr>
<td>Busy Unit:</td>
</tr>
<tr>
<td>Dept/Job:</td>
</tr>
<tr>
<td>Emp ID:</td>
</tr>
<tr>
<td>Emp Rel ID:</td>
</tr>
<tr>
<td>Reg Temp:</td>
</tr>
<tr>
<td>FTE:</td>
</tr>
<tr>
<td>eForm ID:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Actions &amp; Action Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Code</td>
</tr>
<tr>
<td>-------------</td>
</tr>
<tr>
<td>1 PAY</td>
</tr>
</tbody>
</table>

Pay Reason:
- Midpoint Progression Increase
- Technological Change?
- Job Reconciliation?

Is this a promotion?
- Yes

Current Job Information

<table>
<thead>
<tr>
<th>Start Date:</th>
<th>03/01/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location:</td>
<td>PG Ponderosa Annex G</td>
</tr>
<tr>
<td>JDL:</td>
<td></td>
</tr>
</tbody>
</table>

New Job Information

| Start Date: | 04/01/2010 | End Date: |
|-------------|------------|
| Location:   | PG Ponderosa Annex G |
| JDL:        | |

Empl Class:
- Head/Subhead?
- LS?

Monthly Rate: $3500.00

Empl Class:
- Head/Subhead?
- LS?

Monthly Rate: $3800.00
TERMINATIONS & LEAVES: Status Change Form

The Staff Status Change Form is used to change the status of an employee’s current job. Examples would be:

- Leaves
- Return from Leaves
- Terminations

Navigate to Department Self Service > ePAF Home Page > Start a New ePAF > Change Employment Status:

Start a New electronic Personnel Action Form (ePAF)

Terminated Employees

You can retroactively change an employee’s job, however:

If an employee is terminated as of the date you are initiating the form, you will not be able to submit a Change.

In such cases, you will have to submit the retroactive change on paper.

Enter an EMPLID #, SIN # or Name. Format for name is “Last Name,First Name”.

If there is only one job then ePAF will display it.

Otherwise, a list will be presented. ePAF will display all Job Records (including Terminated). Look at the Payroll Status column, and select the appropriate one:
After selecting the employee’s record, ePAF will display the current information. The form data will have different check boxes depending on the Employment category of the employee.

**Step 1 of 2: Enter Status Change Information**

<table>
<thead>
<tr>
<th>Current Job Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Bruce Wayne</td>
</tr>
<tr>
<td>Busn Unit: UBC01</td>
</tr>
<tr>
<td>Dept/ID: ARDO</td>
</tr>
<tr>
<td>Job Code: 284002</td>
</tr>
<tr>
<td>Reg/Temp: Regular</td>
</tr>
<tr>
<td>FTE: 1.000000</td>
</tr>
<tr>
<td>eForm ID: 23879</td>
</tr>
</tbody>
</table>

**Employee Category: Staff Monthly**

<table>
<thead>
<tr>
<th>Form Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>eForm ID: 23879</td>
</tr>
<tr>
<td>□ Appointment being cancelled?</td>
</tr>
<tr>
<td>□ Employee going on Recall List?</td>
</tr>
<tr>
<td>*Action:</td>
</tr>
<tr>
<td>*Reason:</td>
</tr>
<tr>
<td>*Start Date:</td>
</tr>
</tbody>
</table>

**Actions**

**Cancelling**

If cancelling an appointment that was issued in error (that has already been executed to HRMS), click on the “Appointment being cancelled?” box.

**Union Layoffs**

If a union employee is going on layoff and onto the recall list, click on the “Employee going on Recall List?” checkbox (this option will not be visible for nonunion employees).

If neither of the check boxes apply to your action, select an Action and then a Reason from the drop down lists.

Depending on what Action is selected, the date fields will change and other boxes will appear and disappear.

Enter the Action, Reason and Date fields and any other appropriate fields/check boxes.
When you select the Action – Termination, Layoff, or Retirement, options become available regarding vacation pay:

**Form Data**

- □ Appointment being cancelled?
- □ Employee going on Recall List?
- **Action:** Termination
- **Reason:** Resignation
- **Last Day Paid:** 2011/08/31

- □ Last Day At Work is different from Termination or Leave Date
- □ Vacation Owed to Employee?
- □ Payout funding is different from Regular Funding?

If these dialog boxes are clicked, then more boxes are available.

- □ Vacation Owed to Employee?
- □ Payout funding is different from Regular Funding?
- **Severance Pay in Hours:** 0.00
- **Payout Funding Text:**

This is a freeform field to enter a speedchart if vacation is to be paid from a different PG than the normal salary.

**Attachments**

Resignations require a copy of the resignation letter be attached:

- □ Resignation Letter Statement

When your form is complete, click on Submit.
WORKLISTS AND VIEWING FORMS

View a Form

If at any time you need to view a form, go to the ePAF Home Page and click on “View an ePAF”. This is also where to go to see what stage the form is at.

Any of the above fields may be used to search for a form. The “NAME” field is used to search by First Name followed by a Middle Name (if applicable) followed by Last Name.
The “LAST NAME” field is for Last Name only - do not add any other data – it will corrupt the search.

HRMS will display a summary of the form.

**Tracking ePAFs.**

You can always pull up individual ePAFs by ePAF form number, by employee ID or even name using the View an ePAF link.

By entering filtering criteria, you can pull up just incomplete forms (e.g. Status not equal to Executed), or other ways of looking at your forms.

Click on **Next >>** to see the Form History and status.
Here you can see a complete history of the form:

Note that it shows who worked the form and how long each step took.

Once it reaches the System (with a green check mark), it has been entered into HRMS.
Worklists

Initiator
The only time an initiator will need the worklist is when a form is recycled back to you. You must access your worklist through the first option described below.

Approvers
Approvers have two ways of navigating to their worklist.

1. Click on the “Worklist” link on the HRMS header

![Image of HRMS header with worklist link]

Items that need action will display on the worklist.

By clicking on an item in the Link column, HRMS will respond with a view of the form entitled – Evaluate a Hire.

Evaluate a Hire displays a single-screen summary of the information on the form for review by the Approver:
At this point, the Approver can pick one of four options:

- **Approve**: Will forward to next approver (PG approver, Dept Head, HR, Payroll etc). When a form is approved, a notification will automatically be emailed to the next valid approver (except for HR/Payroll)

- **Deny**: Permanently stopped. Initiator will receive an e-mail notification

- **Hold**: Places on hold awaiting further action
Sends back to initiator for further action – will be resent to approver upon resubmitting

When using the DENY, HOLD OR RECYCLE buttons, comments should be added as to the reason why the action has taken place.

2. Approvers can also access their worklist on the ePAF homepage:

![ePAF homepage screenshot]

**Evaluate an ePAF**

Enter any information you have and click Search. Leave fields blank for a list of all values.

- **Find an Existing Value**
- **Empl ID:** begins with
- **Empl Rul Nbr:** =
- **eForm Id:** begins with
- **Name:** begins with
- **Workflow Form Type:** begins with
- **Workflow Form Status:** =
- **Original Operator:** begins with
- **Originated Date From:** >=
- **Payroll Portfolio Code:** =
- **HR Portfolio Code:** =
- **Employee Category:** =
- **Case Sensitive**

Leave all fields blank, and click on Search
Everything routed to you will be displayed.

Criteria may be entered into any of the boxes under *Find an Existing Value* to narrow your search.

Items that need action will display on the worklist.
Click on an item in any row.
HRMS will respond with the Evaluate a Hire page.