



ePAF  
Participants  
Guide

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# SECTION 1 –BASICS OF EPAF

## What is an ePAF?

It is **electronic Personnel Action Form**. This is a system where you can use eforms to submit personnel actions online. It also includes a process for electronic approval routing.

The following eforms are available for an initiator/payroll reporter to use.

- ▶ Hire an Employee
- ▶ Edit Existing Job
- ▶ Change Employment Status
- ▶ Update Employee Personal Data
- ▶ Submit a Manual Request

## Who will use ePAF?

The users of ePAF are;

- Initiators/Payroll reporters
- Department heads and/or other approvers as delegated by them
- Human Resources

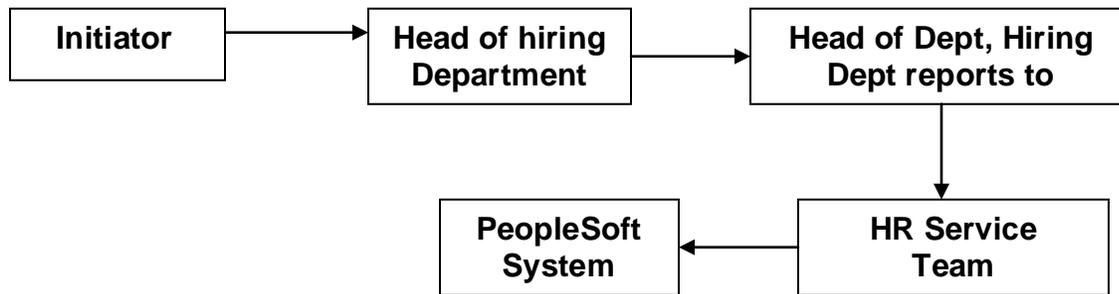
## How does it work?

In the ePAF system, when an initiator fills out a form and submits, it is electronically routed to the approvers for approval, and then to HR for review. Once HR reviews and approves the form, the data will automatically save to PeopleSoft.

ePAFs for staff employees require two approvals. For Faculty ePAFs, multiple approvals are obtained depending on the type of faculty appointment and/or personnel action initiated.

For more information on ePAF go to <http://www.hr.utah.edu/hris/ePAF/index.php>

All **Staff** ePAFs route as follows;



**Note:** Until the Service teams approve the form, the data will not save to PeopleSoft. Service teams will not approve the Hire form until I9, background check, required tests and documentation has been obtained.

Let's look at an example below to understand the routing for a Staff ePAF. This is a screenshot from the **HR Department/Org Head Lookup** web application available in CIS under the Human Resources Management section.

- [00001](#) - President - BETZ,A LORRIS
  - [02002](#) - SENIOR VP FOR ACADEMIC AFFAIRS - PERSHING,DAVID W
    - [00002](#) - SR VP ACADEMIC AFFAIRS - OPER - PERSHING,DAVID W
      - **[00160](#) - College Of Education - MCDONNELL,JOHN**
        - [00161](#) - College Of Education-Dean - HARDMAN,MICHAEL L
        - [00162](#) - Educational Leadership&Policy - SMITH,PAULA
        - [00163](#) - Educational Psychology - CLARK,ELAINE
        - [00164](#) - URBAN INST. FOR TEACHER ED - BURBANK,MARY D
        - [00165](#) - Special Education - O'NEILL,ROBERT E
        - [00950](#) - Education, Culture & Society - KANTOR,HARVEY

All ePAFs for staff employees in College Of Education (Dept ID 00160) will be sent to John McDonnell for first approval, by default, and then to David Pershing for second approval.

Conversely, ePAFs for employees in College of Education-Dean (Dept ID 00161) will be approved by Michael Hardman for first approval and then John McDonnell for second approval.

**Note:** Please review your department tree and contact your service teams if the placement of your department in the tree or the Org head name displayed is incorrect.

This approval routing **only** applies to the following forms;

- Hire an Employee
- Edit Existing Job
- Submit a Manual Request
- Change Employment Status – All actions except Termination.

Approval routing **does not** apply to the following forms;

- Manage Personal Workflow
- Update Employee Personal Data.
- Change Employment Status –Short Work Break and Return from Work Break actions only. Some Termination ePAF's will save to PeopleSoft, others will route to the service team for employees that are benefits eligible. All non-benefits eligible terminations will save to PeopleSoft.

Faculty ePAFs do not follow the default approval routing. Multiple approvals are obtained depending on the type of faculty appointment and/or personnel action initiated. Some examples of approvers are Asst Dean for Faculty Administration, Assoc VP for Health Sciences, Dean for SOM, VP for Health Sciences, Dean of Academic Affairs.

The routing of Faculty ePAFs for all departments that roll up to School of Medicine (00202) is different from Faculty ePAFs for those departments that roll up to Sr. VP for Academic Affairs (00002) and different from Faculty ePAFs for departments that roll up to Sr. VP of Health Sciences (00193)

## SECTION 2 –RECOMMENDED PROCESS FLOW

HR recommends the following process flow to initiate an I-9, to **avoid** the applicant from making **multiple trips** to the department before actually starting the job.

1. Job is posted in PeopleAdmin
2. Department interviews qualified applicants.
3. Department makes final hiring decision.
4. Department determines salary based on the Compensation Structure and Salary Grade.
5. Department extends offer to applicant.
6. Applicant accepts offer.
7. Department emails applicant the following;
  - a. Accurate background check letter
  - b. List of Acceptable documents for I-9 Verification
  - c. New Employee Information form, where applicable
8. Department initiates background/drug test through HR.
9. Department receives Ready for EPAF notification from HR.
10. Department initiates Hire ePAF.
11. 24 hours after the Hire ePAF has been initiated, the new employee can meet with the payroll reporter to complete the online I-9 form.

# SECTION 3 –START A NEW EPAF

From the eForms home page select ePAF.

### eForms Home Page

-  **[My Worklist](#)**  
Work the items that have been routed to you.
-  **[ePAF](#)**  
Click here to process Personnel action eForms like Hire, Edit Job, Change Employment Status, Update Employee Personal Data & Manual Request for employees in your department.
-  **[Employment Eligibility Verification \(I-9/E-Verify\)](#)**  
Click here to process an I-9 or E-Verify form for both new and existing employees in your department.
-  **[Evaluate an eForm](#)**  
Participate in the approval process for an eForm. This link allows you to search for the eForm you want to evaluate.
-  **[View an eForm](#)**  
View a recently submitted eForm, including information about its handling so far. eForms submitted in the last month are listed here. This is a read-only view.

Next select Start a New eForm.

### HR Electronic Forms (eForms) Home page

-  **Start a new eForm**  
Start a new eForm, which will then be routed to the appropriate approvers.  
[Start a new eForm](#)
-  **Resubmit, Change, or Withdraw an eForm**  
Make changes to an eForm that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.  
[Resubmit, Change, or Withdraw an eForm](#)
-  **View an eForm**  
View a recently submitted eForm, including information about its handling so far. eForms submitted in the last month are listed here. This is a read-only view.  
[View an eForm](#)

[Return to eForms Home Page](#)

## Start an eForm



### Hire an Employee

Use this form to hire a new employee into your department, add an additional job for an employee that already works in your department, OR transfer an employee from another department into your department.

[Hire an Employee](#)



### Edit Existing Job

Use this form to edit the job of an employee currently working in your department. Use this to process pay rate change, change in job category/job code, FTE change, etc.

[Edit Existing Job](#)



### Change Employment Status

Use this form to submit a Termination, Retirement, Leave of Absence, Short Work Break, Return from Leave, or Return from Short Work Break action for an employee in your department.

[Change Employment Status](#)



### Update Employee Personal Data

Update Employee Personal Data Use this form to update the Names, Education, Birthdate, SSN, or Military Status for employees in your department.

[Update Employee Personal Data](#)



### Submit a Manual Request

Use this form to request corrections or changes that can't be submitted via the other ePAF forms.

[Submit a Manual Request](#)



### Submit a Department Mass Change Request

Use this form to submit a Department Mass Change Request. YOU CAN SUBMIT MULTIPLE FORMS FOR EACH DEPT UNTIL 06/22/2012

[Submit a Department Mass Change Request](#)

[Return to HR Electronic Forms \(eForms\) Home page](#)

In this section, you will learn how to initiate a new ePAF for the following transactions:

- ▶ Hire an Employee
- ▶ Edit Existing Job
- ▶ Change Employment Status
- ▶ Update Employee Personal Data
- ▶ Submit a Manual Request
- ▶ Submit a Department Mass Change Request

## Hire an Employee

Use this form to **hire a new employee** into your department, **add an additional job** for an employee that already works in your department OR **transfer an employee** from another department into your department.

*Authored by*

### Hire an Employee

**Step 1 of 5: Candidate Search** i

Search below for the person you wish to hire. If you know the Employee ID, enter it, and choose Search. Otherwise, enter the First Name, Last Name and SSN and click Search.

Use the arrow icon to select a row. If your search returns no results, fill out the rest of the fields, and search again. If nothing is found, the Add button will turn on. Click Add to create a new Emplid using your entries.

When searching for a person that is being hired for a posted job requisition, if no results are found, please contact your HR Service Team for further assistance.

---

Is this a hire for a job posted by Human Resources?  Yes  No

**Search Fields**

Employee ID: <input type="text"/>	Applicant ID: <input type="text"/>	Job Opening ID: <input type="text"/>
*First Name: <input type="text"/>	Middle Name: <input type="text"/>	
*Last Name: <input type="text"/>	*Date of Birth: <input type="text"/>	
*Social Security #: <input type="text"/>		

Below is an example of a new hire that is **not** tied to a Job Opening.

When this page comes up, all fields on this page are grayed out till the question is answered.

If the answer is Yes, then only Job Opening ID field opens up. If the answer is No, all other fields except Applicant ID and Job Opening ID open up. Use the available fields and first search to see if the person you plan to hire is in the database.

If the person exists, click on the  sign to select the person.

Is this a Staff hire for a job posted by Human Resources?

Yes  
 No

**Search Fields**

Employee ID:  Applicant ID:  Job Opening ID:

\*First Name:  Middle Name:

\*Last Name:  \*Date of Birth:

\*Social Security #:

**Person Results** Customize | Find |  First  Last

	HR	Job	Act	EmplID	Rcd#	Name	Date of Birth	National ID
1  				00600723	0	CHILLI,RED	05/07/1984	(Not Displayed)

What do these symbols mean?

- HR**
  -  - The person has bio-demo data and an Emplid in the system
- Job**
  -  - The person has Job data
- Act**
  -  - The person has an active Job
- Act**
  -  - The person and/or job are not active in the system
- Job**
  -  - The person has no Job data in the system
-  - Click this to select the person
-  - Click this to see details about the person's job data

If the person does not exist, then the Add button appears.

Is this a Staff hire for a job posted by Human Resources?

Yes  
 No

**Search Fields**

<b>Employee ID:</b> <input type="text"/>	<b>Applicant ID:</b> <input type="text"/>	<b>Job Opening ID:</b> <input type="text"/>
<b>*First Name:</b> <input type="text" value="New"/>	<b>Middle Name:</b> <input type="text"/>	
<b>*Last Name:</b> <input type="text" value="Employee"/>	<b>*Date of Birth:</b> <input type="text" value="04/22/1978"/>	
<b>*Social Security #:</b> <input type="text" value="562-45-8754"/>		

**Your search returned no results.**

#### Notes:

- 1) If you know the Employee ID, always search with this information. If no results show for this criterion, search by First Name, Last Name, DOB and SS#. This is very important as students or Affiliates (Non-employees) may not have a SSN but may exist in the system with an EmplID and you don't want to create a duplicate ID.
- 2) If the SSN entered is an exact match then the number is displayed in the results. If the name and DOB match and SSN is different. Then the SSN is masked in the results.
- 3) If no results are found, the Add button will appear and the system will now allow you to add a new employee.

When you click the Add button, the following page appears;

This person will be added to the Person Directory. Do you want to proceed? (24642,854)

Proceeding with this action will generate a new unique ID and add this person to the Person Directory. If this person is or has been associated with the organization, they should already have an ID in the directory, and proceeding would create a duplicate ID. Only proceed if you are confident the person does not already have an ID.

Click the Yes button and it takes you to the Contact Information page.

# Contact Information Page

## Hire an Employee

### Step 3 of 5: Contact Information

Enter the contact information below

**Personal Info**

EmplID: NEW

\*First Name:  Middle:

\*Last Name:  Suffix:

Preferred First Name:

Email Address:

**Home Address and Phone**

Home address is the person's permanent physical address.

\*Country:

\*Address 1:

Address 2:

\*City:  State:  \*Postal:

Primary Phone:

Field Name	Description
First Name	This information is carried forward from the Candidate search page. Their name must appear as it does on their SS Card.
Last Name	This information is carried forward from the Candidate search page
Middle Name	Enter a middle name if exists
Preferred First Name	Enter the preferred first name if provided by the employee
Email Address	Enter the work email address
Country	The default value is USA. If home is outside the US, enter the country code. This information is saved as Home address.
Address 1 Address 2	Enter the address details in line 1 and 2
City	Enter the City
State	Enter the State
Postal	Enter the postal code
Primary Phone	Enter the employee's primary phone. The value entered here is saved as the home phone number.

## Contact Information Page (Continued)

It is required to specify one emergency contact for a new hire.

Emergency Contact	
*Contact Name:	<input type="text" value="Momma Employee"/>
*Relation:	<input type="text" value="Mother"/>
	<input checked="" type="checkbox"/> Same Address as Employee
Country:	USA    UNITED STATES
Address1:	420 Wakara Way
Address2:	
City:	Salt Lake City                      State: UT                      Postal: 84108
	<input checked="" type="checkbox"/> Same Phone as Employee
Phone:	801/561-7777
Other Phone:	<input type="text" value="8015428975"/> Phone Type: <input type="text" value="Cellular"/>
<input style="border: 1px solid black;" type="button" value=" &lt;&lt; Previous "/> <input style="border: 1px solid black;" type="button" value=" Next &gt;&gt; "/>	

Field Name	Description
<b>Contact Name</b>	Enter the contact name
<b>Relation</b>	Click on the dropdown and select a value.
<b>Same Address as Employee</b>	Select the check box if applicable
<b>Country</b>	The default value is USA. If address is outside the US, enter the country code.
<b>Address 1, Address 2,</b>	Enter the address details in line 1 and 2.
<b>City</b>	Enter the city
<b>State</b>	Enter the 2 character code for the state.
<b>Postal</b>	Enter the Zip code for the address.
<b>Same Phone as Employee</b>	Select the check box if applicable
<b>Phone</b>	Enter a phone number here when the phone number is not the same as employee
<b>Other Phone Type</b>	If you want to enter an additional phone number for the emergency contact, enter that here
<b>Phone Type</b>	Specify the phone type for the additional phone number.

## Identity Information Page

Enter all identification information and Hire date on this page. You must enter data in all fields marked with an \*.

### Hire an Employee

#### Step 4 of 5: Identity Information

Enter Identifying Information below.

#### Personal Info

Name Employee,New EmplID NEW

#### Identity Info

\*Gender Male \*Marital Status Unknown  
\*Date of Birth 04/21/1978 \*Citizenship Status Citizen  
Social Security # 562-45-1235 \*Highest Education Level F-2-Year College Degree  
\*Military Status No Military Service

#### Ethnic Group(s)

Customize | Find | First 1 of 1 Last

*Ethnic Group	Short Description	Primary Flag	
1 ASIAN	Asian	<input type="checkbox"/>	Delete

Add an Ethnic Group

#### Hire Date

\*Hire Date 04/22/2008

<< Previous Save & Next >>

Click the Save & Next button. You see the following message.

Save this information? (24642,113)

If you choose 'Yes,' this information will be immediately saved to the PeopleSoft system. If this information is not yet ready to be saved, choose 'No.'

Click Yes. At this point, an **EmplID** or **UNID** is assigned to the new hire.

START A NEW EPAF 14

**Notes:**

- 1) You must select a value for all the fields marked with an \* . Each field has a default value. In the case where the payroll reporter does not have this information, they can select these default values.
  - Marital Status – Unknown
  - Highest Education Level – Not Indicated
  - Military Status – Not Indicated
  - Ethnic Group – NSPEC – Not Specified
- 2) You will see 2 choices for some ethnic groups in the dropdown. These codes are governed by Federal rules and supplied to us by PeopleSoft. The user can pick any value.
- 3) When an EMPL ID is assigned, the system saves this person as a non-employee/POI Type of 10035 – Incoming New Hire. UPD pay group will purely be used for job code 6001-Unpaid Faculty.

The next morning when this new hire is picked up by the security feed, all IT functions (like provisioning an Email account, UCard, building badge, access to Library Labs etc) that are available to a new hire will be automatically setup.

## Job Information Page

Complete the required fields. Note that when you enter in the Job Code the Job Category will populate.

### Hire an Employee

**Step 4 of 4: Job Information** i

Indicate the type of employee you are hiring by choosing a value in the Empl Group field. Fill out the rest of the fields, and choose Next.

**Personal Info**

**Name:** EMPLOYEE, NEW **EmplID:** 00602080

**Citizenship Status:** Citizen

**Email Address:** NEW@UTAH.EDU

**Job Data**

\*Effective Date:  **eForm ID:** 267285

\*Department:

\*Home Department:

\*Job Code:

\*Job Category:

\*Working Title:

\*Standard Hours:  \*FTE:

\*Regular/Temporary:

Work Phone:

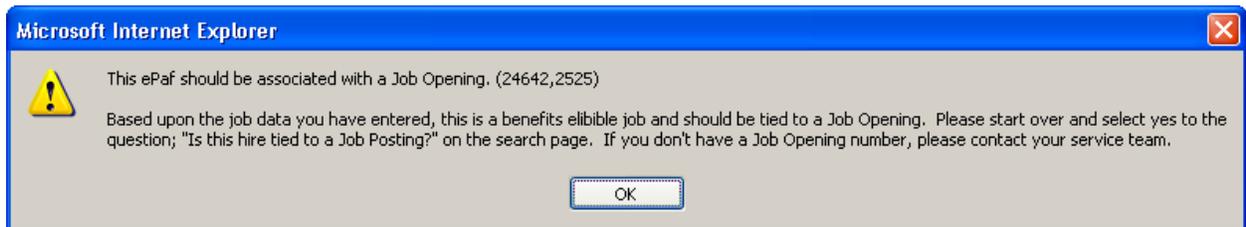
\*Supervisor ID:

Field Name	Description
<b>Effective Date</b>	The Hire date specified on the previous page is carried forward and grayed out.
<b>Department</b>	Enter the <b>reporting</b> department the employee is joining.
<b>Home Department</b>	If the Home department is different, enter the new value.
<b>Job Code</b>	Enter the job code
<b>Job Category</b>	This field will populate once the job code is entered.
<b>Working Title</b>	Enter in Working Title
<b>Standard Hours</b>	Enter the standard hours per week
<b>FTE</b>	This is auto calculated based on standard hours. The equation is 40hrs = 1FTE
<b>Regular/Temporary</b>	Click on the dropdown and select the appropriate value.
<b>Work Phone</b>	Enter the new hire's work phone number.
<b>Supervisor ID</b>	Enter the UID of the person this new hire will report to.

For job categories Exempt, Non-exempt and Administration, if you

- enter standard hours more than 20
- expected duration of more than Regular
- **DID NOT** answer Yes to the question on the search page which required a Job Opening ID for the hire

And you click the Next button, you will see this error message.



This is an error message which means you have to start the new hire ePAF with a Job Opening ID, as this is a job code that requires a job posting.

However, when hiring for USHE –Dept 00651 in the above job categories, you will **not** get this error. (They are the only exception to this rule)

After entering all required data, click the Next button. The compensation page will appear.

# Compensation Page

## Hire an Employee

### Step 3 of 5: Compensation

Enter the employee's compensation, annualized base amount (ABA) and distribution information.

#### Personal Info

**Name:** EMPLOYEE\_NEW      **EmpID:** 00602080  
**Citizenship Status:** Citizen  
**Email Address:** new.employee@utah.edu

#### Compensation Data

**Comp Rate Hourly**       **eForm ID:** 6057  
**ABA**

#### Distribution Data

Customize | Find | First 1-2 of 2 Last

*Bus Unit	*Org ID	Activity/Project	*Account	Allow	Begin Date	End Date	Distribution Factor	Distribution
1 01	00410	00005836	50800	<input checked="" type="checkbox"/>	05/13/2008	06/30/2008	0.48562	\$16.996700
2 01	00410	00001779	50800	<input checked="" type="checkbox"/>	05/13/2008	06/30/2008	0.51438	\$18.003300

**Total Distribution Percent** 1.00000

**Distribution Difference** \$0.000000

<< Previous      Next >>

Field Name	Description
<b>Comp Rate Hourly</b> <b>Comp Rate Annual</b>	Enter either the hourly rate or annual salary depending on the field displayed.
<b>ABA</b>	Enter the annualized base amount.
<b>Distribution Grid</b>	Enter the distribution data.

# Finalize Form Page

## Hire an Employee

### Step 4 of 5: Finalize Form

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

▼ Personal Info

**Name:** EMPLOYEE,NEW                      **EmpID:** 00602080

**Citizenship Status:** Citizen

**Email Address:** new.employee@utah.edu

File Attachments
Customize | Find | First 1 of 1 Last

	Upload	View	Description	Attachment Id
1	<input type="button" value="Upload"/>	<input type="button" value="View"/>	<input style="width: 90%;" type="text"/>	<input type="button" value="Delete"/>

Comments

<< Previous
Submit

**Your Comment:**

Hiring a PT exempt @ Hrly rate of 35/-

**Comment History:**

Field Name	Description
<b>File Attachments</b>	This is where the initiators can attach all required supporting documentation for a new hire.
<b>Add attachment</b>	Click this button to add more attachments.
<b>Comments</b>	Enter any comments you would like the approvers to see.

You can attach up to 10 files and each file can be no larger than 7mb. Attachments must be submitted in PDF format. If you are going to attach documents you need to attach all or none.

Click the submit button

## Form Finalized Page

This page appears when you have successfully submitted the form. It also tells you who this form will be routed to next for approval.

### Hire an Employee

#### Step 5 of 5: Form Finalized

Congratulations, you have successfully submitted this form!

**Personal Info**

**Name:** EMPLOYEE,NEW      **EmpID:** 00602080  
**Citizenship Status:** Citizen  
**Email Address:** new.employee@utah.edu

**Form Status**

**eForm ID:** 4547

**You have just SUBMITTED this form. This action passed the form to Primary Dept Head for further processing.**

[View This Form](#)  
[Close This Form](#)  
[Route approval request to alternate approvers](#)

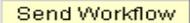
 Refresh

### Notes:

- 1) All **Staff** new hires, transfers and concurrent hires will need 2 approvals and after that it routes to the service team of the Dept ID on the ePAF for final approval.
- 2) For all **Faculty** hires, transfer and concurrent hires the approval path is different from Staff hires.
- 3) Click on the [Route approval request to alternate approvers'](#) link to route the ePAF to an alternate approver **in addition** to the default approver. When you click the link, a list of alternate approvers' as designated by the primary department head displays.

**Alternate Approver's**      [Customize](#) | [Find](#) | [First](#) | 1 of 1 | [Last](#)

EmpID	Name	Yes
1 00601254	MANAGER,ALTERNATE	<input checked="" type="checkbox"/>

**eForm ID:** 4547       Send Workflow

Select the Yes check box and click the send workflow button to route this ePAF to the selected alternate approver.

# Hire on a Job Opening

## Hire an Employee

### Step 1 of 5: Candidate Search ?

Search below for the person you wish to hire. If you know the Employee ID, enter it, and choose Search. Otherwise, enter the First Name, Last Name and SSN and click Search.

Use the arrow icon to select a row. If your search returns no results, fill out the rest of the fields, and search again. If nothing is found, the Add button will turn on. Click Add to create a new Emplid using your entries.

When searching for a person that is being hired for a posted job requisition, if no results are found, please contact your HR Service Team for further assistance.

---

Is this a hire for a job posted by Human Resources?  Yes  No

If Yes, indicate the hiring organization  University of Utah  
 UUHC

#### Search Fields

Employee ID: <input type="text"/>	Applicant ID: <input type="text"/>	*Job Opening ID: <input type="text"/>
*First Name: <input type="text"/>	Middle Name: <input type="text"/>	
*Last Name: <input type="text"/>	*Date of Birth: <input type="text"/>	
*Social Security #: <input type="text"/>		

When this page comes up, all fields on this page are grayed out till the question is answered.

When you hire for a job posting, you must answer 'yes' to the question on the Candidate search page and only then the Job Opening ID field opens up.

Enter **Job Opening #** and click the **search** button. The following page appears:

## Hire an Employee

### Step 1 of 5: Candidate Search ?

Search below for the person you wish to hire. If you know the Employee ID, enter it, and choose Search. Otherwise, enter the First Name, Last Name and SSN and click Search.

Use the arrow icon to select a row. If your search returns no results, fill out the rest of the fields, and search again. If nothing is found the Add button will turn on. Click Add to create a new Emplid using your entries.

When searching for a person that is being hired for a posted job requisition, if no results are found, please contact your HR Service Team for further assistance.

Is this a hire for a job posted by Human Resources?  Yes  No

If Yes, indicate the hiring organization  University of Utah  
 UUHC

**Search Fields**

Employee ID: <input type="text"/>	Applicant ID: <input type="text"/>	*Job Opening ID: <input type="text" value="PRN00887B"/>
*First Name: <input type="text"/>	Middle Name: <input type="text"/>	
*Last Name: <input type="text"/>	*Date of Birth: <input type="text"/>	
*Social Security #: <input type="text"/>		

Applicants <span style="float: right;">Customize   Find   First 1 of 1 Last</span>						
	App Status	Applicant ID	Job Opening ID	Name	Date of Birth	National ID
1	Interview	COCOLARSEN	PRN00887B	LARSEN,CORI		

This page **only** displays an applicant that was selected by the department. If the initiator does not see the person they intend to hire listed here, then they must contact their HR Service Team Representative.

From the results displayed, click the  sign, on the applicant you wish to hire. If the applicant does not have all the required data to start a hire, this message appears;



Is this a Staff hire for a job posted by Human Resources?

Yes  
 No

**Search Fields**

Employee ID:

Applicant ID:

\*Job Opening ID:

\*First Name:

Middle Name:

\*Last Name:

\*Date of Birth:

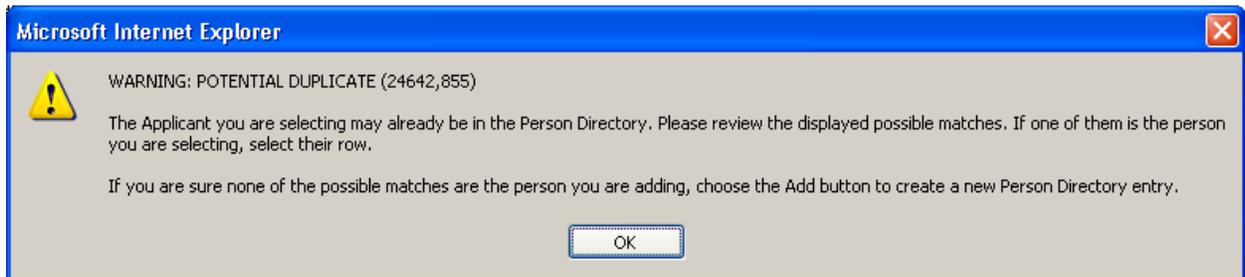
\*Social Security #:

**Applicants** Customize | Find | First 1 of

	App Status	Applicant ID	Job Opening ID	Name	Date of Birth	Natio
1	Interview	180808	30001	Alvarenga,Helen		(Not I

Fill out the missing piece of information, date of birth in this case and click the search button.

The system will do another search and display matches, if any. If a match is found, the following message appears;



In the example below, the system returned a result, but it does not match the birth date entered by the initiator.

Is this a Staff hire for a job posted by Human Resources?

Yes  
 No

**Search Fields**

Employee ID:   
Applicant ID:   
\*Job Opening ID:

\*First Name:   
Middle Name:   
\*Last Name:   
\*Date of Birth:   
\*Social Security #:

**Person Results** Customize | Find | First 1 of 1 Last

	HR	Job	Act	EmplID	Rcd#	Name	Date of Birth	National ID	
1					00592097	0	ALVARENGA,HELEN L	08/07/1984	223334444

This means a match was found in the system for the Name and SSN, but not the birth date. You cannot have 2 different people with the same SSN in the system.

At this point, the initiator will have to **call their Service Team Representative**. The Service Team Rep will need to look at hire paperwork for the person displayed in the result to see if their SSN was entered wrong. If it was wrong, then correct it, which will enable the initiator to complete the ePAF.

Select applicant.

Is this a hire for a job posted by Human Resources?  Yes  No

If Yes, indicate the hiring organization  University of Utah  UUHC

**Search Fields**

Employee ID:  Applicant ID:  \*Job Opening ID:

\*First Name:  Middle Name:

\*Last Name:  \*Date of Birth:

\*Social Security #:

**Applicants** Customize | Find | First 1 of 1 Last

	App Status	Applicant ID	Job Opening ID	Name	Date of Birth	National ID
1	Interview	COCOLARSEN	PRN00887B	LARSEN,CORI		

The warning: potential duplicate message will appear and the applicant shows up in the person results with an EmplID.

**Search Fields**

Employee ID:  Applicant ID:  \*Job Opening ID:

\*First Name:  Middle Name:

\*Last Name:  \*Date of Birth:

\*Social Security #:

**Person Results** Customize | Find | First 1 of 1 Last

	HR	Job	Act	EmplID	Rcd#	Name	Date of Birth	National ID
1				00321058	0	MEAD,TERRI	04/15/1974	111234567

You can click the icon to view details about the active job this employee is currently in. When you click the icon, this page appears

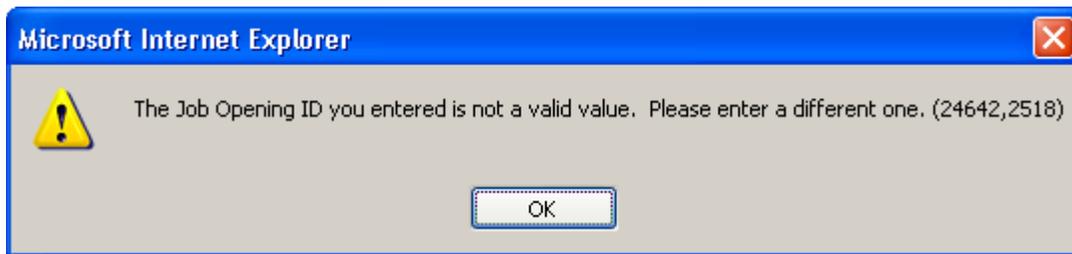


This action takes you directly to the Job information page. You will notice that the job Code and Job Category fields are grayed out. This is because; the data is brought forward from the job requisition and cannot be changed in the hire form. However, the reporting department and home department can be edited.

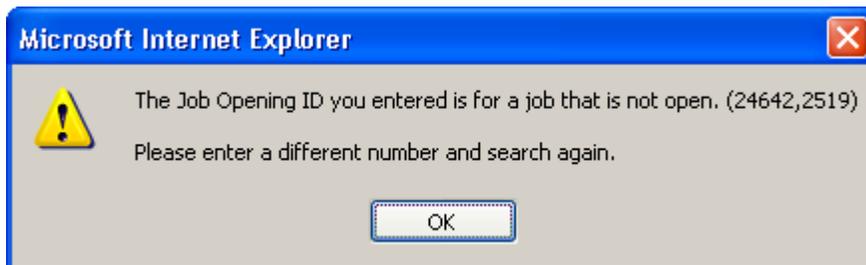
Enter an effective date and fill in the standard hours, Regular/Temporary, Work Phone and Supervisor ID and click the Next button. Follow the instructions outlined on pages 18-20 to successfully submit this form.

**Note:**

- 1) If the department is hiring multiple applicants to one Job Requisition, they will have to initiate the hire for one applicant at a time. ePAF does not allow mass hire.
- 2) When the initiator enters a Job Opening ID that is invalid, they will see this message;



If the job is closed, then this message displays;





## Contract Information Page – Faculty only

This page appears for Faculty on contract only. Enter details of the employee's contract here.

### Hire an Employee

#### Step 4 of 7: Contract Information

Enter the Employee's Contract information.

▼ Personal Info

**Name:** EMPLOYEE,ANOTHER                      **EmplID:** 00602068

**Citizenship Status:** Citizen

**Email Address:** another.employee@utah.edu

Contract Data

**\*Contract Pay Type**  Faculty Pay 9/12                      **eForm ID:** 4551

**Contract Begin Date** 08/16/2008                      **Contract End Date** 05/15/2009

**Payment Begin Date** 07/01/2008                      **Payment End Date** 06/30/2009

<< Previous
Next >>

Field Name	Description
<b>Contract Pay Type</b>	Pick a value. The three choices are 9/12, 10/12 and 11/12
<b>Contract Dates</b>	The contract dates and payment dates auto-populate based on contract pay type and effective date of hire. These are not editable.

**Note:**

If the dates that appear in contract and payment, is not what you are expecting, please contact your service team for assistance.

# Faculty Information Page

Enter details of the employee's faculty information such as Tenure Status, Rank Title, Tenure Home, Faculty Rank, Multi-year appointment and Education data.

### Hire an Employee

**Step 5 of 7: Faculty Information**

Enter the Employee's faculty information such as Tenure Status, Rank Title, Tenure Home, Faculty Rank, Multi-year appointment and Education data

**Personal Info**

**Name:** EMPLOYEE,ANOTHER      **EmplID:** 00602068

**Citizenship Status:** Citizen

**Email Address:** another.employee@utah.edu

**Faculty Information**

**eForm ID:** 4551

\***Tenure Status**

\***Rank Title**

\***Appointment Home**  College Of Law - Dean

**Education**

Degree	Description	Issue Date	School Code	School Name
1 LLB	Bachelor of Laws	01/01/1978	X000032858	HARVARD UNIVERSITY
2 LLM	Master of Laws	01/01/1982	X000033134	YALE UNIVERSITY
3 MBA	Master of Business Admin	01/01/1987		Indian Institute of Management

Field Name	Description
<b>Tenure Status</b>	Pick a value from the dropdown list
<b>Rank Title</b>	Pick a value from the dropdown list that matches the job code description
<b>Appointment Home</b>	Enter the Dept ID where tenure is granted.

When entering school data for education, filter by country & state. The search fields are case sensitive and must be all **CAPS**. If you don't find a school listed, you can type out the school name as shown in the above example.

**Look Up**

#### Look Up School Code

Country:  USA

School Code:

Description:  UNIVERSITY

State:  UT

[Basic Lookup](#)

**Search Results**

Country	School Code	Description	State
USA	X000052087	UNIVERSITY OF PHOENIX	UT
USA	X000033872	UNIVERSITY OF UTAH	UT

After you click the Next button, you are taken to the Compensation page. Follow instructions as outlined on pages 18-20 to successfully submit the form.

## Transfer or Concurrent Hire

You will still use the **Hire an Employee form** to **transfer an employee into** your department or **give them an additional assignment** in your department. This decision is made by the system based on how you answer the question on the Finalize form page.

### Assumption:

On the Candidate search page, you did find an employee with an active job in the system.

Is this a Staff hire for a job posted by Human Resources?

Yes

No

**Search Fields**

Employee ID:

Applicant ID:

Job Opening ID:

\*First Name:

Middle Name:

\*Last Name:

\*Date of Birth:  31

Social Security #:

**Person Results** Customize | Find | First 1 of 1 Last

	HR	Job	Act	EmplID	Rcd#	Name	Date of Birth	National ID	
1					00600723	0	CHILLI,RED	05/07/1984	(Not Displayed)

Click the left arrow to select the employee in the results and enter data in the Job Information and Compensation page as explained in the new hire section earlier.

The Finalize form page will look like this.

## Finalize Form Page

### Hire an Employee

#### Step 4 of 5: Finalize Form

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

**Personal Info**

**Name:** CHILLI,RED **EmplID:** 00600723  
**Citizenship Status:** Citizen  
**Email Address:** red.chilli@utah.edu

**Other Job Actions**

This employee has at least one active job with the university already. Is he/she leaving a job at the university for this one?  
 **Yes, leaving the following assignment:**

Select the job he/she is leaving below.

**Job Transferring From**

Rcd	Job Code Description	Department Description
<input checked="" type="checkbox"/>	0 Coach, Major Sport	HUMAN RESOURCES

**File Attachments**

Customize | Find | First 1 of 1 Last

Upload	View	Description	Attachment Id
1	Upload	View	

Add Attachment

**Comments**

<< Previous Submit

**Your Comment:**  
EE is transferring from HR to USHE

**Comment History:**

At this point, the system detects that the employee has another active job and displays this message in Other Job Actions section.

This Employee has at least one active job with the University already. Is he/she leaving an assignment at the University for this one?

By default, the check box is NOT selected and the active job the employee has is NOT selected. If you leave this as is and click the submit button, this will result in a **Hire Concurrent Job** transaction. If you check the Yes, leaving the following job, the job transferring from section will disappear and it will result in a **Transfer** row on Job Data.

Click the submit button at the bottom of the page and click Yes on this message to submit the form to the next approver

Submit this form? (24642,112)

The form will be directed to the next approver, if any.

**Notes:**

- 1) After the system determines the transaction to be Hire Concurrent and if the combined FTE of all active jobs for the employee exceeds 1, you will see this warning message. For a faculty employee, the warning will appear if combined FTE greater than 2. HR however will have to make adjustments to the other active jobs to allow room and will contact the ePAF initiator for more details. Till this adjustment is done, HR cannot approve the ePAF.



- 2) It was decided to make this a warning and not error, because there might be another ePAF for the same employee on a different employee record reducing standard hours and thus reducing the combined FTE to 1. By making it a warning, we allow the ePAF to get all approvals and HR then makes the final decision.

## Edit Existing Job

Use this form to edit the job of an employee **currently working** in your department. Use this to process pay rate change, reclassification (change in job category/job code), FTE change etc.

To access the form, click on the [Edit Existing Job](#) hyperlink on the Start A New ePAF Homepage, and the following search page appears;

### Select An Employee

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

**Find an Existing Value**

<b>EmplID:</b>	begins with	<input type="text"/>
<b>Empl Rcd Nbr:</b>	=	<input type="text"/>
<b>Name:</b>	begins with	<input type="text"/>
<b>Last Name:</b>	begins with	<input type="text"/>
<b>Department:</b>	begins with	<input type="text"/> 
<b>Job Category:</b>	=	<input type="text"/> <input type="button" value="v"/>
<b>Benefit Program:</b>	begins with	<input type="text"/>

[Basic Search](#)  [Save Search Criteria](#)

You can enter an EmplID or a value in any of the other search fields to bring up an employee that is currently working in your department, whose job data needs to be edited.

Enter an EmplID and click the search button. The following page appears;

## Change Job Data

Example of a job reclassification and pay rate change scenario.

Authored by

### Change Job Data

**Step 1 of 4: Enter Job Change Details** i

Enter a date when change should be effective. Enter new values in the fields that will change for the employee's job you are editing.

**Current Job Info**

<b>Name:</b>	EMPLOYEE,NEW	<b>EmplID:</b>	00602080
<b>DeptID:</b>	00410 Hmnsrcs	<b>Empl Rcd#:</b>	0
<b>Job Code:</b>	0674 StAdminClr		
<b>Reg/Temp:</b>	Temporary		
<b>Employee Group:</b>	Non-Exempt		
<b>Ben Program:</b>	Dummy Prog	<b>FTE:</b>	0.250000
<b>Position:</b>		<b>Std Hrs:</b>	10.00

**New Job Information**

**eForm ID:** 268744

**\*Effective Date:**  BT

**\*Home Department:**  Human Resources

**\*Job Code**  Manager

**\*Employee Group:** Exempt

**\*Working Title:**

**\*Standard Hours:**  **\*FTE**  ✔ Is This a Job Reclassification

**\*Regular/Temporary:** Temporary (less than 9 months)

**Work Phone**

**\*Supervisor ID**  KINGSFORD,HEATHER C

This page displays information from the employee's current job. Enter in all information that is changing.

Field Name	Description
<b>Effective Date</b>	Enter the date when you want this change to be effective.
<b>Job Code</b>	If the job code is changing, enter the new job code.
<b>Working Title</b>	If the working title is changing, enter then new information.
<b>Standard Hours FTE</b>	Enter a value in one field and the other will auto-populate.
<b>Is this a Job Reclassification</b>	If yes, then check the box. Else no.
<b>Expected Duration</b>	Select a value from the drop down
<b>Work Phone Number</b>	Enter the new work phone.
<b>Supervisor ID</b>	Enter Supervisor ID if changing.

# Compensation Page

## Hire an Employee

### Step 3 of 5: Compensation

Enter the employee's compensation, annualized base amount (ABA) and distribution information.

#### Personal Info

**Name:** EMPLOYEE,NEW      **EmpID:** 00602080  
**Citizenship Status:** Citizen  
**Email Address:** new.employee@utah.edu

#### Compensation Data

**Comp Rate Hourly:**       **eForm ID:** 6057  
**ABA**

#### Distribution Data

Customize | Find | First 1-2 of 2 Last

	*Bus Unit	*Org ID	Activity/Project	*Account	Allow	Begin Date	End Date	Distribution Factor	Distribution
1	01	00410	00005836	50800	<input checked="" type="checkbox"/>	05/13/2008	06/30/2008	0.48562	\$16,996700
2	01	00410	00001779	50800	<input checked="" type="checkbox"/>	05/13/2008	06/30/2008	0.51438	\$18,003300

**Total Distribution Percent** 1.00000

**Distribution Difference** \$0.000000

<< Previous      Next >>

Field Name	Description
<b>Comp Rate Hourly</b> <b>Comp Rate Annual</b>	Enter either the hourly rate or annual salary depending on the field displayed.
<b>ABA</b>	Enter the annualized base amount.
<b>Distribution Grid</b>	Enter the distribution data.

**Notes:**

- 1) When there is a change in job code, a new field “Is this a Job Reclassification pops up”. If yes, check the box. When this box is checked, the ePAF is routed to the Compensation team for review after two approvals are obtained.
- 2) Job code – After a value is entered in this field, the system checks to see if this job is Per Diem or Step constrained?
  - If it is determined to be a per diem job, a new field “Per Diem?” with a check box will appear. If you select Yes, then FTE and standard hours populate automatically and gray out. An hourly rate is also entered and grayed out.
  - If the salary plan of the job code = STP, then it is determined to be a step constrained job and on the next page, the hourly rate will be a drop down value. The initiator will have to choose one of the values for comp rate.

We have 10 job codes in STP salary plan. They are 0253, 0292, 0552, 0556, 2628, 2644, 2659, 2672, 2686 and 2697.

- 3) For all Faculty and Staff salary changes in departments that report to School of Medicine (00202), the ePAF will be routed to SOM Dean’s office for a third signature and then routed to the HR Service team.

## Change Employment Status

Use this form to submit a Termination, Retirement, Leave of Absence, Short Work Break, Return from Leave, Return from Short Work Break action for an employee in your department.

To access the form, click on the [Change Employment Status](#) hyperlink from the Start a New ePAF Home Page, and the following search page appears;

### Select An Employee

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

**Find an Existing Value**

<b>EmplID:</b>	begins with	<input type="text"/>
<b>Empl Rcd Nbr:</b>	=	<input type="text"/>
<b>Name:</b>	begins with	<input type="text"/>
<b>Last Name:</b>	begins with	<input type="text"/>
<b>Department:</b>	begins with	<input type="text"/>
<b>Job Category:</b>	=	<input type="text"/>
<b>Benefit Program:</b>	begins with	<input type="text"/>

[Basic Search](#)  [Save Search Criteria](#)

Enter the EmplID and click the search button. The following page appears;

## Change Employment Status

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

Please fill out the form below.

**Current Job Info**

<b>Name:</b>	EMPLOYEE,NEW	<b>EmplID:</b>	00602080
<b>DeptID:</b>	00410 Hmnrsrcs	<b>Empl Rcd#:</b>	0
<b>Job Code:</b>	0054 Comprofes		
<b>Reg/Temp:</b>	Regular	<b>Full/Part:</b>	Full-Time
<b>Job Category:</b>	Exempt		
<b>Ben Program:</b>	Dummy Prog	<b>FTE:</b>	0.480000
		<b>Std Hrs:</b>	19.00

**Form Data**

eForm ID: 4729

\*Effective Date:  

\*Action:   **Expected Return Date:**  

\*Reason:  

**Comments**

**Your Comment:**

# Termination of an Employee

## Change Employment Status

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

Please fill out the form below.

**Current Job Info**

Name: MAHONE,ALEX C      EmplID: 00542699  
DeptID: 00410      Hmnrsrcs      Empl Rcd#: 0  
Job Code: 0052      Compradmin  
Reg/Temp: Regular      Full/Part: Full-Time  
Job Category: Administration  
Ben Program: E75 Program      FTE: 1.000000      Std Hrs: 40.00

**Form Data**

eForm ID: 4731

\*Effective Date: 04/29/2008

\*Action: Termination

\*Reason: Reduction in Force

**Form Messages**

	Message Text	Description
<input type="checkbox"/>	This action will terminate employment.	This action will terminate employment with the University. Are you sure you want to continue?
<input type="checkbox"/>	Employee has accruals at the point of termination.	Vacation Payout will be processed if the employee has accruals at the point of termination.

**Comments**

Your Comment:

Comment History

Termination of Staff **does not** require any approval. Depending on the termination reason, it will be routed to the Benefits Team or Service Team for review. Termination code of Termination/Voluntary does not require approval and will be submitted directly to the system for processing.

## Update Employee Personal Data

Use this form to update Name, Date of Birth, SSN, Education, Military Status, Address or Phone Number for employees in your department.

To update data, click on the [Update Employee Personal Data](#) hyperlink from the Start a New ePAF Home Page.

The following Employee Personal Data Search page appears. Enter the Empl ID or data in any of the name fields and click the search button. The following page appears;

### Update Employee Personal Data

**Step 1 of 2: Update Employee Personal Data** ⓘ  
This page displays the values that is currently stored for Names, Education, Birthdate, SSN, or Military Status.

Enter a new value for the field you wish to update. For changes to primary name and SSN, be sure to review all required documentation prior to making changes.

▼ Header Information

eForm ID: 268746

▼ User Info

User ID: U0595322 HEATHER C KINGSFORD  
Email: Heather.Kingsford@utah.edu

Form Data

Empl ID: 00602080  
First Name:   
Middle Name:   
Last Name:   
Name Suffix:  ⓘ  
Preferred First Name:   
Date of Birth:  ⓘ  
Gender:  ▼  
Social Security #:   
Highest Education Level:  ▼  
\*Military Status:  ▼  
Marital Status:  ▼  
\*Address 1:   
Address 2:   
\*City:   
\*State:  ⓘ  
\*Postal:   
\*Phone:

Form Messages	
	Description
<input type="checkbox"/> ⓘ	Update Employee Personal Data Form I acknowledge that I have reviewed the appropriate documentation to substantiate the change requested in this transaction.

Comments

Your Comment:

This page displays data that is currently stored in PeopleSoft. Enter a new value for the field you wish to update.

For changes to Name you must see a Social Security Card that reflects the name change.

For changes to SS number, unless it was a data entry error you must see a Social Security Card.

For Birth Date changes, unless it was a data entry error you need to see ID the shows the correct birth date (Drivers License, Passport, Birth Certificate.)

Be sure to review all required documentation prior to making changes. **Enter the documents used in data verification in the comments section.** Read the form message, click the checkbox and then click the Submit button.

Submit this form? (24642,112)

The form will be directed to the next approver, if any.

You will see this message. Click the Yes button. The following page appears. Since this form does not require approval, you will see that the form was submitted to the system for processing.

## Update Employee Personal Data

### Step 2 of 2: Form Submission Complete

---

**Form Status**

eForm ID: 4958

**You have just AUTHORIZED this form. This action passed the form to the SYSTEM for further processing.**

[Go To Worklist](#)

[View This Form](#)

[Go To ePAF Home Page](#)

[Close This Form](#)

# Submit a Manual Request

Use this form to request corrections or changes to data that cannot be submitted via the other ePAF forms.

To access the form, click on Submit a Manual Request link from the Start a New ePAF page. Enter the Empl ID or any other data and click the search button. The following page appears.

Authorized by

## Submit Manual Request

**Step 1 of 2: Create Manual Request** i

Enter an effective date and detailed explanation of the changes to be made to Job or Personal Data for employees in your department. Please specify if the employee is Faculty or Staff.

If the change being requested requires documentation, you may upload the file in the File Attachment section  
OR send the documentation later to your HR Service Team.

**▼ Current Job Info**

<b>Name:</b>	EMPLOYEE,NEW	<b>EmplID:</b>	00602080
<b>DeptID:</b>	00410 Hmnrsrccs	<b>Empl Rcd#:</b>	0
<b>Job Code:</b>	0674 StAdminClr		
<b>Reg/Temp:</b>	Temporary		
<b>Employee Group:</b>	Non-Exempt		
<b>Ben Program:</b>	Dummy Prog	<b>FTE:</b>	0.250000
		<b>Std Hrs:</b>	10.00
<b>Position:</b>			

**Form Data**

\*Eff Date:  BT eForm ID: 268748

\*Type of Change: ▼

1. Personal Data Change  
 2. Correction to Effdt, Jobcode  
 3. Correction to Comprate  
 4. Other

\*Manual Request Ex

Please change the annual salary for the above employee to \$45,000 effective 6/15/2012.  
 Note: This is a retroactive increase.

**File Attachments** Customize | Find | First 1 of 1 Last

	Upload	View	Description	Attachment Id
1	<input type="button" value="Upload"/>	<input type="button" value="View"/>		<input type="button" value="Delete"/>

**Comments**

Your Comment:

Comment History:

Enter the effective date of change on the form. Select the appropriate type of change from the drop down menu. In the explanation section, enter a **detailed** explanation of changes to be made to employee's record.

If change requested requires documentation, you may upload files(s) in the File Attachment section **OR** send documentation later to HR.

Click the submit button and you will see this message.

Submit this form? (24642,112)

The form will be directed to the next approver, if any.

Click the Yes button and the following page appears.

*Authored by*

## Submit Manual Request

**Step 2 of 2: Form Submission Completed** i

You have successfully submitted this form.

---

**Form Status**

**eForm ID:** 268748

**You have just SUBMITTED this form. This action passed the form to Org Head Primary for further processing.**

[Go To Worklist](#)

[Go To ePAF Home Page](#)

[View This Form](#)

[Close This Form](#)

[Route approval request to alternate approvers](#)

## Manage Personal Workflow Preferences

This functionality is only available to employees designated as “Department Head” for a Dept ID. This person’s EmplID is stored on the HR Department Tree and only that person can access the form.

### Manage Personal Workflow Preferences



[Change Personal Workflow Preferences](#)  
Create a request for proxy and alternate roles for your workflow.



[View Personal Workflow Preference Changes](#)  
View a previous request for proxy and alternate roles for your workflow.



[View Archived Personal Workflow Preference Changes](#)  
View an archived request for proxy and alternate roles for your workflow.

Use the [Change Personal Workflow Preferences](#) form to create a request for proxy and/or alternate roles for your workflow.

The definition for the two roles is as follows;

### Proxies

- ◆ You can select one or more individuals (per department) to be your proxy
- ◆ A proxy will automatically receive the email notifications and worklist items that you (the dept head) will receive for ePAF.
  - Email notifications and workflow items cannot be turned off for proxies – they will receive them.
- ◆ This is defined per department, so if you are the org head of multiple departments, and you want Sue Employee to be your proxy in all of them, you must submit a form for each department with her name under the Proxies section.
- ◆ **Use:** designate a proxy when it is someone who regularly approves on your behalf, not just on special occasions.

## Alternates

- ♦ You can select one or more individuals (per department) to be your alternate
- ♦ An alternate has approval power, but they will **NOT** automatically receive the email notifications and worklist items that the dept head will receive, so they won't be able to access every ePAF. Instead :
  - When an initiator submits an ePAF, they will have the ability to route the ePAF to alternates for approval. These alternates will be listed on a drop down list. The initiator will select the individuals that they would like the notifications to be routed to. The alternate approver can route the ePAF to another alternate approver as well
- ♦ This is defined per department, so if you are the org head of multiple departments and you want Joe Employee to be your alternate in all of them, you must submit a form for each department with his name under the Alternates section.
- ♦ **Use:** use the alternate section to list those individuals who you trust to approve on your behalf on special occasions (when you can't be reached, when you have an emergency, etc.)

Click the link and this page appears;

### Create Workflow Request

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

**Find an Existing Value**

---

Department:   

Description:

[Basic Search](#)  [Save Search Criteria](#)

If you are the department head for multiple Dept IDs, you will have to create proxies and alternates for each Dept ID.

Enter a Dept ID and click the search button. The following page appears;

# Create Personal Workflow Request

## Step 1 of 3: Create Personal Workflow Request

### Manage Proxies:

People you list here will receive all Dept Head workflow routings for this department.

### Manage Alternates:

People you list here will be authorized to act on Dept Head workflow routings, but will only receive routings you or your proxies forward to them.

Department				
Department:	00410	Human Resources	CAMPUS	
Proxies				
EmplID	Name	Revoke	Requested Action	
1 00108503	JENSEN,KRISTIN OSTLER	<input type="button" value="Revoke"/>	Unchanged	<input type="button" value="+"/> <input type="button" value="-"/>
Alternates				
EmplID	Name		Requested Action	
1 <input type="text" value="00108503"/> <input type="button" value="🔍"/>	JENSEN,KRISTIN OSTLER		Grant	<input type="button" value="+"/> <input type="button" value="-"/>
2 <input type="text" value="00542699"/> <input type="button" value="🔍"/>	O'KEEFE,KEVIN C		Grant	<input type="button" value="+"/> <input type="button" value="-"/>
3 <input type="text" value="00512762"/> <input type="button" value="🔍"/>	WILSON,AIMEE		Grant	<input type="button" value="+"/> <input type="button" value="-"/>
4 <input type="text" value="00251660"/> <input type="button" value="🔍"/>	ARKO,KRISTY		Grant	<input type="button" value="+"/> <input type="button" value="-"/>
5 <input type="text" value="00565853"/> <input type="button" value="🔍"/>	BONE,CHRISTOPHER A.		Grant	<input type="button" value="+"/> <input type="button" value="-"/>

The Dept ID is listed at the top of the grid. In the proxies section, click the + sign and enter an Empl ID. By default the requested action is set to granted. To revoke a proxy assignment, click the Revoke button. You can have more than 1 proxy per Dept ID.

In the Alternates section, click the + sign and enter an EmplID. To add multiple alternates, click the + sign to insert a row and then enter Emplid. To revoke an alternate approve, click the – sign to delete the row.



## View Personal Workflow

Use this link to view a recently submitted Personal Workflow ePAF, including all the details of the request, and information about its handling so far. This is a read-only view and shows a listing of all ePAFs submitted by you in the last month.

Click the [View Personal Workflow changes](#) link from the Manage Personal Workflow Preferences page, and search for and select the request you wish to view.

Page 1 displays the Proxies and Alternates designated by you.

### View Personal Workflow Request

#### Step 1 of 2: View Personal Workflow Requests

This page displays Proxies and Alternates designated by you. For details on form history, choose Next.

Department		
<b>Department:</b>	00410	President
Proxies		
EmplID	Name	Requested Action
1 00108503	JENSEN,KRISTIN OSTLER	Unchanged <input type="button" value="+"/> <input type="button" value="-"/>
Alternates		
EmplID	Name	Requested Action
1 00108503	JENSEN,KRISTIN OSTLER	Grant <input type="button" value="+"/> <input type="button" value="-"/>
2 00251660	ARKO,KRISTY	Grant <input type="button" value="+"/> <input type="button" value="-"/>
3 00512762	WILSON,AIMEE	Grant <input type="button" value="+"/> <input type="button" value="-"/>
4 00542699	O'KEEFE,KEVIN C	Grant <input type="button" value="+"/> <input type="button" value="-"/>
5 00565853	BONE,CHRISTOPHER A.	Grant <input type="button" value="+"/> <input type="button" value="-"/>

Click the next button to view details on form history.

Page 2 displays the form history. The transaction log displays the approval process and the current status of the request.

Since this form does not go through the approval process, you will see that it was initiated and approved by the same person who is the department head.

### View Personal Workflow Request

[Step 2 of 2: Form History](#)

This page displays a history of this form, including everyone that has signed it.

**FormList Fields**

eForm ID: 4976	Workflow Form Status: Executed
Workflow Form Type: PERSWFLOW	
Original Operator: U0108503 KRISTIN OSTLER JENSEN	Original DateTime: 05/04/2008 12:00:03AM
Last Operator: U0108503 KRISTIN OSTLER JENSEN	Last By Alternate Operator:
Last DateTime: 05/04/2008 12:00:03AM	
Next Approving RoleUser:	
Next Approving RoleName: <a href="#">Who can work this form?</a>	

**Transaction Log**

Log Instance	Current DateTime	Role Name	User ID	User Description	Form Action	For Rolename	Alternate User ID	Workflow Form Status
1	05/04/2008 12:00:03AM	gtInitiator	U0108503	KRISTIN OSTLER JENSEN	Authorize		<input type="text"/>	Authorized <span style="float: right;">+ -</span>
2	05/04/2008 12:00:05AM	SYSTEM	U0108503	KRISTIN OSTLER JENSEN	Execute		<input type="text"/>	Executed <span style="float: right;">+ -</span>

[Form Messages](#)

<< Previous
Next >>

## View Archived Personal Workflow

Use this section to find and view a Personal Workflow ePAF, exactly as you would do using the View Personal Workflow change ePAF function. As with View, this is a read-only. The only difference, then, is Archived shows all ePAFs submitted by you **more than one month ago**.

# SECTION 4 – MY WORKLIST

Use the [My Worklist](#) section from the ePAF Home Page to work the items that have been routed to you. This section will list transactions that are awaiting your **approval** and/or requests that have been **recycled** to you for more information.

Click on the My Worklist link and the following page appears;

Worklist for GTJOSNA: Department Head

Work List Filters:

[Detail View](#) Customize | Find | View All | First 1-12 of 12 | Last

From	Date From	Work Item	Worked By Activity	Priority	Link		
Josna Kotturappa	03/05/2008	Update Form	eForm Routing		<a href="#">HIRE: MELANEE LEE MCLEAN</a>	Mark Worked	Reassign
ACS ID: Courtney McMillan	03/24/2008	Update Form	eForm Routing		<a href="#">HIRE: JOHN T SMITH</a>	Mark Worked	Reassign
GTC - Auguste Tolatau	04/02/2008	Evaluate Form	eForm Routing		<a href="#">JOBCHANGE: AUGUSTE S TOLUTAU ESG</a>	Mark Worked	Reassign
Department Head	04/17/2008	Evaluate Form	eForm Routing		<a href="#">HIRE: BABY KITTY</a>	Mark Worked	Reassign
ACS ID: Allan Mendoza	04/18/2008	Evaluate Dept ePAF	eForm Routing		<a href="#">HIRE: PHAT NGOC HUYNH</a>	Mark Worked	Reassign
Department Head	04/22/2008	Evaluate Dept ePAF	eForm Routing		<a href="#">HIRE: SOMEONE JUST BRANDNEW</a>	Mark Worked	Reassign
Department Head	04/22/2008	Evaluate Dept ePAF	eForm Routing		<a href="#">MANULREQST: HEIDI MARIE BRUNNER</a>	Mark Worked	Reassign
Department Head	04/22/2008	Evaluate Dept ePAF	eForm Routing		<a href="#">JOBCHANGE: REBECCA OLSEN</a>	Mark Worked	Reassign
Department Head	04/24/2008	Evaluate Form	eForm Routing		<a href="#">HIRE: RED ONION</a>	Mark Worked	Reassign
					<a href="#">JOBCHANGE: RUFFI JA</a>		

You can click the column headers to sort by that column data. Click on the hyperlink of any of the items in your work list to start the process. For example, click on [HIRE: PHAT NGOC HUYNH](#) submitted on 4/17/2008 and the following page appears;

### Evaluate Hire

**Step 1 of 2: Evaluate Hire Request**

Review the form data below. If it is correct, choose Approve to approve the form and forward it to the next approver, if any. If you wish to stop processing for this form, choose Deny. To send the form back to the originator for correction or clarification, enter a comment and choose Recycle.

To save your work and keep the form at your level, choose Hold.

**Personal Info**

Name: HUYNH,PHAT NGOC      EmpID: 00185727

Citizenship Status:

Email Address: phat.huynh@utah.edu

**Hire Form Data**

\*Effective Date: 04/18/2008      eForm ID: 4299

\*Job Category: Exempt

\*Department: 00410 HUMAN RESOURCES

Location Code: 0858000000 420 WAKARA WAY      Home Department: 00410

\*Job Code: 0008 Manager

\*Standard Hours: 40.00      \*FTE: 1.000000

Expected Duration: 9 months or Less

\*Annual Salary: 10000.000000

**Distribution Data**

*Bus Unit	*Org ID	*Activity/Project	*Account	Allow	Begin Date	End Date	Distribution Factor	Distribution
1 01	00013	00005694	50011	<input checked="" type="checkbox"/>	04/18/2008	06/30/2008	1.00000	\$10,000.000000

Total Distribution Percent: 1.00000

Distribution Difference: \$0.000000

Edit Existing Job?

Job Transferring From		
Rcd	Job Code Description	Department Description
<input checked="" type="checkbox"/>	0 Library Aide	Marriott Library

File Attachments		
View	Description	Attachment Id
1 <input type="button" value="View"/>		

**Comments**

Your Comment:

Comment History:

Review all the Job data entered by the initiator for the new hire. If you have any comments, you can enter that in the Comments section shown on the next page.

Comments can be viewed by everyone in the approval path that this form routes to after you have worked this form. The initiator can view the same, when he/she looks up the form in the View ePAF section.

After reviewing the data entered for the new hire you can approve, deny, recycle, hold or close this form. The following actions take place for each option;

- **Approve** – The form gets submitted with your approval to the next approver.
- **Denied** – The form is denied by you and this stops further processing of this transaction.
- **Recycle** – Use this when you want to send the form back to the initiator asking them to make changes to the data entered. Enter changes in the comments section. The form when recycled goes back to the initiator and after changes are made will be re-routed to the same approvers.
- **Hold** – This action puts a hold status on the form, even though this does not prevent others who have proper authorization from working on this item.
- **Close** – This closes the page and takes you back to the work list.

Click the Approve button and you get the following message;

Approve this form? (24642, 111)

The form will be sent on to the next approver for evaluation, or, if you are the final approver, the form will be loaded into the system. If you change anything on the form, please make note in the comments box.

Click the Yes button and this page appears;

## Evaluate Hire

### Step 2 of 2: Evaluation Complete

Congratulations! You have successfully evaluated this form.

**Personal Info**

**Name:** HUYNH,PHAT NGOC      **EmplID:** 00185727

**Citizenship Status:**

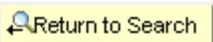
**Email Address:** phat.huynh@utah.edu

**Form Status**

**eForm ID:** 4299

**You have just AUTHORIZED this form. This action passed the form to the SYSTEM for further processing.**

[Go To Worklist](#)  
[View This Form](#)  
[Go To ePAF Home Page](#)



In this example, the person approving is the final approver and hence you see this message that this has been passed to the System for further processing.

# SECTION 5 –RESUBMIT, CHANGE OR WITHDRAW AN ePAF

In this section, you will learn how to Resubmit, Change or Withdraw an ePAF:

From the ePAF Home PAGE use the link to change, resubmit or withdraw a previously submitted manual request for an employee.

From the Search Page select the previously submitted request that needs resubmitted, changed or withdrawn. Once selected, you will be brought to a page displaying the request information as previously entered.

## Resubmit, Change, or Withdraw an eForm

-  **Update Hire eForm**  
Use this link to change, resubmit or withdraw a request to hire an employee.  
[Update Hire eForm](#)
-  **Update a Job Edit eForm**  
Use this link to change, resubmit or withdraw a request to edit a job for an employee  
[Update a Job Edit eForm](#)
-  **Update an Employment Status Change eForm**  
Use this link to change, resubmit or withdraw a request to change employment status for an employee.  
[Update an Employment Status Change eForm](#)
-  **Update Manual Request**  
Use this page to change, resubmit, or withdraw a previous manual request.  
[Update Manual Request](#)
-  **Update Department Mass Change Request**  
Use this page to change, resubmit, or withdraw a previous Department Mass Change Request.  
[Update Department Mass Change Request](#)

[Return to HR Electronic Forms \(eForms\) Home page](#)

After working your way through the request, making any necessary changes, page 3 of 4 is where you will finalize the form. Indicate in the comments section exactly what was changed (if applicable) and the reason for the change, resubmission, hold or withdrawal. From there, select from the following options:

- **Hold** – This action puts a hold on the form, which means nobody else can work on this form even though they have the proper authorization.
- **Close** – This will allow the user to exit the page without making any changes.
- **Resubmit** – If the user initiates changes, the form will need to be resubmitted. This will save the changes that have been entered and send the ePAF back through the approval steps. The final page below allows the user to determine if the form should be resubmitted.

Resubmit this form? (20002,29)

The form will be sent to the next approver with any changes and/or comments you may have made.

If the form is ready to be resubmitted select, “Yes.” To return to the previous page and make changes to the form select, “No.”

- **Withdraw** – If the request should no longer be considered (the manual override does not need to happen, for example), the form will need to be withdrawn. This will cancel the request completely and not allow any additional action on the request. If this option is selected it will advance to the following screen to finalize the action.

Are you sure you want to withdraw this form? (20002,28)

Withdrawing a form permanently ends form processing. The form will be archived.

If the form is to be permanently ended select, “Yes.” To return to the previous page and make changes to the form select, “No.”

The final page will confirm that the request was successfully placed on hold, withdrawn or resubmitted.

## Update Manual Request

### Step 3 of 3: Form Update Complete

#### Form Status

eForm ID: 4309

You have just RESUBMITTED this form. This action passed the form to Org Head Primary for further processing.

[Go To Worklist](#)

[View This Form](#)

[Close This Form](#)

## Update Employment Status Change

### Step 2 of 2: Update Complete

#### Current Job Info

Name:	BACON,CHEDDER AND	EmplID:	00600668
DeptID:	00410 Hmnrsrcs	Empl Rcd#:	2
Job Code:	0039 Clerk	<a href="#">Personal Data</a>	
Reg/Temp:	Regular	Full/Part:	Full-Time
Job Category:	Non-Exempt	<a href="#">Job Data</a>	
Ben Program:	Dummy Prog	FTE:	1.000000
		Std Hrs:	40.00

#### Form Status

eForm ID: 1638

You have just PLACED ON HOLD this form.

[Go To Worklist](#)

[View This Form](#)

[Close This Form](#)

## Update Hire

### Step 4 of 4: Form Finalized

Congratulations, you have successfully updated this form!

#### ▼ Personal Info

Name:	DOG,ALPHA	EmplID:	00602063
Citizenship Status:	Citizen		<a href="#">Personal Data</a>
Email Address:			<a href="#">Job Data</a>
			<a href="#">Additional Pay</a>

#### Form Status

eForm ID: 4233

**You have just WITHDRAWN this form. This permanently ends processing for this form.**

[Go To Worklist](#)

[View This Form](#)

[Go To ePAF Home Page](#)

[Return to Search](#)

[Previous in List](#)

[Next in List](#)

**Note:** Once an ePAF has been approved by the final approver and executed to the system the previously submitted ePAF is no longer available to resubmit, change or withdraw.

## SECTION 6 –VIEW AN EPAF

Use this section to view a recently submitted ePAF, including all the details of the request, any comments made through the approval process, and information about its handling so far. This is a read-only view and shows a listing of all ePAFs submitted in the last month. You can also remove the date in the Originated Date From field to search all ePAF's for an employee.

From the ePAF Home PAGE use the link to View and eForm.

### HR Electronic Forms (eForms) Home page

 **Start a new eForm**  
Start a new eForm, which will then be routed to the appropriate approvers.  
[Start a new eForm](#)

 **Resubmit, Change, or Withdraw an eForm**  
Make changes to an eForm that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.  
[Resubmit, Change, or Withdraw an eForm](#)

 **View an eForm**  
View a recently submitted eForm, including information about its handling so far. eForms submitted in the last month are listed here. This is a read-only view.  
[View an eForm](#)

[Return to eForms Home Page](#)

Page 1 displays the details of the request along with the comment history. Click next to see the form history.

### View Hire

**Step 1 of 2: Form Contents and Comments** 0

View the form data below. Click Next for the Form History page.

**Personal Info**

**Name:** EMPLOYEE,NEW      **EmplID:** 00602080

**Citizenship Status:** Citizen

**Email Address:** New@Utah.edu

**Hire Form Data**

**Effective Date:** 06/01/2012    **Empl Rcd Hbr:** 0    **eForm ID:** 268743

**Department:** 00410    Human Resources

**Home Department:** 00410    Human Resources

**Job Code:** 0674    UU Student - Admin/Clerical

**Empl Group:** Non-Exempt

**Working Title:** Intern

**Standard Hours:** 10.00      **FTE:** 0.250000

**Regular/Temporary:** Temporary (less than 9 months)

**Work Phone:** 801/322-4200

**Comp Rate Hourly:** \$10.000000      **ABA:** \$20,000

**Supervisor ID:** 00595322      KINGSFORD,HEATHER C

**Action:** HIR Hire

**Reason Code:** NHR New Hire

Distribution Data								Customize   Find	First	1 of 1	Last
Bus Unit	Org ID	Activity/Project	Account	Allow	Begin Date	End Date	UU Distribution Factor Percent	Distribution			
1 01	00410	00001602	50800	<input checked="" type="checkbox"/>	06/01/2012	06/30/2012	1.00000	\$10.000000	+	-	

**File Attachments** Customize | Find | | | First 1 of 1 Last

View	Description	Attachment Id
1	View	

**Comments**

**Comment History:**

<< Search
Next >>

Page 2 displays the form history. The transaction log displays the approval process and the current status of the request.

If the final line in the transaction Log lists the form action as **Execute** then the form has been through all approvals and processed in the system.

If the request is still pending (waiting for an approval) you may click on the **Who can work this form?** link to see who has access to approve the request and get it moving through the process again.

*Autoexec by*

**View Hire**

[Step 2 of 2: Form History](#) i

This page displays a history of this form, including everyone that has signed it.

**FormList Fields**

**eForm ID:** 268743      **Workflow Form Status:** Executed

**Workflow Form Type:** HIRE

**Original Operator:** U0595322      HEATHER C KINGSFORD  
**Original DateTime:** 06/19/2012 8:37:11 AM

**Last Operator:** U0626017      STACIE RIGBY  
**Last By Alternate Operator:**  
**Last DateTime:** 06/19/2012 8:51:26 AM

**Next Approving RoleUser:**  
**Next Approving RoleName:** Who can work this form?

**Transaction Log** Customize | Find | [Icons] | First 1-3 of 3 Last

Log Instance	Current DateTime	Role Name	DeptID	User ID	User Description	Form Action	For Rolename	Alternate User ID	Workflow Form Status
1	06/19/2012 8:37:11 AM	gtInitiator	00410	U0595322	HEATHER C KINGSFORD	Submit			Pending
2	06/19/2012 8:51:26 AM	gtServiceTeam	00410	U0626017	STACIE RIGBY	Authorize			Authorized
3	06/19/2012 8:52:07 AM	SYSTEM	00410	U0626017	STACIE RIGBY	Execute			Executed

[Form Messages](#) << Previous Next >>

[Go To ePAF Home Page](#)

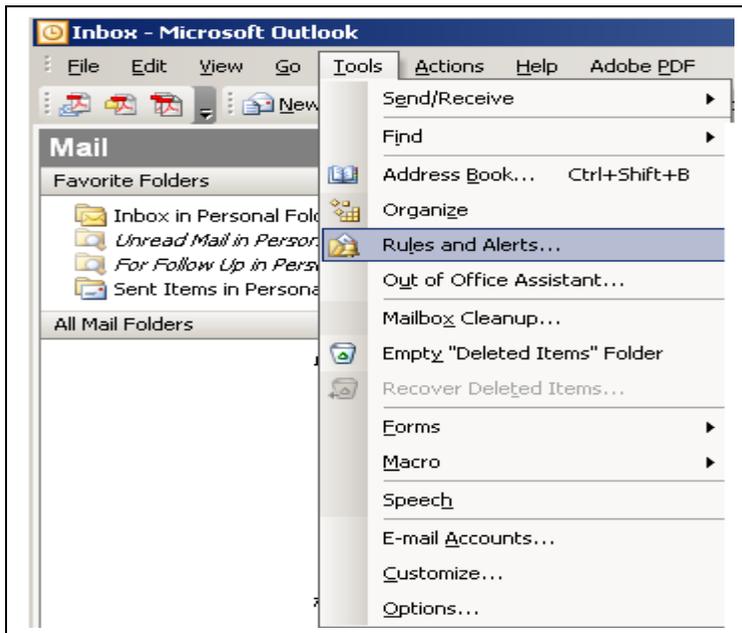
## THINGS TO REMEMBER

- 1) Follow payroll cut off dates. A current calendar can be found on the HR homepage. <http://www.hr.utah.edu/payroll/schedule/>
- 2) Use 'Previous' and 'Next' buttons on the page. Do **not** use the back button on the browser.
- 3) A payroll reporter can be the initiator and the first approver for an ePAF.
- 4) You cannot initiate an ePAF for yourself.
- 5) You cannot initiate an ePAF for an Employee and employee record combination when there is already an ePAF pending approval. Once the existing ePAF is approved, you can initiate a new transaction.
- 6) If you attach any documents to an ePAF, it is not required to send a paper copy to HR.
- 7) For unpaid staff and other non-employee categories, you will use the Non-employee/Affiliate paper form.
- 8) It is a good practice to enter comments in the box when you recycle an ePAF as it helps the initiator understand why it was returned and what changes need to be made. Once the initiator resubmits with changes, it will go through the same approval path. So, if the first approver had approved it the first time, they will have to reapprove the changes.
- 9) In the situation where the primary department head is on vacation and not able to designate proxies and alternates, please contact your service team so that they can work with HRIS in setting up those roles.
- 10) You can always make changes to an ePAF and resubmit as long as the ePAF hasn't been fully approved. You can check the status of an ePAF under View an ePAF.
- 11) You can continue to submit & approve ePAF's during payroll processing. Payroll will put on hold the ePAF's from updating PeopleSoft during processing and remove the hold after payroll closes, which will then allow mass update of approved ePAF's to PeopleSoft.
- 12) W-4's can be completed online by the employee or paper forms should be sent to Tax Services/Payroll Accounting, 411 Park Building.
- 13) Direct Deposits can be completed online by the employee or paper forms should be sent directly to Payroll, 420 Wakara Way.

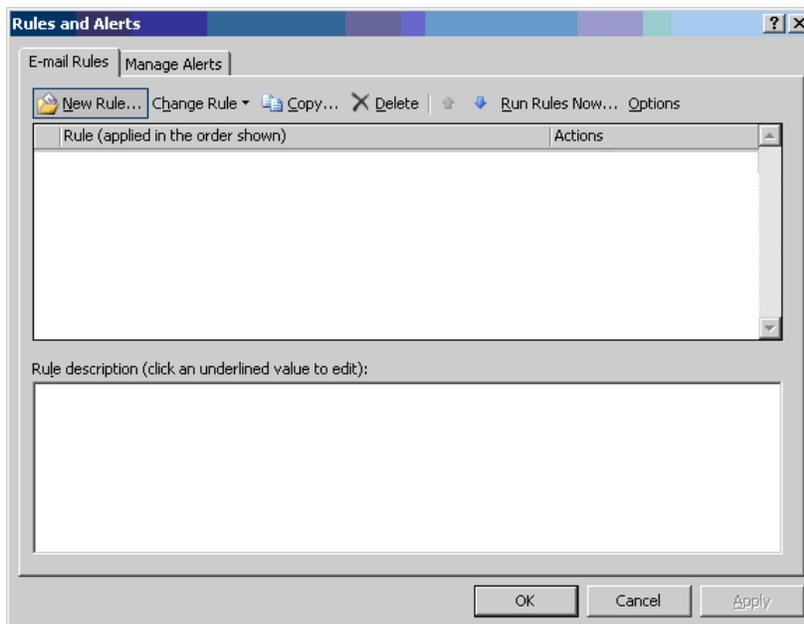
# RULE IN OUTLOOK

You can create a rule in outlook to direct all ePAF emails into a separate folder so as not to crowd your inbox. Follow the steps outlined below to create the rule.

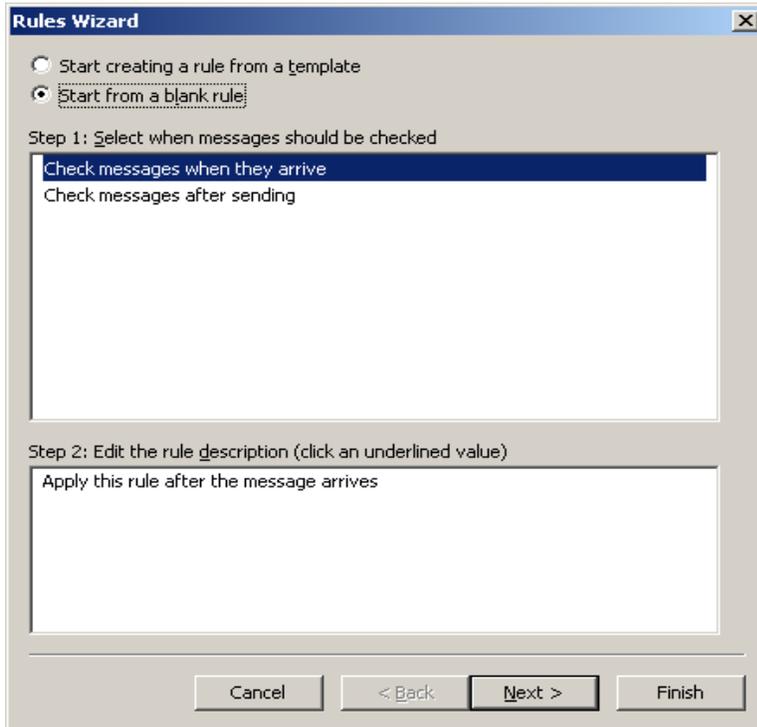
- 1) Open outlook and navigate to Tools > Rules and Alerts



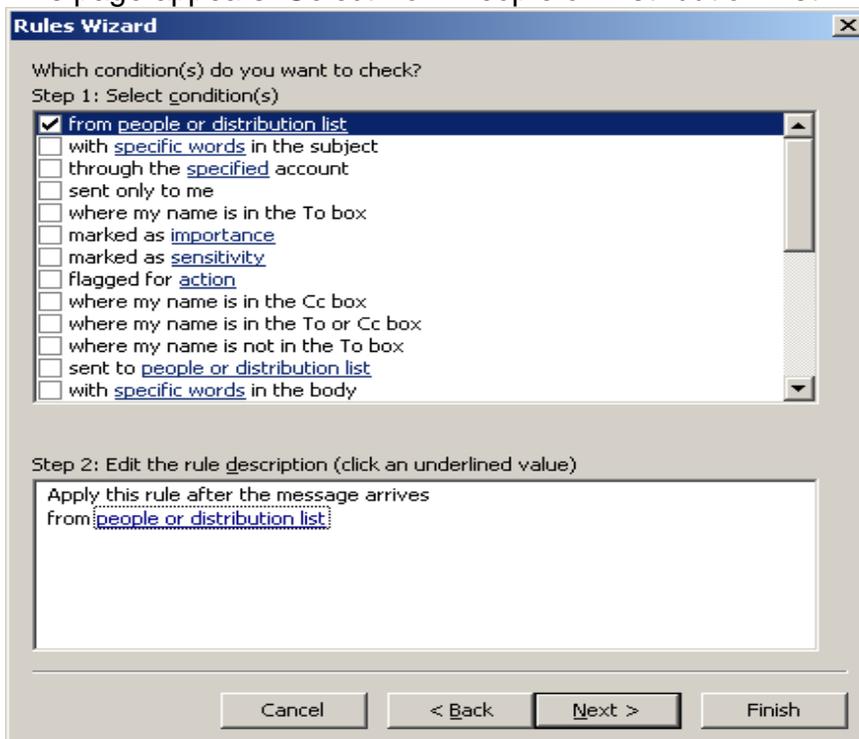
- 2) The following page appears;



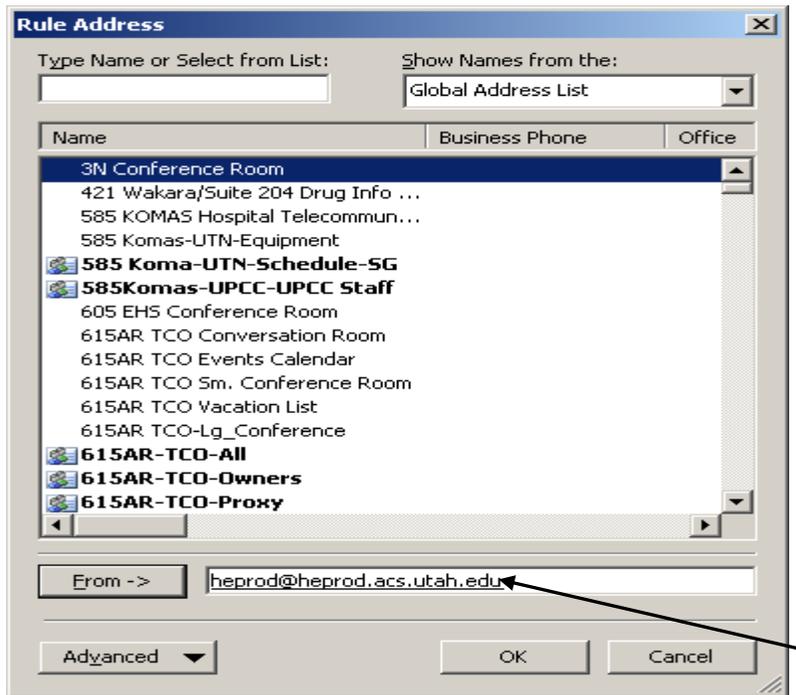
Click on new rule and then select Start from a blank Rule. Click the next button.



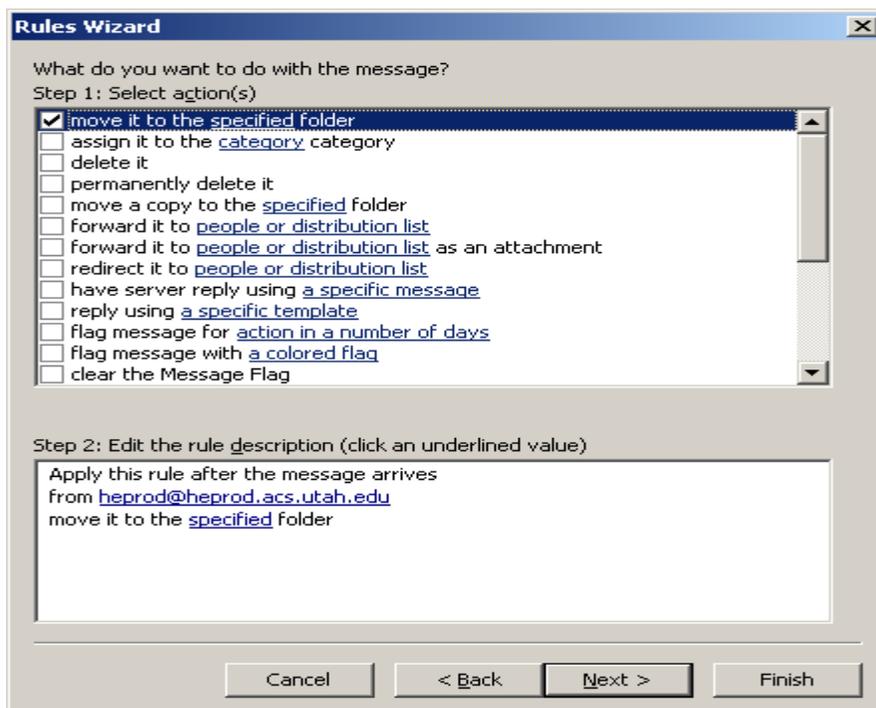
This page appears. Select from People or Distribution List



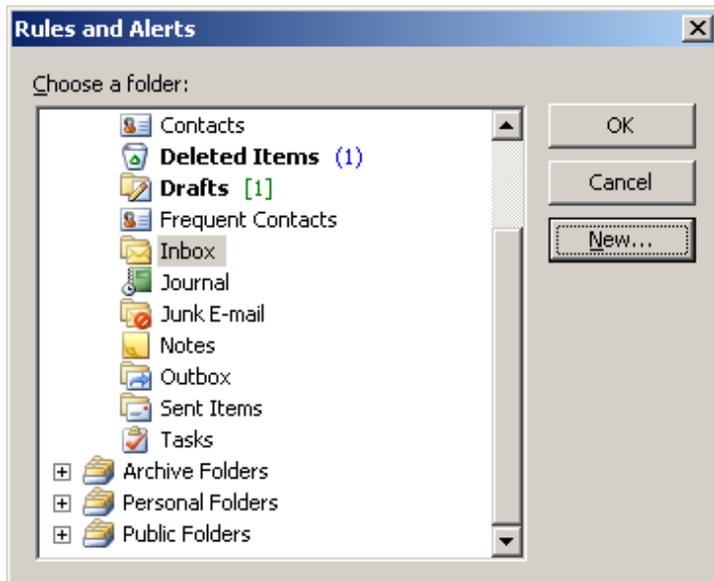
Then select the hyperlink [people or distribution list](#) in the step 2 section. The following page appears.



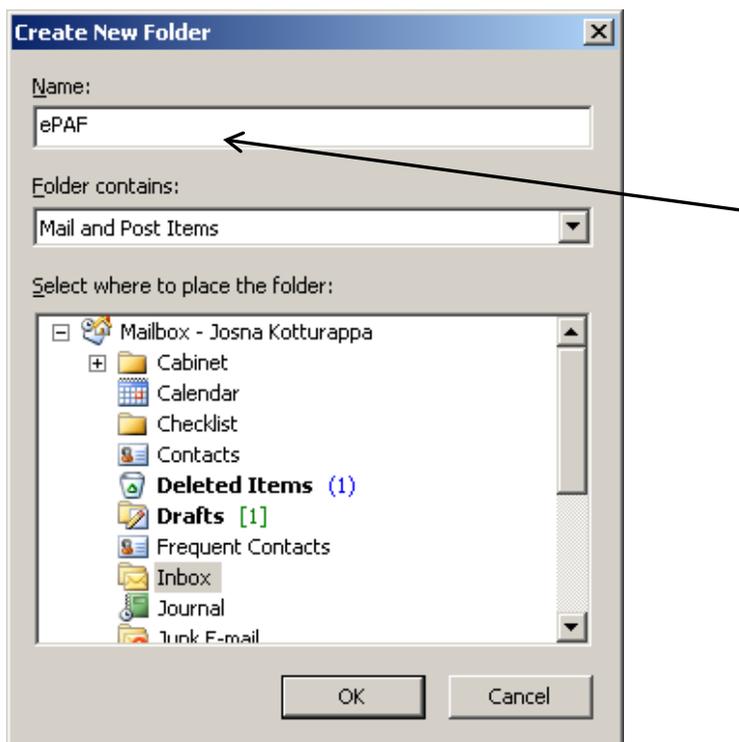
Type email address [heprod@heprod.acs.utah.edu](mailto:heprod@heprod.acs.utah.edu) in the From section as shown above. Then click the OK button and check the box move it to a specified folder.



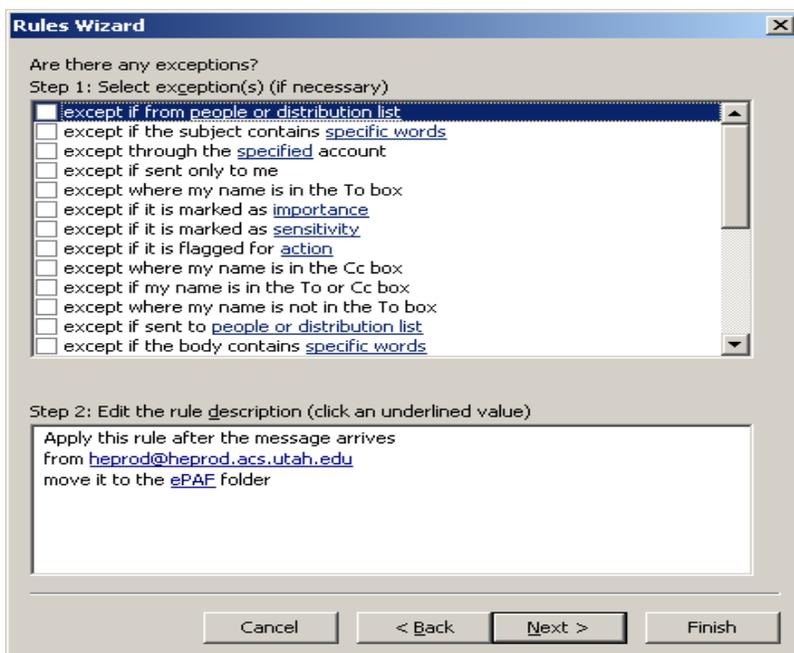
Click on the hyperlink [specified](#) folder



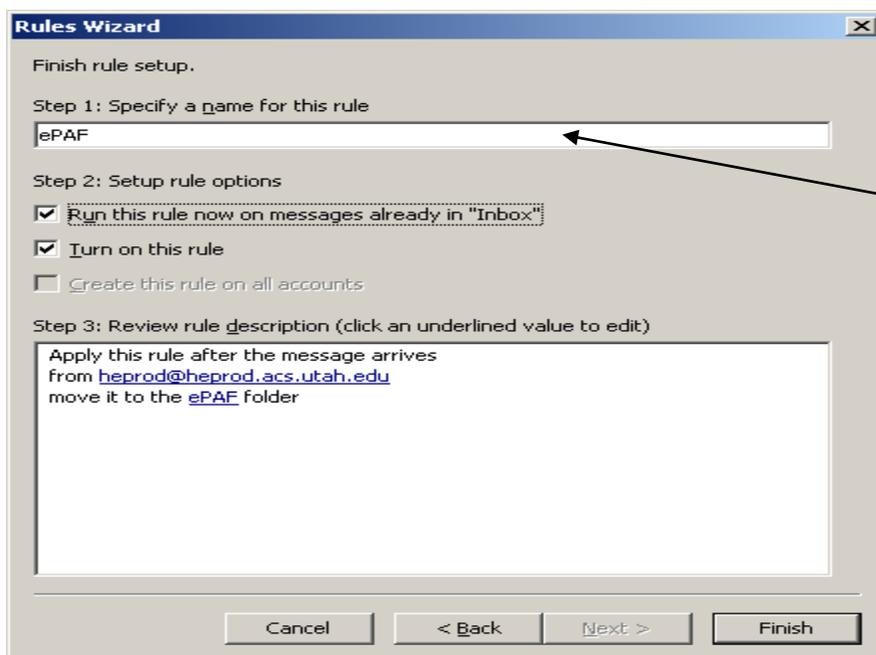
Click the New button.



Enter a folder name in the Name section. All ePAF emails will route to this folder. Then click the Ok button and the next button on this page.



The following page appears;



Enter a rule name in Step 1 as shown above. Click the checkbox Turn on this rule, so that any ePAF emails received after this rule is created with route to the special folder.

Click the checkbox 'Run this rule now on messages already in inbox **ONLY** if you want to move all ePAF emails that are currently in your inbox to a separate folder. If you want to leave old emails in your inbox, do not check this box.

Click the Finish button and you are all done. You have successfully created a rule in Outlook to route all ePAF emails to a specified folder.