# EPAF EDIT EXISTING JOB - USER MANUAL

This manual provides step by step information on how to enter a change to an existing job.

# EPAF Edit existing Job - User Manual

## EPAF AUTOMATED FORMS

ePAF (electronic personnel action form) is a module within PeopleSoft that allows for paperless employment transactions such as hiring an employee, job or pay changes and ending employment. The ePAF is initiated by a department initiator then it is electronically routed for appropriate approvals, notifications and finally entered by HR into the system.
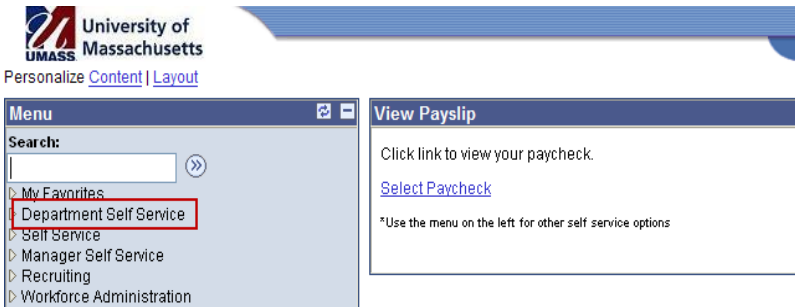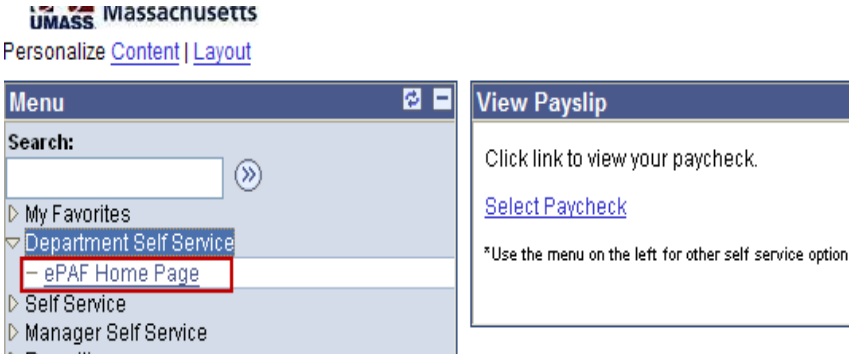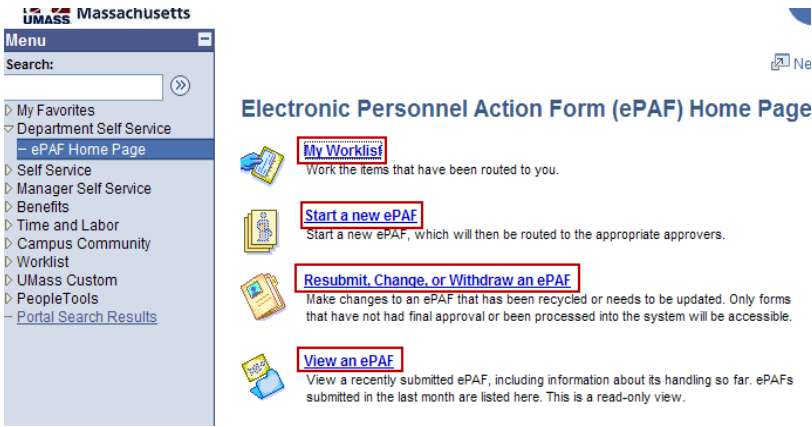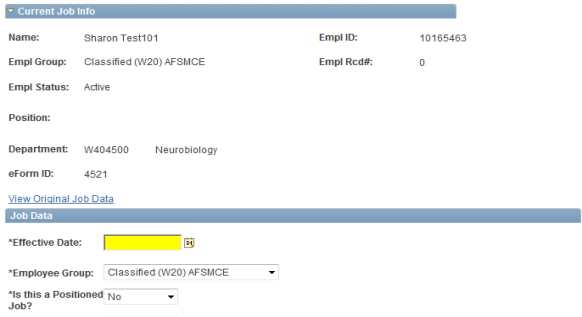
## Processing Employee Job Change

Upon completion of this section, you will be able to enter:

    I.  Transfer - Have Department Access
   II.  Pay Rate Change
  III.  Change in Time
  IV.  Non-Benefitted to Benefitted status change
   V.  Benefitted to Non-Benefitted status change
  VI.  Promotion
 VII.  Funding Change

## I.  Processing Employee Job Change: Enter a Transfer

| Step | Action |
|---|---|
| 1. | Begin by logging into **HR Direct**  |

| Step | Action |
|------|--------|
| 2. | Click the **Department Self Service** link. |
| 3. | Click on the **ePAF Home Page** link. |
| 4. | This is the **ePAF Home Page**.<br> Here you will see links to:<br> • My Worklist<br> • Start a new ePAF<br> • Resubmit, Change or Withdraw an ePAF<br> • View an ePAF<br>Click on **Start a new ePAF** link. |

| Step | Action |
|------|--------|
| 5. | **1.** If you do not have access to the employee's department, use the "Transfer No Department Access" procedure. <br><br> **2.** If you have access to the employee, then continue. <br><br> In this example you do have access to the employee, therefore, "Edit Existing Job" is used. Click **Edit Existing Job** link. |
| 6. | Enter the Employee ID, Click the **Search** button. |
| 7. | Current Job Info will populate. **Note the Form Id #** |

| 8. | Enter **Effective Date,** tab out of field.  Review each of  the categories and make appropriate changes for the new department.<br><br>Job Data<br>*Effective Date: 07/01/2013<br>*Employee Group: Classified (W20) AFSMCE<br>*Is this a Positioned Job? No<br>Supervisor ID: 10004158  Gail Phillips<br>*Department: W404501  Neurodiagnostics<br>*Job Code: ME0053  Console Operator  *Full/Part Time  Full-Time<br>*Location Code: MED SCHOOL  Medical School  *Regular/Temporary  Regular<br>*Standard Hours: 20.00  *FTE: 0.500000<br>Mail Drop ID: IM1<br><br><< Previous    Next >> |
|----|----|
| 9. | For the field **"Is this a positioned job?"**  Use the following guide:<br>If employee is in a positioned job, select **"Yes"** and enter position number.  All fields will populate.<br>If employee is not in a positioned job, select **"No"** and complete all fields. Click **Next**<br><br>*Effective Date: 12/01/2012<br>*Employee Group: Post Doc<br>*Is this a Positioned Job? No<br>Supervisor ID: 10021872<br>*Department: W875016  Data Center<br>*Job Code: MB1222  Analyst, Data  *Full/Part Time  Full-Time<br>*Location Code: MED SCHOOL  Medical School  *Regular/Temporary  Regular<br>*Standard Hours: 40.00  *FTE: 1.000000<br>Mail Drop ID: IM1 |
| 10. | For non positioned employees, click **Department Look up** if needed<br><br>Job Data<br>*Effective Date: 12/07/2012<br>*Employee Group: Professional (W60) Non Un<br>*Is this a Positioned Job? Yes<br>*Position Number: 00022252  Appli<br>Reports To Position Number:<br>*Department: W875000  Infor<br>*Job Code: MC2037  Appli<br>*Location Code: SOUTH ST  South<br>*Standard Hours: 40.00  *FTE: 1.00<br>Mail Drop ID: I16<br><br>Look Up<br>Look Up Department<br>SetID: UMWOR<br>Department: begins with<br>Description: begins with<br>Look Up  Clear  Cancel  Basic Lookup<br>Search Results<br>View 100  First  1-21 of 21  Last<br>Department Description<br>W416710  JP Administration<br>W416711  JP - Computer Services<br>W875000  Information Services<br>W875010  Chief Information Officer |

| 11. **For more detailed info on funding input, please see funding manual.** | Review the **Hourly** or **Bi-Weekly Rate**. The Annual Rate will update. Enter the **GL Combination Code**<br><br>Employee Type: Exception Hourly<br>Bi-Weekly Rate: 2000.000000   Annual Rate: $52,000.000<br>Plan W60   Salary Grade 44<br><br>Total Annual Rate $52,000.000<br><br>Begin Date 12/01/2012<br><br>GL Combination Code \| Fund Code \| Department \| Program Code \| Project/Grant \| Class Field \| End Date \| Earning Code<br>1 W118646  51491  W834500040  B01<br><br>Add Date Range |
|---|---|
| 12. | Or use **Look up icon** to find the code and select. **Note:** Always search for "W" for Worcester campus.<br><br>Employee Type: Exception Hourly<br>i-Weekly Rate: 3698.9'<br>Plan W6A<br><br>☐ Add Additional Components o<br><br>Begin Date 12/07/2<br><br>GL Combination Code   Fun<br>1<br><br>**Look Up**<br>**Look Up GL Combination Code**<br>GL Combination Code: begins with  W<br>Description: begins with<br>Short Description: begins with<br>Look Up  Clear  Cancel  Basic Lookup<br><br>**Search Results**<br>Only the first 300 results of a possible 6507 can be displayed.<br>View 100   First ◄ 1-300 of 300 ► Last<br>GL Combination Code \| Description \| Short Description<br>W100025  W100025  W100025<br>W102526  W102526  W102526<br>W102527  W102527  W102527<br>W102528  W102528  W102528 |
| 13. | Then scroll to the right and enter the **Percent.** If there is another combo code needed, click the plus sign to add a row. Remember the combined percent must total 100. Click **Next**<br><br>Customize \| Find \| ▣ ▦  First ◄ 1 of 1 ► Last<br>Class Field \| End Date \| Earnings Code \| Distribution Type \| Percent \| Commitment Amount \| Fund End Date<br>  \|  \|  \| Percent ▼ \| 100.000 \| $30,285.714 \|  ⊞ ⊟ |

| 14. | Review **Union Code** and update if needed.  Click **Next** |
|-----|-----|
|     |  |

| 15 | Scroll to bottom of page to Time and Labor Schedule section.  If schedule is different from standard (M-F 8 hrs a day), check the Schedule Different box and note the schedule in the description box. Click Next |
|-----|-----|
|     |  |

| 16. | **Action Code, Action Description and Reason Code** will be populated**.  For schedule changes only, you will need to upload a schedule form.  See next step.** |
|-----|-----|
|     |  |

| 17. | Have form completed and saved.  Click on Upload button, browse to where schedule form is saved, select file, Click Open,  Click Upload, the Attachment Id will populate.  In the Description select "Other". |
|-----|-----|
|     |  |

| 18. | Click **Submit** |
| --- | --- |
| |  |
| 19. | Pop up message will come up to confirm that this form is ready to be submitted. <br><br> Click **Yes** <br><br>  |
| 20. | The **form status** indicates that you have submitted this form. <br><br>  |
| 21. | **Congratulations!** You have entered a **change of department.** <br><br> **End of Procedure.** |

# II. Processing Job Change: <u>Enter a Pay Rate Change</u>

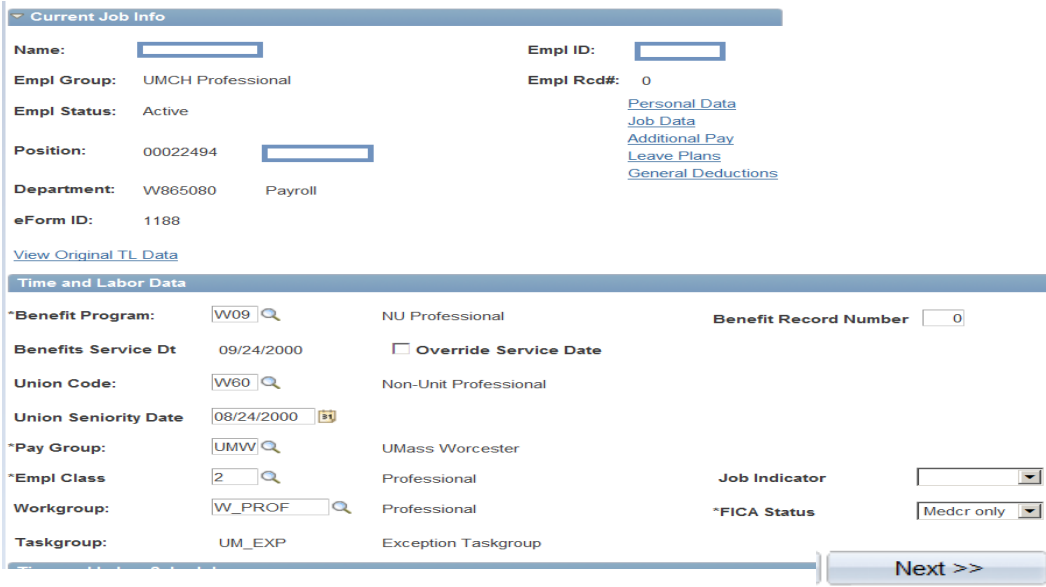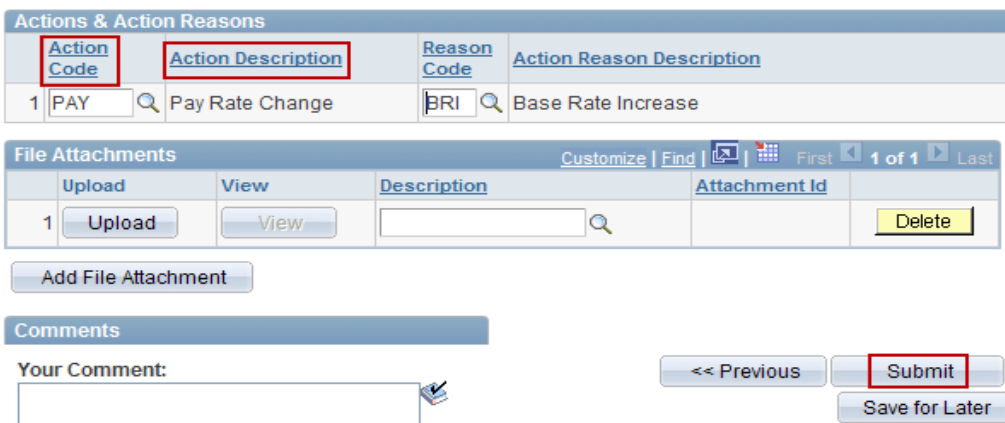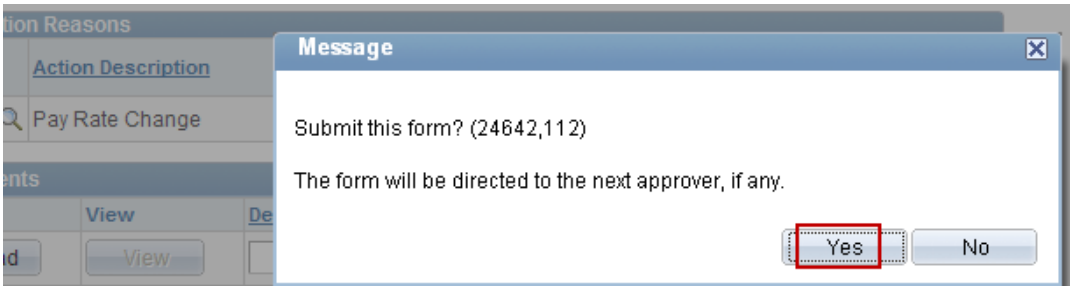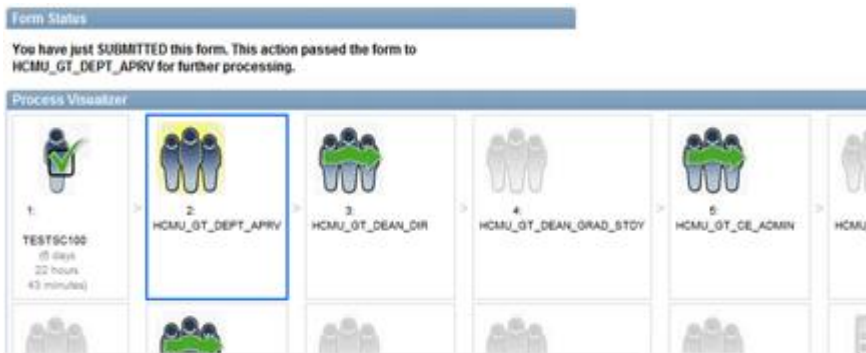| Step | Action |
|------|--------|
| 1. | From HR Direct click on Department Self-Service and the ePAF home page, click "Start a new ePAF". Then click **Edit Existing Job** link.<br><br>**Start a New electronic Personnel Action Form (ePAF)**<br><br>**Hire an Employee**<br>Use this form to hire a new employee into your department, or to add an additional job for an employee that already works in your department.<br>Hire an Employee<br><br>**Edit Existing Job**<br>Use this form to edit the job of an employee currently working in your department.<br>Edit Existing Job<br><br>**Change Employment Status**<br>Use this form to submit a termination, retirement, leave of absence or return from leave.<br>Change Employment Status<br><br>Return to Electronic Personnel Action Form (ePAF) Home Page |
| 2. | Enter the employee's last name or Empl ID, Click **Search**. Click on the **Name link** from the search list. If employee has more than one job record, **ensure you are selecting the correct record.**<br><br>**Select An Employee**<br><br>Enter any information you have and click Search. Leave fields blank for a list of all values.<br><br>**Find an Existing Value**<br><br>Limit the number of results to (up to 300): 300<br>Empl ID: = <br>Empl Rcd Nbr: = <br>Name: begins with <br>Last Name: begins with D<br>Department: begins with <br>Employee Group: begins with <br>☐ Case Sensitive<br><br>Search   Clear   Basic Search   Save Search Criteria<br><br>**Search Results**<br>View All                First ◄ 1-16 of 16 ► Last<br><br>| Empl ID | Empl Rcd Nbr | Name | Last Name | Department | Employee Group | Payroll Status |<br>|---------|--------------|------|-----------|------------|----------------|----------------|<br>| 10004592 | 0 | | | W875000 | PRO60 | Terminated |<br>| | 0 | | | W875000 | PRO60 | Active | |

| Step | Action |
|------|--------|
| 3. | Enter the **Effective Date** then tab out of the field.  **Note the Form Id #.**  Click **Next** <br><br>**Job Data** <br><br>\*Effective Date: 12/05/2012 <br> \*Employee Group: Professional (W60) Non Unit <br> \*Is this a Positioned Job? No <br> Supervisor ID: <br> \*Department: W875000  Information Services <br> \*Job Code: MC2042    \*Full/Part Time  Full-Tin <br> \*Location Code: SOUTH ST  South Street    \*Regular/Temporary  Regula <br> \*Standard Hours: 40.00  \*FTE: 1.000000 <br> Mail Drop ID: IM1 <br><br> << Previous   Next >> <br> << Search   Save for Later   Close |
| 4. | Enter the new **Hourly** or **Biweekly Rate**, tab out of field. Annual rate will update. Click **Next** <br><br>View Original Comp Data <br> **Compensation Data** <br><br> Employee Type: Exception Hourly <br> Bi-Weekly Rate: 3364.629197   Annual Rate:  $87,480.359 <br> Plan  W6A  Salary Grade 75 <br><br> ☐ Add Additional Components of Pay? <br> Compensation Rate  $87,480.359 <br> Begin Date  07/01/2010 |

| | GL Combination Code | Fund Code | Department | Program Code | Project/Grant | Class |
|---|---|---|---|---|---|---|
| 1 | W108477 | 11000 | W875026000 | F10 | | |

Add Date Range

<< Previous   Next >>
Save for Later

| Step | Action |
|------|--------|
| 5. | Current Job Info will show, Click **Next**<br><br>**Current Job Info**<br>Name:<br>Empl Group: UMCH Professional<br>Empl Status: Active<br>Position: 00022494<br>Department: W865080 Payroll<br>eForm ID: 1188<br>View Original TL Data<br>Empl ID:<br>Empl Rcd#: 0<br>Personal Data<br>Job Data<br>Additional Pay<br>Leave Plans<br>General Deductions<br><br>**Time and Labor Data**<br>*Benefit Program: W09   NU Professional   Benefit Record Number 0<br>Benefits Service Dt 09/24/2000   ☐ Override Service Date<br>Union Code: W60   Non-Unit Professional<br>Union Seniority Date 08/24/2000<br>*Pay Group: UMW   UMass Worcester<br>*Empl Class: 2   Professional   Job Indicator<br>Workgroup: W_PROF   Professional   *FICA Status Medcr only<br>Taskgroup: UM_EXP   Exception Taskgroup<br><br>Next >> |
| 6. | Choose the **Action "PAY" and the appropriate Reason Code. Comments or file attachments will not be used.** Click **Submit**<br><br>**Actions & Action Reasons**<br>Action Code / Action Description / Reason Code / Action Reason Description<br>1 PAY   Pay Rate Change   BRI   Base Rate Increase<br><br>**File Attachments**   Customize \| Find \|   First 1 of 1 Last<br>Upload / View / Description / Attachment Id<br>1 Upload   View     Delete<br><br>Add File Attachment<br><br>**Comments**<br>Your Comment:<br><br><< Previous   Submit   Save for Later |
| 7. | Click **Yes** to submit the form when Pop up message comes up.<br><br>tion Reasons<br>Action Description<br>Pay Rate Change<br><br>**Message** ☒<br>Submit this form? (24642,112)<br>The form will be directed to the next approver, if any.<br><br>Yes   No |

| Step | Action |
|------|--------|
| 8. | The **form status** indicates that you have submitted this form.<br><br>Form Status<br><br>You have just SUBMITTED this form. This action passed the form to HCMU_GT_DEPT_APRV for further processing.<br><br>Process Visualizer<br><br>1: TESTSC100 (6 days 22 hours 43 minutes) · 2: HCMU_GT_DEPT_APRV · 3: HCMU_GT_DEAN_DIR · 4: HCMU_GT_DEAN_GRAD_STDY · 5: HCMU_GT_CE_ADMIN · 6: HCMU_I |
| 9. | **Congratulations!**  You have entered a **Pay Rate Change**.<br><br>**End of Procedure.** |

## III. Processing Employee Job Change: <u>Change In Schedule</u>

| Step | Action |
|------|--------|
| 1. | From HR Direct click on Department Self-Service and the ePAF home page, click "Start a new ePAF". Then click **Edit Existing Job** link.<br><br>**Start a New electronic Personnel Action Form (ePAF)**<br><br>Hire an Employee<br>Use this form to hire a new employee into your department, or to add an additional job for an employee that already works in your department.<br>Hire an Employee<br><br>Edit Existing Job<br>Use this form to edit the job of an employee currently working in your department.<br>Edit Existing Job<br><br>Change Employment Status<br>Use this form to submit a termination, retirement, leave of absence or return from leave.<br>Change Employment Status<br><br>Return to Electronic Personnel Action Form (ePAF) Home Page |

| Step | Action |
|------|--------|
| 2. | Enter the employee's last name or Empl ID, Click **Search**.  Click on the **Name link** from the search list.  If employee has more than one job record, **ensure you are selecting the correct record.** |

Select An Employee

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

**Find an Existing Value**

Limit the number of results to (up to 300): 300

| | | |
|--|--|--|
| Empl ID: | = ▾ | |
| Empl Rcd Nbr: | = ▾ | |
| Name: | begins with ▾ | |
| Last Name: | begins with ▾ | D |
| Department: | begins with ▾ | |
| Employee Group: | begins with ▾ | |

☐ Case Sensitive

[ Search ]  [ Clear ]  Basic Search  💾 Save Search Criteria

**Search Results**

| View All | | | | First ◀ 1-16 of 16 ▶ Last | | |
|----------|---|---|---|---|---|---|
| Empl ID | Empl Rcd Nbr | Name | Last Name | Department | Employee Group | Payroll Status |
| 10004592 | 0 | | | W875000 | PRO60 | Terminated |
| | 0 | | | W875000 | PRO60 | Active |

| Step | Action |
|------|--------|
| 3. | Enter the **Effective Date** then tab out of the field.  Change the **Standard Hours** to the new weekly hours.  Tab out of field and **FTE** will populate, adjust if needed.  Change Full/Part time if applicable.  **Note the Form Id #.**  Click **Next** |

eForm ID:   1992

View Original Job Data

**Job Data**

*Effective Date:   01/12/2013  📅

*Employee Group:   Professional (W60) Non Unit  ▾

*Is this a Positioned Job?   Yes  ▾

*Position Number:   00022624  🔍

Supervisor ID:   🔍

☑ Override Position Fields

*Department:   W860021  🔍   HR Systems & Service Center

*Job Code:   MB0206  🔍   HR Systems Analyst      *Full/Part Time   Part-Time ▾

*Location Code:   SOUTH ST  🔍   South Street      *Regular/Temporary   Regular ▾

*Standard Hours:   30.00      *FTE:   0.750000

Mail Drop ID:   IPS

| Step | Action |
|------|--------|
| 4. | If employee is exception hourly, enter new **Biweekly Rate**, tab out of field. Annual rate will update.<br><br>**Compensation Data**<br><br>Employee Type: Exception Hourly<br><br>Bi-Weekly Rate: 0.000000    Annual Rate: $87,480.359<br><br>Plan  W6A    Salary Grade 75 |
| 5. | Click **Next**<br><br>**Compensation Data**<br><br>Employee Type: Exception Hourly<br>Bi-Weekly Rate: 2000.000000    Annual Rate: $52,000.000<br>Plan  W6A    Salary Grade 75<br><br>☐ Add Additional Components of Pay?<br>Compensation Rate    $52,000.000<br><br>Begin Date  07/01/2010<br><br>| | GL Combination Code | Fund Code | Department | Program Code | Project/Grant | Clas |<br>|---|---|---|---|---|---|---|<br>| 1 | W108477 | 11000 | W875026000 | F10 | | |<br><br>Add Date Range<br><br><< Previous    Next >><br>Save for Later |
| 6. | Scroll to bottom of page to Time and Labor Schedule section. If schedule is different from standard (M-F 8 hrs a day), check the **Schedule Different** box and note the schedule in the description box. Click **Next**<br><br>▼ Current Job Info<br>Name: ____    Empl ID: ____<br>Empl Group: UMCH Professional    Empl Rcd#: 0<br>Empl Status: Active    Personal Data / Job Data / Additional Pay / Leave Plans / General Deductions<br>Position: 00022494  ____<br>Department: W865080  Payroll<br>eForm ID: 1188<br>View Original TL Data<br>Time and Labor Data<br>Benefit Program: W09    NU Professional    Benefit Record Number  0<br>Benefits Service Dt  09/24/2000    ☐ Override Service Date<br>Union Code: W60    Non-Unit Professional<br>Time and Labor Schedule<br><br>☑ Schedule different from standard?    ☐ Select Schedule ID<br><br>Schedule Description:<br>Employee schedule will be two days a week, 10 hours a day |

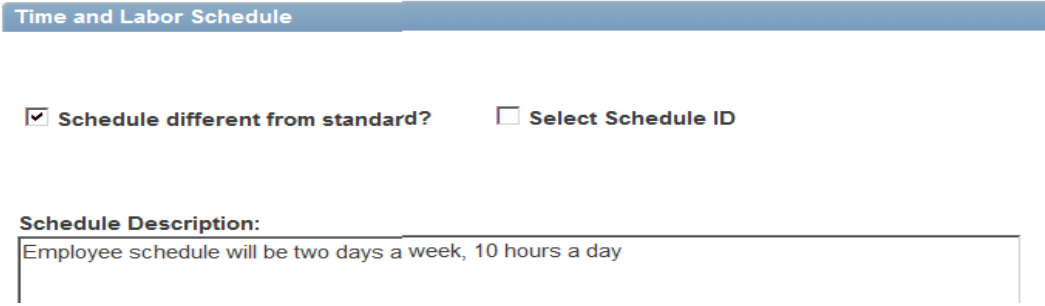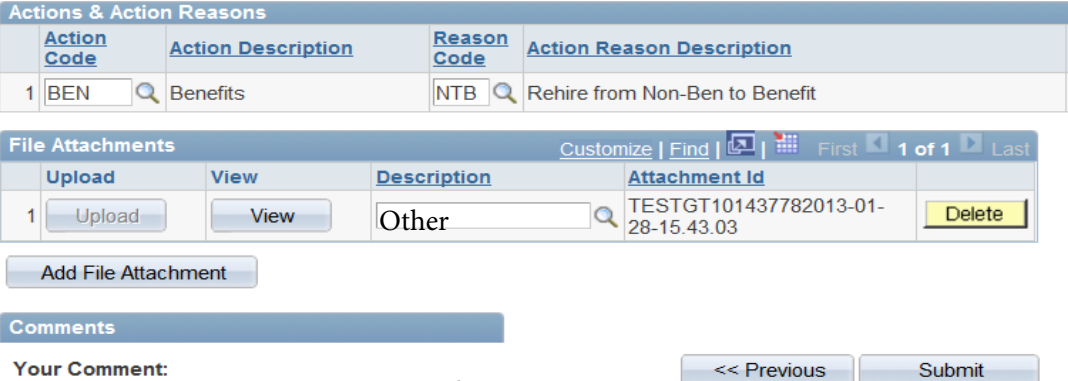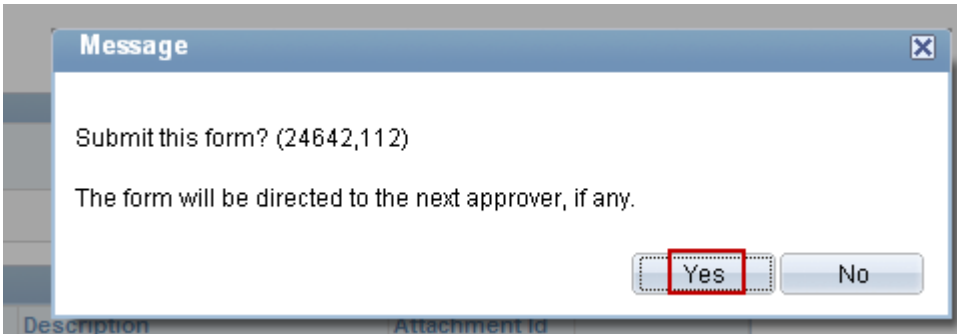| Step | Action |
|------|--------|
| 7. | Choose the **Action "DTA" and Reason Code "CIT"**.  You will need to upload a schedule form.  First, have it completed and saved.  Click on the **Upload** button, browse to where schedule form is saved, select file, Click **Open**  Click **Upload, The Attachment Id will populate.  In the Description select "Other".**  Click **Submit**<br><br><br><br>**Comments will not be used** |
| 8. | Click **Yes** to submit the form when Pop up message comes up.<br><br> |
| 9. | The **form status** indicates that you have submitted this form.<br><br> |
| 10. | **Congratulations!**  You have entered a **change in time**.<br><br>**End of Procedure.** |
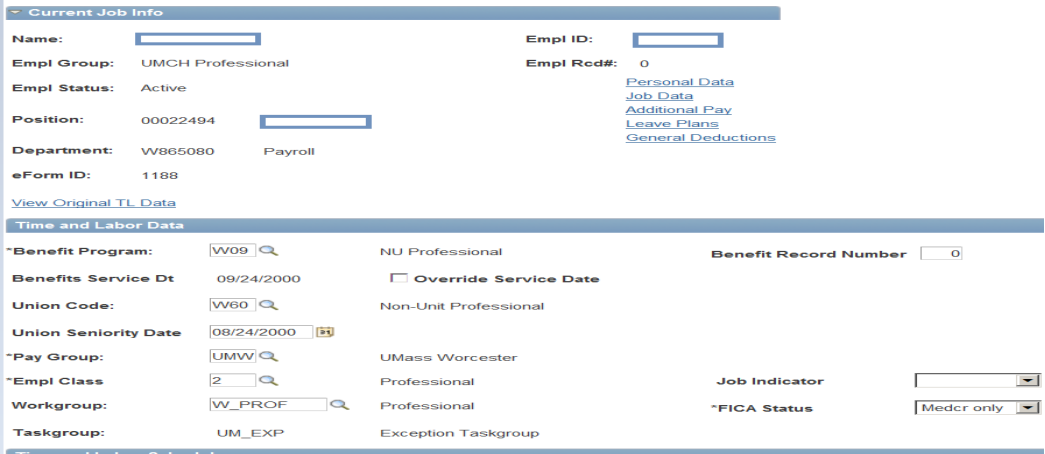
## IV. Processing Employee Job Change:
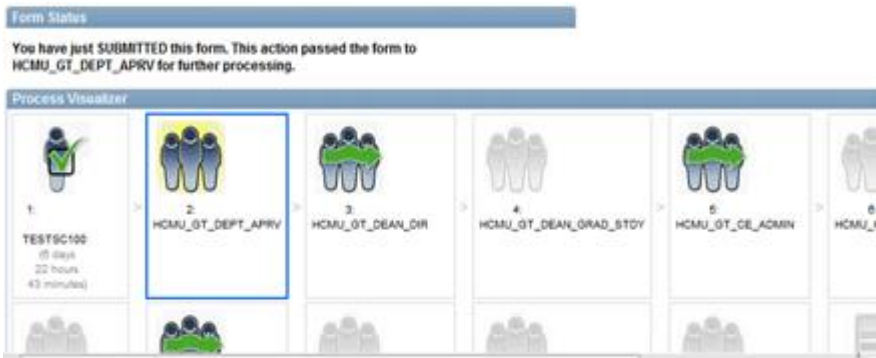
## Enter a status change from Non-Benefitted to Benefitted

| Step | Action |
|------|--------|
| 1. | From HR Direct click on Department Self-Service and the ePAF home page, click "Start a new ePAF". Then click **Edit Existing Job** link. |
| | **Start a New electronic Personnel Action Form (ePAF)** |
| | **Hire an Employee** Use this form to hire a new employee into your department, or to add an additional job for an employee that already works in your department. Hire an Employee |
| | **Edit Existing Job** Use this form to edit the job of an employee currently working in your department. Edit Existing Job |
| | **Change Employment Status** Use this form to submit a termination, retirement, leave of absence or return from leave. Change Employment Status |
| | Return to Electronic Personnel Action Form (ePAF) Home Page |
| 2. | Enter the employee's last name or Empl ID, Click Search. Click on the **Name link** from the search list. If employee has more than one job record, **ensure you are selecting the correct record.** |
| | **Select An Employee** |
| | Enter any information you have and click Search. Leave fields blank for a list of all values. |
| | **Find an Existing Value** |
| | Limit the number of results to (up to 300): 300 |
| | Empl ID: = |
| | Empl Rcd Nbr: = |
| | Name: begins with |
| | Last Name: begins with D |
| | Department: begins with |
| | Employee Group: begins with |
| | ☐ Case Sensitive |
| | Search    Clear    Basic Search    Save Search Criteria |
| | **Search Results** |
| | View All                                   First  1-16 of 16  Last |

| Empl ID | Empl Rcd Nbr | Name | Last Name | Department | Employee Group | Payroll Status |
|---------|--------------|------|-----------|------------|----------------|----------------|
| 10004592 | 0 | | | W875000 | PRO60 | Terminated |
| 1000050_ | 0 | | | W875000 | PRO60 | Active |

| Step | Action |
|------|--------|
| 3. | Enter the **Effective Date** then tab out of field.  **Note Form Id #.**  Change **Employee Group** if applicable.  For the field "**Is this a positioned job?**", use the following guide:<br><br>If employee is in a positioned job, select **"Yes"** and enter position number.  All fields will populate.<br><br>If employee is not in a positioned job, select **"No"** and complete all fields that will need to change.  Click **Next**<br><br>**Job Data**<br><br>\*Effective Date: 12/05/2012<br>\*Employee Group: Professional (W60) Non Unit<br>\*Is this a Positioned Job? No<br>Supervisor ID: 10034964<br>\*Department: W875000  Information Services<br>\*Job Code: MC2042  \*Full/Part Time: Full-Time<br>\*Location Code: SOUTH ST  South Street  \*Regular/Temporary: Regular<br>\*Standard Hours: 40.00  \*FTE: 1.000000<br>Mail Drop ID: IM1<br><br>&lt;&lt; Previous  Next &gt;&gt;  &lt;&lt; Search  Save for Later  Close |
| 4.<br><br>**For more detailed info on funding input, please see funding manual.** | Select appropriate **Employee Type**, enter the new **Hourly** or **Biweekly Rate**, tab out of field.  Annual rate will update.  If funding is changing, click on **Add Date Range** button<br><br>**Compensation Data**<br>Employee Type: Exception Hourly<br>Bi-Weekly Rate: 2500.000000  Annual Rate: $65,000.000<br>Plan  W6A  Salary Grade 75<br><br>☐ Add Additional Components of Pay?<br>Compensation Rate  $65,000.000<br>Begin Date  07/01/2010<br><br>| | GL Combination Code | Fund Code | Department | Program Code | Project/Grant | Class F |<br>| 1 | W108477 | 11000 | W875026000 | F10 | | |<br><br>Add Date Range<br>&lt;&lt; Previous  Next &gt;&gt;  Save for Later<br><br>Enter **Begin Date** and new funding information.  Click on plus sign if additional rows are needed.  Click **Next**<br><br>Begin Date  01/01/2013<br><br>Customize \| Find \| First<br>| | GL Combination Code | Fund Code | Department | Program Code | Project/Grant | Class Field | End Date | Earnings Code | Distribution Type | Percent | Commitment Amount | Fund End D |<br>| 1 | W115281 | 53106 | W710070018 | B03 | S61110000009580 | | 03/31/2013 | | Percent | 100.000 | $7,714.286 | |<br><br>Next &gt;&gt; |

| Step | Action |
|---|---|
| 5. | If **Union Code** is changing, update that field.<br>Scroll to bottom of page to **Time and Labor Schedule** section for any schedule change.<br><br>**Current Job Info**<br>Name:      Empl ID:<br>Empl Group:   UMCH Professional     Empl Rcd#:   0<br>Empl Status:   Active     Personal Data / Job Data / Additional Pay / Leave Plans / General Deductions<br>Position:   00022494<br>Department:   W865080    Payroll<br>eForm ID:   1188<br>View Original TL Data<br>**Time and Labor Data**<br>*Benefit Program:   W09   NU Professional     Benefit Record Number   0<br>Benefits Service Dt   09/24/2000   ☐ Override Service Date<br>Union Code:   W60   Non-Unit Professional<br>Union Seniority Date   08/24/2000<br>*Pay Group:   UMW   UMass Worcester<br>*Empl Class   2   Professional     Job Indicator<br>Workgroup:   W_PROF   Professional     *FICA Status   Medcr only<br>Taskgroup:   UM_EXP   Exception Taskgroup |
| 6. | For any schedule that is different from standard (M-F 8 hrs a day), check the **Schedule Different** box and note the schedule in the description box.  Click **Next**<br><br>**Time and Labor Schedule**<br><br>☑ Schedule different from standard?     ☐ Select Schedule ID<br><br>Schedule Description:<br>Employee schedule will be two days a week, 10 hours a day |
| 7. | Choose the **Action "BEN" and Reason Code "NTB"**.  You will need to upload a schedule form.  First, have it completed and saved.  Click on the **Upload** button, browse to where schedule form is saved, select file, Click **Open**  Click **Upload**  In the Description select "Other"  Click **Submit**<br><br>**Actions & Action Reasons**<br>| Action Code | Action Description | Reason Code | Action Reason Description |<br>| 1 BEN | Benefits | NTB | Rehire from Non-Ben to Benefit |<br><br>**File Attachments**   Customize \| Find \|   First 1 of 1 Last<br>| Upload | View | Description | Attachment Id | |<br>| 1 Upload | View | Other | TESTGT101437782013-01-28-15.43.03 | Delete |<br><br>Add File Attachment<br><br>**Comments**<br>Your Comment:     << Previous   Submit<br>**Comments will not be used** |

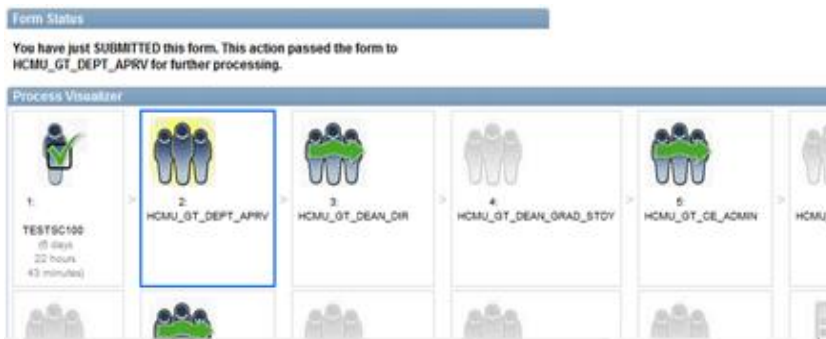| Step | Action |
|------|--------|
| 8. | Click **Yes** to submit the form when Pop up message comes up.  |
| 9. | The **form status** indicates that you have submitted this form.  |
| 10. | **Congratulations!** You have entered a change in **non-benefitted to benefitted status.** **End of Procedure.** |

## V. Processing Employee Job Change:

## Enter a status change from Benefitted to Non-Benefitted

| Step | Action |
|------|--------|
| 1. | From HR Direct click on Department Self-Service and the ePAF home page, click "Start a new ePAF". Then click **Edit Existing Job** link. |

**Start a New electronic Personnel Action Form (ePAF)**

Hire an Employee

Use this form to hire a new employee into your department, or to add an additional job for an employee that already works in your department.
Hire an Employee

Edit Existing Job

Use this form to edit the job of an employee currently working in your department.
Edit Existing Job

Change Employment Status

Use this form to submit a termination, retirement, leave of absence or return from leave.
Change Employment Status

Return to Electronic Personnel Action Form (ePAF) Home Page

| Step | Action |
|------|--------|
| 2. | Enter the employee's last name or Empl ID, Click Search. Click on the **Name link** from the search list. If employee has more than one job record, **ensure you are selecting the correct record.** |

**Select An Employee**

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

**Find an Existing Value**

Limit the number of results to (up to 300): 300

Empl ID: = 
Empl Rcd Nbr: = 
Name: begins with 
Last Name: begins with D
Department: begins with 
Employee Group: begins with 
☐ Case Sensitive

Search  Clear  Basic Search  Save Search Criteria

**Search Results**

| View All | | | | First ◄ 1-16 of 16 ► Last | | |
|----------|------|------|-----------|------------|----------------|----------------|
| Empl ID | Empl Rcd Nbr | Name | | Last Name | Department | Employee Group | Payroll Status |
| 10004592 | 0 | | | | W875000 | PRO60 | Terminated |
| | 0 | | | | W875000 | PRO60 | Active |

| Step | Action |
|------|--------|
| 3. | Enter the **Effective Date** then tab out of field. **Note Form Id #.** Change **Employee Group** if applicable. For the field "**Is this a positioned job?**", use the following guide:<br><br>If employee is in a positioned job, select **"Yes"** and enter position number. All fields will populate.<br><br>If employee is not in a positioned job, select **"No"** and complete all fields that will need to change. Click **Next**<br><br>**Job Data**<br>*Effective Date: 01/01/2013<br>*Employee Group: UMCH Professional<br>*Is this a Positioned Job? Yes<br>*Position Number: 00022494  Analyst, Data<br>Supervisor ID: 10140390<br>☑ Override Position Fields<br>*Department: W865080  Payroll<br>*Job Code: MB1222<br>*Location Code: SOUTH ST  South Street<br>*Standard Hours: 16.00  *FTE: 0.400000<br>Mail Drop ID: IM1<br>*Full/Part Time: Part-Time<br>*Regular/Temporary: Regular<br><< Previous   Next >> |
| 4.<br><br>**For more detailed info on funding input, please see funding manual.** | Select appropriate **Employee Type**, enter the new **Hourly** or **Biweekly Rate**, tab out of field. Annual rate will update. If funding is changing, click on **Add Date Range** button<br><br>**Compensation Data**<br>Employee Type: Exception Hourly<br>Bi-Weekly Rate: 2500.000000  Annual Rate: $65,000.000<br>Plan W6A  Salary Grade 75<br>☐ Add Additional Components of Pay?<br>Compensation Rate $65,000.000<br>Begin Date 07/01/2010<br><br>| | GL Combination Code | Fund Code | Department | Program Code | Project/Grant | Class F |<br>|---|---|---|---|---|---|---|<br>| 1 | W108477 | 11000 | W875026000 | F10 | | |<br><br>Add Date Range<br><< Previous   Next >>   Save for Later<br><br>Enter **Begin Date** and new funding information. Click on plus sign if additional rows are needed. Click **Next**<br><br>Begin Date 01/01/2013<br><br>| | GL Combination Code | Fund Code | Department | Program Code | Project/Grant | Class Field | End Date | Earnings Code | Distribution Type | Percent | Commitment Amount | Fund End D |<br>|---|---|---|---|---|---|---|---|---|---|---|---|---|<br>| 1 | W115281 | 53106 | W710070018 | B03 | S61110000009580 | | 03/31/2013 | | Percent | 100.000 | $7,714.286 | | |

| Step | Action |
|------|--------|
| 5. | Update **Union Code** |
| 6. | |

**Current Job Info**

| | | | |
|---|---|---|---|
| Name: | | Empl ID: | |
| Empl Group: | UMCH Professional | | |
| Empl Status: | Active | | Personal Data |
| | | | Job Data |
| Position: | 00022494 | | Additional Pay |
| | | | Leave Plans |
| Department: | W865080  Payroll | | General Deductions |
| eForm ID: | 1188 | | |

View Original TL Data

**Time and Labor Data**

| | | | | |
|---|---|---|---|---|
| *Benefit Program: | W09 | NU Professional | Benefit Record Number | 0 |
| Benefits Service Dt | 09/24/2000 | ☐ Override Service Date | | |
| Union Code: | W60 | Non-Unit Professional | | |
| Union Seniority Date | 08/24/2000 | | | |
| *Pay Group: | UMW | UMass Worcester | | |
| *Empl Class | 2 | Professional | Job Indicator | |
| Workgroup: | W_PROF | Professional | *FICA Status | Medcr only |
| Taskgroup: | UM_EXP | Exception Taskgroup | | |

| Step | Action |
|------|--------|
| 7. | Choose the **Action "BEN"** and **Reason Code "TBN"**.  **Comments and File Attachments will not be used**.  Click **Submit** |

eForm ID:      651

**Actions & Action Reasons**

| | Action Code | Action Description | Reason Code | Action Reason Description |
|---|---|---|---|---|
| 1 | BEN | Benefits | TBN | Term Benefit to Non Bnft Statu |

**File Attachments**                    Customize | Find | 🔄 | 🏢    First ◄ 1 of 1 ► Last

| | Upload | View | Description | Attachment Id | |
|---|---|---|---|---|---|
| 1 | Upload | View | | | Delete |

Add File Attachment

**Comments**

| Step | |
|------|--|
| 8. | Your Comment:                    << Previous    Submit |

Click **Yes** to submit the form when Pop up message comes up.

**Message**                                             ✖

Submit this form? (24642,112)

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

                                        Yes      No

Description              Attachment Id

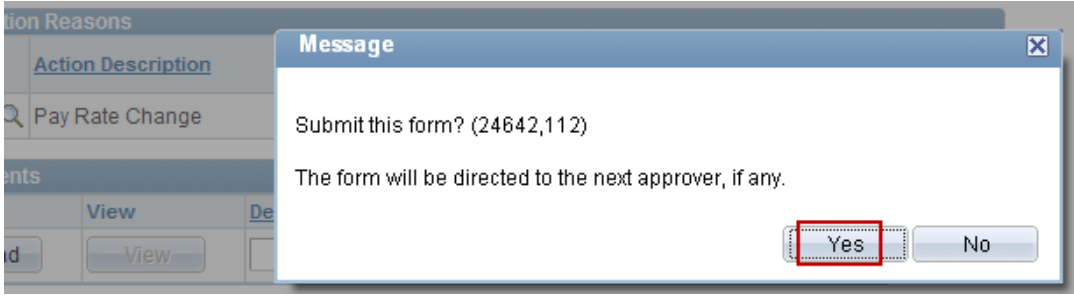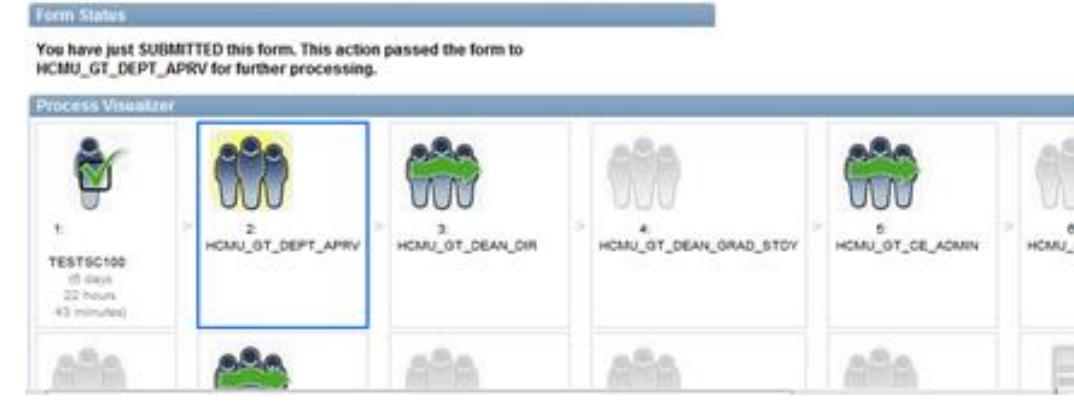| Step | Action |
|------|--------|
| 8. | The **Form Status** indicates that you have submitted this form.  |
| 9. | **Congratulations!**  You have entered a **change in benefitted to non-benefitted status**<br><br>**End of Procedure.** |

# VI. Processing Employee Job Change: <u>Enter a Promotion</u>

| Step | Action |
|------|--------|
| 1. | From HR Direct click on Department Self-Service and the ePAF home page, click "Start a new ePAF". Then click **Edit Existing Job** link.  |

| Step | Action |
|------|--------|
| 2. | Enter the employee's last name or Empl ID, Click Search. Click on the **Name link** from the search list. If employee has more than one job record, **ensure you are selecting the correct record.** |

**Select An Employee**

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

**Find an Existing Value**

Limit the number of results to (up to 300): 300

| | | |
|---|---|---|
| Empl ID: | = ▾ | |
| Empl Rcd Nbr: | = ▾ | |
| Name: | begins with ▾ | |
| Last Name: | begins with ▾ | D |
| Department: | begins with ▾ | |
| Employee Group: | begins with ▾ | |

☐ Case Sensitive

[Search] [Clear] Basic Search 💾 Save Search Criteria

**Search Results**

View All                                    First ◀ 1-16 of 16 ▶ Last

| Empl ID | Empl Rcd Nbr | Name | Last Name | Department | Employee Group | Payroll Status |
|---------|--------------|------|-----------|------------|----------------|----------------|
| 10004592 | 0 | | | W875000 | PRO60 | Terminated |
| | 0 | | | W875000 | PRO60 | Active |

| Step | Action |
|------|--------|
| 3. | Enter the **Effective Date** then tab out of field. **Note Form ID #**. Change **Employee Group** if applicable. For the field "**Is this a positioned job?**", use the following guide:

If employee is in a positioned job, select **"Yes"** and enter position number. All fields will populate.

If employee is not in a positioned job, select **"No"** and complete all fields that will need to change. Click **Next** |

**Job Data**

*Effective Date: 12/05/2012 📅

*Employee Group: Professional (W60) Non Unit ▾

*Is this a Positioned Job? No ▾

 Supervisor ID: _____ 🔍 _____

*Department: W875000 🔍  Information Services

*Job Code: MC2042 🔍  _____                     *Full/Part Time  Full-Tin

*Location Code: SOUTH ST 🔍  South Street               *Regular/Temporary  Regula

*Standard Hours: 40.00   *FTE: 1.000000

 Mail Drop ID: IM1

<< Previous   [ Next >> ]

<< Search   Save for Later   Close

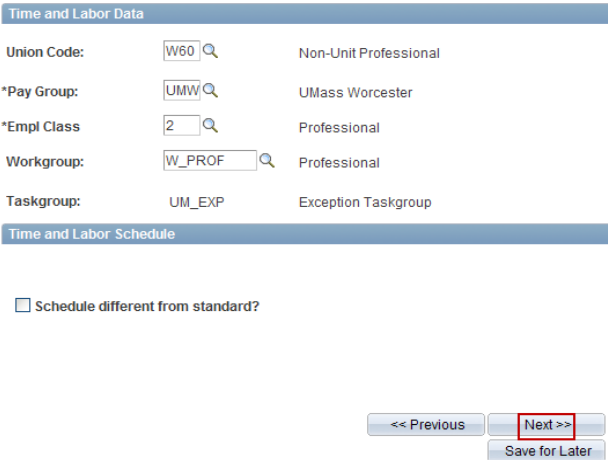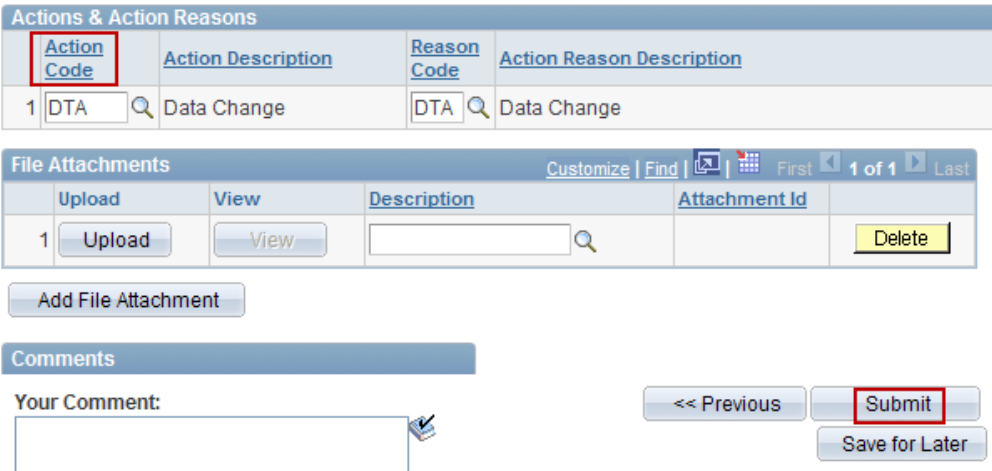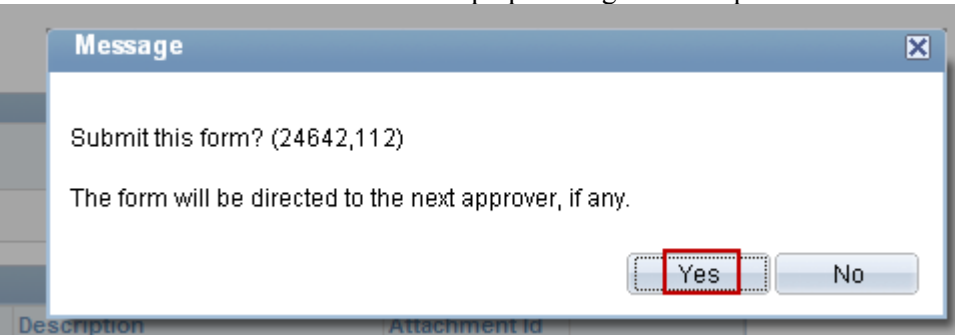| Step | Action |
|------|--------|
| 4. | Select appropriate **Employee Type**, enter the new **Hourly** or **Biweekly Rate**, tab out of field. Annual rate will update.  Click **Next**  |
| 5. | If **Union Code** is changing, update that field. <br> Scroll to bottom of page to Time and Labor Schedule section for any schedule change.  |

| Step | Action |
|------|--------|
| 6. | For any schedule that is different from standard, check the schedule different box and note the schedule in the description box.  Click **Next**<br><br>**Time and Labor Schedule**<br><br>☑ Schedule different from standard?     ☐ Select Schedule ID<br><br>Schedule Description:<br>Employee schedule will be two days a week, 10 hours a day |
| 7. | Choose the **Action "PRO"** and **Reason Code "PRO".  Any approval you received from the Compensation Department must be attached.**  Browse to where the approval is saved, select file**, Click Open, Click Upload  Attachment Id will populate.  In the Description select "Other".**  Click **Submit**<br><br>**Actions & Action Reasons**<br><br>| Action Code | Action Description | Reason Code | Action Reason Description | | |<br>|---|---|---|---|---|---|<br>| 1 PRO 🔍 | Promotion | PRO 🔍 | Prom to another Position | ➕ | ➖ |<br><br>**File Attachments**     Customize \| Find \| 🔲 \| First ◁ 1 of 1 ▷ Last<br><br>| Upload | View | Description | Attachment Id | |<br>|---|---|---|---|---|<br>| 1 Upload | View | Other 🔍 | Attachment Id<br>100147302013-<br>01-24-12.12.31 | Delete |<br><br>Add File Attachment<br><br>**Comments**<br><br>Your Comment:     << Previous     Submit |

| Step | Action |
|------|--------|
| 8. | Click **Yes** to submit the form when Pop up message comes up.<br><br>**Message**<br>Submit this form? (24642,112)<br>The form will be directed to the next approver, if any.<br>Yes  No |
| 9. | The form status indicates that you have submitted this form<br><br>**Form Status**<br>You have just SUBMITTED this form. This action passed the form to HCMU_GT_DEPT_APRV for further processing.<br><br>**Process Visualizer** |
| 10. | **Congratulations!**  You have entered a **promotion**.<br><br>**End of Procedure.** |
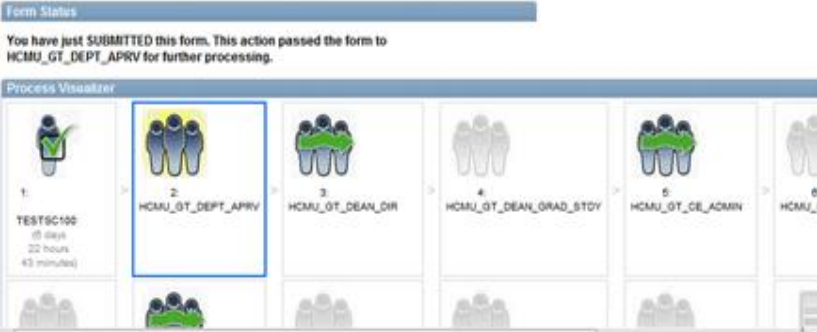
## VII. Processing Employee Job Change: <u>Enter a Funding Change</u>

| Step | Action |
|------|--------|
| 1. | From HR Direct click on Department Self-Service and the ePAF home page, click "Start a new ePAF". Then click **Edit Existing Job** link. |
| 2. | Then **Search** the employee by last name or Empl ID. Click on the **Name link** when it pops up. |

| Step | Action |
|------|--------|
| 3. | Choose the **Effective Date,** tab out of field. **Note Form ID #**. If there are other changes occuring along with funding change, then you can do it here. Otherwise click "**Next**".<br><br>**Job Data**<br><br>*Effective Date: 12/03/2012<br>*Employee Group: Professional (W60) Non Unit<br>*Is this a Positioned Job? Yes<br>*Position Number: 00001540<br>Reports To Position Number:<br>*Department: W875000<br>*Job Code: MC2038 — Applic Database Developer III — *Full/Part Time<br>*Location Code: SOUTH ST — South Street — *Regular/Tempo<br>*Standard Hours: 40.00 *FTE: 1.000000<br>Mail Drop ID: IM1<br><br><< Previous   Next >> |
| 4. | Then update the **Compensation Data**, change the new "**GL Combination Code**". Once the code selected, the other fields (Fund, department and program code will be autopopulated. Then Click **"Next"**<br><br>Position: 00001540 Web Developer, Sr.<br>Department: W875000 Information Services<br>eForm ID: 632<br><br>View Original Comp Data<br><br>**Compensation Data**<br>Employee Type: Exception Hourly<br>Bi-Weekly Rate:      Annual Rate:<br>Plan W6A Salary Grade 75<br><br>☐ Add Additional Components of Pay?<br>      Compensation Rate<br><br>Begin Date 07/01/2010<br><br>| | GL Combination Code | Fund Code | Department | Program Code | Project/Grant | Class |<br>|---|---|---|---|---|---|---|<br>| 1 | W108480 | 11000 | W875025000 | F10 | | | |

| Step | Action |
|------|--------|
| 5. | Review the **Time & Labor Data** and click **"Next".**<br><br>**Time and Labor Data**<br><br>Union Code: W60 🔍 Non-Unit Professional<br>*Pay Group: UMW 🔍 UMass Worcester<br>*Empl Class 2 🔍 Professional<br>Workgroup: W_PROF 🔍 Professional<br>Taskgroup: UM_EXP Exception Taskgroup<br><br>**Time and Labor Schedule**<br><br>☐ Schedule different from standard?<br><br>[ << Previous ] [ Next >> ]<br>[ Save for Later ] |
| 6. | Then choose the **Action Code** as "Data Change". Click **"Submit"**.<br><br>eForm ID: 632<br><br>**Actions & Action Reasons**<br><br>| | Action Code | Action Description | Reason Code | Action Reason Description |<br>|1| DTA 🔍 | Data Change | DTA 🔍 | Data Change |<br><br>**File Attachments** — Customize | Find | 🔲 🔳 First ◀ 1 of 1 ▶ Last<br><br>| | Upload | View | Description | Attachment Id | |<br>|1| Upload | View | [____] 🔍 | | Delete |<br><br>[ Add File Attachment ]<br><br>**Comments**<br><br>Your Comment:<br>[_____]✔️<br><br>[ << Previous ] [ Submit ]<br>[ Save for Later ] |
| 7. | Click "**Yes**" to submit the form when Pop up message comes up.<br><br>**Message** ✖<br><br>Submit this form? (24642,112)<br><br>The form will be directed to the next approver, if any.<br><br>[ Yes ] [ No ]<br><br>Description    Attachment Id |

| Step | Action |
|------|--------|
| 8. | The **form status** indicates that you have submitted this form.<br><br>**Form Status**<br>You have just SUBMITTED this form. This action passed the form to HCMU_GT_DEPT_APRV for further processing.<br><br>**Process Visualizer**<br>1: TESTSC100 (6 days 22 hours 43 minutes)   2: HCMU_GT_DEPT_APRV   3: HCMU_GT_DEAN_DIR   4: HCMU_GT_DEAN_GRAD_STDY   5: HCMU_GT_CE_ADMIN   6: HCMU_ |
| 9. | **Congratulations!** You have entered a **Funding Change**.<br><br>**End of Procedure.** |