



# EPAF LEAVE OF ABSENCE PROCESS - USER MANUAL

*Initiator User Manual for Change in Employment Status*

## *Leave of Absence Process (Unpaid) and Paid Leave of Absence*

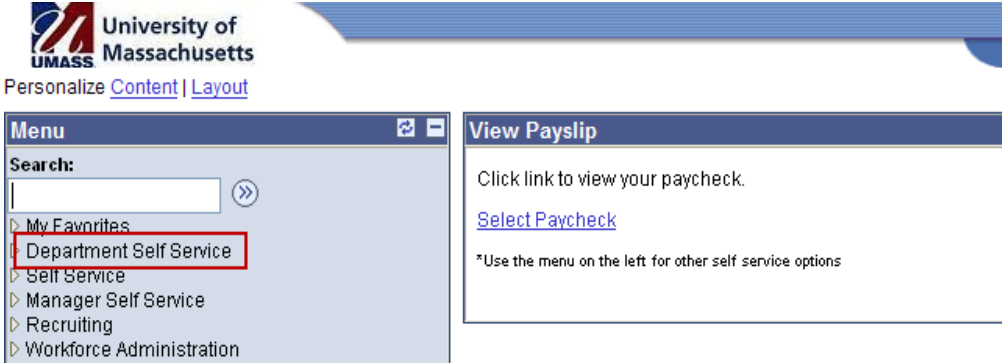
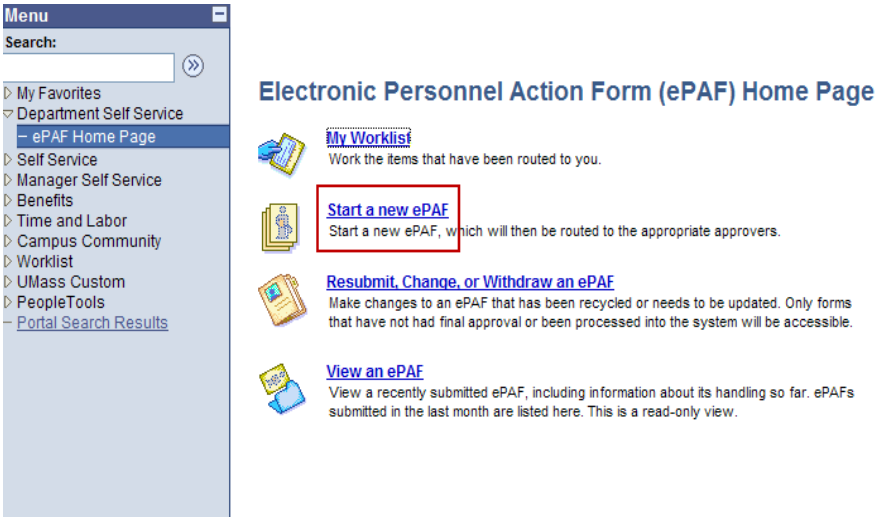
This manual provides step by step information on how to enter a Leave of Absence.


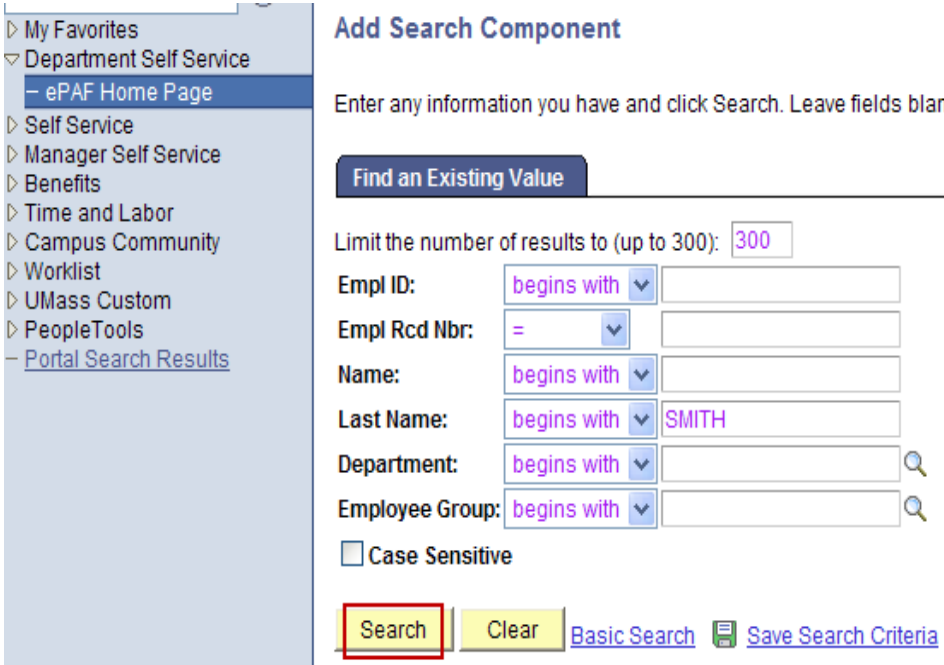
**Developed by:  
Learning & Development Group  
Human Resources Diversity & Inclusion**

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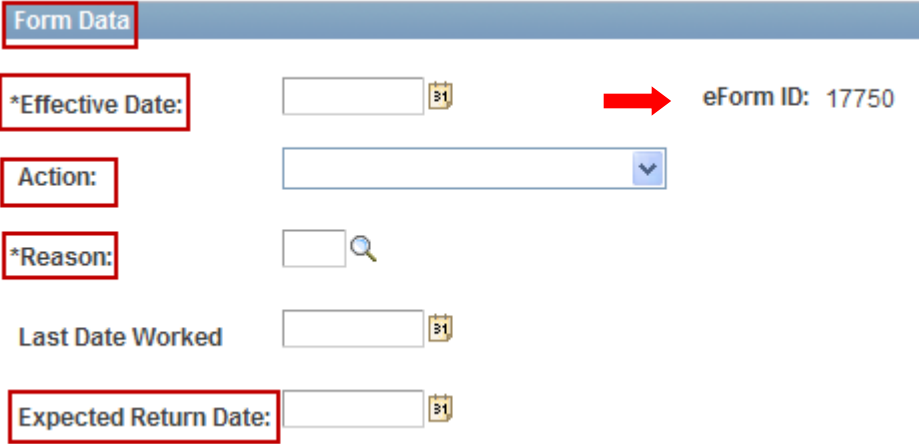


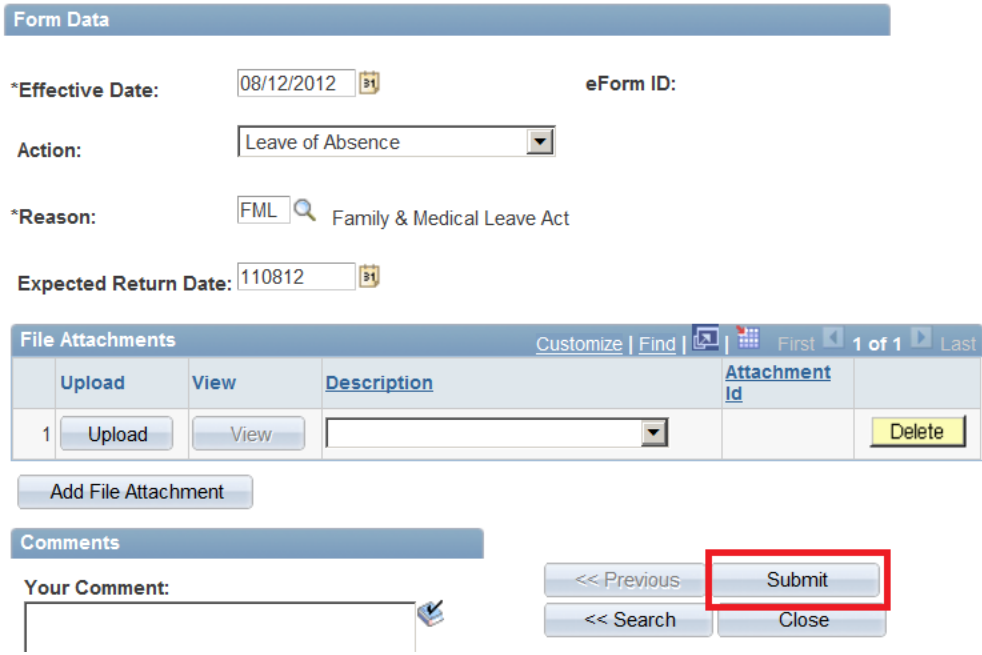
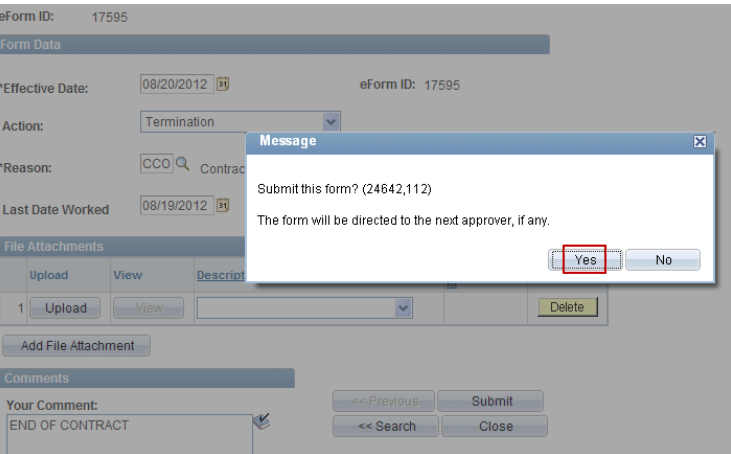
# EPAF Leave of Absence Process - User Manual


Step	Action
1.	<p>After logging into PeopleSoft, click on the <b>Department Self Service</b> link.</p>  <p>The screenshot shows the University of Massachusetts PeopleSoft interface. On the left, a 'Menu' sidebar contains a search bar and a list of links: 'My Favorites', 'Department Self Service' (highlighted with a red box), 'Self Service', 'Manager Self Service', 'Recruiting', and 'Workforce Administration'. On the right, a 'View Payslip' section contains the text 'Click link to view your paycheck.' and a link 'Select Payslip'. A note at the bottom of this section states: '*Use the menu on the left for other self service options'.</p>
2.	<p>Click the <b>ePAF Home Page</b> link.</p> <p>The <b>ePAF Home Page</b> is a useful area for managing PA Forms. Here you will see links to open your <u>worklist</u>, <u>start a new ePAF</u>, <u>resubmit</u>, <u>change or withdraw an ePAF</u>, or <u>view an ePAF</u>.</p> <p>Click the <b>Start a new ePAF</b> link.</p>  <p>The screenshot shows the 'Electronic Personnel Action Form (ePAF) Home Page'. On the left, a 'Menu' sidebar contains a search bar and a list of links: 'My Favorites', 'Department Self Service' (expanded to show 'ePAF Home Page' which is highlighted with a red box), 'Self Service', 'Manager Self Service', 'Benefits', 'Time and Labor', 'Campus Community', 'Worklist', 'UMass Custom', 'PeopleTools', and 'Portal Search Results'. The main content area is titled 'Electronic Personnel Action Form (ePAF) Home Page' and contains four sections, each with an icon and a link:      <ul style="list-style-type: none"> <li><b>My Worklist</b>: Work the items that have been routed to you.</li> <li><b>Start a new ePAF</b> (highlighted with a red box): Start a new ePAF, which will then be routed to the appropriate approvers.</li> <li><b>Resubmit, Change, or Withdraw an ePAF</b>: Make changes to an ePAF 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.</li> <li><b>View an ePAF</b>: View a recently submitted ePAF, including information about its handling so far. ePAFs submitted in the last month are listed here. This is a read-only view.</li> </ul> </p>

3.	<p>To submit a <b>Leave of Absence</b>, click the <b>Change Employment Status</b> link.</p>  <p>The screenshot shows the ePAF Home Page. On the left is a 'Menu' with a search bar and a list of links: My Favorites, Department Self Service (expanded), ePAF Home Page (selected), Self Service, Manager Self Service, Benefits, Time and Labor, Campus Community, Worklist, UMass Custom, PeopleTools, and Portal Search Results. On the right, under the heading 'Start a New electronic Personnel Action Form (ePAF)', there are three options: 'Hire an Employee', 'Edit Existing Job', and 'Change Employment Status'. The 'Change Employment Status' option is highlighted with a red rectangular box. Below it is a link to 'Return to Electronic Personnel Action Form (ePAF) Home Page'.</p>
4.	<p>You can search by Empl ID, Name, Department or Employee Group. The example below shows a search by <b>Last Name</b>. If employee has more than one job record, ensure you are selecting the correct record.</p> <p>Click the <b>Search</b> button.</p>  <p>The screenshot shows the 'Add Search Component' search form. On the left is the same 'Menu' as in the previous screenshot. On the right, under the heading 'Add Search Component', there is a text box for 'Find an Existing Value'. Below this is a section for search criteria. The 'Limit the number of results to (up to 300):' is set to 300. The search criteria include: 'Empl ID:' with a dropdown set to 'begins with', 'Empl Rcd Nbr:' with a dropdown set to '=', 'Name:' with a dropdown set to 'begins with', 'Last Name:' with a dropdown set to 'begins with' and the text 'SMITH' entered, 'Department:' with a dropdown set to 'begins with', and 'Employee Group:' with a dropdown set to 'begins with'. There is a 'Case Sensitive' checkbox which is unchecked. At the bottom, there is a 'Search' button highlighted with a red rectangular box, a 'Clear' button, a link to 'Basic Search', and a link to 'Save Search Criteria'.</p>

Step	Action
5.	<p>Click on the employee name link from the search results. The <b>Change Employment Status</b> page appears.</p> <p>The fields under the <b>Current Job Info</b> will populate.</p> <div data-bbox="370 520 1166 1024"> <h3>Change Employment Status</h3> <p><b>Step 1 of 2: Enter Status Change Information</b></p> <p>Please fill out the form below.</p> <div> <div>Current Job Info</div> <div> <div>Name: [Redacted]</div> <div>Empl ID: [Redacted]</div> <div>Empl Group: Professional (W60) Non Unit</div> <div>Empl Rcd#: 0</div> <div>Empl Status: Active</div> <div>Position: 00022556 Database Administrator Sr.</div> <div>Department: W875000 Information Services</div> <div>eForm ID: 17750</div> <div> Personal Data  Job Data  Additional Pay  Leave Plans  General Deductions </div> </div> </div> </div>

Step	Action
6.	<p>In the <b>Form Data</b> section, enter the <b>Effective Date</b> and tab out of field. <b>Note Form ID #.</b></p> <p>Click the <b>Action</b> list drop down menu and choose <b>Leave of Absence</b> for an unpaid Leave of Absence or choose <b><u>Paid Leave of Absence</u></b> if the employee will be using accruals.</p> <p>In the <b>Reason</b> field, select appropriate Reason.</p>  <p><b>Note:</b> Once the action of <b>Leave of Absence</b> or <b>Paid Leave of Absence</b> is selected, You need to enter the <b>Expected Return Date</b>. <b>Last Day Worked</b> will be removed once you select the one of the leave actions.</p>

Step	Action
7.	<p><b>Note:</b> No comments or file attachments will be entered on EPAF Leave form.</p> <p>Click <b>Submit</b></p>  <p>The screenshot shows the EPAF Leave form interface. At the top is a 'Form Data' section with fields for *Effective Date (08/12/2012), eForm ID, Action (Leave of Absence), *Reason (FML - Family &amp; Medical Leave Act), and Expected Return Date (110812). Below this is a 'File Attachments' table with columns for Upload, View, Description, Attachment Id, and a Delete button. An 'Add File Attachment' button is below the table. At the bottom is a 'Comments' section with a 'Your Comment:' text area and a 'Submit' button highlighted with a red box. Navigation buttons like '&lt;&lt; Previous', '&lt;&lt; Search', 'Submit', and 'Close' are also visible.</p>
Step	Action
15.	<p>Click <b>Yes</b> when the pop up shows up, to confirm that you are ready to submit this form.</p>  <p>The screenshot shows the same EPAF Leave form as in step 7, but with a confirmation pop-up dialog box. The dialog box is titled 'Message' and contains the text 'Submit this form? (24642,112)' and 'The form will be directed to the next approver, if any.' There are 'Yes' and 'No' buttons at the bottom of the dialog, with the 'Yes' button highlighted by a red box. The background form shows the same fields as before, with the 'Submit' button still highlighted.</p>

Step	Action
16.	<p>The <b>Form Status</b> indicates that you have submitted this form.</p> <p><u>Step 2 of 2: Form Finalized</u></p> <hr/> <p><b>Current Job Info</b></p> <p>Name: [REDACTED] Empl ID: [REDACTED]  Empl Group: Professional (W60) Non Unit Empl Rcd#: 0  Empl Status: Active Personal Data  Position: 00022443 [REDACTED] Job Data  Department: W875000 Information Services Additional Pay  eForm ID: 17595 Leave Plans  General Deductions</p> <p><b>Form Status</b></p> <p>You have just SUBMITTED this form. This action passed the form to HCMU_GT_HR_UPDATE for further processing.</p> <p><b>Process Visualizer</b></p>  <pre> graph LR     1[1: Sbrogna, Kimberly A (TESTGT10020876)] --&gt; 2[2: HCMU_GT_HR_REVIEWER]     2 --&gt; 3[3: HCMU_GT_HR_UPDATE]     3 --&gt; 4[4: HCMU_GT_HR_UPDATE_2]     4 --&gt; 5[5: Integrat Broker] </pre>
17.	<p>Congratulations! You have successfully submitted a <b>Leave of Absence</b> or <b>Paid Leave of Absence</b>".</p> <p><b>End of Procedure.</b></p>