



EPAF TERMINATION PROCESS -USER MANUAL

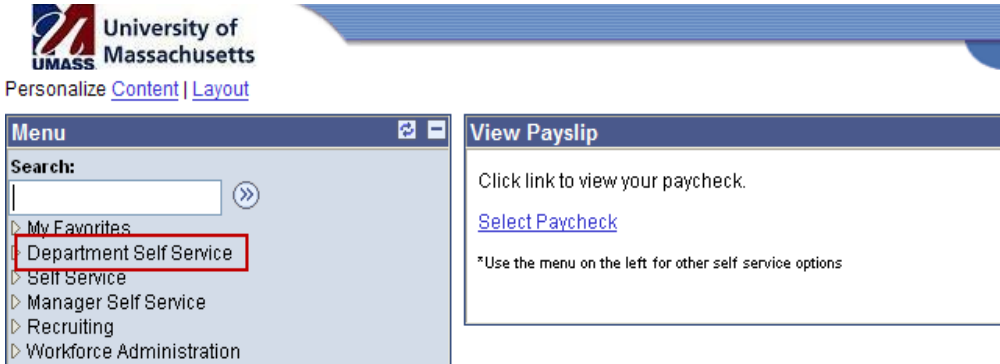
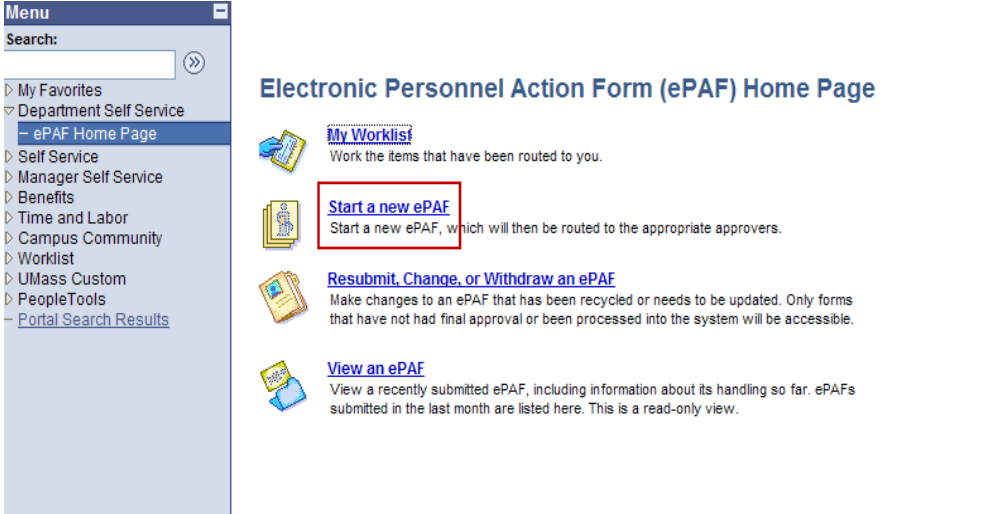
Initiator User Manual for Change in Employment Status

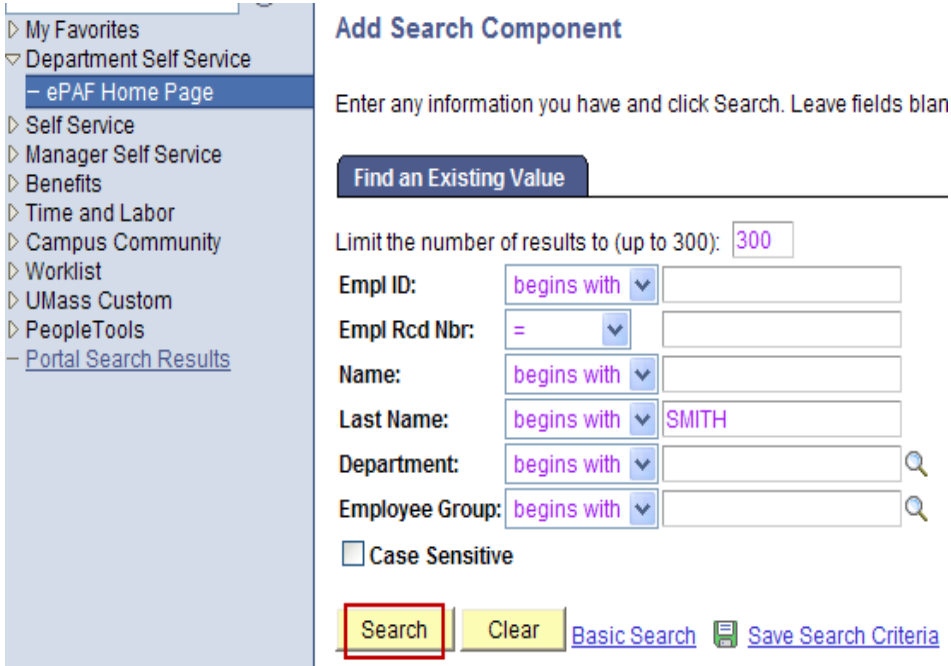
Termination Process

This manual provides step by step information on how to enter a voluntary termination. For any involuntary termination, please work with your Business Partner. Have questions????? Please contact your Business Partner.

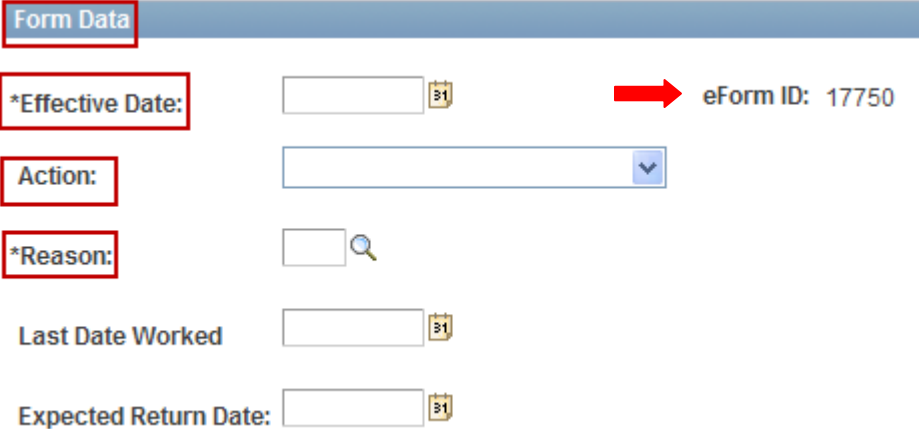
Developed by:
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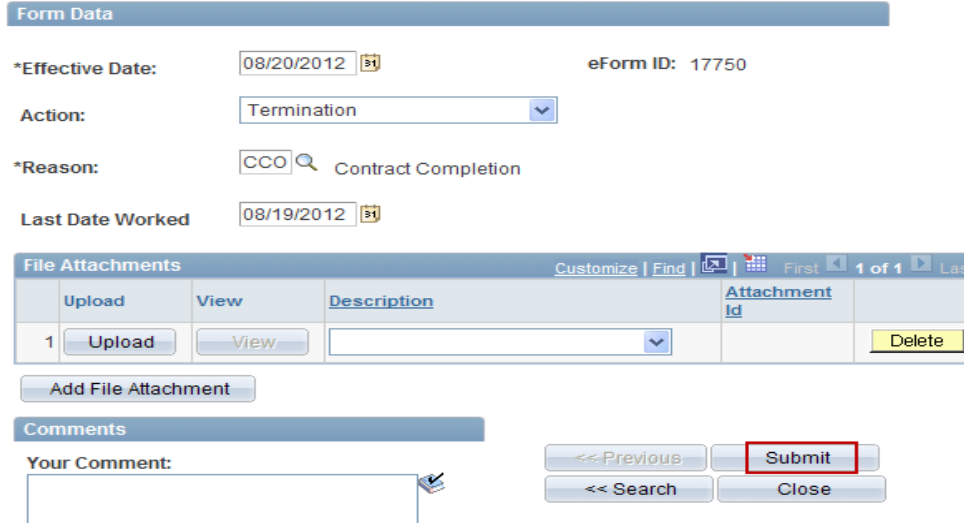
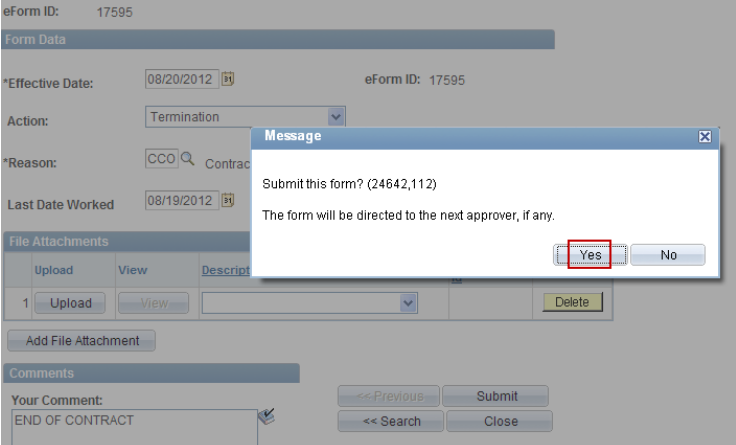
EPAF Termination Process -User Manual

Step	Action
1.	After logging into PeopleSoft, click on the Department Self Service link.  The screenshot shows the University of Massachusetts PeopleSoft interface. In the left-hand menu, the 'Department Self Service' link is highlighted with a red rectangular box. To the right, under the 'View Payslip' section, there is a link labeled 'Select Paycheck'.
2.	Click the ePAF Home Page link. The ePAF Home Page 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>. Click the Start a new ePAF link.  The screenshot displays the 'Electronic Personnel Action Form (ePAF) Home Page'. In the left-hand menu, the 'Start a new ePAF' link is highlighted with a red rectangular box. The main content area features several links with corresponding icons: 'My Worklist' (with a document icon), 'Start a new ePAF' (with a document icon), 'Resubmit, Change, or Withdraw an ePAF' (with a document icon), and 'View an ePAF' (with a document icon).

3.	To submit a termination, click the Change Employment Status link.  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. The main content area is titled 'Start a New electronic Personnel Action Form (ePAF)' and lists 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 the options is a link to 'Return to Electronic Personnel Action Form (ePAF) Home Page'.
4.	You can search by Empl ID, Name, Department or Employee Group. The example below shows a search by Last Name. If employee has more than one job record, ensure you are selecting the correct record. Click the Search button.  The screenshot shows the 'Add Search Component' form. On the left is the same 'Menu' as in the previous screenshot. The main content area is titled 'Add Search Component' and contains a section for 'Find an Existing Value'. It includes a text input field for 'Limit the number of results to (up to 300):' with the value '300' entered. Below this are several search criteria fields: 'Empl ID:', 'Empl Rcd Nbr:', 'Name:', 'Last Name:', 'Department:', and 'Employee Group:'. Each field has a dropdown menu with 'begins with' selected. The 'Last Name' field has 'SMITH' entered. There are magnifying glass icons next to the 'Department' and 'Employee Group' fields. At the bottom, there is a 'Case Sensitive' checkbox (unchecked) and a 'Search' button highlighted with a red rectangular box. Other buttons include 'Clear', 'Basic Search', and 'Save Search Criteria'.

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

Step	Action
6.	In the Form Data section, enter the Effective Date and tab out of field. Note Form ID #. Click the Action list drop down menu and choose Termination. In the Reason field, select appropriate Reason.  Note: Once the action of Termination is selected, the system will calculate the Last Date Worked based on the effective date of the transaction. You have the ability to change this date. The Expected Return Date will be remove once you select the Termination action.

Step	Action
7.	Note: No comments or file attachments will be entered on EPAF termination form. Click Submit 
Step	Action
15.	Click Yes when the pop up shows up, to confirm that you are ready to submit this form. 

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