

Loyola ePAF User Guide

Updates:

Version	Description
August 3, 2015	Added workflows for grants, gifts, and endowments that route to Department Approvers, SPA, and General Accounting.

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1. Introduction

The Electronic Personnel Action Form, or ePAF, is designed to streamline the creation and processing of Personnel Action Forms.

The ePAF pulls in a student employee's personal data, such as the enrollment status and Federal Work Study data, from LOCUS via their UVID, and utilizes Lawson to pull in the Lawson ID and to check to see if the student has been employed at Loyola before.

If the accounting units from which the student will be paid require the approvals of Department Approvers (i.e., Primary Investigators or other designated department approvers), Sponsored Program Accounting, and/or General Accounting, routing for these additional approvals is handled within the ePAF system as well.

Please note that this guide is designed for Hiring Managers and Hiring Manager Delegates.

2. *Logging in to EPAF*

Human Resources grants Hiring Managers access to the online ePAF system and associates them with the correct work locations for hiring. In order to gain access to the online ePAF system, contact Human Resources Compensation.

If Human Resources has defined you as a user, you may log in using your Loyola UVID and Password.

For users who are Hiring Managers for multiple work locations, you will be given the option to select a work location for this session.

3. *The Home Page*

The Home Page provides access to all functionality Hiring Managers will need for managing students' ePAFs. Hiring Managers also have the option of creating Hiring Manager Delegates from the Home Page if they so choose.

Hiring Manager Delegates have access to a subset of functionality on the Home Page which allows them to start and edit ePAFs.

3.1 *View/Change Work Location*

This option appears only for those users who have multiple work locations.

This section displays the work location you have already chosen for this session. If you would like to switch your work location for this session, click the link that says "Click Here to Change."

3.2 *Start a New Form*

Clicking on Start a New Form will allow the user to start a new PAF. For more information, consult "Creating a PAF" in Section 4 of this guide.

3.3 Managing ePAFs

The following sections of the Home Page are available for Hiring Managers:

1. Incomplete Forms
2. Forms Awaiting Hiring Manager Approval
3. Forms Returned by HR
4. Forms Awaiting Department Approval
5. Forms for SPA or GA Approval
6. Forms Awaiting HR Approval
7. HR Approved Forms

The following section of the Home Page is available for Hiring Manager Delegates:

1. Forms for Hiring Manager Delegate

3.4 Manage Hiring Delegates

This option appears only for Hiring Managers.

If you would like to delegate the ability to create PAFs to others, you may assign one or more Hiring Manager Delegates. Delegates have some, but not all, of the features available to Hiring Managers. They can create PAFs and submit them to the Hiring Manager for their review and submission to Human Resources. Delegates can view and edit PAFs started, but not submitted, for that work location. They will not be able to see any sensitive LOCUS or Lawson information. Moreover, they cannot manage other Hiring Manager Delegates. Note that Hiring Manager Delegates are defined for the work location and not for a particular Hiring Manager.

Hiring Manager Delegates

Click the “Manage Delegates” panel (the eighth and final tab in the section).

This section displays all the Hiring Manager Delegates currently assigned to this work location. They may be deleted by clicking Delete.

This section also displays a tool for Adding or Updating a Hiring Manager Delegate.

Add/Update a Hiring Manager Delegate

Within the “Manage Delegates” panel, enter the UVID and email address for the new Delegate into the given form fields.

For more information about these sections of the Home Page and how they are used, consult Section 5 of this guide.

4. *Creating, Saving, and Submitting a PAF*

4.1 *Creating a New PAF*

Step 1. On the Home Page, click Start a New Form. Enter the UVID of the student employee and click Proceed. The system will use the UVID to pull in information about the student from LOCUS and Lawson, such as the status of the person's Social Security Number in LOCUS or the person's Academic Load, and display it on the PAF input page.

Directly above the person's UVID, the system will display information for any combination of the following three items:

1. Whether the person is present in Lawson
2. Whether the person requires new-hire documentation
3. The status of the person's documentation in DocFinity

Note that Hiring Manager Delegates will not see any LOCUS data other than the student's name and LID.

Step 2. At the bottom of the screen, select an Effective Date and Action Code. Input fields specific to the Action Code will dynamically appear within the Manager Section. The action codes available are: New Hire, Rehire, Change – Add Position, Change – Budget, Change – Rate, and Termination.

New Hire, Rehire, Change – Add Position

The New Hire, Rehire, and Change – Add Position Action Codes require the same set of input fields.

The Position Title determines the pay rate structure for the employee. Student Workers and Temporary Employees require Weekly Hours and an Hourly Pay Rate. Graduate Assistants and Resident Assistants require a stipend with an Effective and End date along with a Monthly Pay Rate. Either the Stipend or the Monthly Pay Rate can be entered; the other will be calculated.

For the Hourly Rate and for the Monthly Stipend Rate, the minimum and maximum values are set by HR. For the Weekly Hours, a maximum is set by HR.

Change – Budget, Change – Rate

The Change – Budget and Change – Rate Action Codes require the same set of input fields.

This form contains two sections. The first is the current employee information. The second is the proposed information. Both sections contain the same input fields relative to the Position Title selected.

The Position Title determines the pay rate structure for the employee. Student Workers and Temporary Employees require Weekly Hours and an Hourly Pay Rate. Graduate Assistants and Resident Assistants require a stipend with an Effective and End date along with a Monthly Pay Rate. Either the Stipend or the Monthly Pay Rate can be entered; the other will be calculated.

For the Hourly Rate and for the Monthly Stipend Rate, the minimum and maximum values are set by HR. For the Weekly Hours, a maximum is set by HR.

Funding Sources, Percentages, and Approval Routing

Multiple Accounting Units can be entered onto the form, and also can be deleted. Note that the Percentages for each Accounting Unit must add up to 100%.

If the student has ***Federal Work Study (FWS)*** funds available, as noted in the LOCUS section of this screen, then you must apply FWS as a funding source. The FWS Accounting Unit number is managed by HR and updated each year. In order to apply FWS funds for your student employee, click on the FWS Indicator check box in the first column of the funding sources section. The ePAF system will automatically populate the following values for that row:

Accounting Unit = this year's FWS Accounting Unit value.

Account = the account code relative to the student's Position Title.

Percent = 60%. FWS funds are always applied at 60% of the student's total wages.

If one or more of your funding sources are ***grants, gifts***, or other Accounting Units that require approval from a Primary Investigator (or other designated department approver) and Sponsored Program Accounting (SPA), then you will be required to enter the following values for ***each*** such funding source:

Accounting Unit = If your Accounting Unit follows one of the following patterns, it will be routed for approval by Department Approver and SPA: 2xxxxx, 5xxxxx (*except Federal Work Study*), 103xxx, 1047xx, 1048xx.

Account = pre-populated with the account code relative to the student's Position Title.

Percent = percentage of the student's total wages.

Dept Approval = Enter the UVID* of the Primary Investigator, or other designated department approver, in the appropriate box. If you, the Hiring Manager, are also a designated department approver for this Accounting Unit, then you may click the check box in this column to

automatically fill in your UVID and record your approval. You may enter different Department Approvers for each Accounting Unit, if desired.

*Note that Department Approvers do not need to be manually added as system users, as is required for Hiring Managers. As soon as a PAF is submitted with a new Department Approver, that user will be automatically added to the system. All Department Approvers added to a submitted PAF will receive an email requesting that they login to the system and review the PAF(s) requiring their approval.

If one or more of your funding sources are **endowments** or other Accounting Units that require approval from General Accounting, or if your funding source(s) are regular **operating funds** or other funds that do not require special approval, then you will be required to enter the following values for **each** such funding source:

Accounting Unit = If your Accounting Unit follows the pattern 4xxxxx, it will be routed for approval by General Accounting.

Account = pre-populated with the account code relative to the student's Position Title.

Percent = percentage of the student's total wages.

Termination

For this Action Code, you only need to enter the position number from which this employee is being terminated, and select whether the employee is eligible for rehire.

4.2 Saving a PAF

The Save button and Cancel button appear at the bottom of the page for all PAFs that have either not been submitted or have been returned by Human Resources, a Department Approver, Sponsored Program Accounting, or General Accounting.

To save an incomplete PAF for later editing or reviewing, click Save at the bottom left of the screen. The saved PAF will appear under the Incomplete Forms section on the Home Page.

Human Resources, Department Approvers, Sponsored Program Accounting, and General Accounting cannot view a PAF that has been saved, but not yet submitted.

4.3 Submitting a PAF

The Save and Approve button appears at the bottom of the page for all PAFs that have either not been submitted or have been returned by Human Resources, a Department Approver, Sponsored Program Accounting, or General Accounting.

After you have completed a PAF, click Save and Approve to submit it to the next approver in the queue:

Department Approver, if one or more Accounting Units requires approval by a Department Approver who is not the Hiring Manager.

Sponsored Program Accounting and/or General Accounting, if one or more Accounting Units requires approval by one of these groups (and a Department Approver has provided his/her signoff for SPA-applicable Accounting Units).

Human Resources, if all Accounting Units on the form consist of operating funds or Federal Work Study, or if the form has received all applicable approvals from the Department Approver, SPA, and GA.

If required fields are left blank or were entered incorrectly, the system will display messages indicating those errors. You will be required to fix the errors before submitting the PAF to the approval queue.

Hiring Manager Delegates are unable to submit PAFs to the approval queue. Instead of a Save and Approve button, they will see a Submit button. When they submit a PAF, it will move to the Forms Awaiting Hiring Manager Approval section on the Home Page for the Hiring Manager to review and submit to the approval queue.

Once a PAF is submitted to the approval queue by a Hiring Manager, it cannot be unsubmitted or edited, but it may be viewed from the Home Page.

After you submit a PAF to the approval queue, an email is sent to all Hiring Managers assigned to your work location. Note that if you have been assigned multiple work locations, the email will be sent to all Hiring Managers assigned to the work location you selected for this session.

The Approval Queue, and Returned PAFs

The submitted PAF will appear under the Forms Awaiting Department Approval tab, the Forms for SPA or GA Approval tab, or the Forms Awaiting HR Approval tab, as applicable.

As each group within the approval queue approves the submitted PAF, the PAF will move to the appropriate tab on the Home Page for the next group in the approval queue.

If a Department Reviewer, SPA, or GA returns the submitted PAF to the Hiring Manager, then it will appear in the Forms Awaiting Hiring Manager Approval tab on the Home Page.

If Human Resources returns the submitted PAF to the Hiring Manager, then it will appear in the Forms Returned by HR tab on the Home Page.

If your PAF is returned to you with requests for changes, you may make any changes recommended and resubmit the PAF. However, if your PAF had previously been approved by a Department Reviewer, SPA, and/or GA, and you make any changes to the form that affect funding sources, then the PAF will enter the full approval queue again.

Once the PAF has been approved and processed by Human Resources, then it will appear in the HR Approved Forms tab on the Home Page.

5. *Reviewing and Editing a PAF*

5.1 *Reviewing and Editing a PAF (Hiring Manager Delegate)*

Forms for Hiring Manager Delegate

PAFs in this section have been saved but not submitted to the Hiring Manager. The Hiring Manager Delegate may view or edit a PAF by clicking the UVID, or delete a PAF by clicking Delete.

Note that this is the only section that Hiring Manager Delegates will see.

5.2 *Reviewing and Editing a PAF (Hiring Manager)*

All PAFs at any stage in the process can be viewed from the Home Page by a Hiring Manager. Each stage is accessed by clicking the appropriate panel.

Incomplete Forms

PAFs in this section have been saved but not submitted to Human Resources. The Hiring Manager may view or edit a PAF by clicking the student employee's UVID, or delete a PAF by clicking Delete.

Forms Awaiting Hiring Manager Approval

PAFs in this section have been submitted by Hiring Manager Delegates for the Hiring Manager's approval but have not yet been submitted to Human Resources. The Hiring Manager may view or edit a PAF by clicking the student employee's UVID, or delete a PAF by clicking Delete.

After selecting a PAF, the Hiring Manager can Save, Save and Approve, or Save and Reject the PAF. If the Hiring Manager clicks Save and Reject, the PAF is returned to the Incomplete Forms section for Hiring Managers, and the Forms for Hiring Manager Delegate section for Hiring Manager Delegates.

Forms Returned by HR

PAFs in this section were submitted by a Hiring Manager to the approval queue, but have been returned by Human Resources. The Hiring Manager may view or edit a PAF by clicking the student employee's UVID, or delete a PAF by clicking Delete.

After selecting a PAF, the Hiring Manager can Save, Save and Approve, or Save and Reject the PAF. If the Hiring Manager clicks Save and Reject, the PAF is returned to the Incomplete Forms section for Hiring Managers, and the Forms for Hiring Manager Delegate section for Hiring Manager Delegates.

Forms Awaiting Department Approval

PAFs in this section have been submitted to the Department Approver (a Primary Investigator or other designated department approver) and are awaiting review and approval. The Hiring Manager may access them by clicking the student employee's UVID. The forms can only be viewed.

See Section 4.1 for a description of PAFs that require Department Approval.

Forms for SPA or GA Approval

PAFs in this section have been submitted to Sponsored Program Accounting (SPA) and/or General Accounting (GA) and are awaiting review and approval. The Hiring Manager may access them by clicking the student employee's UVID. The forms can only be viewed.

See Section 4.1 for a description of PAFs that require SPA and/or GA approval.

Forms Awaiting HR Approval

PAFs in this section have been submitted to Human Resources and are awaiting processing. The Hiring Manager may access them by clicking the student employee's UVID. The forms can only be viewed.

HR Approved EPAFs

PAFs in this section have been approved by Human Resources. The Hiring Manager may access them by clicking View/Save PDF File. The forms can only be viewed by downloading a copy in PDF format.