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Chapter 1 – ePAR Home Page

Overview

This is an overview of the ePAR Home Page. The “My Worklist” Link, “Start a New ePAR” Link, “Resubmit, Change or Withdraw an ePAR” Link, “View an ePAR” Link and “Look Up an Archived ePAR” Link can all be found on this page.

Objectives

At the end of this chapter, you will be able to:

- Work the items on your worklist,
- Start a new ePAR form,
- Make changes to an ePAR form that has been recycled or needs to be updated,
- View an ePAR form that was submitted within the last month,
- Review an archived ePAR that was submitted more than a month ago.

ePAR Home Page
Use the ePAR Home Page to navigate to the “My Worklist” Link

Navigation: **Department Self Service > ePAR Home Page > My Worklist**

To select the link

1. Click on “My Worklist”

2. Click on link to work the form

3. Depending on your ePAR role you may Approve, Deny, Recycle or Hold the form
Use the ePAR Home Page to navigate to the “Start a New ePAR” Link

Navigation:  **Department Self Service > ePAR Home Page > Start a New ePAR**

To select the link

1. Click on “Start a New ePAR”

2. Click on the forms to initiate a form action or you may select return to the ePAR Home page
Use the ePAR Home Page to navigate to the “Resubmit, Change, or Withdraw an ePAR” Link

Navigation: Department Self Service > ePAR Home Page > Resubmit, Change, or Withdraw an ePAR

To select the link

1. Click on “Resubmit, Change, or Withdraw an ePAR”

2. Click on the forms to resubmit, change or withdraw a form action or you may select to return to the ePAR Home page.
Use the ePAR Home Page to navigate to the “View an ePAR” Link

Navigation: Department Self Service > ePAR Home Page > View an ePAR

To select the link

1. Click on “View an ePAR”

2. Click on the forms to view a recently submitted ePAR within the last month or you may select to return to the ePAR Home page.
Use the ePAR Home Page to navigate to the “Look Up an Archived ePAR” Link

Navigation: Department Self Service > ePAR Home Page > Look Up an Archived ePAR

To select the link

1. Click on “Look Up an Archived ePAR”

Look Up an Archived ePAR
Review an archived ePAR. ePARs submitted more than a month ago will be listed here. This is a read-only view.

2. Click on the forms to review an archived ePAR submitted more than a month ago or you may select to return to the ePAR Home page.
Look Up Archived electronic Personnel Action Request (ePAR)

Hire an Employee
Use this link to look up an archived request to hire an employee.
[Link: Look Up an Archived Hire ePAR]

Edit Existing Job
Use this link to look up an archived request to edit a job for an employee.
[Link: Look Up an Archived Job Edit ePAR]

Change Employment Status
Use this link to look up an archived request to change employment status for an employee.
[Link: Look Up an Archived Change Employment Status ePAR]

Additional Pay
Use this link to look up an archived request to add additional pay for an employee.
[Link: Look Up an Archived Additional Pay ePAR]

[Link: Return to Electronic Personnel Action Request (ePAR) Home Page]
Chapter 2 – Hire an Employee

Overview

Use this form to hire a new employee, rehire an employee, or transfer an employee into your department; or use this form to add an additional job.

Objectives

At the end of this chapter, you will be able to:

- Explain the fields on a new hire, rehire, transfer, and additional job.

New Hire

Use the Hire Form to hire.

Navigation: Department Self Service > ePAR Home Page > Start a new ePAR > Hire an Employee

To initiate candidate search

1. Enter an employee id number or otherwise enter the information you have and click search.
Note: If your search(es) does not return any results, enter the candidate's first name, last name, and date of birth, and click search. The Add button will display.

2. Click Add to create a new EmplID.

Note: You will receive the following message.

A Person Record will be created in PeopleSoft HR with a new ID. Do you want to proceed? (24842, 854)

If this person is or has been associated with the University of Houston System as an Employee, Student, or Student Applicant, they should already have an ID in PeopleSoft HR. Proceeding will create a duplicate ID. Only proceed if you are confident the person does not already have an ID.

Click Yes

3. Enter Contact Information and click next.
4. Enter Identity Information and click Next.

Note: If you leave social security number blank you will receive the following message:

Click here

Note: If you enter Gender: Male and Birth date between 18 and 25 years or younger then you must enter Selective Service Information.
Note: The following options are available for Citizenship status. Visa/Permit information will be entered by HR.

5. Submit Personal Information by clicking Save & Next.

If Auth Alien Temp is selected HR enters information

6. Enter Job Information by selecting Empl Class, Reg/Temp, and Position and click Next.

Save this individual’s personal information? (24642,113)

Yes  No

Enter information
7. Enter Compensation Information and click Next.

8. Finalize the form by submitting it in workflow to the next approver.

Note: You may attach a document and add comments if needed.
ReHire

Use the Hire Form to rehire a terminated employee.

Navigation: Department Self Service > ePAR Home Page > Start a new ePAR > Hire an Employee

To initiate candidate search

1. Enter an employee id number or otherwise enter the information you have and click search.

Hire an Employee

Candidate Search

Search below for the person you wish to hire. If you know the EmpID, enter it, and click Search. Otherwise, enter the information you have and click Search.

Use the arrow icon to select a row. If your search(es) does not return any results, enter the candidate’s first name, last name, and date of birth, and click search. The Add button will display.

Click Add to create a new EmpID.

Search Fields

- Employee ID:
- First Name: Michele
- Middle Name: Diane
- Last Name: Messa
- Date of Birth: 
- Social Security #: 
- Gender: 

Search

Click here
2. Select the row.

Note: Person Results has three options HR - Individual has personal information in the system; Job – Individual has job information in the system; Act – Individual is an active employee in the system.

Hire an Employee

Candidate Search

Search for the person you wish to hire. If you know the EmpID, enter it, and click Search. Otherwise, enter the information you have and click Search. Use the arrow icon to select a row. If your search(es) does not return any results, enter the candidate’s first name, last name, and date of birth, and click search. The Add button will display. Click Add to create a new EmpID.

Search Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>Michele</td>
</tr>
<tr>
<td>Last Name</td>
<td>Messi</td>
</tr>
<tr>
<td>Date of Birth</td>
<td></td>
</tr>
<tr>
<td>Social Security</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
</tbody>
</table>

Click here

Person Results

<p>| | | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>0080580</td>
<td>0</td>
<td>Michele Diane Messi</td>
<td>Michele Tellez</td>
</tr>
</tbody>
</table>

Click here

Note: Contact information is pre populated with the capability for update if necessary.
3. Submit Personal Information.

4. As in a New Hire now you enter Job Information by selecting Empl Class, Reg/Temp, and Position and click Next.

5. As in a New Hire enter Compensation Information and click Next.
6. Finalize the form by submitting it in workflow to the next approver.

**Note:** You may attach a document and add comments if needed.

### Hire an Employee

**Step 6 of 6: Finalize Form**

Enter any relevant information requested where indicated and/or comments in the "Your Comment" field to be included with this form.

<table>
<thead>
<tr>
<th>Personal Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Michele Tellez</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Action &amp; Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>EmpID</td>
</tr>
<tr>
<td>0085080</td>
</tr>
</tbody>
</table>

**Attachments**

<table>
<thead>
<tr>
<th>Description</th>
<th>Add New Document</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
<th>File size</th>
<th>Author</th>
<th>Created Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>View</td>
<td></td>
<td></td>
<td>05/13/08 4:28:30PM</td>
</tr>
</tbody>
</table>

**Comments**

Your Comment:

Ms. Tellez has previous UH experience.

Comment History:

Submit this form? (24642,112)

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

Yes  No

---

**Form Finalized**

The form will now be forwarded to the appropriate Approver.

<table>
<thead>
<tr>
<th>Personal Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Michele Tellez</td>
</tr>
</tbody>
</table>

**Form Status**

**eForm ID:** 59

You have just SUBMITTED this form. This action passed the form to UHM Dept Business Adminstr for further processing.

[Go To Worklist](#)
[View This Form](#)
[Go To eP&R Home Page](#)
**Transfer**

Use the Hire Form to transfer an employee into your department.

**Navigation:** Department Self Service > ePAR Home Page > Start a new ePAR > Hire an Employee

**To initiate candidate search**

1. Enter an employee id number or otherwise enter the information you have and click search.

![Candidate Search Form](image)

2. Select the row.

![Candidate Search Results](image)
3. As in a New Hire and a Rehire now you enter Job Information by selecting Empl Class, Reg/Temp, and Position and click Next.

4. As in a New Hire and a Rehire enter Compensation Information and click Next.
5. Finalize the form by submitting it in workflow to the next approver.

**Note:** If an employee already has at least one active job and is transferring from another job, you must indicate a requested job action. Update the Active Job and select job record to be transferred.

![Form Image]

**Transfers**

- The employee already has at least one active job with the university. Is the employee transferring from another job? If so, indicate requested job action is an update to an Active Job and select job record to be transferred.

### Active Job Records

<table>
<thead>
<tr>
<th>Rec</th>
<th>Unit</th>
<th>Department</th>
<th>Class</th>
<th>Temp</th>
<th>Job Code</th>
<th>Title</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>HR100</td>
<td>Business Services</td>
<td>ProfAdmin</td>
<td>Regular</td>
<td>D317</td>
<td>Spec, Customer Service 2</td>
<td>1.00</td>
</tr>
</tbody>
</table>

- **Update to an Active Job?**
  - Yes

- **Promotion, Transfer, Demotion?**
  - Promotion

### Action & Reason

*Emp Rec:*
- Promotion
- Promotion-With Pay

### Attachments

- Description
- 
- Add New Document

### Comments

*Your Comment:*

**Comment History:**

Submit this form (24642,112)
The form will be directed to the next approver if any

**Click here**

---

**Hire an Employee**

**Form Finalized**

- The form will now be forwarded to the appropriate Approver.

### Personal Info

- **Name:** Arturo Tapia
- **EmplID:** 0115743

### Form Status

- **eForm ID:** 60

You have just SUBMITTED this form. This action passed the form to UHM Dept Business Adminstr for further processing.

- **Go To Worklist**
- **View This Form**
- **Go To ePart Home Page**
Add an Additional Job

Use the Hire Form to add an additional job record for an employee.

Navigation: Department Self Service > ePAR Home Page > Start a new ePAR > Hire an Employee

To initiate candidate search

1. Enter an employee id number or otherwise enter the information you have and click search.

2. Enter Additional Job information by selecting Empl Class, Reg/Temp, and Position and click Next

Note: There is an option for an assignment end date.
3. Enter Additional Job Compensation Information and click Next.

4. Finalize the form by submitting it in workflow to the next approver.

Note: You will receive the message that the employee has at least one active job and you must verify if it is an update. In the case of an additional job record you must check no.

Note: The update to active job is No and the new record is displayed.
Submit this form? (24642,112)

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

Yes  No  

Click here

Hire an Employee

Form Finalized
The form will now be forwarded to the appropriate Approver.

Personal Info
Name: April Moreno  EmplID: 0089300

Form Status
eForm ID: 75
You have just SUBMITTED this form. This action passed the form to UHM Dept Business Adminstr for further processing.

Go To Worklist
View This Form
Go To ePAR Home Page
Chapter 3 – Job Change - Edit existing job

Overview

Use this form to edit the job of an employee currently working in your department

Objectives

At the end of this chapter, you will be able to:

- Explain the fields on a job change that allow for promotions, transfers, pay rate changes and FTE changes within your department.

Promotion with Pay

Use the Job Change form for Promotions with Pay.

Navigation: Department Self Service > ePAR Home Page > Start a new ePAR > Edit Existing Job

To initiate search

1. Enter an employee id number or otherwise enter the information you have and click search.

2. Complete the fields with the appropriate job information that is being changed and click Next.

Note: You must enter effective date and a new position number.
3. Enter Compensation Information and click Next.

4. Finalize the form by submitting it in workflow to the next approver.

**Note:** Select whether this job action is a Promotion, Transfer, or Demotion. If this job action is a Transfer or Demotion, indicate the Reason for the action.
Transfer

Use the Job Change form for Transfers.

Navigation: Department Self Service > ePAR Home Page > Start a new ePAR > Edit Existing Job

To initiate search

1. Enter an employee id number or otherwise enter the information you have and click search.
2. Complete the fields with the appropriate job information that is being changed and click Next.

3. Enter Compensation Information if necessary and click Next.
4. Finalize the form by submitting it in workflow to the next approver.

Change Job Data
Step 3 of 3: Finalize Form
Enter any relevant information requested where indicated and/or comments in the "Your Comment" field to be included in this form.

Current Job Info
Name: Andrew Meissen
Business Unit: HR730
EmpID: 0398424
DeptID: H0098
Job Code: 5200
Reg/Temp: Temporary
Empl Class: Support Staff
Position #: 01003493
FTE: 0.38
Std Hrs: 15.00

Action(s) & Reasons(s)
Action Reason
1 Transfer New Assignment

Attachments
Description
View Description File size Author Created Date/Time
View

Comments
Your Comment:

Form Finalized
The form will now be forwarded to the appropriate Approver.

Current Job Info
Name: Andrew Meissen
Business Unit: HR730
EmpID: 0398424
DeptID: H0098
Job Code: 5200
Reg/Temp: Temporary
Empl Class: Support Staff
Position #: 01003493
FTE: 0.38
Std Hrs: 15.00

Form Status
eForm ID: 119
You have just SUBMITTED this form. This action passed the form to UHM Dept Business Adminstr for further processing.

Go To Wordlist
View This Form
Go To ePAR Home Page
Pay Rate Change

Use the Job Change form for Pay Rate Changes.

Navigation: Department Self Service > ePAR Home Page > Start a new ePAR > Edit Existing Job

To initiate search

1. Enter an employee id number or otherwise enter the information you have and click search.

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

Find an Existing Value

- EmplID: begins with 0328074
- Empl Rcd #br: =
- Name: begins with
- Last Name: begins with
- Department: begins with

[Case Sensitive]

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

2. Enter Effective Date of Pay Rate Change and click Next.

Step 1 of 3: Enter Job Change Details
Complete the fields below with the appropriate job information that is being changed.

Current Job Info

- Name: Rosemarie Castano
- EmplID: 0328074
- Business Unit: HR730
- Dept/Job Code: H0098
- Name: Dean, Law

Job Information

- *Effective Date: 06/01/2008
- Empl Class: Prof/Admin
- Reg/Temp: Regular
- Position Number: 01008735
- Business Unit: HR730
- Department: H0098
- Job Code: E9B6
- Sal Plan: UHE
- Salary Grade: 068

[eForm ID: 126]

[Search] [Next]
3. Enter Compensation Information and click Next.

Note: You may enter multiple compensation rates on the form.

4. Finalize the form by submitting it in workflow to the next approver.
Submit this form? (24642, 112)
The form will be directed to the next approver, if any.

Yes  No  

Change Job Data

Form Finalized
The form will now be forwarded to the appropriate Approver.

Current Job Info

Name: Rosemarie Castano  EmplID: 0328074
Business Unit: HR730  Empl Rcd#: 0
DeptID: H0098  Dean, Law
Job Code: E9B6  Mgr, Program
Reg/Temp: Regular
Empl Class: Prof/Admin
Position #: 01008736
FTE: 1.00  Std Hrs: 40.00

Form Status

eForm ID: 126
You have just SUBMITTED this form. This action passed the form to UHM Dept Business Adminstr for further processing.

Go To Worklist
View This Form
Go To ePAIR Home Page
Chapter 4 – Change Employment Status

Overview

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

Objectives

At the end of this chapter, you will be able to:

- Explain the fields on a termination, retirement, leave of absence or return from leave.

Termination, retirement, leave of absence or return from leave

Use the Change Employment Status form to terminate, retire, place on leave or return an employee from leave.

Navigation: Department Self Service > ePAR Home Page > Start a new ePAR > Change Employment Status

To select an employee

1. Enter an employee id number or search by name
Note: The "Effective Date" should be the first day of the new status. Please select from the actions and reasons provided. Enter any relevant comments in the "Your Comment" field to be included with this form.

2. Enter Term/Leave/Retire Information

List of Action/Reasons for Change Employment Status Form

<table>
<thead>
<tr>
<th>Action/Reason</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave of Absence</td>
<td>EDU</td>
<td>Education</td>
</tr>
<tr>
<td>Leave of Absence</td>
<td>FML</td>
<td>Family and Medical Leave Act</td>
</tr>
<tr>
<td>Leave of Absence</td>
<td>HEA</td>
<td>Health Reasons</td>
</tr>
<tr>
<td>Leave of Absence</td>
<td>MIL</td>
<td>Military Service</td>
</tr>
<tr>
<td>Leave of Absence</td>
<td>PAR</td>
<td>Parental Leave</td>
</tr>
<tr>
<td>Leave of Absence</td>
<td>PRS</td>
<td>Personal Reasons</td>
</tr>
<tr>
<td>Leave of Absence</td>
<td>STD</td>
<td>Short Term Disability</td>
</tr>
<tr>
<td>Leave of Absence</td>
<td>SUS</td>
<td>Suspension</td>
</tr>
<tr>
<td>Leave of Absence</td>
<td>WCO</td>
<td>Workmans Compensation</td>
</tr>
<tr>
<td>Paid Leave of Absence</td>
<td>ESL</td>
<td>Extended Sick Leave</td>
</tr>
<tr>
<td>Paid Leave of Absence</td>
<td>FML</td>
<td>FMLA</td>
</tr>
<tr>
<td>Paid Leave of Absence</td>
<td>MIL</td>
<td>Military Service</td>
</tr>
<tr>
<td>Paid Leave of Absence</td>
<td>PAR</td>
<td>Parental Leave</td>
</tr>
<tr>
<td>Paid Leave of Absence</td>
<td>SLP</td>
<td>Sick Leave Pool</td>
</tr>
<tr>
<td>Retirement</td>
<td>DIO</td>
<td>Disability ORP Retiree</td>
</tr>
</tbody>
</table>
Retirement | DIS | Disability Retirement
--- | --- | ---
Retirement | DIT | Disability TRS Retiree
Retirement | ORP | ORP Retiree
Retirement | RET | Retirement
Retirement | TRS | TRS Retiree
Return from Leave | REC | Recall from Suspension
Return from Leave | REL | Return From Disability
Return from Leave | RFL | Return from Leave
Return from Leave | RWC | Return From Worker's Comp
Termination | ASN | Assignment End
Termination | DEA | Death
Termination | IAT | Involuntary-Attendance
Termination | IGM | Involuntary-Gross Misconduct
Termination | IJA | Involuntary-Job Abandonment
Termination | IMI | Involuntary-Misconduct
Termination | IMS | Involuntary-Misstmt on Applic
Termination | INV | Involuntary
Termination | IOT | Involuntary - Other Reason
Termination | PFR | Involuntary -- Performance
Termination | PRO | Involuntary-Under Probation
Termination | RIF | Involuntary-Reduction in Force
Termination | VOL | Voluntary

3. Click Submit and the form will be sent to the next Approver in Work Flow.

Click Submit

Click Yes
Change Employment Status

Form Finalized

The form will now be forwarded to the appropriate Approver.

Current Job Info

Name: Kimberly Paul
EmpID: 0155628

Business Unit: HR739
EmpID Record: 0

DeptID: H0024
Position: Dean, Architecture

Job Code: D5X7
Position: Asst, Financial 2

RegTemp: Regular

Empl Class: Support Staff
FTE: 1.00
Std Hrs: 40.00

Form Status

eForm Id: 958

You have just SUBMITTED this form. This action passed the form to UH M Human Resources Dept for further processing.

Go To Workflow
View This Form
Go To ePAS Home Page
Chapter 5 – Additional Pay

Overview

Use this form to submit a request to add additional pay for an employee.

Objectives

At the end of this chapter, you will be able to:

- Explain the fields on a request for additional pay.

Additional Pay

Use the Additional Pay Form to submit a request to add additional pay for an employee.

Navigation: Department Self Service > ePAR Home Page > Start a new ePAR > Additional Pay

To select an employee

1. Enter an employee id number or search by name.
2. Enter earnings code, pay period amount and any comment you may have. Then click Submit.

**List of Earnings Codes:**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>125</td>
<td>Employee Awards/Payroll</td>
</tr>
<tr>
<td>441</td>
<td>Auto Allowance/Payroll</td>
</tr>
<tr>
<td>442</td>
<td>Communication Allowance/PR</td>
</tr>
<tr>
<td>455</td>
<td>Human Subject Testing/Payroll</td>
</tr>
<tr>
<td>460</td>
<td>Additional Compensation</td>
</tr>
<tr>
<td>990</td>
<td>Other Earnings</td>
</tr>
<tr>
<td>991</td>
<td>Miscellaneous Compensation</td>
</tr>
<tr>
<td>992</td>
<td>UHCL Professorships</td>
</tr>
</tbody>
</table>

**Note:** If the additional pay is recurring, the “Recurring?” box should be checked and the pay start date and end date should be entered.
Note: If the additional pay is to be paid on a separate cost center, check the “Paid on separate cost center?” box and enter cost center information.
3. Click Submit and the form will be sent to the Approver in Work Flow.

Submit this form? (24042,112)
The form will be directed to the next approver, if any.
[Yes] [No]

Add Additional Pay

Form Finalized

The form will now be forwarded to the appropriate Approver.

Current Job Info

Name: Kathleen Lachon
EmpId: 0086545
Business Unit: H730
EmpLoc: 0
DeptId: H0024
Job Code: D548
RegTemp: Regular
Position Id: 0091224
Emp Class: PreEmpAdmin Staff
FTE: 1.00
Std Hrs: 40.00

Form Status

eForm Id: 959
You have just SUBMITTED this form. This action passed the form to UAH Human Resources Dept for further processing.

Go To Workflow
View This Form
Go To ePFR Home Page
Chapter 6 – Links on the Forms

Overview

The “Go To Worklist”, “View This Form” and “Go to ePAR Home Page” links are located on the bottom of the finalize page.

Objectives

At the end of this chapter, you will be able to:

- To navigate to each of the three links.

Use the links to navigate to the designated areas

To select the “Go To Worklist” link

1. Click on the link

Note: You can reassign your work items by entering another User ID
To select the “View This Form” link
2. Click on the link

Update Change Employment Status
Step 2 of 2: Update Complete
The form will now be forwarded to the appropriate Approver.

Current Job Info
Name: Stephen Fox
Business Unit: HR730
DeptID: H0024
Job Code: 1070
Reg/Temp: Temporary
Empl Class: Faculty

Form Status
eForm ID: 296
You have just RESUBMITTED this form. This action passed the form to UHCM Human Resources Dept for further processing.

Step 1 of 3: Form Contents and Comments
This page displays the data that was entered on the form and associated comments.

Current Job Info
Name: Stephen Fox
Business Unit: HR730
DeptID: H0024
Job Code: 1070
Reg/Temp: Temporary
Empl Class: Faculty

Form Data
Effective Date: 04/18/2008
Action: Termination
Reason: Voluntary

Comments
Comment History: [TextBox]

Update Change Employment Status
Step 2 of 2: Update Complete
The form will now be forwarded to the appropriate Approver.
To select the “Go To ePAR Home Page” link
3. Click on the link.

Click on the link
Electronic Personnel Action Request (ePAR) Home Page

- **My Worklist**
  Work the items that have been routed to you.

- **Start a New ePAR**
  Start a new ePAR, which will then be routed to the appropriate approvers.

- **Resubmit, Change, or Withdraw an ePAR**
  Make changes to an ePAR 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.

- **View an ePAR**
  View a recently submitted ePAR, including workflow history and form status. ePARs submitted in the last month are listed here. This is a read-only view.

- **Look Up an Archived ePAR**
  Review an archived ePAR. ePARs submitted more than a month ago will be listed here. This is a read-only view.
Chapter 7 – Attachments

Overview

The Attachments section is located on the bottom of the finalize form page.

Objectives

At the end of this chapter, you will be able to:

- To add and delete attachments.

Use the links to navigate to the designated forms. The attachments window will display.

Note: This functionality will only be available for Add, Evaluate, and Update Task. View and View Archive tasks will have a “View Attachment” button.

1. To attach a file you must first enter a description and select the “Add New Document” Button.

2. Now you can upload your file by clicking on the browse button.

Note: Only PDF, TXT, TIF, DOC, RTF and XLS file types are allowed
3. This will open up a window that will allow you to search for the file

4. Select your file and click “Upload Image”

5. Click on “Return to ePAR Form” to navigate back to the original document.

Note: You have the option to view a file you uploaded and to delete a file you uploaded.
<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
<th>File size</th>
<th>Author</th>
<th>Created Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>New Hire Form</td>
<td>19968 0089155</td>
<td>04/09/08 11:01:39AM</td>
<td></td>
</tr>
</tbody>
</table>
Chapter 8 – General References

Overview

The references section will include information about the forms that will be useful while navigating through ePAR.

Form Messages

Note: Form messages are warnings that will appear when information needs to be corrected or if more information is needed it should be added in the comments section of the form. The following is a break down of messages by form:

Hire:
• Missing Social Security #:
  Message Text (Message #572):
    Social Security # should be entered.
  Message Description:
    Social Security # should be entered. If this is a new international employee without a social security #, leave field blank and secure a temporary SSN from Payroll within 30 days of hire.

Hire/Job Change:
• Comp Rate (Monthly) greater than Pay Grade Max:
  Message Text (Message #558):
    Comp Rate is greater than the max rate for position's Pay Plan (1), Grade (2), which is (3) per month.
  Form Message Text (Message #573):
    Comp Rate is greater than the max rate for position's Pay Plan and Grade.
  Message Description:
    The Comp Rate is greater than the maximum monthly rate for the position's Pay Plan and Grade at 1.00 FTE. Resubmit a new ePAR, edit Comp Rate, or provide explanation in Comments Section.

• Comp Rate (Monthly) less than Pay Grade Min:
  Message Text (Message #559):
    Comp Rate is less than the min rate for position's Pay Plan (1), Grade (2), which is (3) per month.
  Form Message Text (Message #574):
    Comp Rate is less than the min rate for position's Pay Plan and Grade.
  Message Description:
    The Comp Rate is less than the minimum monthly rate for the position's Pay Plan and Grade at 1.00 FTE. Resubmit a new ePAR, edit Comp Rate, or provide explanation in Comments Section.

• Comp Rate (Monthly) less than FLSA Min:
  Message Text (Message #567):
Comp Rate is less than the FLSA min monthly salary, or $1,971.66.

**Message Description:**
Requested Comp Rate is below the minimum monthly salary for exemption from the provisions of FLSA, or $1,971.66. Correct the Comp Rate or provide explanation in Comments section.

- **Comp Rate (Hourly) greater than Pay Grade Max:**
  **Message Text (Message #560):**
  Comp Rate is greater than the max rate for position's Pay Plan (1), Grade (2), which is (3) per hour.

**Form Message Text (Message #575):**
Comp Rate is greater than the max rate for position's Pay Plan and Grade.

**Message Description:**
The Comp Rate is greater than the maximum hourly rate for the position's Pay Plan and Grade. Resubmit a new ePAR, edit Comp Rate, or provide explanation in Comments Section.

- **Comp Rate (Hourly) less than Pay Grade Min:**
  **Message Text (Message #561):**
  Comp Rate is less than the min rate for position's Pay Plan (1), Grade (2), which is (3) per hour.

**Form Message (Message #576):**
Comp Rate is less than the min rate for position's Pay Plan and Grade.

**Message Description:**
The Comp Rate is less than the minimum hourly rate for the position's Pay Plan and Grade. Resubmit a new ePAR, edit Comp Rate, or provide explanation in Comments Section.

- **Temp Position – Benefits-eligible:**
  **Message Logic:**
  Sum of FTE of active faculty and staff job records is greater than or equal to .50 and requested assignment end date is greater than or equal to 4 ½ months
  **Message Text (Message #562):**
  Requested job action appears to create a benefits-eligible employment status.

**Message Description:**
Requested job action appears to create a benefits-eligible employment status. Resubmit a new ePAR for a Reg position, edit Std Hrs or Assignment End Date, or provide explanation in Comments Section.

- **Reg Position – Non-benefits-eligible:**
  **Message Logic:**
  Sum of FTE of active faculty and staff job records is less than .50
  **Message Text (Message #563):**
  Requested job action appears to create a non-benefits-eligible employment status.

**Message Description:**
Requested job action appears to create a non-benefits-eligible employment status. Resubmit a new ePAR for a Temp position, or provide explanation in Comments Section.
• Grad Asst Position – Non-benefits-eligible:
  Message Logic:
  Sum of FTE of active graduate assistant job records is less than .50 or requested
  assignment end date is less than 4 ½ months
  Message Text (Message #564):
  Requested job action appears to create an employment status that is not insurance-
  eligible.
  Message Description:
  Requested job action appears to create an employment status that is not insurance-
  eligible. Resubmit a new ePAR for a non-benefits-eligible position, edit Std Hrs or
  Assignment End Date, or provide explanation in Comments.

• Multiple Campus Reg Positions:
  Message Logic:
  Request is to create a benefits-eligible job record, and employee has an active
  benefits-eligible job record at another component campus
  Message Text (Message #565):
  Requested job action appears to create benefits-eligible appointments at more than
  one campus.
  Message Description:
  Requested job action appears to create benefits-eligible appointments at more than
  one component campus. Resubmit a new ePAR for a non-benefits-eligible position,
  or provide explanation in Comments Section.

• # of Incumbents exceeds Max Head Count for Position:
  Message Text (Message #550):
  Requested action creates Head Count of (4), which exceeds Maximum Head Count
  of (5) for position.
  Form Message Text (Message #549):
  Requested job action exceeds maximum head count for the position selected.
  Message Description:
  Requested job action exceeds maximum head count for the position selected. Select
  another position or provide explanation in Comments.

(1) Applicable Pay Plan
(2) Applicable Pay Grade
(3) Applicable Min/Max Pay Grade Comp Rate
(4) # of Incumbents
(5) Max Head Count
Employment Status Change:
None

Additional Pay:
• Earning Codes that Require Comments
  Message Text (Message #1158):
  Earn Code selected requires explanation for additional pay.
  Message Description:
  Submit explanation in Comments Section or resubmit request as job record action.

• Invalid Cost Center
  Message Text (Message #1159):
  Invalid Cost Center
  Message Description:
  Enter another cost center or uncheck “Paid on separate cost center?” to charge additional pay to position on job record. If cost center is valid but not in PeopleSoft HR, provide cost center and associated chartfields in Comments Section.

Form Actions

Note: Form Actions identify the status of a form as it is routed through Workflow. Attached is a matrix of the different form actions:

<table>
<thead>
<tr>
<th>Form Action</th>
<th>Form Menu</th>
<th>Created by Role</th>
<th>Form Status</th>
<th>Workflow</th>
<th>Worklist</th>
<th>E-mail Notification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Start a New</td>
<td>Initiator/Evaluator(s)*</td>
<td>Pending</td>
<td>Forwards to next Evaluator</td>
<td>Posted on Next Evaluator's Worklist</td>
<td>Yes</td>
</tr>
<tr>
<td>Hold</td>
<td>Add**, Update***</td>
<td>Initiator/Evaluator(s)</td>
<td>On Hold</td>
<td>Removed from Workflow</td>
<td>Removed from Worklist</td>
<td>No</td>
</tr>
<tr>
<td>Resubmit</td>
<td>Update**</td>
<td>Initiator/Evaluator(s)</td>
<td>Pending</td>
<td>Forwards to next Evaluator</td>
<td>Posted on Next Evaluator's Worklist</td>
<td>Yes</td>
</tr>
<tr>
<td>Withdraw</td>
<td>Update**</td>
<td>Evaluator(s)</td>
<td>Withdraw</td>
<td>Removed from Workflow</td>
<td>Removed from Worklist</td>
<td>No</td>
</tr>
<tr>
<td>Approve</td>
<td>Evaluate</td>
<td>Evaluator(s)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deny</td>
<td>Evaluate</td>
<td>Evaluator(s)</td>
<td>Denied</td>
<td>Removed from Workflow</td>
<td>Removed from Worklist</td>
<td>Yes</td>
</tr>
<tr>
<td>Recycle</td>
<td>Evaluate</td>
<td>Evaluator(s)</td>
<td>Pending</td>
<td>Returned to Initiator or Evaluator Originating ePAR</td>
<td>Posted on Initiator Worklist</td>
<td>Yes</td>
</tr>
</tbody>
</table>

*Evaluator(s) with Add Task
**Hold Action only available on Add Hire ePAR
***Update available to all Evaluators within ePAR Workflow
## Form Status

<table>
<thead>
<tr>
<th>Form Status</th>
<th>Created by Role</th>
<th>Created by Action</th>
<th>Form Status Definition</th>
<th>View Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>Initiator/Evaluator(s)*</td>
<td>Add, Recycle, Resubmit</td>
<td>Action initiated, recycled, or resubmitted. No approvals.</td>
<td>View only (30 days)</td>
</tr>
<tr>
<td>On Hold</td>
<td>Initiator/Evaluator(s)</td>
<td>Hold</td>
<td>Action placed on hold. Form processing suspended until resubmitted or withdrawn.</td>
<td>View only (30 days)</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>Initiator/Evaluator(s)</td>
<td>Withdraw</td>
<td>Action withdrawn. Form processing ends.</td>
<td>View only (30 days)</td>
</tr>
<tr>
<td>Denied</td>
<td>Evaluator(s)</td>
<td>Deny</td>
<td>Action denied. Form processing ends.</td>
<td>View only (30 days)</td>
</tr>
<tr>
<td>Partially Approved</td>
<td>Evaluator(s)</td>
<td>Approved</td>
<td>Action approved by one or more Evaluators, but not approved by Last Evaluator (HR/Payroll).</td>
<td>View only (30 days)</td>
</tr>
<tr>
<td>Authorized</td>
<td>Last Evaluator</td>
<td>Approved</td>
<td>Action approved by HR or Payroll. Form ready to be executed.</td>
<td>View only (30 days)</td>
</tr>
<tr>
<td>In Error</td>
<td>System</td>
<td>Authorized (Last Approval)</td>
<td>Action erred when submitted for entry into PeopleSoft HRMS.</td>
<td>View only (30 days)</td>
</tr>
<tr>
<td>Executed</td>
<td>System</td>
<td>Authorized (Last Approval)</td>
<td>Action entered into PeopleSoft HRMS.</td>
<td>View and Archive</td>
</tr>
</tbody>
</table>

*Evaluator(s) with Add Task

## Workflow

**Note:** Workflow allows you to move forms through for approval and entry into the system. You may access your work list via the main HRMS Home Page or through the links made available on the forms.
You can reassign your worklist items by clicking on “Reassign”.

You can view the form and work it by clicking on the link.

Note: You will enter new User ID and select OK. The task will be routed to new user.

Note: You should make sure that your Workflow Attributes are checked off in your “My System Profile”

You can select an alternate user if you will be unavailable by entering information in the Alternate User section.
E-mail Notifications

Note: E-mail notifications will be sent out to Initiators and Evaluators when a work list item is generated. There will be a link asking you to log on or if you already logged on it will take you to the form in ePAR. Please note that you should check on the “Email User” box in My System Profile to receive the emails.
<table>
<thead>
<tr>
<th><strong>Comments</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Note:</strong> Comments in ePAR will be part of an electronic personnel file. All comments should be as accurate and concise as possible.</td>
</tr>
</tbody>
</table>