a place of mind

UNIVERSITY OF BRITISH COLUMBIA

PAYMENT & PROCUREMENT SERVICES
OKANAGAN CAMPUS

PAYROLL

ePAF Training Manual

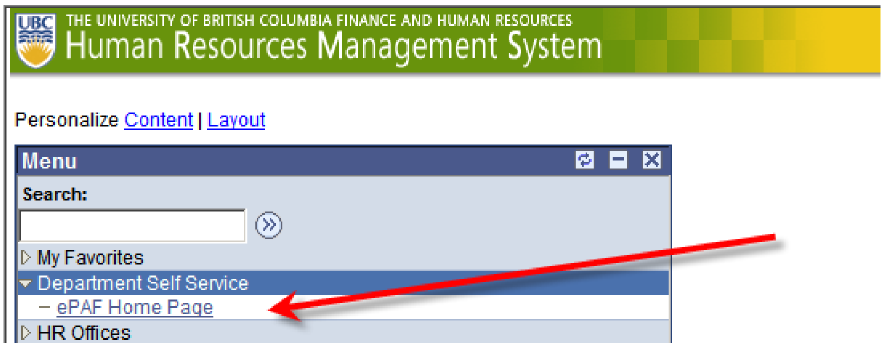
2015

Hiring employees

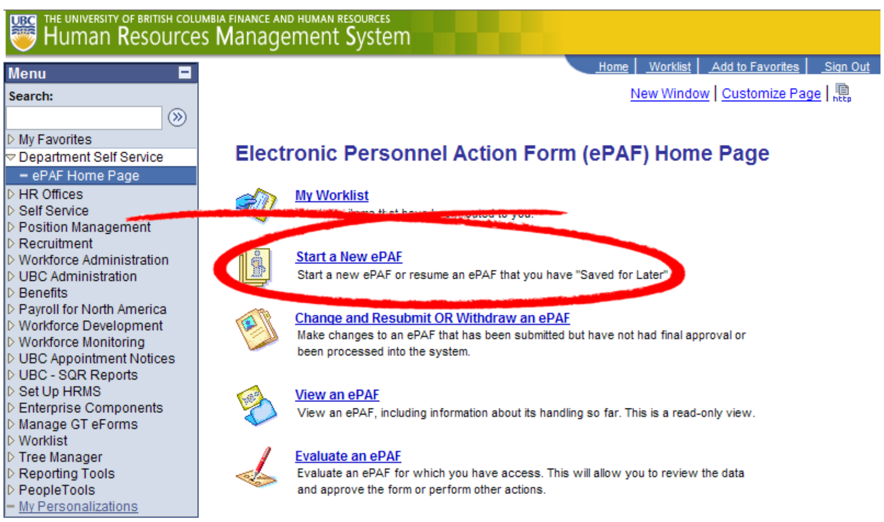
ACCESSING ePAF

Sign onto HRMS with your normal CWL.

Select *Department Self Service*
»Click on ePAF Home Page:



Click on Start a New ePAF

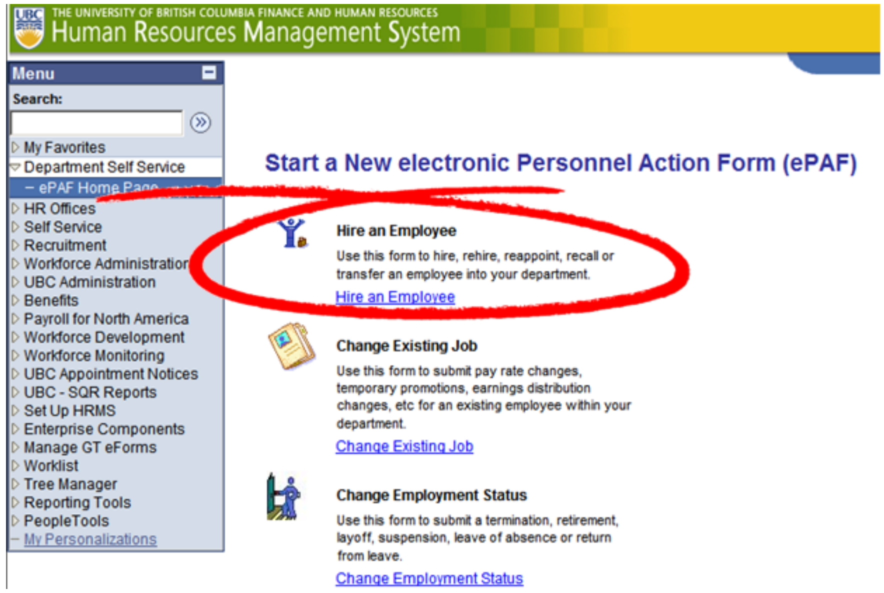


This option is used for starting any of the 3 forms (Hire an Employee, Job Change Existing Job form or Change Employment Status form)

FOR ALL JOBS THAT NEED TO BE POSTED, YOU MUST USE eRECRUIT.

What jobs don't need posting?

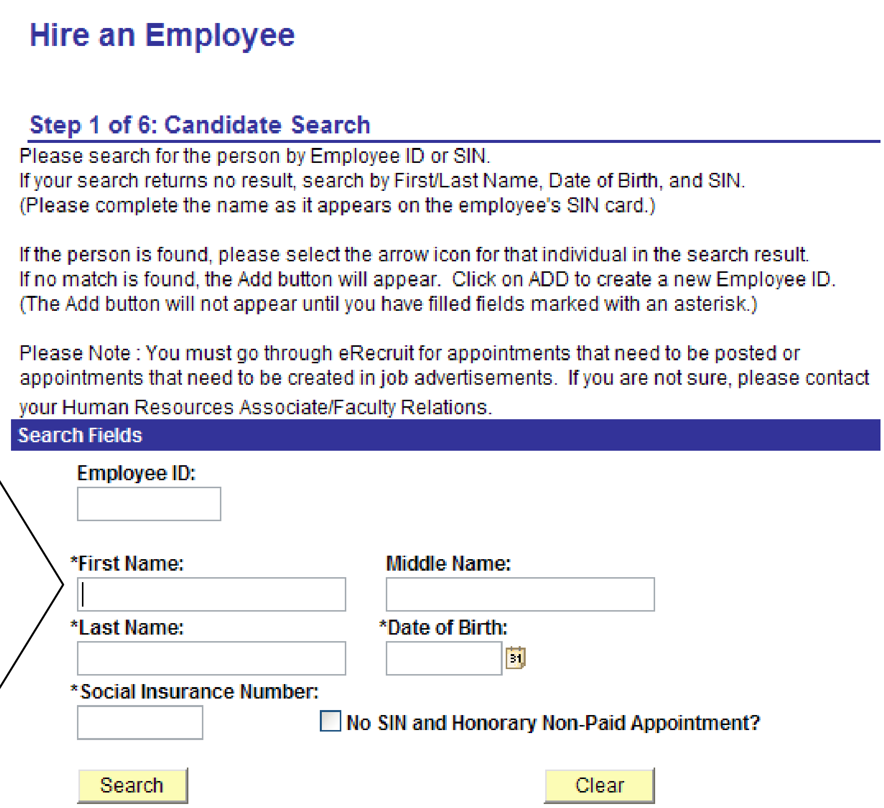
- Student Hires/Rehires
- Staff Positions of less than 3 months
- Staff Leave Replacements
- Faculty Tenure/tenure track reappointments



Select *Hire an Employee*. This is used for Hiring, Rehiring or Reappointing someone into your dept that does NOT require a job posting.

Candidate Search: Checking if the person already exists on HRMS

The first step in hiring an employee is to check if they already exist on the HRMS. You can check by Employee ID Number, Social Insurance Number, and Name



When searching for an employee, these fields may be used together or independently.

Search by emplid if you have it.

If not, search by SIN.

If no match, search by name + birthdate

1. **Check by employee ID.**
    - If you have their employee id, enter it, and it will bring up their current active and inactive job records.
    - If an emplid # has been assigned using Early ID assignment but the employee is not yet in HRMS, the system will *not* find the employee at this point.
        - However, it *will* assign the correct number from Early ID once the e-form has been saved and submitted for approval by matching the SIN you enter.
        - There is no need to go to Early ID assignment -- this procedure will do it for you.
2. **Check by Social Insurance Number.**
    - If you are hiring a new employee, you must have their SIN.
    - If SIN brings up no match, it is possible that they were employed under a different SIN (a temporary one, for example), therefore the last step is:
3. **Check by Lastname + Birthdate.**
    - First (at least Initial) & Last Names are mandatory for a name search.
    - You may use the % sign as a wildcard under either field.

Sample Results:

Person Results — Customize | Find | First 1-2 of 2 Last

	Act	EmplID	Rcd#	Name	Date of Birth	SIN
1		1451316	0	Lois Lane	1969/01/13	(No Match)
2		2932334	0	Loreen Lane	1955/01/17	(No Match)

Your search will display any existing employees that match your criteria.

Partial Matches (Name+Birthdate Search)

SIN+Name + Birthdate searches will not display a SIN if there is no SIN match – it will show name and birthdate, however. If the name *and* birthdate match, then it is possible that:

- You have the wrong SIN – contact your new employee to verify
- Your employee exists on HRMS with a temporary SIN (ie was here on a work permit). Obtain the new SIN and Permanent Resident papers from the employee, and send them to Payroll for processing.

Matches: Selecting An Employee

For each person matched, it will list each job record on HRMS, both active and inactive.

Quick Summary

Check if the employee already exists on the system by emplid, SIN and then name/birthdate

If yes, pick the employee/employment record, and their personal data will be populated by what is already in the system – update it if necessary.

If not, continue to Add a new employee

In the example, the filled box (green on the screen) indicates an active job:

Person Results | Customize | Find | First 1-6 of 6 Last

	Act	EmplID	Rcd#	Name	Date of Birth	SIN
1		4336119	0	Brian Harasyn	05/02/1990	(No Match)
2		4336119	1	Brian Harasyn	05/02/1990	(No Match)
3		1986333	0	Hannah K Fraser	05/02/1990	(No Match)
4		5691206	0	Isabelle Plessis	05/02/1990	(No Match)
5		3538885	0	Madeline Eto	05/02/1990	(No Match)
6		NEW	0	Student Hire	05/02/1990	(No Match)

***Carefully check** the Names and Date of Birth for a match.*

Our database has over 125000 people in it – the possibility of a match on name alone is high – please check birthdate, and if possible, SIN, to confirm that it actually is the same person.

The unfilled boxes (red/white on the screen) indicate inactive jobs. The last entry has no emplid # assigned – this indicates a new hire in process.

Click on the in the Results column to see more information about that job to assist you in selecting one.

Click on the *triangle* ▷ in the Person Column to select a job to be rehired. The following will be displayed:

Do you want to proceed? (24642,854)

If you want to Proceed, click on the "Yes" button. If you need to go back, click on the "No" button.

Yes No

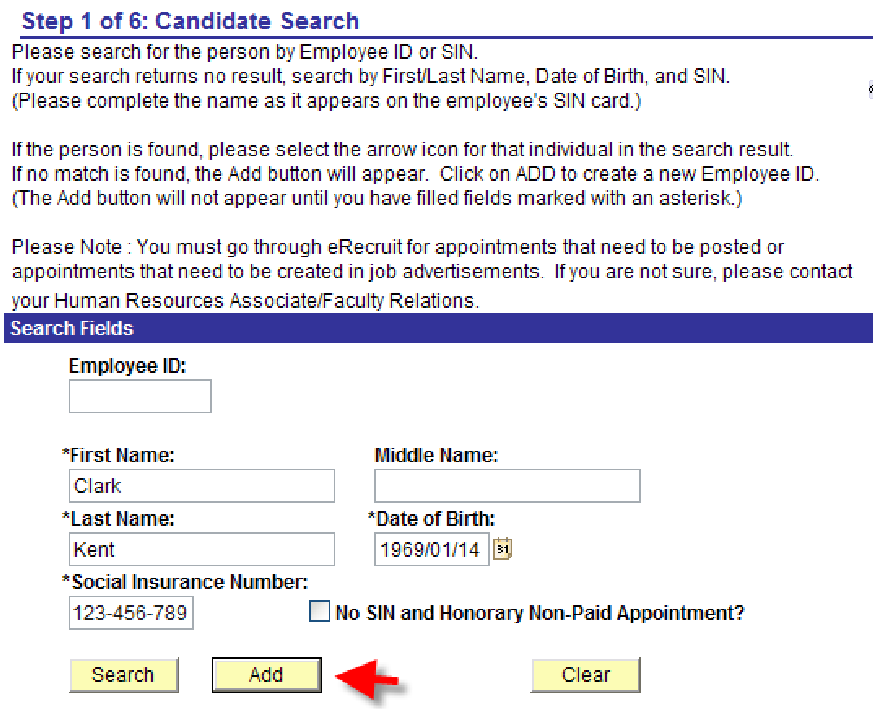
Click on Yes

(Note: If you select a line with a green box, the system will skip the personal data and take you directly to Step 2 – Job Information.)

The system will take you to the HIRE page and display the name that was entered on the search page.

No Matches:

If no one appears from your search result, or the results that do appear are not your hire, click the Add button:

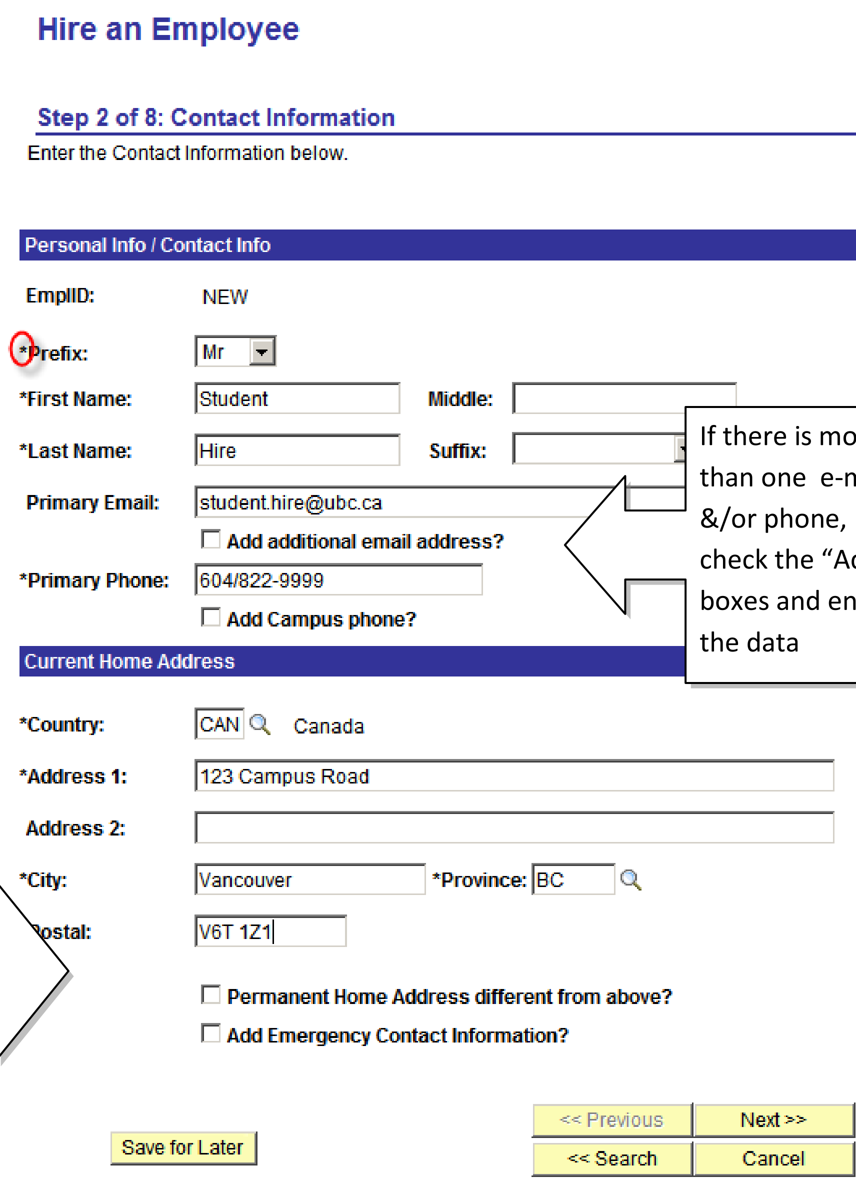


From this step forward, all the screens have a "Save for Later" button.

If you save the form, it will take you out of the page. When returning to the form, you will need an identifier such as form ID#, SIN # or name.

To pick up where you left off, go back to Start a NEW ePAF>Hire an Employee and hit Next >> *through the pages until reaching where you stopped.*

Contact Information



If there is more than one e-mail &/or phone, check the "Add" boxes and enter the data

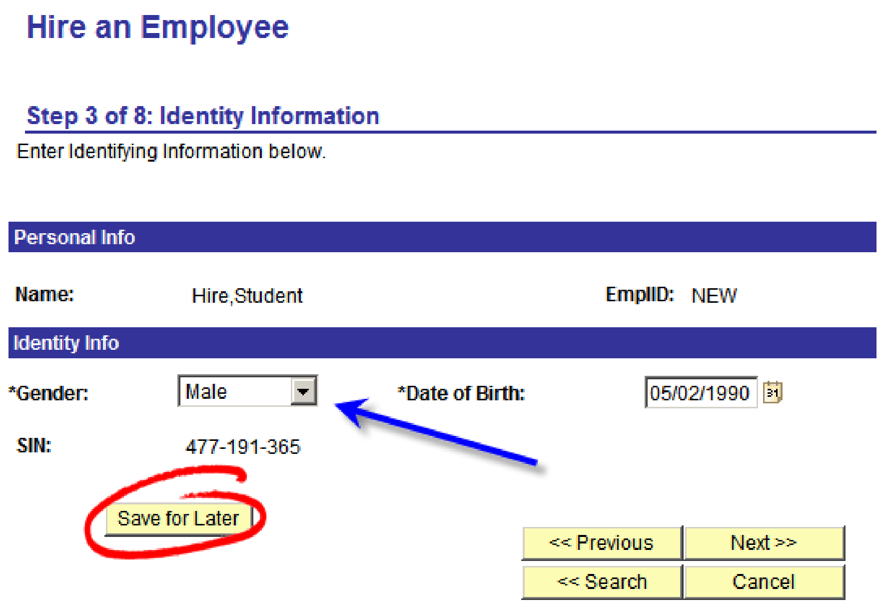
NOTE: If the Emergency Contact info is not in Canada, the field names (Province and Postal Code) will not change to that country's format

Enter the rest of the personal information. Fields marked with an asterisk are required fields.

Identity:

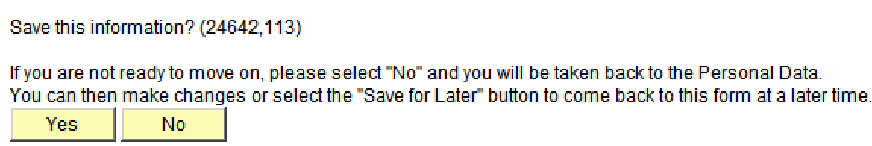
Upon Clicking Next >>, one of two different panels will be displayed depending on whether the employee has a permanent or temporary SIN #.

For a permanent SIN # - the following will be displayed:



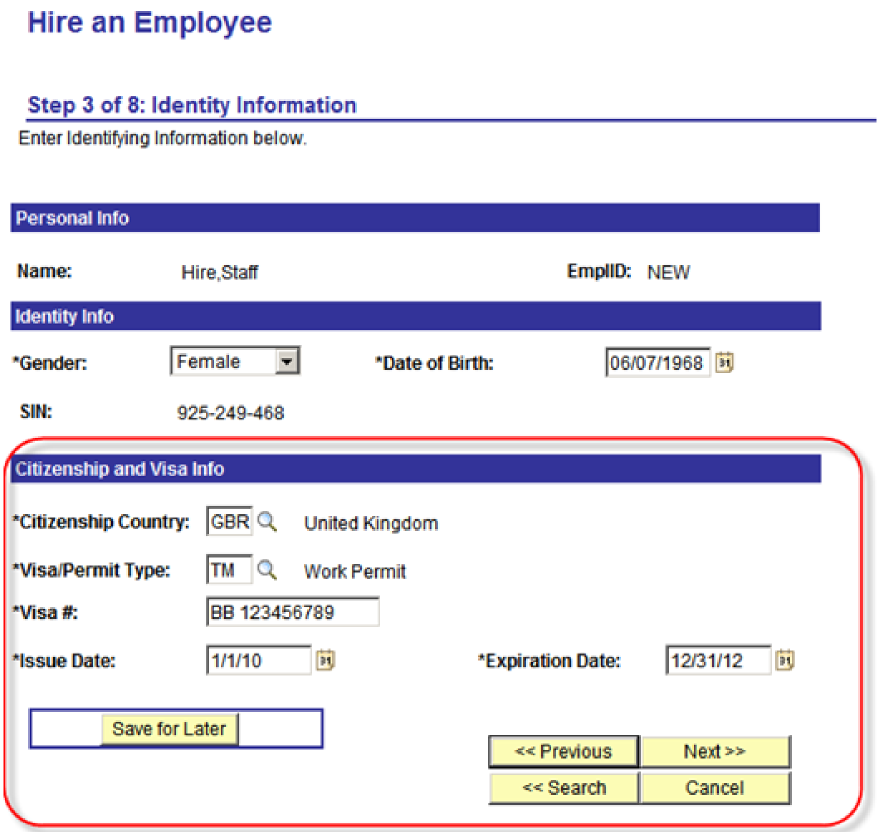
Select the Gender and click on Next >>.

The following message will be displayed



Click on Yes

For a temporary SIN (SINs starting with a 9) - the following extra box will be displayed:


Hire an Employee

Step 3 of 8: Identity Information

Enter Identifying Information below.

Personal Info

Name:	Hire,Staff	EmplID:	NEW

Identity Info

*Gender:	Female	*Date of Birth:	06/07/1968
SIN:	925-249-468		

Citizenship and Visa Info

*Citizenship Country:	GBR United Kingdom		
*Visa/Permit Type:	TM Work Permit		
*Visa #:	BB 123456789		
*Issue Date:	1/1/10	*Expiration Date:	12/31/12

Save for Later

<< Previous | Next >>

<< Search | Cancel

It's a good idea to scan and save (on your computer or a local server) a copy of the Work Permit, as it will need to be attached to the form at the end of the process.

Enter the Citizenship & Visa Info. All fields are required.

Dates of employment must be within the period of the work visa. In other words:

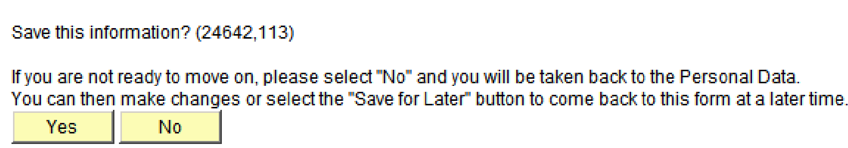
The appt dates must match the dates of the job

OR

be later than the visa issue date and before the visa expiration date.

Click on Next >>

The following message will be displayed


Save this information? (24642,113)

If you are not ready to move on, please select "No" and you will be taken back to the Personal Data. You can then make changes or select the "Save for Later" button to come back to this form at a later time.

Yes | No

Click on Yes

Job Information

Depending on the employee selected, as well as the field data selected on the form, various fields will appear or disappear (such as Step, FTE, and Extension and Recall options).

Step 2 of 6: Job Information

Complete the employee's job information and choose Next.
You can use 'Clone From eForm ID' which will copy the job and comprate information from the specified eForm.

▼ Personal Info

Name: Staff Hire **EmplID:** NEW

eForm ID: 2219

Clone From eForm ID

Job Data

***Start Date:** 01/01/2010 **Appt End Date:** 12/31/2012

***Empl Category:** Staff Monthly

***Department:** FIND Financial Services

***Location Code:** GSA General Services Admin Bldg

Position#: 123458

***Empl Group:** CUPE 2950 (Cler/Secr/Library)

***Job Family:** FINA29

***Job Code:** 284002 Financial Proc. Spec 5 (Gr7)

***Step:** 1

***Job Title:** Financial Proc. Spec 5 (Gr7)

***FTE:** 1.000000

Empl Class:

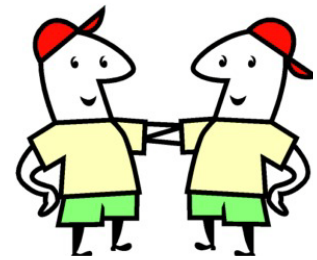
Note: TAs have additional rules re: FTE. See page 20

Enter data into all the fields with asterisks or use the drop down boxes.

If you enter the Position# (which is optional for student appointments), then the next 5 fields are defaulted in for you

The Job Families displayed are dependent on the Empl Group chosen
The job codes displayed in the drop-down are dependent on the Job Family chosen:

HOW TO SAVE TIME!



CLONING

When hiring several employees into the same job type, using the Clone feature will save time.

Once one employee in your dept has been hired, you may "clone" the job information from that form.

Create and enter a new employee, and enter the personal information.

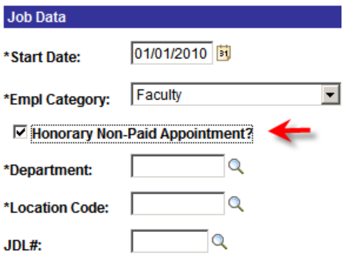
When arriving at Step 2 (this page), enter the eForm # of the data you want to copy.

Clone From eForm ID

The screen will automatically populate the "Job Data" and "Compensation and Funding" fields for you when you tab out of the Clone field.

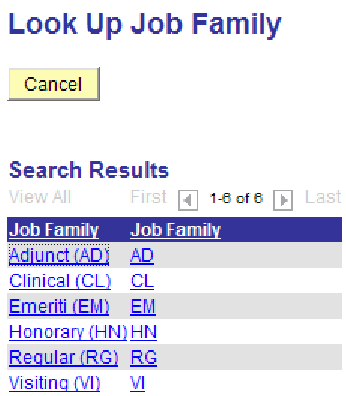
Any of the fields may be then overwritten if required (for example, if everything is the same except the Speedchart, the information can be cloned, and then the Speedchart can be changed)

CAUTION



If you select Faculty as the "Empl Category" in error and have also accidently checked the "Honorary Non-Paid Appointment?" box, ENSURE that the box is *un*clicked before you correct your Empl Category.

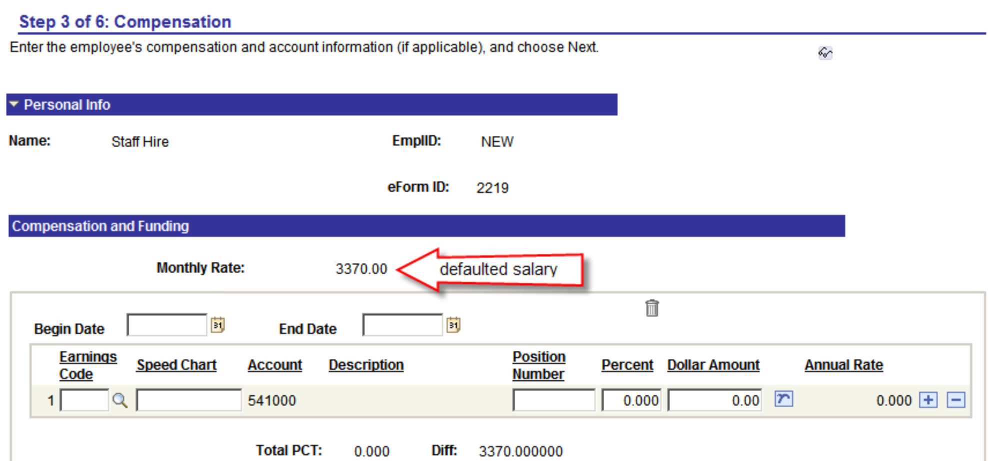
If you correct the Empl Category first, the box disappears but stays clicked on. This will cause it to error when Payroll tries to authorize it. The form will need to be recycled back to the initiator for correction.



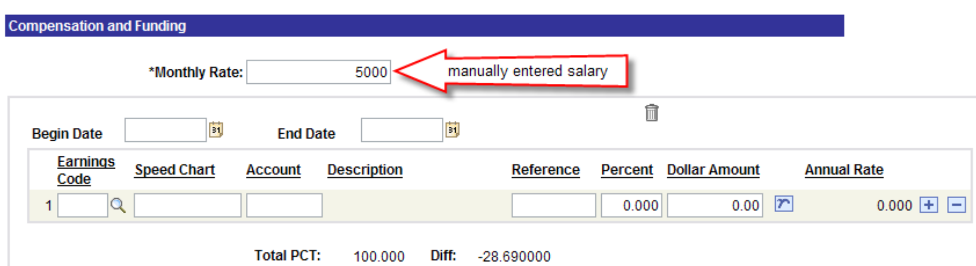
Click on Next >>

Compensation

For the employee's compensation, there are 2 options for a salaried employee – if they are on a set salary scale (eg BCGEU), the Monthly Rate is defaulted in.

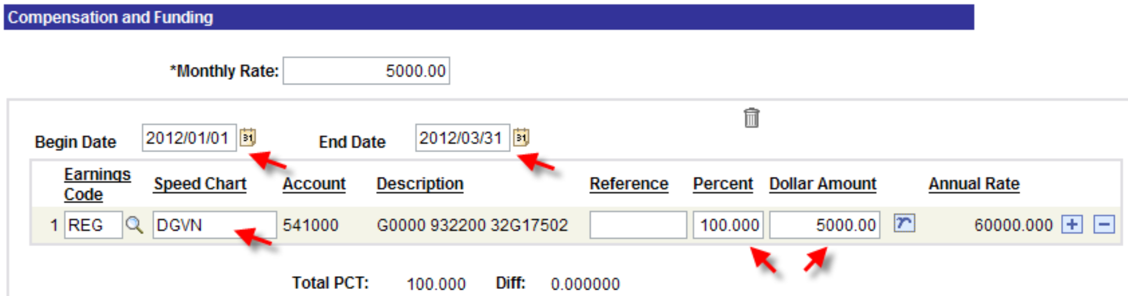


If they are not on a set salary scale (eg M&P), then enter the rate:



Funding Information:

Enter the Begin (and End date if it is a term appt) of the funding source . If there is only one distribution line, the Begin (and End if applicable) dates will always be the same as the Appt Start & End Date.



Enter the Earnings Code & Speedchart (note that the Account defaults) and then enter *either*

- the percent (100% if only one distribution line)
  OR
- the dollar amount (same as monthly rate if only one distribution line).

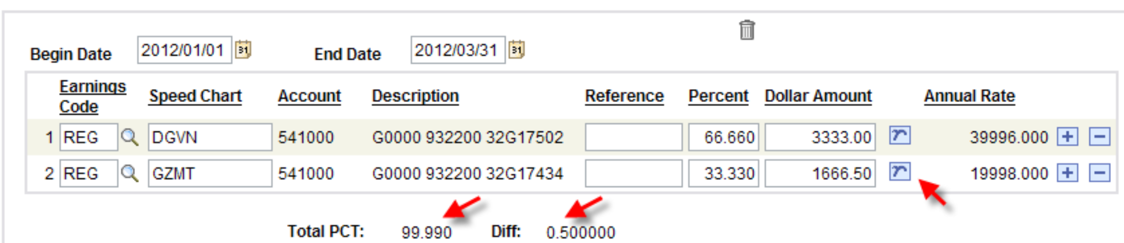
There are additional tools to assist you in determining salaries and FTEs for Graduate Teaching Assistants. See Page 20.

Multiple Distribution Lines

If the employee is to be paid from more than one Speedchart for exactly the same period, then click on the *plus sign* next to the annual rate and enter the next earns code and speedchart. Click on the *minus sign* to delete any extra rows within the date range.

Amount: Lines must total the Monthly rate.

Percent: Lines must total 100%.



Differences: The *Total PCT* line will show that if you have correctly distributed the amount for the date range and display a difference if there is one.

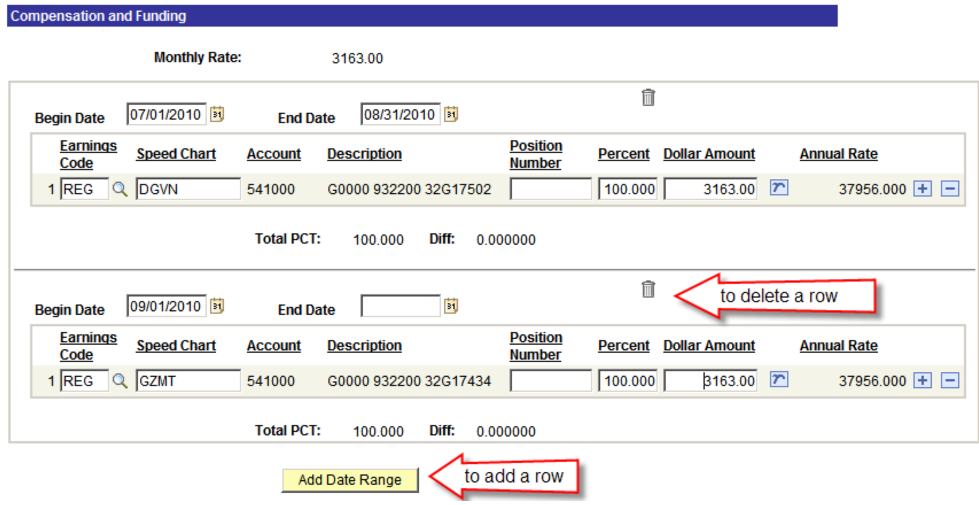
You will not be able to move on if there is a difference. A quick way to resolve differences is to click on the reconcile button next to one of the lines. This will increase or decrease the line Percent/Amount to make everything add up to the total.

If you have more than one date range, each range needs to be reconciled.

Adding Earnings Periods

If the employee is to be paid at a different rate, or from different Speedchart(s), then additional date ranges can be inserted at this point.

Click the Add Date Range box:



The dates must:

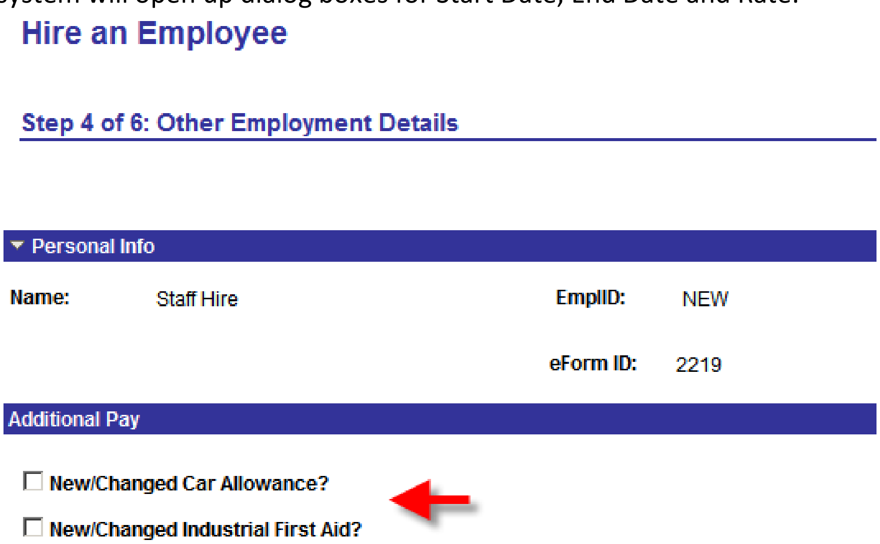
- **have no overlaps**
- **no gaps**
- **be within the start and end dates of the job**

If you need to delete a row, click on the garbage can

When you are finished, click on Next >>

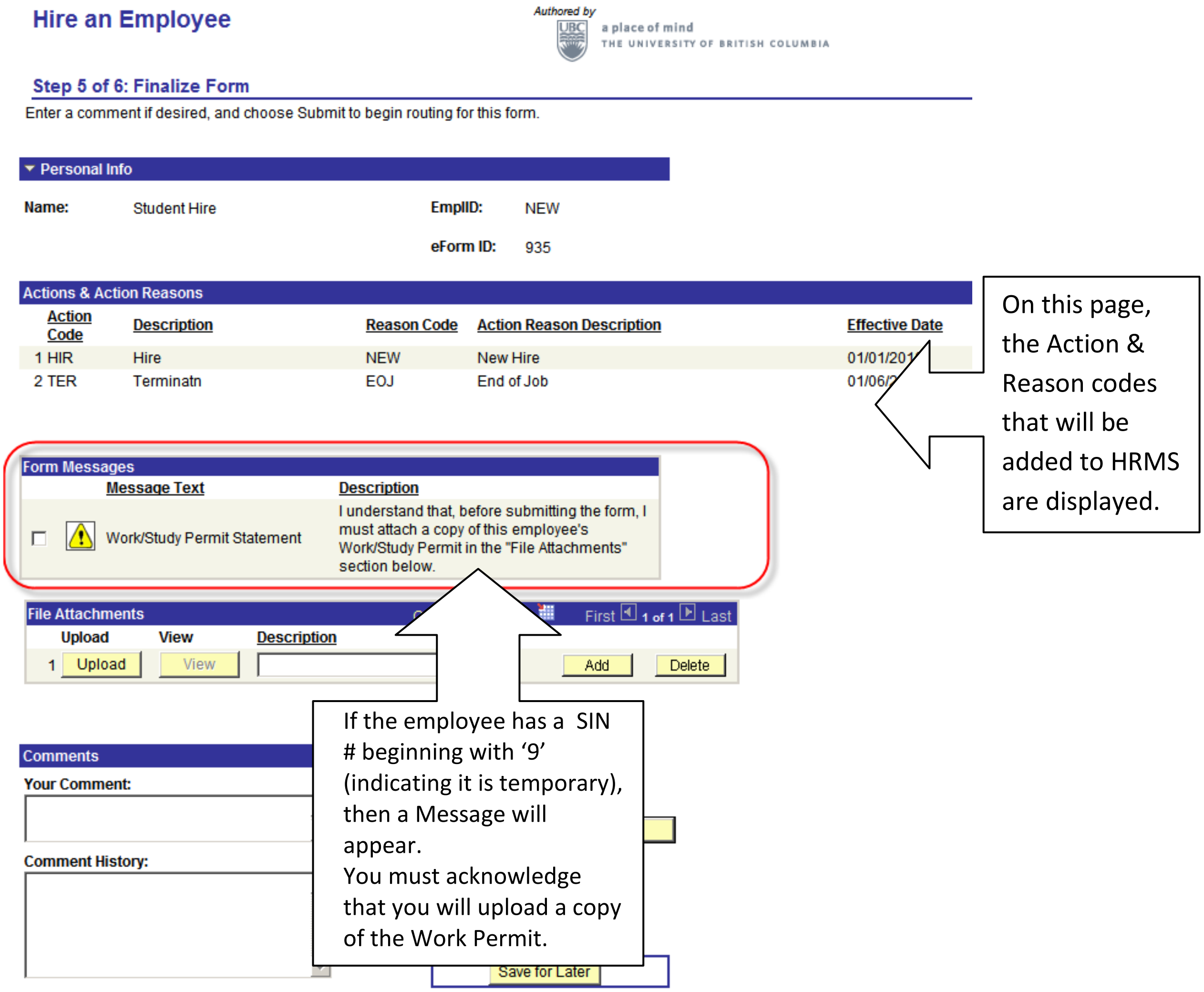
Additional Pay

If an employee is to receive additional money for a Car Allowance or an Industrial First Aid Certificate, please check the appropriate box. The system will open up dialog boxes for Start Date, End Date and Rate:



If not applicable, click on Next >>

Finalizing the Form



If an attachment is <u>required</u> (such as a Work Permit) and not attached, the Payroll rep will "recycle" it back to the initiator for the attachment.

The form will then have to be re-approved before resubmitting to Payroll.

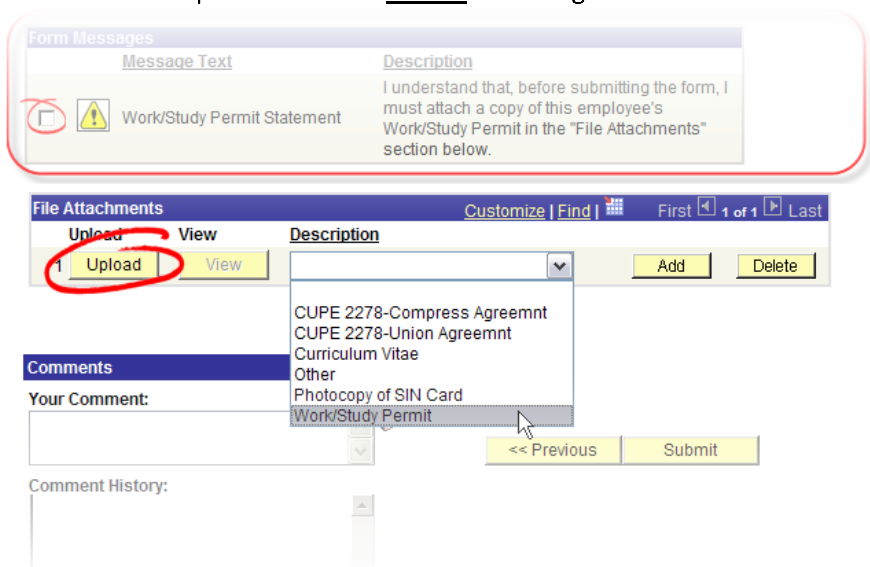
Attaching Documents

Certain documents may be required with a hire or rehire:

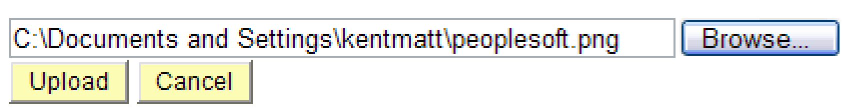
CUPE2278 Compression Agreement: UBC-V only
CUPE2278 Union Agreement: UBC-V only
Curriculum Vitae: Required for new Faculty Hires
Photocopy of SIN card: not required, but recommended (the employer must be shown the SIN card by law)
Direct Deposit: Recommended. Have the employee fill out this form, so their first cheque does not require pickup.
Work / Study Permit: If the employee has a SIN beginning with '9', the system will require a Work/Study permit be uploaded
Offer Letter: (For Faculty only)
TD1: Employee's taxation form

If documents need to be added, scan them and save them to a file on your computer or local server.

Select the Description of the file **<u>before</u>** attaching it.



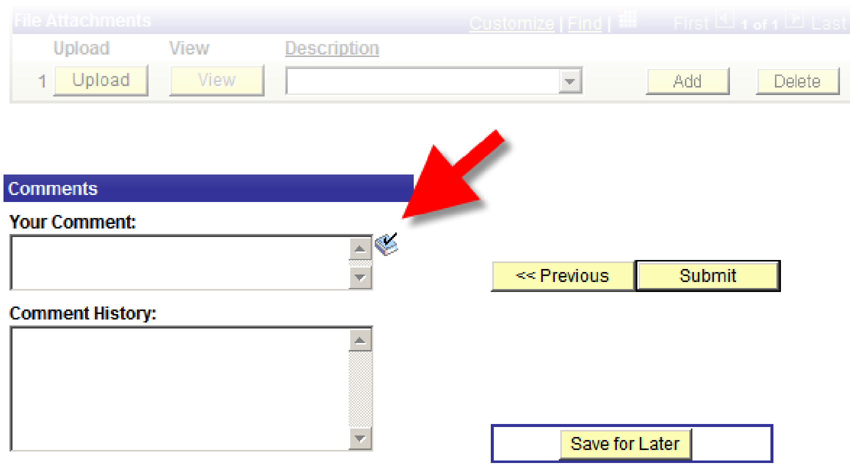
Pressing the Upload button will allow you to select the file (click on Browse).
Once the file is selected, press Upload again:

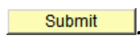


More than one may be added if necessary.

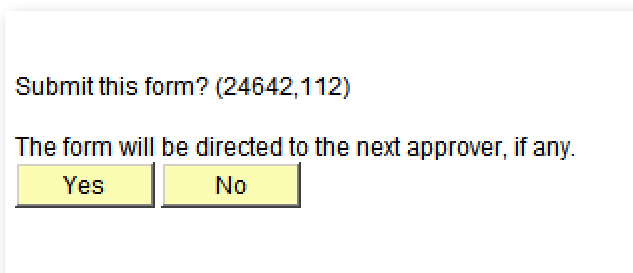
Comments

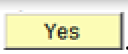
Add any needed comments (these are available for everyone to see) :



If you are finished your form, click on .

The following message will appear.



If ready, click on .

The following message will be displayed.:

Don't forget to pass along the employee ID and PIN to your new employee!

They will need it to set up their CWL account

New Employee ID successfully created!

Employee Name: Staff Hire

Department Financial Services

Empl ID # 2076454

CWL signup PIN 6419

Return to Hire

Provide the employee ID and the PIN to your employee so they can apply for a CWL account.

If the PIN is lost or forgotten:

(1) Return to the Early ID screen and re-enter the SIN. The PIN and employee ID will be displayed.

(2) Use the employee ID to display the PIN by using the Personal Data page.

HRMS assigns the Emplid # and the CWL signup PIN #

Click on the Return to Hire link.

Hire an Employee

Step 7 of 7: Form Finalized

Congratulations, you have successfully submitted this form!

Personal Info

Name: Staff Hire **EmplID:** 2076454

eForm ID: 2219

Form Status

eForm ID: 2219

You have just AUTHORIZED this form. This action passed the form to the SYSTEM for further processing.

If you want to see a summary of your form – click on "View This Form"

Go To Worklist
View This Form
Go To ePAF Home Page
Close This Form

Congratulations - you are now finished this form.

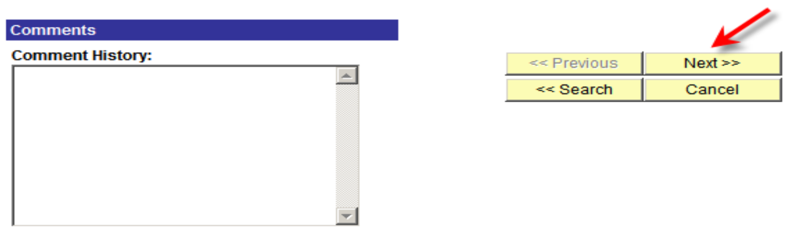
To start a new one, click on Go To ePAF Home Page.

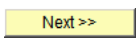
What Happens Next

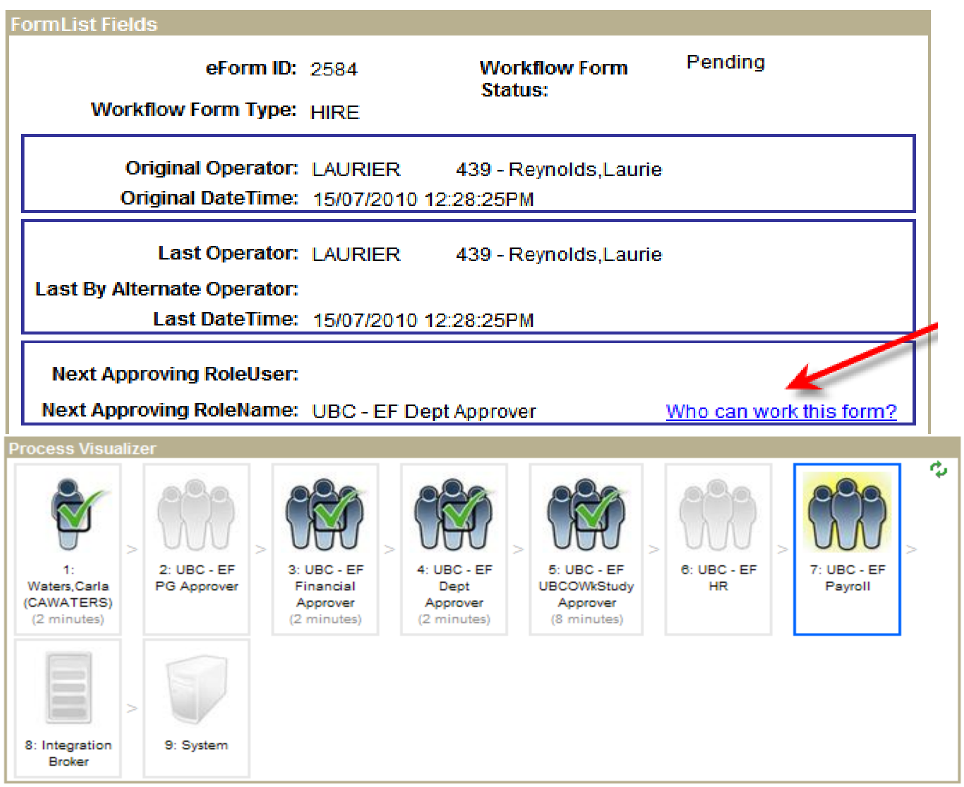
When a form is submitted, a notification will automatically be e-mailed to the approver (unless the approver requests "No Notification" on their access application form).

If the Approver clicks on "recycle" or "deny", the initator will receive an email notification. A "recycled" ePAF will show on the initiator's worklist.

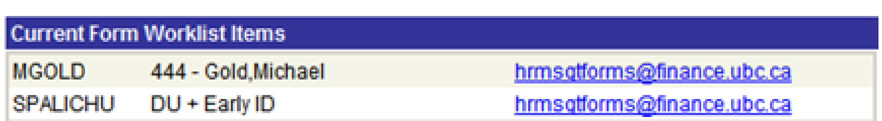
If you want to see who the form has actually been sent to - click on View This Form – HRMS will display a 2 page form:


Comments
Comment History:
<< Previous | Next >>
<< Search | Cancel

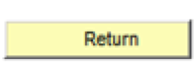
Click on 
Next >>


FormList Fields
eForm ID: 2584 Workflow Form Status: Pending
Workflow Form Type: HIRE
Original Operator: LAURIER 439 - Reynolds,Laurie
Original DateTime: 15/07/2010 12:28:25PM
Last Operator: LAURIER 439 - Reynolds,Laurie
Last By Alternate Operator:
Last DateTime: 15/07/2010 12:28:25PM
Next Approving RoleUser:
Next Approving RoleName: UBC - EF Dept Approver Who can work this form?
Process Visualizer
1: Waters,Carla (CAWATERS) (2 minutes)
2: UBC - EF PG Approver
3: UBC - EF Financial Approver (2 minutes)
4: UBC - EF Dept Approver (2 minutes)
5: UBC - EF UBCOWkStudy Approver (8 minutes)
6: UBC - EF HR
7: UBC - EF Payroll
8: Integration Broker
9: System

Then click on Who can work this form? to see the actual names of the Dept Approvers:


Current Form Worklist Items

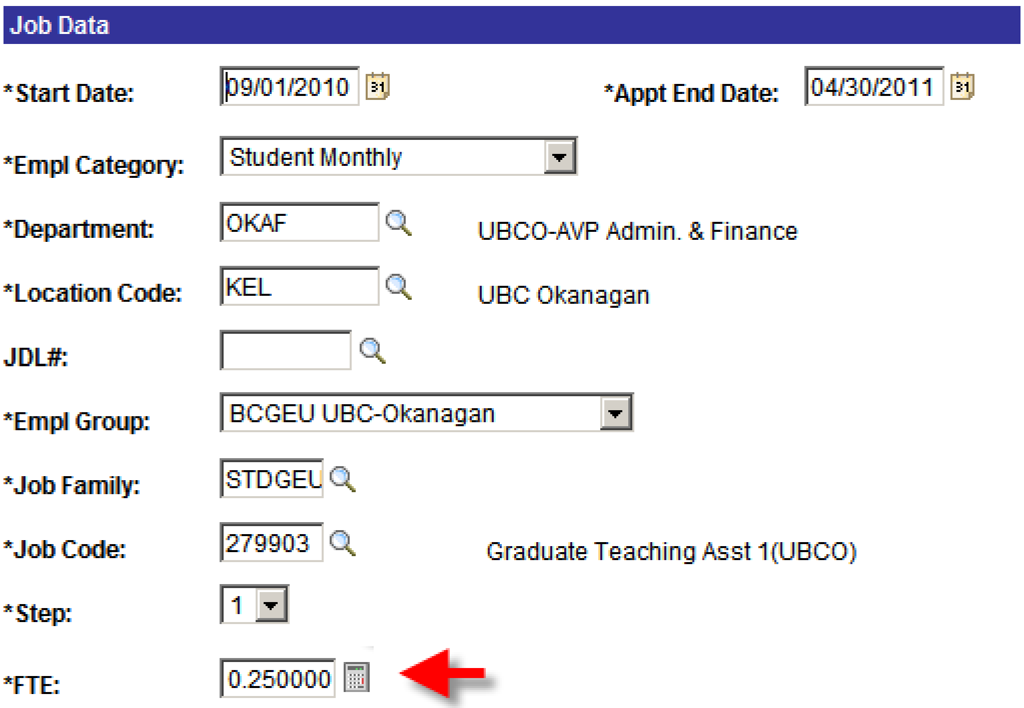
MGOLD	444 - Gold,Michael	hrmsgtforms@finance.ubc.ca
SPALICHU	DU + Early ID	hrmsgtforms@finance.ubc.ca


Return

Work Study and Work Learn appointments will go to the worklist of the UBCO Work Study Approver AFTER the Dept Approver approves the appointment. All other student appointments bypass this approver and route directly to Finance after the Dept Approver.

TEACHING ASSISTANTS – Steps, FTE and Compensation

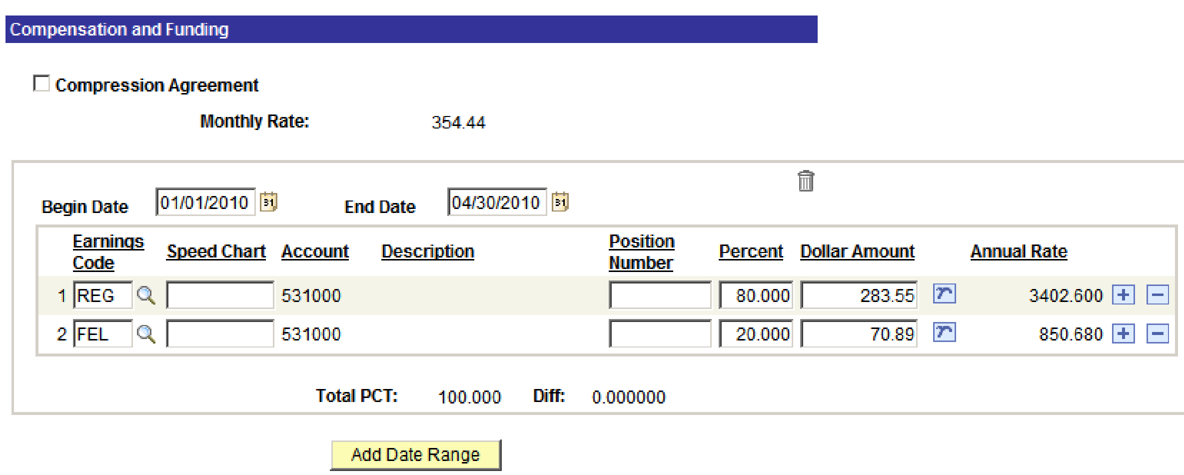
As per the Collective Agreement – Teaching Assistants are to be paid under the agreed pay scales and therefore should not be paid as "Per Period" amounts. When entering a TA appt into an ePAF, the rate will default for you from the salary table after the Step and FTE have been entered.



Job Data

*Start Date:	09/01/2010	*Appt End Date:	04/30/2011
*Empl Category:	Student Monthly		
*Department:	OKAF	UBCO-AVP Admin. & Finance	
*Location Code:	KEL	UBC Okanagan	
JDL#:			
*Empl Group:	BCGEU UBC-Okanagan		
*Job Family:	STDGEU		
*Job Code:	279903	Graduate Teaching Asst 1(UBCO)	
*Step:	1		
*FTE:	0.250000		

Please note that for job codes 279903 & 279904, ePAF will display the 80% REG & 20% FEL lines for you. If you go back and change the FTE, when this page is displayed again, the percentages will not be correct and you will need to reset to 80/20. If you forget, the system will display an error when you hit NEXT.



Compensation and Funding

☐ Compression Agreement

Monthly Rate: 354.44

Begin Date 01/01/2010 End Date 04/30/2010

	Earnings Code	Speed Chart	Account	Description	Position Number	Percent	Dollar Amount	Annual Rate
1	REG		531000			80.000	283.55	3402.600
2	FEL		531000			20.000	70.89	850.680

Total PCT: 100.000 Diff: 0.000000

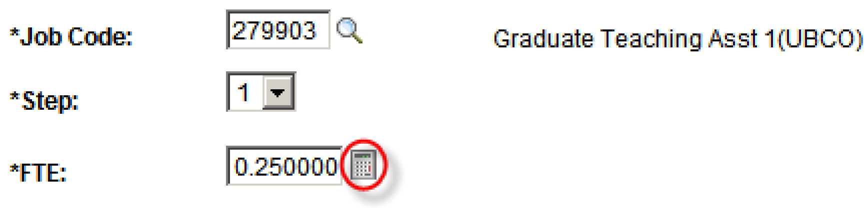
Add Date Range

If hiring an hourly TA, the system will split the hourly rate into the 80/20 % split.

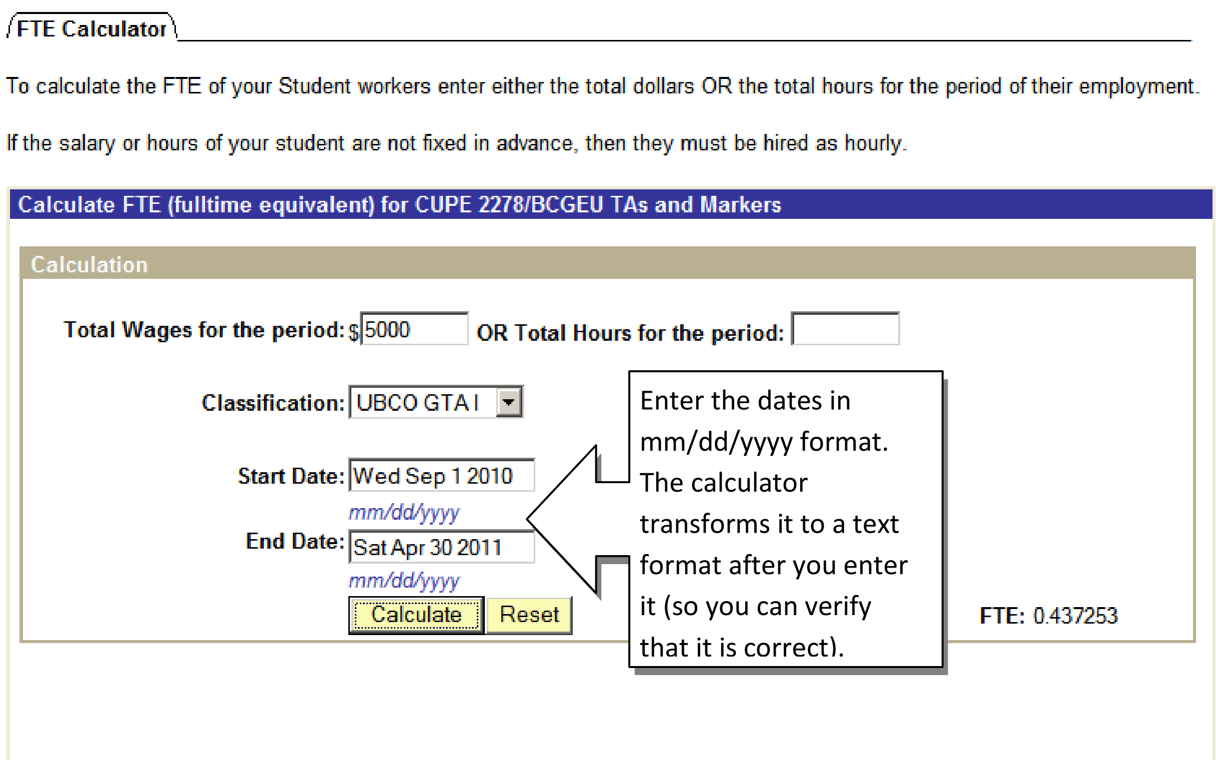
“Per Period” amounts

While technically TAs are not be paid as “Per Period” amounts , departments often hire with a specific amount of funds available, and wish to pay the TA for hours up to this amount.

Payroll has built an FTE calculator to assist with these - click on the calculator icon next to the FTE field:



Enter the dollar amt or total hours to be worked for the period, select the TA level, start & end dates and hit Calculate. The correct FTE will be displayed. This is the FTE to be entered onto the ePAF.

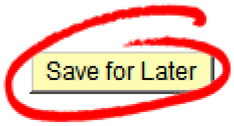


Calculations are based on the current BCGEU (Letter of Understanding #2 – Teaching Assistants) and on a fulltime work week of 12 hours.

If you wish to use the calculator separately from ePAF, then use the link below.

http://www.finance.ubc.ca/payroll/admin/salarycalculator.htm

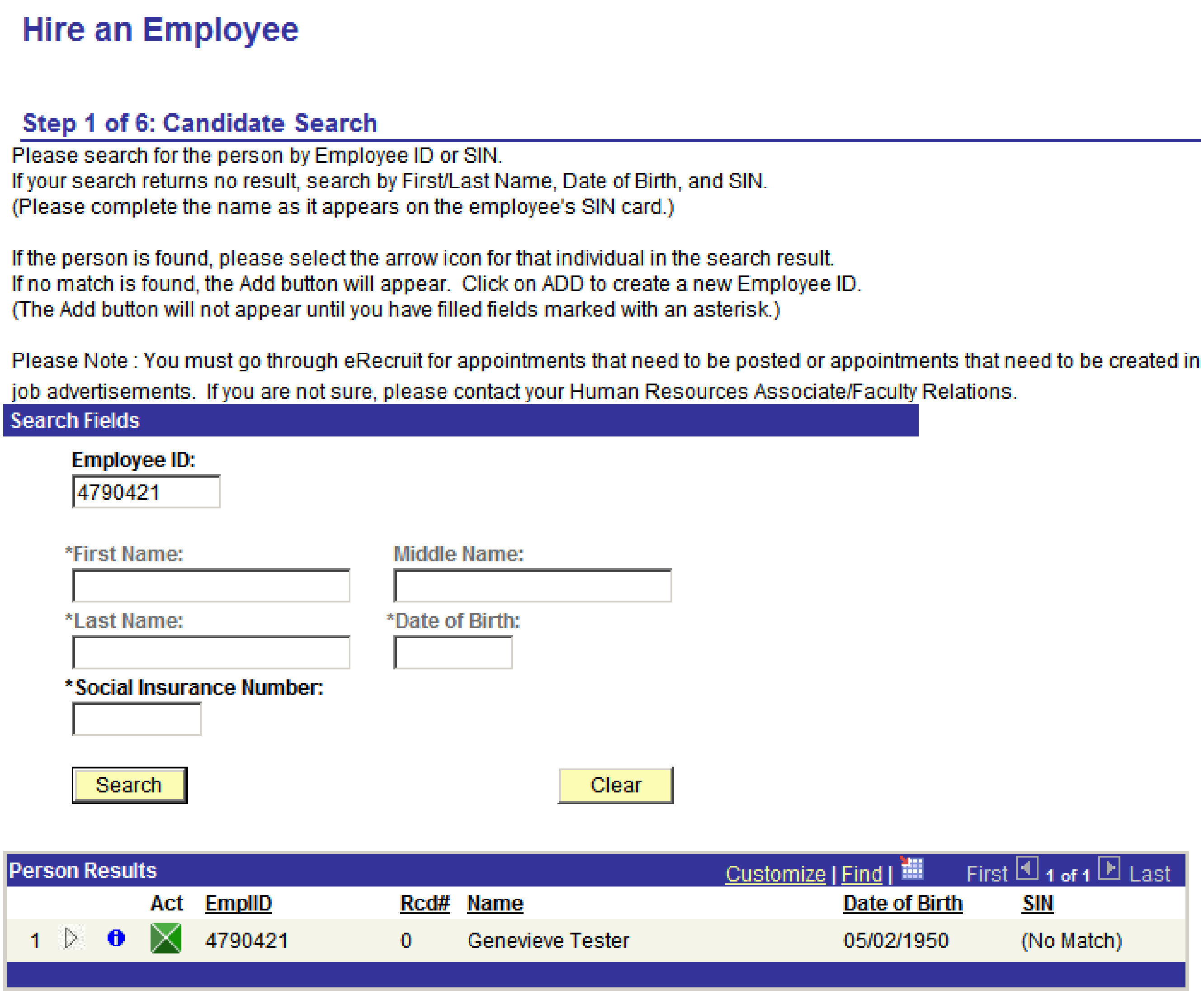
SAVE FOR LATER



While working on an ePAF, you may hit the Save for Later button.

Only you, as the initiator, may continue the form at a later time.

When you want to return to a form you have Saved for Later, go back to the original Start a New ePAF link, enter the SIN# or name (for a brand new employee since if you Saved for Later they don't yet have an employee ID) or an emplid # for an existing/previous employee:



Click on the ▷ and the following will appear.

Continue Save For Later Hire?

There is an existing Save-for-Later form for this employee.

Click "Proceed" if you would like to continue with your saved form.

Click "Withdraw" if you would like to erase the saved form. You will be taken back to the search page where you will be able to start a brand new form for this employee.

Click "Cancel" to do neither - you will be taken back to the search page.

.

Proceed

Withdraw Cancel

Click on Proceed

REAPPOINTMENTS, EXTENSIONS, AND CONCURRENT JOBS

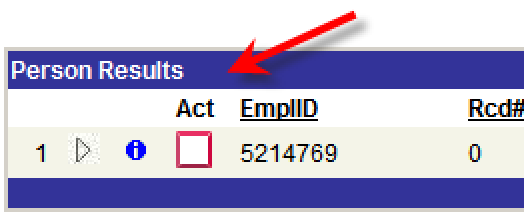
Changing Existing Jobs

- Rehiring an employee back into the same job is considered a Rehire or Extension
- Hiring an employee who is active in one department into another is a transfer if the original appointment is to be terminated
- If you are hiring an employee into a position where they are not terminating their existing position, it is an Additional Hire into a concurrent job.

Begin the ePAF as you would a normal Hire:

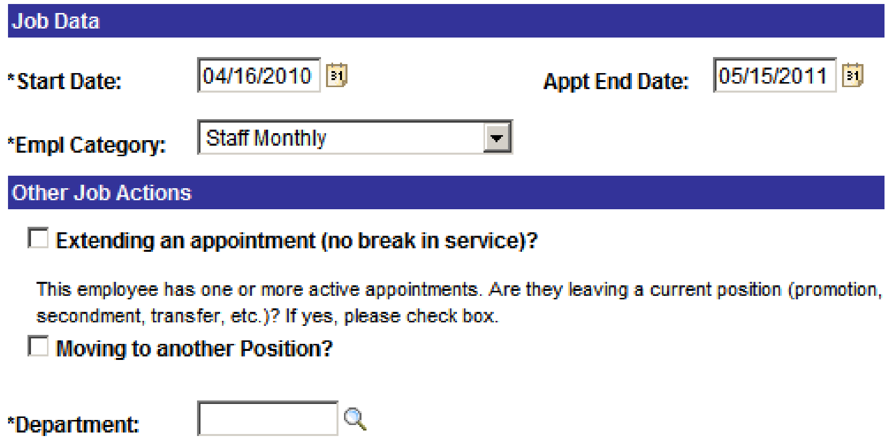
Go to(*Department Self Service>ePAF Home Page>Start a New EPAF>Hire an Employee*

Enter the emplid # of the employee being extended/transferred/hired concurrently.



- If the *Act* (Active) box is (green), the employee is still active and the system will bypass the personal data.
- If the *Act* box is white (the employee is not active as of today), it will require you to verify/amend the personal information.

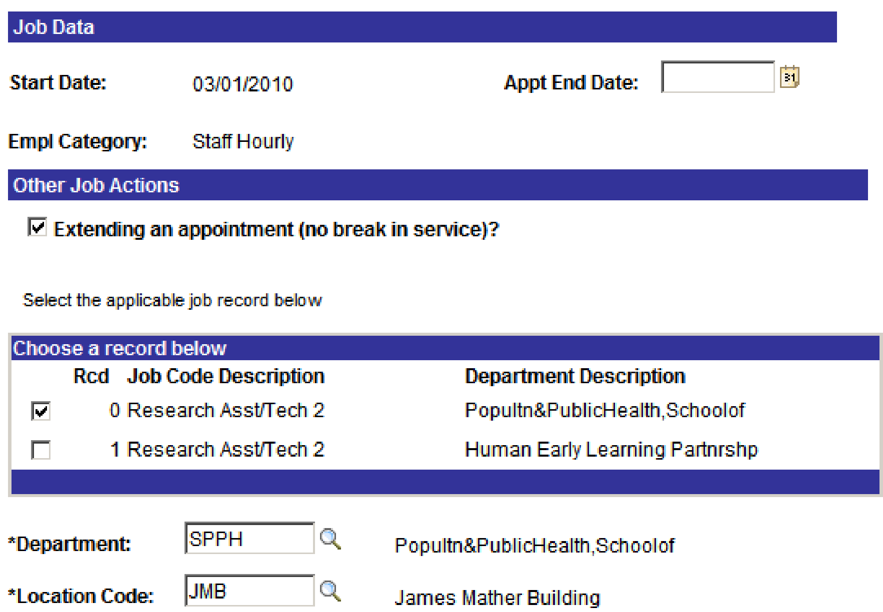
Enter the **Start Date**, **Appt End Date** (if applicable) and the **Empl Category**. ePAF will open up an **Other Job Actions** dialog box:



Extensions

If you click on "Extending an appointment", the system will respond with one of 2 options:

- If the employee only has one employment record, the system will default in most of the job information from that position.
- If the employee has more than one employment record, the system will display any jobs eligible for reappointment regardless of Empl Category:



It will not display any ongoing positions but will display any active term positions and any terminated job records.

Click on the box beside the job you are extending and most of the job information will default in.

Be Careful With the Start Date!

A break in service (even one day) should be a Rehire action, not an Extension.

Example: If the previous job ended Feb 28 and it doesn't re-start until Mar 9, DO NOT check the "extension box" or ePAF will default in Mar 1.

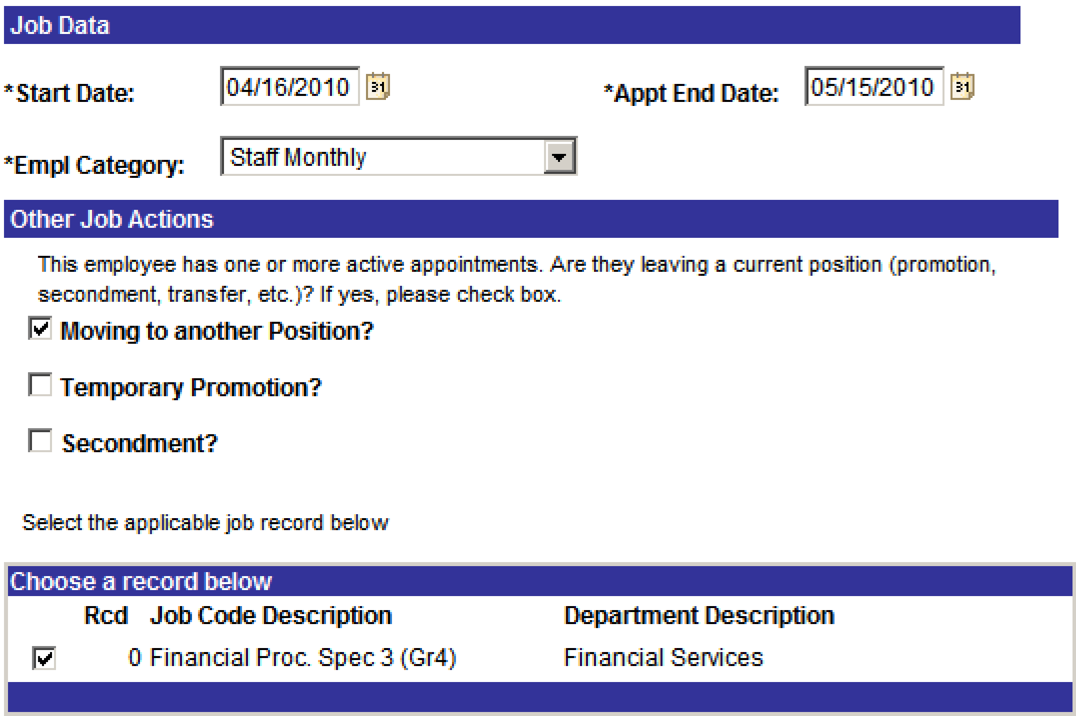
Weekends

ANY break in service (even one day) can affect seniority, vacation entitlements, etc.

If the job ends on a weekend, then you should start the new job with *no* break in service. (Don't worry - HRMS is smart enough to only pay Staff Appointments from Monday to Friday.)

Transfers (Moving to Another Position)

If you click on “Moving to another position”, the system will open some dialog boxes and display any active positions as of the start date you entered. (Positions terminated as of this date do not display as they would need to be “rehired” and not transferred.)


Job Data

*Start Date: 04/16/2010 *Appt End Date: 05/15/2010

*Empl Category: Staff Monthly

Other Job Actions

This employee has one or more active appointments. Are they leaving a current position (promotion, secondment, transfer, etc.)? If yes, please check box.

☑ Moving to another Position?

☐ Temporary Promotion?

☐ Secondment?

Select the applicable job record below

Choose a record below

	Rcd	Job Code Description	Department Description
☑	0	Financial Proc. Spec 3 (Gr4)	Financial Services

If more than one employment record displays, select the one that is transferring.

Click on *Temporary Promotion* or *Secondment* if appropriate.

The system will read the information entered and determine whether the action will be Transfer or Promotion.

The action of *Recall* will only be displayed when the employee is unionized and currently in a layoff status.

Adding a Concurrent Job

If the job you are hiring the employee into is to be in addition to their existing positions (i.e. they are not leaving an existing position), then leave both “Extending an appointment” and “Moving to another position” blank.

Complete the rest of the job information in the same way as a Hire and submit the form.

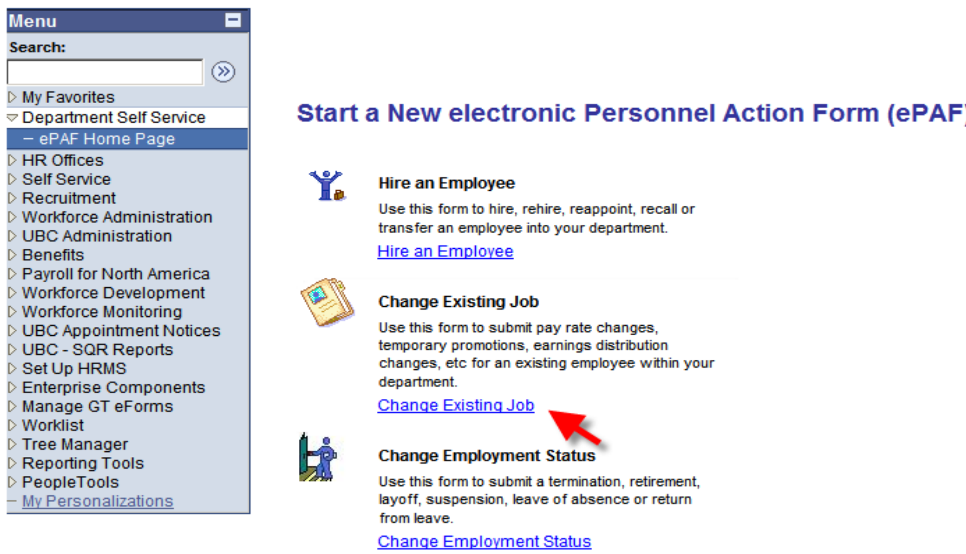
Changing Existing Jobs

The Change Existing Job Form is used to change an employee's current job. Examples would be

- Temporary Promotions
- Pay Rate Changes
- FTE changes
- Increased Workload
- Job Reclass

Staff Job Change Form is only to be used for ACTIVE employees.

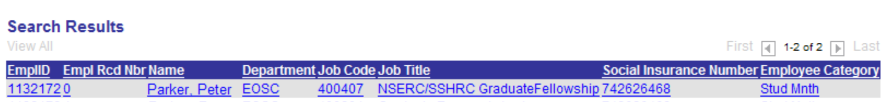
Navigate to Department Self Service > ePAF Home Page > Start a New ePAF > Change Existing Job:



Enter an EMPLID #, SIN # or Name, just as you would for a Hire.

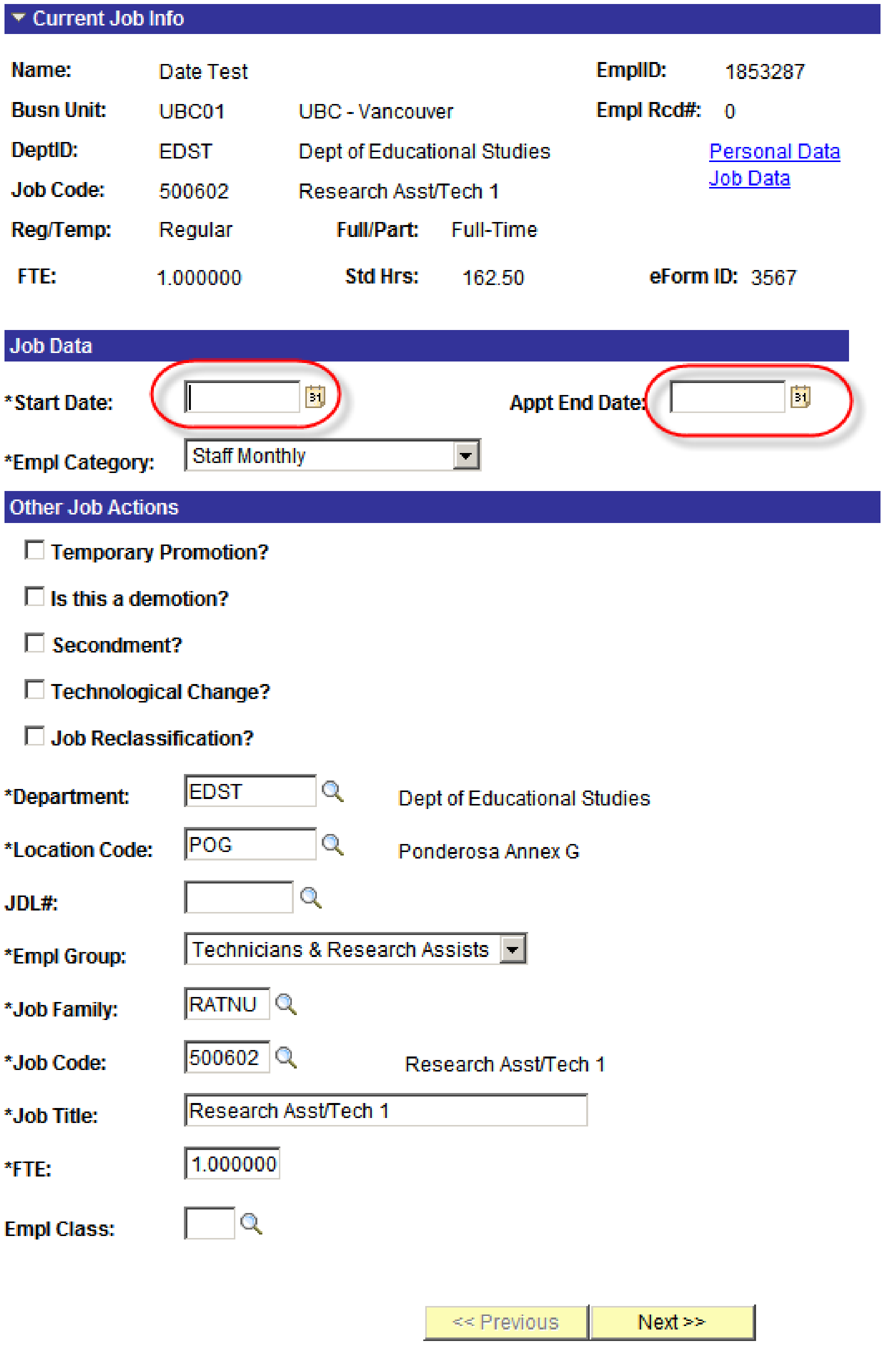
If an employee cannot be located, it may be because they are no longer active (an employee is no longer active when the Termination Date is less than the current date).

If there is only one active job then ePAF will display it. Otherwise, a list will be presented. Click on the job you are changing

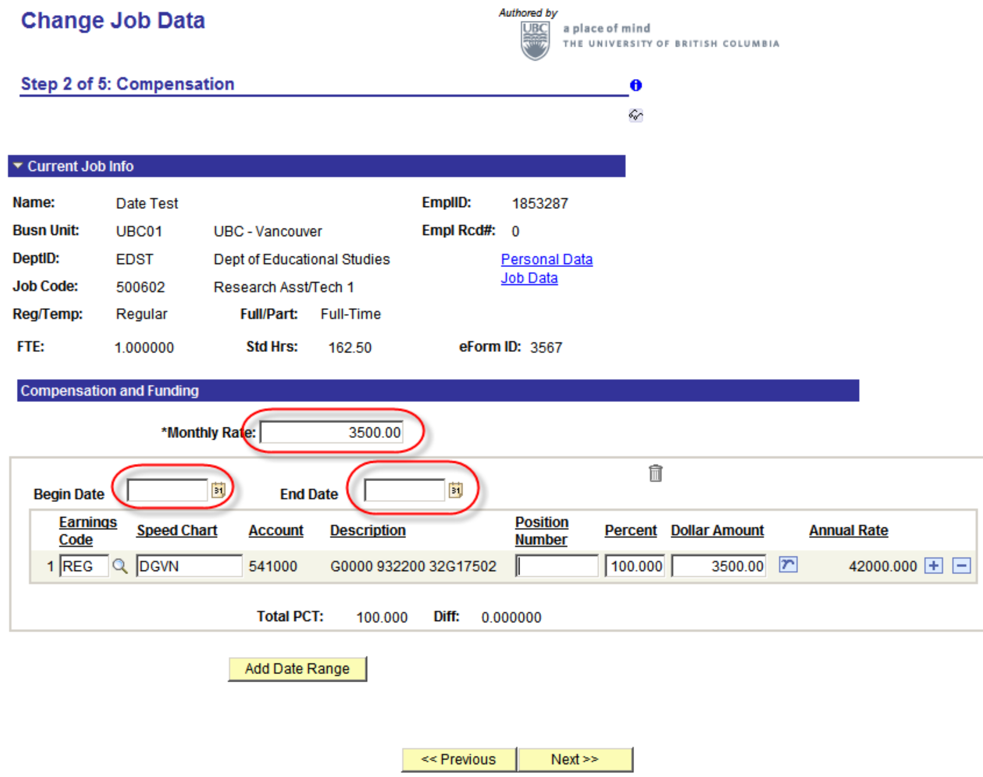

Search Results

View All First 1-2 of 2 Last

EmplID	Empl Rcd Nbr	Name	Department	Job Code	Job Title	Social Insurance Number	Employee Category
1132172	0	Parker, Peter	EOSC	400407	NSERC/SSHRC GraduateFellowship	742626468	Stud Mnth
1132172	1	Parker, Peter	EOSC	400201	Graduate Research Asst	742626468	Stud Mnth



1. Enter the Start date (and End date if required)
2. click on any of the applicable boxes under *Other Job Actions* if appropriate - these boxes are used to help determine the Action/Reason.
    - These additional actions are not applicable to student positions, and will not display
3. Click on Next >>.

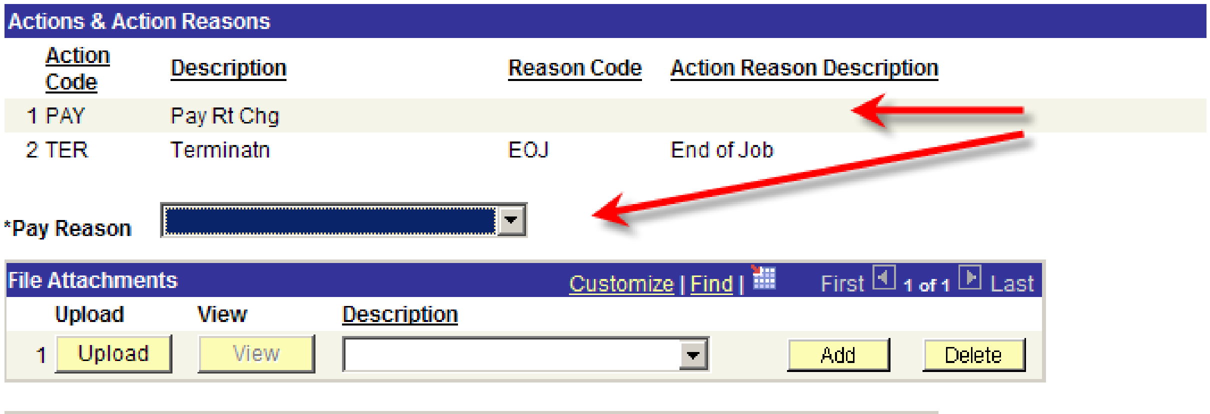


Enter

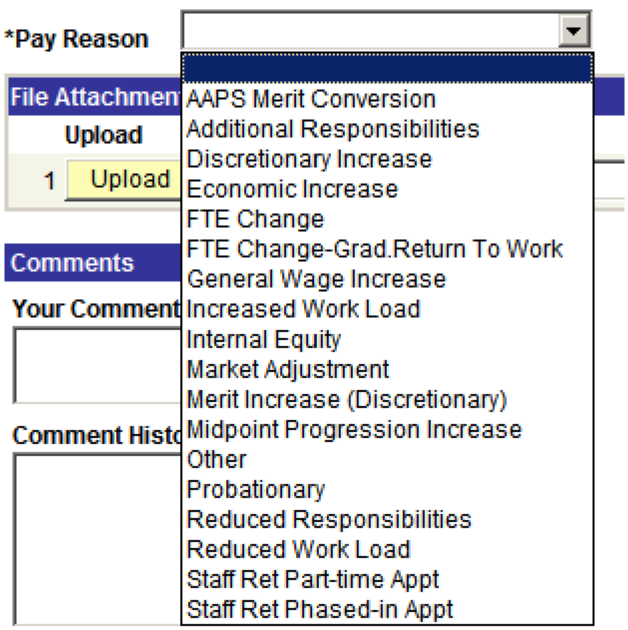
- current or new Monthly Rate
- Begin date
- End date (if required)
- amend the Speedchart info if this is an earnings distribution change.

Click on Next >>

The system will determine the Action based on what you have entered:



If there is a pay rate change, a Pay Reason drop down will appear.
You need to specify a reason from the drop down box:



Now that you are finished, click on Submit

Viewing a Change Form

When viewing a Change Form – the top area "Current Job Info" is the status as of today's date. The "Current Job Information" shown under the Actions & Reasons, is that status as of the effective date.

ePAF will display the Action & Reason for the Job Change and highlight the fields that have been changed:

Current Job Info

Name:	Date Test		**EmplID:**	1853287
Busn Unit:	UBC01	UBC - Vancouver	**Empl Rcd#:**	0
DeptID:	EDST	Dept of Educational Studies		Personal Data
Job Code:	500602	Research Asst/Tech 1		Job Data
Reg/Temp:	Regular	**Full/Part:** Full-Time		
FTE:	1.000000	**Std Hrs:** 162.50	**eForm ID:**	3567

Actions & Action Reasons

Action Code	Description	Reason Code	Action Reason Description
1 PAY	Pay Rt Chg	MPI	Midpoint Progression Increase

Pay Reason Midpoint Progression Increase

- ☐ **Temporary Promotion?**
- ☐ **Is this a demotion?**
- ☐ **Secondment?**
- ☐ **Technological Change?**
- ☐ **Job Reclassification?**

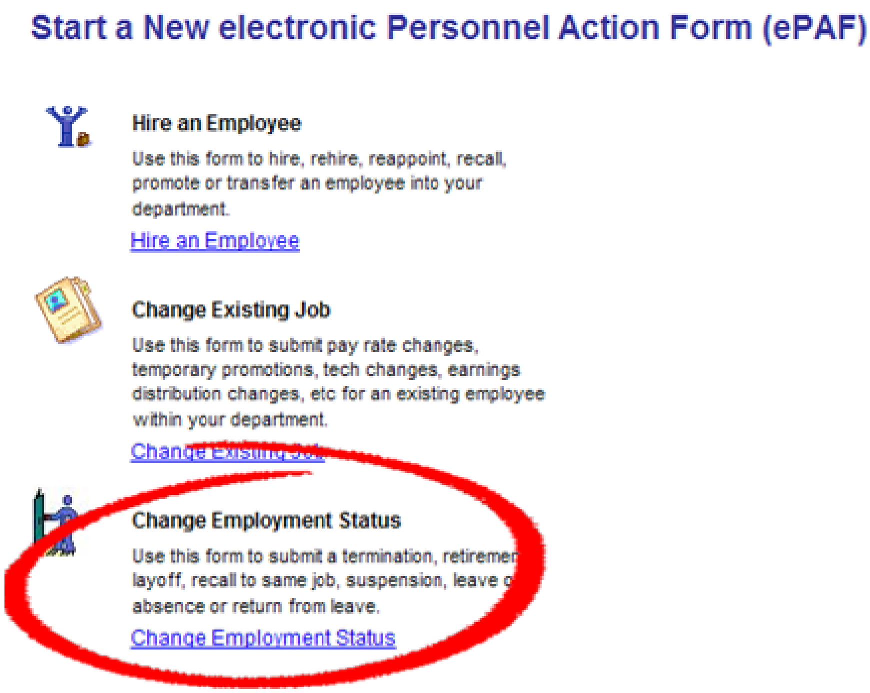
Current Job Information			New Job Information		
Start Date:	03/01/2010		**Start Date:**	04/01/2010	**Appt End Date:**
Empl Category:	Staff Monthly		**Empl Category:**	Staff Monthly	
Department:	EDST	Educ Study	**Department:**	EDST	Educ Study
Location:	POG	Ponderosa Annex G	**Location:**	POG	Ponderosa Annex G
JDL#:			**JDL#:**		
Empl Group:	NUT		**Empl Group:**	NUT	
Job Family:	RATNU		**Job Family:**	RATNU	
Job Code:	500602	Research Asst/Tech 1	**Job Code:**	500602	Research Asst/Tech 1
Job Title:	Research Asst/Tech 1		**Job Title:**	Research Asst/Tech 1	
FTE:	1.000000		**FTE:**	1.000000	
Empl Class:			**Empl Class:**		
☐ **Head/SubHead?**		**Rate:**			
☐ **LSI?**		**Rate:**			
Monthly Rate:		3500.00	**Monthly Rate:**		3800.00

STAFF STATUS CHANGE FORM

The Staff Status Change Form is used to change the status of an employee's current job. Examples would be

- Leaves
- Return from Leaves
- Terminations

Navigate to *Department Self Service > ePAF Home Page > Start a New ePAF > Change Employment Status:*



Enter an EMPLID #, SIN # or Name. Format for name is "Last Name,First Name".

If there is only one job then ePAF will display it.

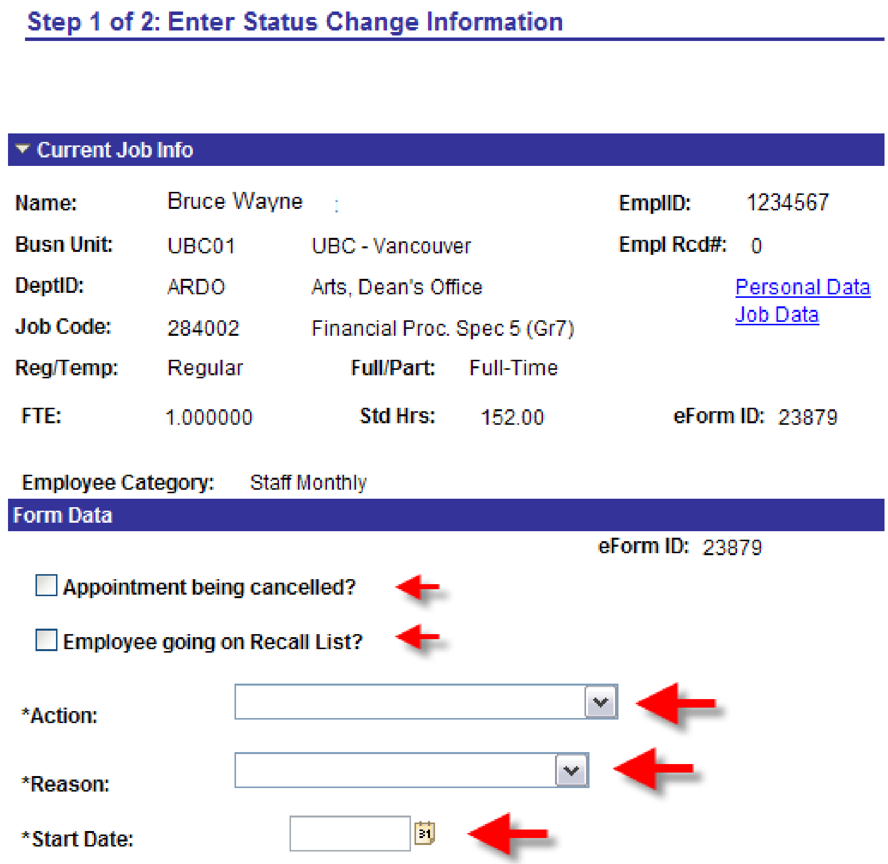
Otherwise, a list will be presented. ePAF will display all Job Records (including Terminated). Look at the *Payroll Status* column, and select the appropriate one:

Search Results

View All First 1-3 of 3 Last

EmplID	Empl Rcd Nbr	Name	Department	Job Code	Job Title	Social Insurance Number	Employee Category	Payroll Status
5102642	0	Science,Applied	BNRC	400201	Graduate Research Asst	339602534	Stud Mnth	Terminated
5102642	1	Science,Applied	FIND	400203	Undergrad Academic Asst	339602534	Stud Mnth	Active
5102642	2	Science,Applied	AQUA	290102	Lifeguard/Instructor	339602534	Stud Hr	Active

After selecting the employee's record, ePAF will display the current information. The form data will have different check boxes depending on the "union" group of the employee.



Actions

Cancelling

If cancelling an appointment that was issued in error (that has already been executed to HRMS), click on the "*Appointment being cancelled?*" box.

Union Layoffs

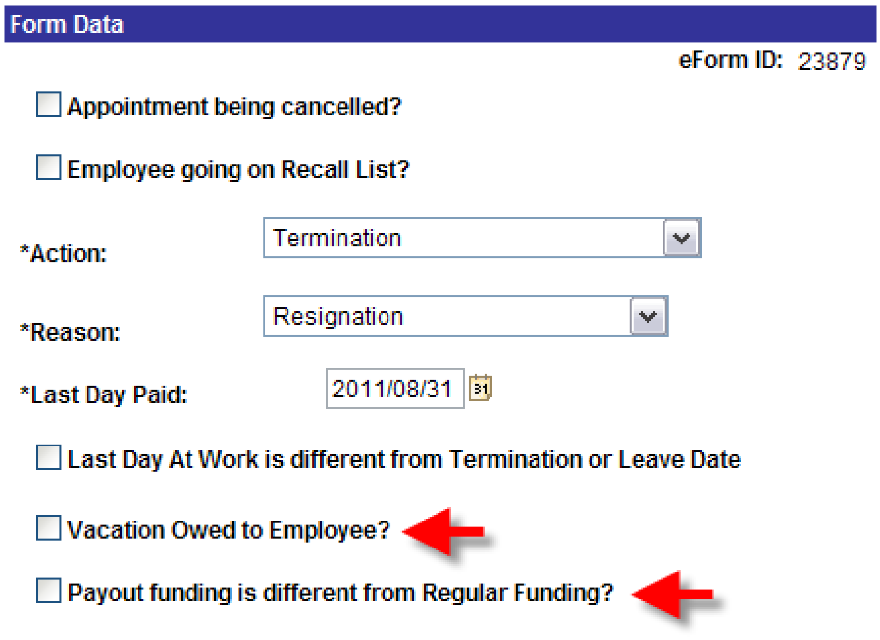
If a union employee is going on layoff and onto the recall list, click on the "*Employee going on Recall List?*" checkbox (this option will not be visible for nonunion employees).

If neither of the check boxes apply to your action, select an *Action* and then a *Reason* from the drop down lists.

Depending on what Action is selected, the date fields will change and other boxes will appear and disappear.

Enter the Action, Reason and Date fields and any other appropriate fields/check boxes.

When you select the Action – *Termination, Layoff, or Retirement*, options become available regarding vacation pay:


Form Data

eForm ID: 23879

☐ Appointment being cancelled?

☐ Employee going on Recall List?

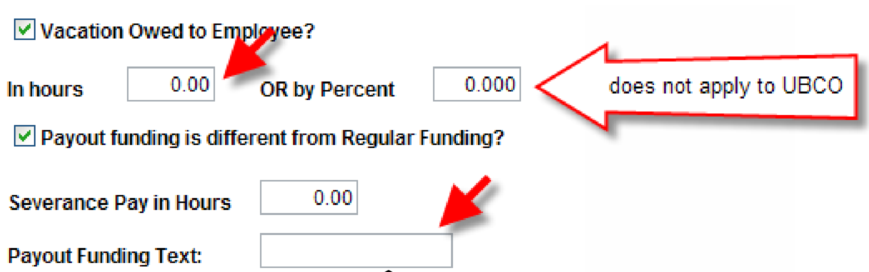
*Action:	Termination
*Reason:	Resignation
*Last Day Paid:	2011/08/31

☐ Last Day At Work is different from Termination or Leave Date

☐ Vacation Owed to Employee?

☐ Payout funding is different from Regular Funding?

If these dialog boxes are clicked, then more boxes are available.


☑ Vacation Owed to Employee?

In hours 0.00 OR by Percent 0.000

☑ Payout funding is different from Regular Funding?

Severance Pay in Hours 0.00

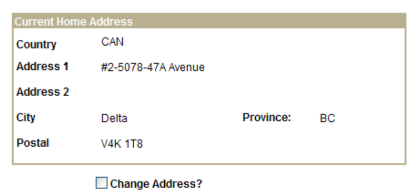
Payout Funding Text:

This is a freeform field to enter a speedchart if vacation is to be paid from a different PG than the normal salary.

Address Upon Termination

It is very important that employees terminating or going on leave from UBC have an up to date address.

T4 slips, ROEs, Leave of Absence invoices, etc. are mailed out to the address on file. You have the opportunity to update the address at the time of termination:

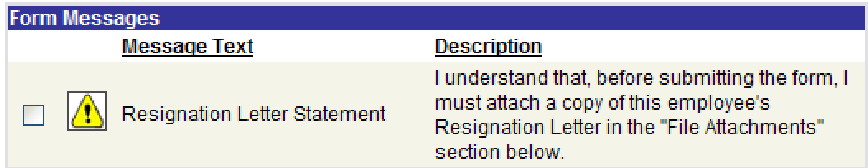

Current Home Address

Country	CAN		
Address 1	#2-5078-47A Avenue		
Address 2			
City	Delta	Province:	BC
Postal	V4K 1T8		

☐ Change Address?

Attachments

Resignations require a copy of the resignation letter be attached:



Form Messages

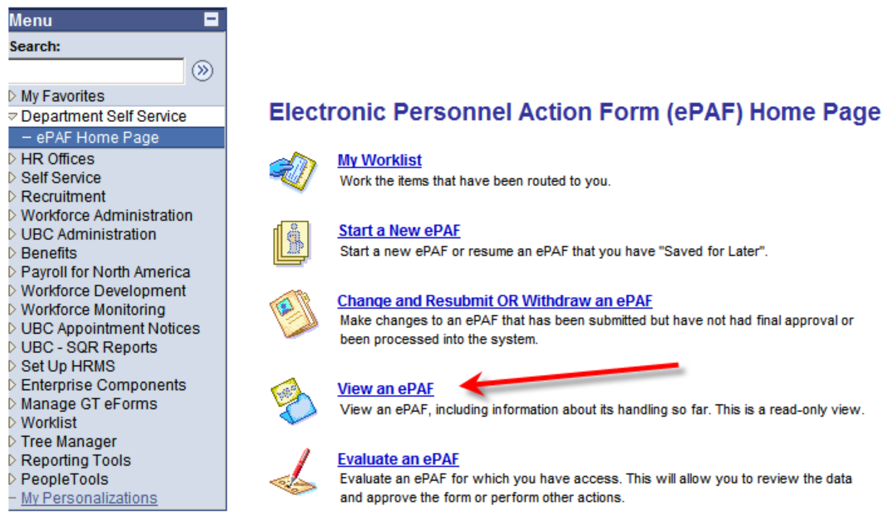
		Message Text	Description
☐	⚠	Resignation Letter Statement	I understand that, before submitting the form, I must attach a copy of this employee's Resignation Letter in the "File Attachments" section below.

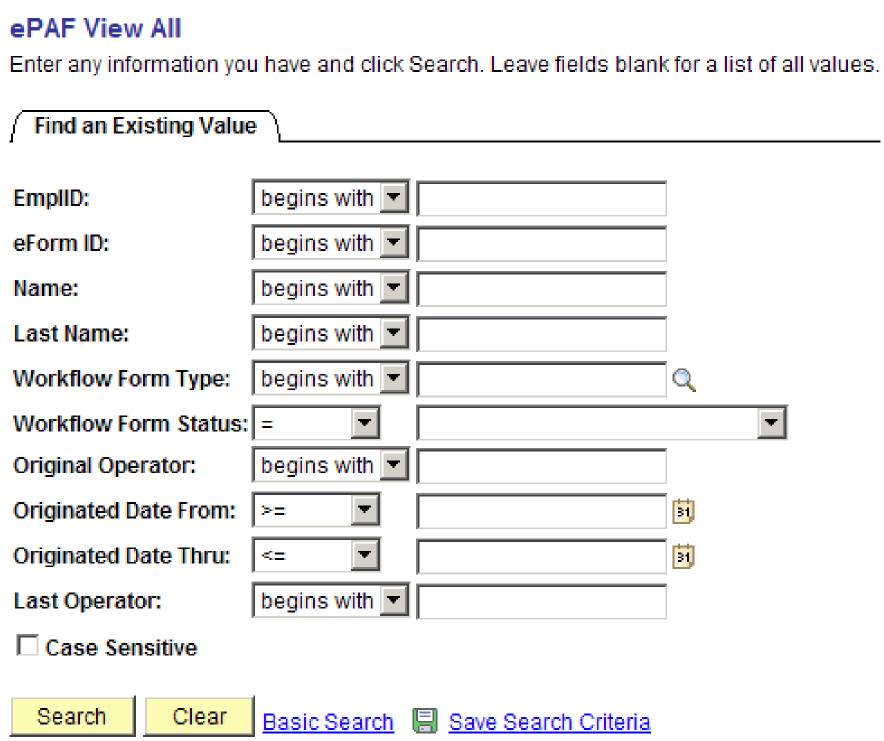
When your form is complete, click on Submit.

Worklists and Viewing Forms

VIEW A FORM

If at any time you need to view a form, go to the ePAF Home Page and click on “View an ePAF”. This is also where to go to see what stage the form is at.





Any of the above fields may be used to search for a form.
The “NAME” field is used to search by First Name followed by a Middle Name (if applicable) followed by Last Name.

The “LAST NAME” field is for Last Name only - do not add any other data – it will corrupt the search.

HRMS will display a summary of the form.

Step 1 of 2: View a Hire

Personal Info

Name: Staff Hire

EmplID: 2076454

eForm ID: 2219

Actions & Action Reasons

	Action Code	Description	Reason Code	Action Reason Description
1	HIR	Hire	NEW	New Hire
2	TER	Terminatn	STA	Staff Appointment End

Job Data

Start Date: 01/01/2010 **Appt End Date:** 12/31/2012

Empl Category: Staff Monthly

Department: FIND Financial Services

Location Code: GSA General Services Admin Bldg

JDL#:

Empl Group: Technicians & Research Assists

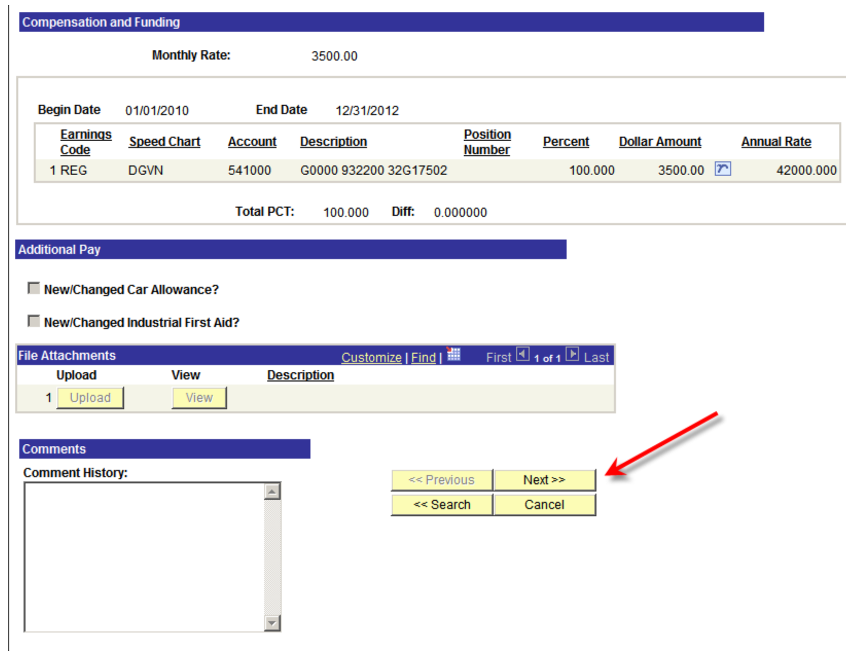
Job Family: RATNU

Job Code: 500602 Research Asst/Tech 1

Job Title: Research Asst/Tech 1

FTE: 1.000000

Empl Class:



Compensation and Funding

Monthly Rate: 3500.00

Begin Date 01/01/2010 **End Date** 12/31/2012

	Earnings Code	Speed Chart	Account	Description	Position Number	Percent	Dollar Amount	Annual Rate
1	REG	DGVN	541000	G0000 932200 32G17502		100.000	3500.00	42000.000

Total PCT: 100.000 **Diff:** 0.000000

Additional Pay

New/Changed Car Allowance?

New/Changed Industrial First Aid?

File Attachments Customize | Find | First 1 of 1 Last

	Upload	View	Description
1	Upload	View	

Comments

Comment History:

<< Previous Next >>

<< Search Cancel

Click on Next >> to see the Form History and status.

Here you can see a complete history of the form:

View a Hire

Step 2 of 2: Form History

FormList Fields

eForm ID: 1328 **Workflow Form Status:** Executed

Workflow Form Type: HIRE

Original Operator: AAZIZ 402 - Aziz,Amina

Original DateTime: 01/21/2010 10:40:04AM

Last Operator: JDAR1 210 - Darling,Jill V

Last By Alternate Operator:

Last DateTime: 01/21/2010 2:03:06PM

Next Approving RoleUser:

Next Approving RoleName: Who can work this form?

Process Visualizer

Transaction Log

	Current DateTime	Role Name	User ID	User Description	Form Action	Workflow Form Status
1	01/21/2010 10:40:04AM	UBC - EF Initiator	AAZIZ	402 - Aziz,Amina	Submit	Pending
2	01/21/2010 10:52:14AM	UBC - EF PG Approver	MDUNN2	401 - Dunn,Maureen	Approve	Part Apprv
3	01/21/2010 2:03:10PM	UBC - EF Payroll	JDAR1	210 - Darling,Jill V	Authorize	Authorized
4	01/21/2010 2:03:16PM	SYSTEM	JDAR1	210 - Darling,Jill V	Execute	Executed

Form Messages

Note that it shows who worked the form and how long each step took.

Once it reaches the System (with a green check mark), it has been entered into HRMS.

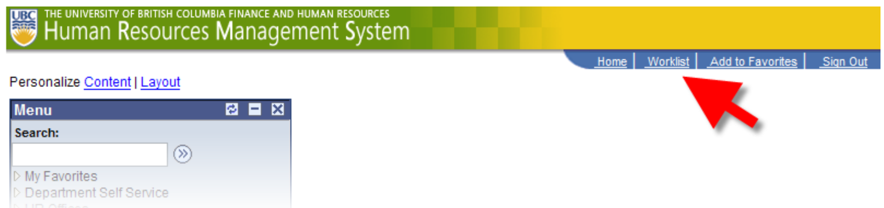
WORKLISTS (Initiator or Approver)

Initiator

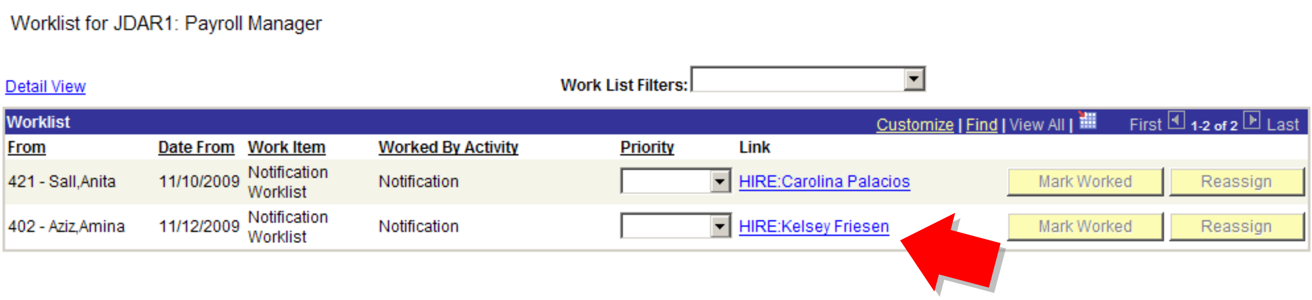
The only time an initiator will need the worklist is when a form is recycled back to you. You must access your worklist through the first option described below

Approvers

Approvers have two ways of navigating to their worklist.



Click on the "Worklist" link



Items that need action will display on the worklist.

By clicking on an item in the **Link** column, HRMS will respond with a view of the form entitled – Evaluate a Hire.

Mark Worked
Reassign

Evaluate a Hire

Step 1 of 2: Job Information

Personal Info

Name: UBCO Workflow400311 **EmplID:** 5864542

eForm ID: 23868

Actions & Action Reasons

	Action Code	Description	Reason Code	Action Reason Description
1	HIR	Hire	NEW	New Hire
2	TER	Terminatn	EOJ	End of Job

Job Data

Start Date: 2011/05/01 **End Date:** 2011/08/31

Empl Category: Student Hourly

Department: OKFS UBCO - Financial Services

Location Code: KEL UBC Okanagan

Position#:

Empl Group: Student Services Appointees

Job Family: STDNT

Job Code: 400311 WST Project Worker

Step: 1

Compensation and Funding

Hourly Rate: 13.27

Begin Date 2011/05/01 **End Date** 2011/08/31

	Earnings Code	Speed Chart	Account	Description	Reference	Percent	Dollar Amount
1	REG	DGVN	545000	G0000 932200 32G17502		100.000	13.27

Total PCT: 100.000 **Diff:** 0.000000

Other Details

☐ **Is this Student Non-UBC** **Student Number:** 14154111

Project #: **Max Hours:**

File Attachments Customize | Find | First 1 of 1 Last

	Upload	View	Description		
1	Upload	View		Add	Delete

Comments

Your Comment:

Approve | Deny | Hold | Recycle

At this point, the Approver can pick one of four options:

Approve Will forward to next approver (PG approver, Dept Head, HR, Payroll etc). When a form is approved, a notification will automatically be emailed to the next valid approver (except for HR/Payroll)

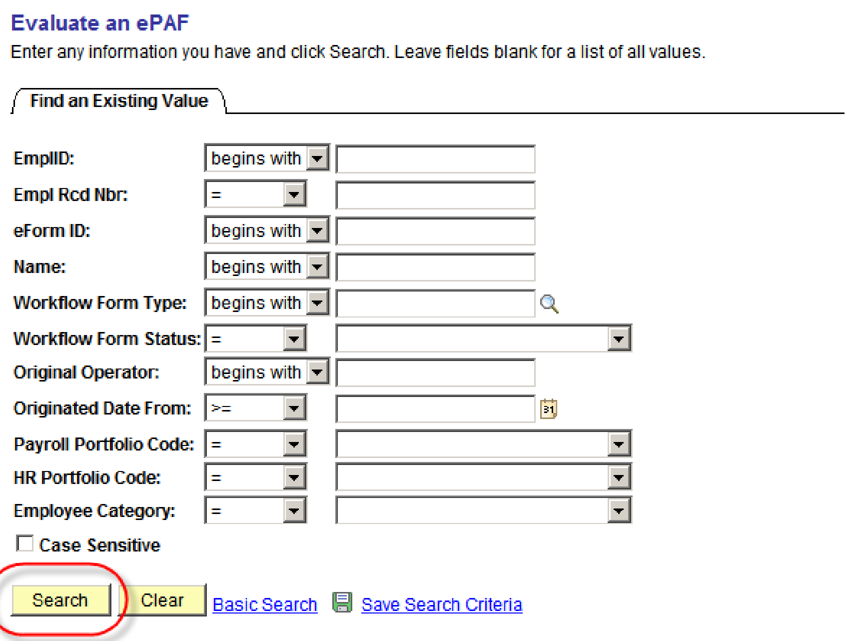
Deny Permanently stopped. Initiator will receive an e-mail notification

Hold Places on hold awaiting further action

Recycle Sends back to initiator for further action – will be resent to approver upon resubmitting

When using the DENY, HOLD OR RECYCLE buttons, comments should be added as to the reason why the action has taken place.

The 2nd option for approvers to access their worklist:



Click on Search

Everything routed to you will be displayed.

Evaluate an ePAF

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

Find an Existing Value

EmplID:	begins with	
Empl Rcd Nbr:	=	
eForm ID:	begins with	
Name:	begins with	
Workflow Form Type:	begins with	
Workflow Form Status:	=	
Original Operator:	begins with	
Originated Date From:	>=	
Payroll Portfolio Code:	=	
HR Portfolio Code:	=	
Employee Category:	=	

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-6 of 6

EmplID	Empl Rcd Nbr	eForm ID	Name	Workflow Form Type	Workflow Form Status	Original Operator	Last Operator	Last Date	Payroll Portfolio Code	HR Portfolio Code	Employee Category
2091399	0	2352	Monthly,Workflow Staff	HIRE	Pending	AAZIZ	AAZIZ	05/28/2010	Portfolio1	Portfolio1	Staff Mnth
4361776	0	2305	Darling,Emma G	HIRE	Pending	AAZIZ	AAZIZ	05/21/2010	Portfolio1	Portfolio1	Stud Mnth
5158958	0	2334	Medicine,Faculty Of	HIRE	Pending	AAZIZ	AAZIZ	05/25/2010	Portfolio1	Portfolio1	Stud Mnth
5177626	0	2337	Darling,Jane	HIRE	Pending	AAZIZ	AAZIZ	05/25/2010	Portfolio1	Portfolio1	Stud Mnth
5193095	0	2350	Student,Workflow Monthly	HIRE	Pending	AAZIZ	AAZIZ	05/28/2010	Portfolio1	Portfolio1	Stud Mnth
5195349	0	2351	Hourly,Workflow Student	HIRE	Pending	AAZIZ	AAZIZ	05/28/2010	Portfolio1	Portfolio1	Stud Hr

Criteria may be entered into any of the boxes under *Find an Existing Value* to narrow your search.

Items that need action will display on the worklist.
Click on an item in any row.
HRMS will respond with the Evaluate a Hire page.

Comments

Your Comment:

Comment History:

** 401 - Hill,Karen
** Mon, Jan 25 10, 01:34:26 PM
Approve this form

Approve Deny
Hold Recycle

Return to Search

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QUICK LINKS

PAYMENT & PROCUREMENT SERVICES HOME PAGE
http://pps.ok.ubc.ca/welcome.html

EFORMS ACCESS REQUEST FORMS
http://finance.ubc.ca/payroll/administrative-procedures