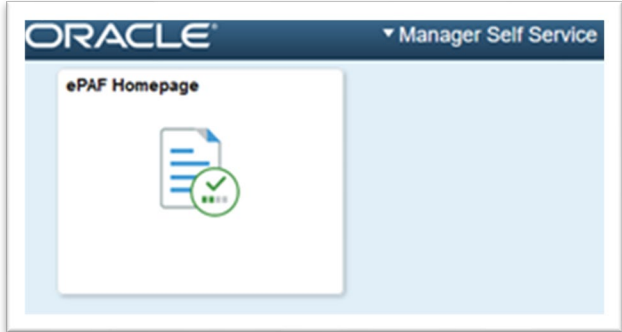
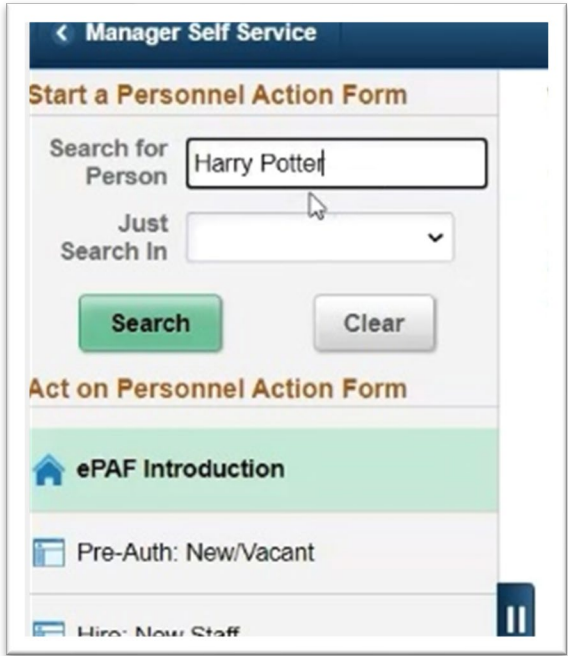
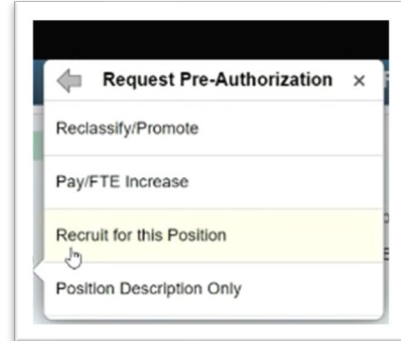
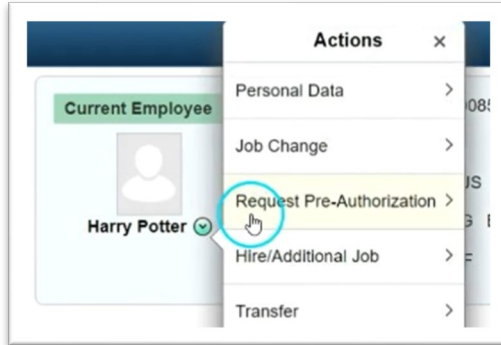


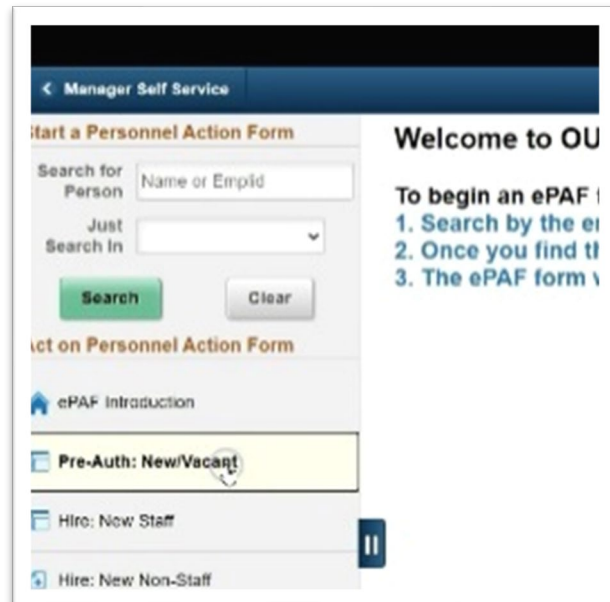
<b>Step Preauthorization for Staff Actions including Hire and Job Change</b>	
<b>Navigation: Main Menu &gt; Manager Self Service &gt; ePAF Homepage</b>	
<b>Preauthorization Request for a New Staff Hire</b>	
1	In this section, we will review the end-to-end process to Hire into a staff position. Our first step is to request preauthorization to recruit for the staff position.
2	<p>From the <b>Manager Self Service</b> Homepage. Find and click on the <a href="#">EPAF HOMEPAGE</a> Tile.</p> <div style="text-align: center; margin: 10px 0;">  </div>
3	<p>You have a couple options for how to launch the preauthorization form:</p> <p>First, you can search for the employee currently filling the position by entering the name or employee ID in the <a href="#">SEARCH FOR PERSON</a> field.</p> <p>Search for an employee in the upper left box in one of these ways.</p> <ol style="list-style-type: none"> <li>1. Search by Name             <ol style="list-style-type: none"> <li>a. Enter their first name followed by their last name. Partial names can be used.</li> <li>b. For example: Searching for "Ma Fle" will return Marcella Fleming, Mary Fleming, Max Fletcher, and Matthew Fleming, etc.</li> <li>c. Add more letters to the name to narrow the search.</li> <li>d. Use the beginning of the names when using partial names.</li> </ol> </li> <li>2. Search by Employee ID             <ol style="list-style-type: none"> <li>a. Partial or whole EMPL IDs can be used.</li> <li>b. Use the beginning for the EMPL ID when using partial numbers.</li> </ol> </li> </ol> <div style="text-align: right; margin-top: 20px;">  </div>



Once you have identified the employee and the desired employment record, click on the related actions drop down. Select the **REQUEST PREAUTHORIZATION** folder and then the **RECRUIT FOR THIS POSITION** action.

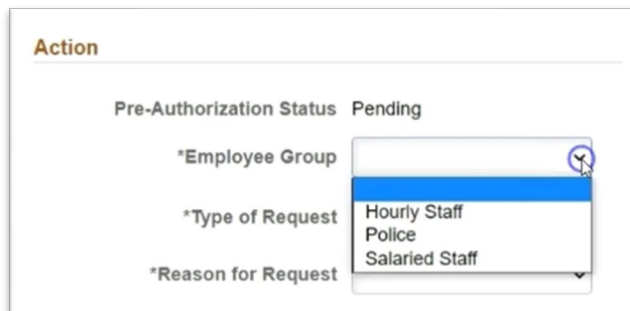


Second, if you need to request a preauthorization for a position that is not currently filled or request a new position be created, you will select the link in left column called **PRE-AUTH: NEW/VACANT**.



4 We begin the form with the **Action** segment. If you started the form from a related action, many of the fields will be pre-populated.

Select the **EMPLOYEE GROUP** from the dropdown options of: Hourly Staff, Police or Salaried Staff. Note: The positions you can select from will depend on the Employee Group selected.





Indicate the **TYPE OF REQUEST** if you entered the form through Pre-Auth: New/Vacant, you will only have the action of Fill a Position or Position Description Only. Otherwise, the field will populate based on the related action you chose.

Select a **REASON FOR REQUEST** from the dropdown list.

Indicate whether you are requesting a new position or filling an existing position by using the dropdown menu in the **NEW OR EXISTING POSITION** field.

- If filling an existing position, you will be presented with a field to indicate the **POSITION NUMBER**. If the number is known, enter it directly into the field. Otherwise, use the search to filter results and find the position. Reminder: The positions you can select from are filtered by the employee group. If you selected Salaried Staff then you will not see Police or Hourly Staff positions.
- If the position you are modifying is a pooled position, a drop-down will appear and you are asked if you would like to **UPDATE THE POOLED POSITION**. If you respond No, some of the fields throughout the rest of the form will not be available for change. These fields include **JOB CODE**, **REPORTS TO**, **LOCATION**, **STANDARD HOURS** and **FTE**.
- If Creating a new position, you will be presented with a field to indicate the **NUMBER OF POSITIONS TO CREATE**.
- If Creating a new position for the Norman Campus you will also be asked to indicate the **APPOINTMENT TYPE**. Select from either 12-Month Staff or Summer Off Staff.



5 Next, complete the **Classification** segment. If you are modifying an existing position, some fields will be populated. Use the search button on each field to filter and select from multiple results.

Select the **JOB CODE** (or job title) of the position and the department.

If you have selected to modify an existing position, then **JOB CODE** and **DEPARTMENT** will be read only. A new position would have to be requested to modify these fields.

Indicate the **WORK SITE LOCATION** which is where the employee works. Use the magnify glass to search by the location code or using the location description.

For the **REPORTS TO EMPLID** field, enter or search for the Employee ID of the position's supervisor or use the search function to search by name, title, department, etc.

The screenshot shows a form titled "Classification" with four rows of input fields. Each row has a label, a text input field, a magnifying glass search icon, and a dropdown menu. The first row is for "\*Job Code" with the value "0049" and the dropdown showing "Custodian II". The second row is for "\*Department" with the value "ACAG" and the dropdown showing "Atmospheric & Geographic Scien". The third row is for "\*Work Site Location" with the value "1PP" and the dropdown showing "One Partners Place". The fourth row is for "\*Reports to EMPLID" with the value "600092" and the dropdown showing "Snow White".

6 Use the **Recruitment** Segment to provide additional detail for the recruiting process.

The **HIRING MANAGER** is the manager responsible for the hiring process. This may or may not be the same as the Reports To manager.

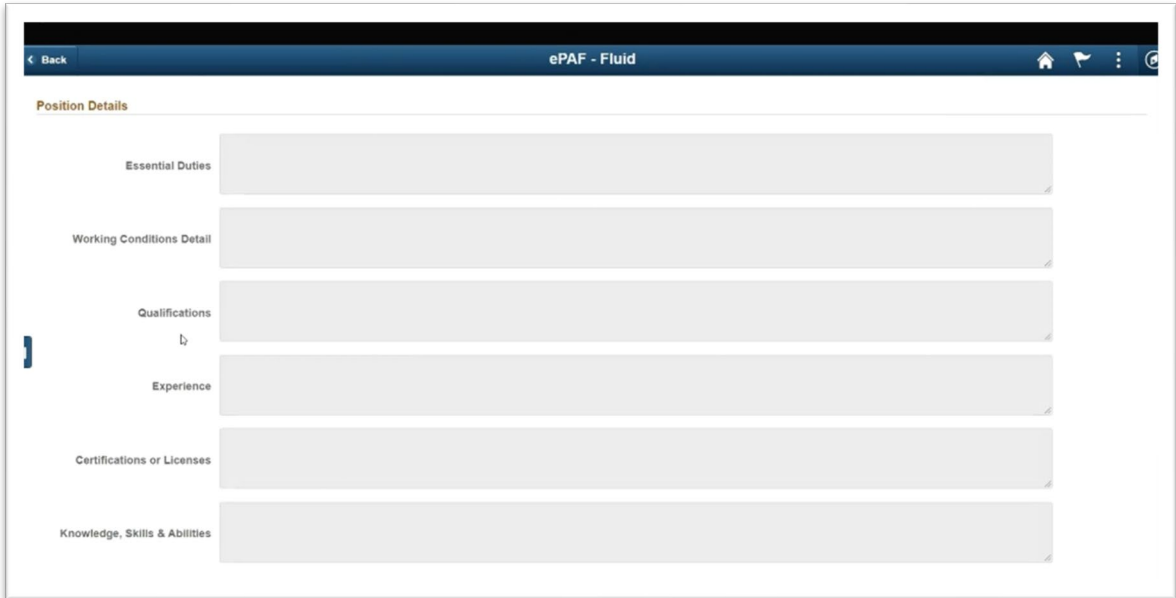
- If **DRIVER'S LICENSE CHECK**, **DRUG TESTING** or **POST OFFER EMPLOYMENT TESTING** is required, click the slider to Yes.
- Provide a **WORKING TITLE** and **INTRODUCTION FOR JOB LISTING** to be posted on Taleo.

Click the **NEXT** button to proceed.

The screenshot shows a form titled "Recruitment Details" with several fields. The first field is "\*Hiring Manager" with the value "600092" and the dropdown showing "Snow White". Below this are three toggle switches: "Driver's License Check" set to "Yes", "Drug Testing" set to "No", and "Post Offer Employment Testing" set to "Yes". The next field is "\*Working Title" with the value "Custodian" and a magnifying glass icon. The final field is "\*Introduction for Job Listing" with a text area containing "FUNCTION: This position performs routine cleaning in offices and public areas." and "REPRESENTATIVE DUTIES:". At the bottom of the form are three buttons: "Search", "Next", and "Save".

7

The next page is the **Position Description**, where you will first see position details populate based on the job code selected on the previous page. This segment is read only. If it is blank, then you will need to contact HR Compensation to get the job description at [ohr@ou.edu](mailto:ohr@ou.edu) for your Taleo job listing. Over time, this information will be added for every job by HR and will automatically flow to your Taleo job listing.

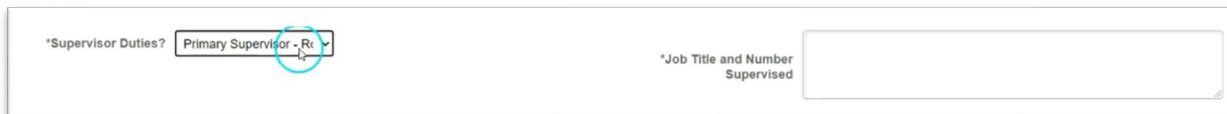


8

In the **Supervision** Segment you will indicate whether the position has any **SUPERVISORY DUTIES**. Select between the following options:

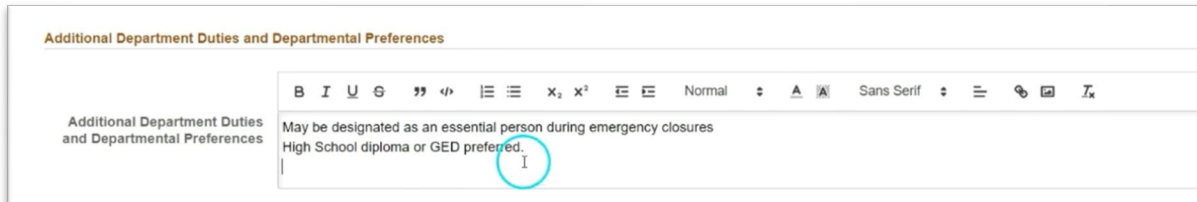
- 1-5 Staff
- No Supervisory Duties
- Primary Supervisor – Role
- Student Group
- Team Leader

If the position does have supervisory duties an additional field will display where you should indicate the **JOB TITLES AND NUMBER OF EMPLOYEES SUPERVISED** by the position.



9

Provide **ADDITIONAL DEPARTMENT DUTIES OR PREFERENCES** that were not in the position details above. This information is copied to the job listing in Taleo. Click the **NEXT** button to proceed





10

On the **Compensation and Funding** page you will provide details on the position funding and salary.

- **FULL/PART TIME** and **EMPLOYEE TYPE** fields will be defaulted if modifying an existing position. If creating a new position Full/Part Time will be calculated based on the FTE/Standard hours entered.
- **FTE** and **STANDARD HOURS** calculate based on the other. If you enter FTE then the Standard Hours will be calculated and vice versa.
- If you are modifying an existing position you will see the **PRIOR INCUMBENT'S COMPENSATION**. This is read only and provided to assist in completing the next field.
- Enter the **PROPOSED ANNUAL SALARY** you are requesting for approval. Remember this is an annual amount so even for Hourly employees, you want to enter the annual salary, not the hourly rate.

Note: Once the recruiting has completed and you hire someone into the position you will not be able to pay them more than was requested (and approved) here in this field.

11

If you are modifying an existing position you will see a Segment with the **Current Position Funding**. This includes the HR Combo Code and Chartfield string that the position is paying from and the percent distribution.

If you need to modify the current funding click the slider button next to **DO YOU WANT TO OVERRIDE THE CURRENT FUNDING?** field. Otherwise, you can skip this segment.

Once you indicate you wish to override the current funding you will be presented with some options.

- Copy all funding rows to the New Distribution by clicking the **COPY ALL FUNDING ROWS TO NEW DISTRIBUTION**. This is a great approach to take if the Combo Codes are the same but you need to change the distribution.

Dist %	Select	HR Combo Code	Account	Fund	Org	Function	Entity	Source	Purpose	Project
100.000000	No	000073990	521511	SUAUX		00051	00000	AX477000		



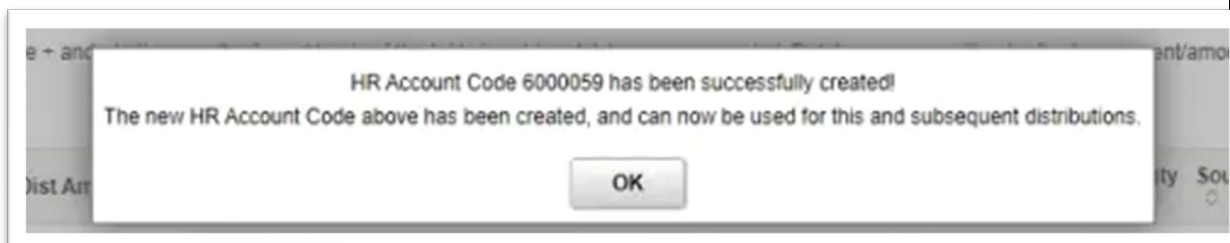
12

The **New Distribution** segment will only be visible if you are Creating a New Position or Modifying an Existing Position and you have indicated you need to override the current funding. In addition to the copying functions discussed previously, you can also add existing combo codes or create new combo codes to add to the funding distribution grid.

- If you know the HR Combo Code that should be used, use the **COMBO CODE** field to type that code in.
- If you do not know the Combo Code but know parts of the Chartfield string, use the fields to search for the pieces you know.
- Once you have entered as many pieces of the Chartfield string as you know, click on **SEARCH** to return all combo codes that match the fields entered.
- If no HR Combo Codes return, you also have the option to create a new combo code. At a minimum you must select an **ACCOUNT**, **FUND**, **ORG**, **FUNCTION** and **ENTITY**. If you do not have an **ENTITY**, enter 00000. Note: Other fields may be required depending on your selection to these main five requirements.
- After clicking **CREATE**, a message appears asking you to confirm a New HR Account code should be created. To confirm, click **YES**.
- If no, you can continue to search for an existing HR Combo Code.
- The HR Combo Code creation will fail if the Chartfield string information is not valid in the Financials system. If you believe the Chartfield string should be valid, please contact your department administrator or Financial Services.

Combination Code	Account	Fund	Org	Function	Entity	Source	Purpose	Project

- When the HR Combo Code creation is successful, a confirmation message will appear showing the newly created HR Combo Code. The Select HR Combo Code window will close and the Chartfield string will be displayed in the grid.





13

Use the **ADD A ROW** button to add more rows to the grid as needed.

Be sure to indicate the **PERCENTAGE DISTRIBUTION** or **DISTRIBUTION AMOUNT** for each row. Note: The percentage and amount calculate back and forth based on the proposed annual salary entered above.

**New Distribution**

Build new funding in the table below. Include any rows you want to keep from current funding. Use the + and - buttons on the far right side of the table to add or delete rows as needed. Delete any rows without a funding percent/amount. Funding percent must total to 100%.

	Dist %	Dist Amount \$	Select/Create Combo Code	HR Combo Code	Account	Fund	Org	Function	Entity	Source	Purpose	Project	Insert A Row	Delete A Row
1	100.000000	\$34424.000000	Select/Create Combo Code		521511	SUAUX		00051	00000	AX477000			+	-

2 rows

**New Distribution**

Build new funding in the table below. Include any rows you want to keep from current funding. Use the + and - buttons on the far right side of the table to add or delete rows as needed. Delete any rows without a funding percent/amount. Funding percent must total to 100%.

	Dist %	Dist Amount \$	Select/Create Combo Code	HR Combo Code	Account	Fund	Org	Function	Entity	Source	Purpose	Project	Insert A Row	Delete A Row
1	100.000000	\$34424.000000	Select/Create Combo Code		521511	SUAUX		00051	00000	AX477000			+	-

2 rows

The total for the grid can be seen in the **New Distribution Total** segment. This must be at 100% to submit the form.

**New Distribution Total**

---

Percent Total 100.00



14

Next, you will be asked to respond to some questions regarding the funding of the position.

- Indicate in the **HOW WOULD THE DEPARTMENT'S TOTAL HEADCOUNT CHANGE?** field whether it would increase, decrease or have no change
- Indicate in the **WHAT IS THE STATUS OF THIS ACTION'S FUNDING?** how the position will be funded. Options include:
  - 100% grant funded
  - Fund currently in department accounts
  - Funding needed from accounts outside the department
  - New funding accounts are being established
  - Other source

Select no or yes to indicate if **THIS ACTION REQUIRES AN INCREASE IN OVERALL BUDGET COSTS?**

Finally, use the **FUNDING EXPLANATION** field to provide additional funding details, especially to further explain any of the answers to the previous questions.

15

Attach any required documents or use the **ADD** button to add additional attachments.

16

Enter comments if needed.



17	<p>Click <b>SUBMIT</b> to send the form through the approval process.</p> <div data-bbox="272 268 786 373">A row of three buttons: 'Previous' (grey), 'Save' (grey), and 'Submit' (green).</div> <p>Make a note of the Form ID as this will be used later in the process.</p> <div data-bbox="1130 279 1414 569">A screenshot of a mobile application interface. It shows a home screen with a blue header, navigation icons, and the text 'Form ID 103541' with a red circle around the ID number. A 'Refresh' button is visible below.</div>
18	<p>Once the preauthorization request has been approved and an applicant has accepted the position, return to the <b>EPAF HOMEPAGE</b> to complete the hire.</p> <div data-bbox="256 684 868 1016">A screenshot of the Oracle Manager Self Service 'ePAF Homepage'. The page has a blue header with the Oracle logo and 'Manager Self Service'. The main content area shows a document icon with a green checkmark, indicating a successful or approved status.</div>



19

**ALERT TO NORMAN AND TULSA DEPARTMENTS:** If you already have an EMPL ID, you should use the Search box to find the person. Then choose from the related actions menu in the green arrow next to their name. Then skip to Step 26 below.

If you don't have an EMPL ID in Norman or Tulsa, your new employee must first submit their New Hire Paperwork in person to Human Resources. A new employee on the Norman campus can schedule an appointment with HR here: <https://newemployee.ou.edu/Norman-Campus/New-Employee-Paperwork-Submission>. A new employee in Tulsa should contact the HR office on the Tulsa campus. After the New Hire Paperwork is processed, HR will send you the EMPL ID.

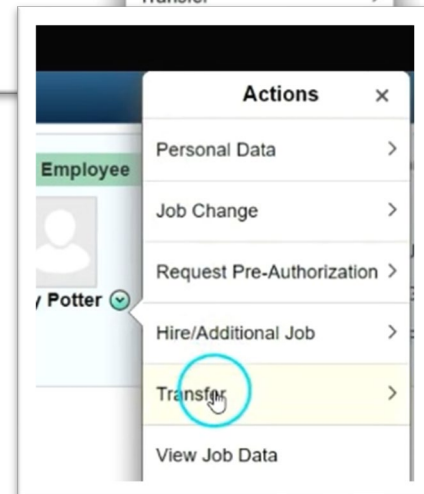
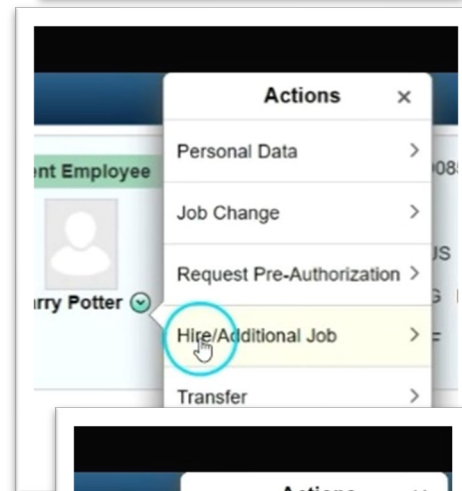
-----  
If you don't have the EMPL ID and you're not in a Norman or Tulsa department, you should follow these instructions:

There are two different paths you can take to complete the hire form.

First, if the chosen candidate works or has worked for the University, search for that person in the **SEARCH FOR PERSON** field.

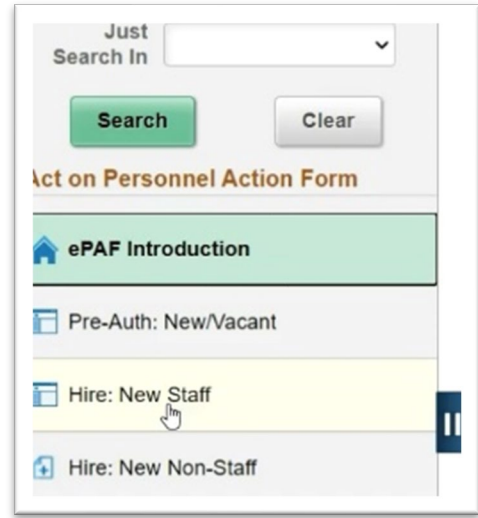
Once you find the employee you wish to take action on, click the Action drop down and select between **HIRE/ADDITIONAL JOB** and **TRANSFER**. If the person is currently active you will only see the Hire/Additional Job action if the employee is active on the Norman campus and should only be selected if this is an additional job. All other active employees hired into a new position should be done as a Transfer.

- After Selecting Transfer or Hire/Additional Job, select **STAFF POSITION** to proceed.
- If the applicant is currently an active employee, you will bypass the personal data pages of the form and be directed straight to the job data pages. You will, however, be asked to provide the **SOCIAL SECURITY NUMBER** to confirm that you have selected the right employee.
- NOTE: If the employee you have selected and the SSN entered does not match but you feel confident it is the correct person, contact HR Records. Employees hired with a Temporary SSN may not have updated their SSN and thus a match may not be found.





If the applicant selected has never worked for the University and would be a New Hire, use the link called **HIRE: NEW STAFF** in the left column main navigation bar.





20

The first page you will encounter is a **search**. The purpose of this search is to find the Preauthorization form that was approved and granted permission to complete this hire. This is the point where having previously noted the Form ID comes in handy. There are a number of other search fields that help to narrow down your results if you do not recall the Form ID.

Note: The **EMPLOYEE** and **DISPLAY NAME** you see in the results will be those of the prior incumbent in the case of a recruitment.

	Form ID	Preauthorization Status	Position Number	Title	Open Positions Approved	Num Positions w/ Step 2 Form	Department	Description	Employee	Display Name
1	103545	Approved	20000839	Asst.Staff	1	0	PRV100	Office of the Provost	600014	Shaggy Rogers
2	103541	Approved	00000050	Driver,Transit	1	0	ADM477	OU Transportation	999999	(blank)
3	103541	Approved	00000050	Driver,Transit	1	0	ADM477	OU Transportation	999999	(blank)
4	103531	Approved	20000904	Tech,Laboratory Animal I	1	0	ORA019	Comparative Medicine	999999	(blank)

21

After selecting the Preauthorization form to use, a new form will open and you will be asked to complete the personal data fields. Enter the applicants **SOCIAL SECURITY NUMBER, DATE OF BIRTH, FIRST, MIDDLE, and LAST NAME** and then click the **CONTINUE** button. This will run a search against the University's employee database to ensure that the applicant is, in fact, a new hire.

- If a match is found a message will pop up letting you know there was a match and that the hire will be connected to this employee record. If the matched employee is currently active you will skip over the personal data page.



- If a match is not found a message will pop up letting you know there wasn't a match and a new person will be created. You will then be presented with fields to provide additional personal data.

22

Once it has been confirmed this is a new employee, you will be presented with additional fields to provide additional personal data. As you enter the appropriate information in the form there are a few key fields to make note of.

- **COUNTRY OF CITIZENSHIP** – select the employees' country of citizenship.
- **ADDITIONAL COUNTRY OF CITIZENSHIP** – if the employee has dual citizenship, use this field to enter the additional country of citizenship.
- **CITIZENSHIP STATUS** – some citizenship statuses will open up an additional field where you must indicate the applicants **VISA/PERMIT TYPE**.
- **MILITARY STATUS** – if the employee has self-identified their military status use the veteran status field to indicate their selection. If they have selected **Option 1 (I belong to the following classifications of protected veterans)** additional fields will open up where you can specify the classifications to which they have identified. Choose all that apply. If the employee has not provided their military status leave that field blank.
- **ETHNICITY** – the ethnicity section allows for identification as Hispanic or Latino as well as the applicant's race. Choose all that apply.



23

In the **Address** segment, you will be required to provide two addresses for the applicant—home and mailing. **HOME ADDRESS** is for the employee’s permanent address. **MAILING ADDRESS** is where the employee will receive all mail from the University, such as the W-2 tax form and insurance information. These fields should NOT be filled out in All Caps.

- If the mailing address is the same as the Home address click the “**MAILING ADDRESS SAME AS HOME**” button and you will not be required to enter the address twice.

- If the home or mailing address is located outside of the United States, select the Country in the grid. A segment will display below to gather the international address. Be sure to enter the full **International Address**—street address, city, country, postal code.

24

In the **Contact Information** segment, you will provide the phone number and email addresses where the applicant can be reached.

If the applicant has provided a **PERSONAL EMAIL ADDRESS** enter that in the field provided. The OU Email address will be created for a new employee through a separate process and the employee records will be updated at that time.


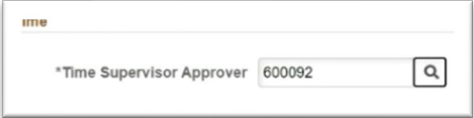
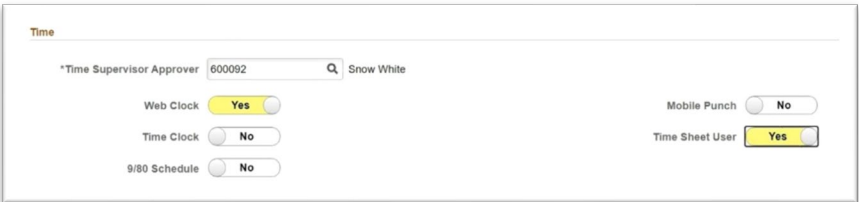
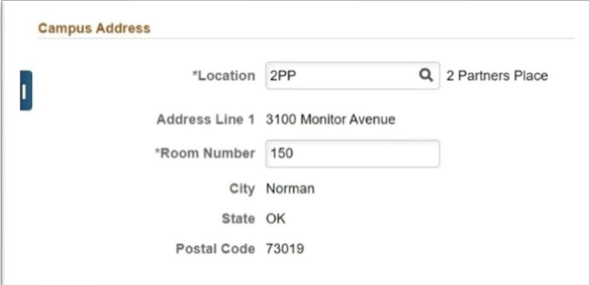
25

Click the **SAVE PERSONAL DATA** to create the new person record and proceed to the next page.

You will not be able to click **NEXT** until the personal data has been saved.

If you need to correct any information on the personal data page simply click the **SAVE PERSONAL DATA** button again to save the updated information. This will not create a duplicate person.



<p>26</p>	<p>Next, you will be directed to the <b>Job Details</b> Page where additional information will be provided about the job.</p>  <p>In the <b>Position Classification</b> segment begin by entering the <b>EFFECTIVE DATE</b> of the hire.</p> <p><b>JOB CODE, DEPARTMENT</b> and <b>REPORTS TO EMPLID</b> will be loaded with the data provided on the preauthorization form. Any fields that are open can be edited. Anything that is read-only cannot be modified at this point and would require a new pre-authorization if a change is needed.</p> <p>Also, in this segment you will indicate whether this position (and the applicant filling the position) will be a <b>DEPARTMENT HEAD</b> or a <b>BUDGET HEAD</b>.</p>
<p>27</p>	<p>In the <b>Time</b> segment, you will be asked to select who the <b>TIME SUPERVISOR APPROVER</b> will be for the position/employee. In most cases, this should be the same employee as previously inserted into the <b>REPORTS TO EMPLID</b> field.</p>  <p>If the position is located on the Norman campus, you will also have the ability to select the time keeping options. Choose from <b>WEB CLOCK, TIME CLOCK, MOBILE PUNCH</b> or <b>TIME SHEET USER</b>. You may also select if the employee is working a <b>9/80 SCHEDULE</b>.</p> 
<p>28</p>	<p>The <b>Campus Address</b> segment will populate from position data but can be modified—specifically the <b>LOCATION</b>. Note that the street address, city, state and postal code will populate based on the location selected and is not editable.</p>  <p><b>ROOM NUMBER</b> is required. This can be the room number of a department office if the employee does not have a separate room number.</p>
<p>29</p>	<p>In the <b>Work Location Details</b> you will be asked to provide details on <b>WHERE THE EMPLOYEE WILL BE PERFORMING WORK FOR OU</b> and <b>WHERE THE EMPLOYEE WILL BE LIVING DURING THEIR OU EMPLOYMENT</b>. If the employee will be working or living outside the United States or US Territories select <b>FC</b> for Foreign Country.</p>



If the employee will be telecommuting you will need to request approval and should check the **WILL YOU BE ASKING FOR APPROVAL FOR TELECOMMUTING?** box Yes.

You should also provide the employee with the Telecommuting Work Agreement which can be found by clicking on the link or going to the HR website.

**Work Location Details**

Enter FC if employee will be working or living outside the United States or US Territories.

\*Where will this employee be performing work for OU?  Oklahoma

\*Where will this employee be living during their OU employment?  Oklahoma

Will you be asking for approval for telecommuting?  Yes

30 The next page asks for information on the **Hours and Pay**.

**Hours/Pay**

Full/Part Time Full-Time Employee Type Hourly

\*FTE  Standard Hours

Proposed Annual Salary \$ 34424.000000

The Hours and Pay segment will also populate with data entered on the preauthorization form.

Note: While these fields are editable, you will not be able to select a higher **FTE** or more **STANDARD HOURS** than was requested on the Preauthorization. For example, if a .5 FTE was requested you cannot change FTE to 1.0. If this change is needed you must complete a new Preauthorization request.

31 The **Components of Pay** segment is used to break down the employee’s salary by various Pay Types. Any pay types (or rate codes) that are required for the employee group will already be loaded in the grid.

Pay Type	*Hourly Rate \$	Annual Amount \$	Base Pay	Insert A Row	Delete A Row
1 Default NA Hourly	<input type="text" value="0.000000"/>	0.000000	Yes	+	
2 Non-Pd Other Funding	<input type="text" value="0.000000"/>	0.000000	No	+	-
3	<input type="text" value="0.000000"/>	0.000000			

Additional components of pay can be entered by clicking the **INSERT A ROW** button.

32 The pay rate of the employee’s salary is defined based on the employee type and the company.

Pay Type	*Hourly Rate \$	Annual Amount \$	Base Pay	Insert A Row	Delete A Row
1 Default NA Hourly	<input type="text" value="16.000000"/>	33280.000000	Yes	+	
2 Non-Pd Other Funding	<input type="text" value="5.000000"/>	10400.000000	No	+	-
3	<input type="text" value="16.000000"/>	33280.000000			

- If the employee type is Hourly, an **HOURLY RATE** field will appear in the grid and you should provide the compensation in an Hourly rate. The annual amount will calculate based on the standard hours entered above.



	<ul style="list-style-type: none"><li>• If the employee type is Salaried and the employee is an HSC employee, a <b>BIWEEKLY RATE</b> field will appear in the grid. The compensation should be provided as the bi-weekly rate. The annual amount will calculate based on 26 pay periods for the year.</li><li>• If the employee type is Salaried and the employee is a Norman employee, the compensation should be provided as a <b>MONTHLY RATE</b>. The annual amount will calculate based up 12 pay periods.</li><li>• The last row in the grid serves as the total row and will sum the two rate columns in the grid.</li></ul> <p>Note: You will not be able to select a total Annual Amount that is greater than the Proposed Annual Salary that was approved on the preauthorization form.</p> <p>Click <b>NEXT</b>.</p>								
33	<p>The next page is used to indicate <b>Required Training</b>. You will see the course name and the course description on the left.</p> <ul style="list-style-type: none"><li>• To assign a course to an employee, select Yes from the dropdown next to the <b>ASSIGN COURSE?</b> Field.</li><li>• All courses require a response of Yes or No.</li></ul> <p>Click <b>NEXT</b> to continue</p> <div data-bbox="256 997 1476 1543"><p><b>Assign Required Training</b></p><p>The type of training an employee needs is based on the type of job they do. Please look at the job duties descriptions and select either "Yes" or "No", based on the employee's job. If you do not know what training is required, please check with the employee's supervisor.</p><table border="0"><tr><td><b>Laboratory Safety</b> <small>Job duties include the work or the supervision of work in a laboratory setting where chemicals are used or stored.</small></td><td>*Assign Course? <b>Yes</b></td></tr><tr><td><b>Bloodborne Pathogens</b> <small>Job duties include the reasonable anticipation of exposure to human blood, tissue or cell lines.</small></td><td>*Assign Course? <b>No</b></td></tr><tr><td><b>General Biosafety</b> <small>Job duties include research activities involving recombinant and synthetic nucleic acid molecule, gene transfers, microorganisms, viruses and biological toxins. This includes anyone that is working a laboratory where these activities take place.</small></td><td>*Assign Course?</td></tr><tr><td><b>Tuberculosis</b></td><td>*Assign Course?</td></tr></table></div>	<b>Laboratory Safety</b> <small>Job duties include the work or the supervision of work in a laboratory setting where chemicals are used or stored.</small>	*Assign Course? <b>Yes</b>	<b>Bloodborne Pathogens</b> <small>Job duties include the reasonable anticipation of exposure to human blood, tissue or cell lines.</small>	*Assign Course? <b>No</b>	<b>General Biosafety</b> <small>Job duties include research activities involving recombinant and synthetic nucleic acid molecule, gene transfers, microorganisms, viruses and biological toxins. This includes anyone that is working a laboratory where these activities take place.</small>	*Assign Course?	<b>Tuberculosis</b>	*Assign Course?
<b>Laboratory Safety</b> <small>Job duties include the work or the supervision of work in a laboratory setting where chemicals are used or stored.</small>	*Assign Course? <b>Yes</b>								
<b>Bloodborne Pathogens</b> <small>Job duties include the reasonable anticipation of exposure to human blood, tissue or cell lines.</small>	*Assign Course? <b>No</b>								
<b>General Biosafety</b> <small>Job duties include research activities involving recombinant and synthetic nucleic acid molecule, gene transfers, microorganisms, viruses and biological toxins. This includes anyone that is working a laboratory where these activities take place.</small>	*Assign Course?								
<b>Tuberculosis</b>	*Assign Course?								



34

The final page of the form is the **Action and Attachments** page. The **ACTION** field will display the action that is being taken with the form.

Status	Action	Description	File Name	Delete
1	Upload	Loyalty Oath		Delete
2	Upload	Staff Handbook Acknowledgement		Delete
3	Upload	Personal Data Form		Delete
4	Upload	Confidential & Proprietary Information Disclosure		Delete

The **File Attachments** segment will again display with any required documents showing a red exclamation mark.


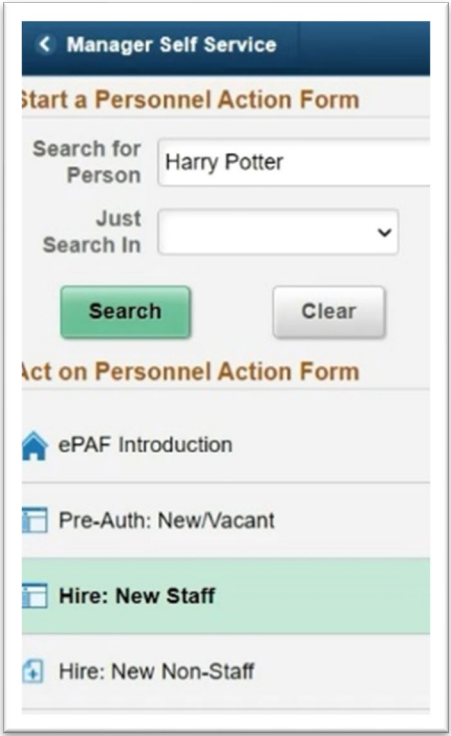
You will also see the comments segment collapsed. Click on the arrow to open the comments if you need to provide any additional comments.

35

Click **SUBMIT** to initiate the workflow process.

► Comments

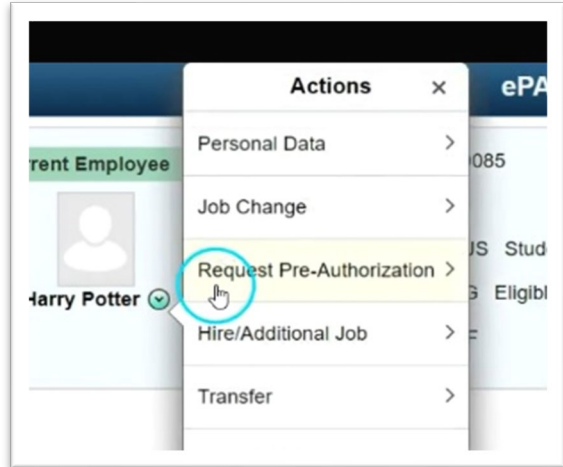
Search Save Submit

Job Change Process using Preauthorization 1 and Step 2 eForms	
1	<p>In this section, we will walk through the process to complete one of the following actions for a staff employee:</p> <ul style="list-style-type: none"> <li>• Reclassification (change job title of their current position)</li> <li>• Pay Increase</li> <li>• FTE Increase</li> </ul> <p>Note that staff employees include hourly staff, salaried staff, and police.</p> <p>These actions require a preauthorization form be completed and approved. All other job changes for a staff employee can be completed without a preauthorization.</p>
2	<p>On the <b>Manager Self Service</b> Homepage, click on the <b>EPAF HOMEPAGE</b> Tile.</p> 
4	<p>Search for the employee you wish to take action on by entering the name or employee ID in the <b>SEARCH FOR PERSON</b> field.</p> <p>Search for an employee in the upper left box in one of these ways.</p> <ol style="list-style-type: none"> <li>3. Search by Name             <ol style="list-style-type: none"> <li>a. Enter their first name followed by their last name. Partial names can be used.</li> <li>b. For example: Searching for "Ma Fle" will return Marcella Fleming, Mary Fleming, Max Fletcher, and Matthew Fleming, etc.</li> <li>c. Add more letters to the name to narrow the search.</li> <li>d. Use the beginning of the names when using partial names.</li> </ol> </li> <li>4. Search by Employee ID             <ol style="list-style-type: none"> <li>a. Partial or whole EMPL IDs can be used.</li> <li>b. Use the beginning for the EMPL ID when using partial numbers.</li> </ol> </li> </ol> 



Once you have identified the employee and the desired employment record, click on the Related Actions dropdown.

Select the **REQUEST PREAUTHORIZATION** folder and choose between **RECLASSIFY/PROMOTE** and **PAY/FTE INCREASE**.



5 We begin the form with the **Action** segment where many of the fields will be pre-populated and some can be edited.

- Select a **REASON FOR REQUEST**
- If you are doing a Reclassification/Promotion, you will have the ability to specify whether you are **MODIFYING THE EXISTING POSITION** or **CREATING A NEW POSITION**.
- If the position you are modifying is a pooled position, a drop-down will appear, and you are asked if you would like to **UPDATE THE POOLED POSITION**. If you respond No, some of the fields throughout the rest of the form will not be available for change.



<p>6</p>	<p>The <b>Classification</b> Segment will be populated and read only. If you are requesting a Pay/FTE Increase, these fields cannot be edited.</p> <p>If you are doing a Reclassification/Promotion and modifying an existing position some of the fields will be populated. Change those fields that need to be modified and select any that may need to be filled in. Use the search button on each field to filter and select from multiple results.</p> <p>If you have selected to modify an existing position, the <b>DEPARTMENT</b> field will be read only. This field cannot be modified, a new position would have to be requested if this needs to be changed.</p> <p>Click <b>NEXT</b>.</p>
<p>7</p>	<p>The next page is the <b>Job Description</b> page. If you are requesting a <b>Reclassification/ Promotion</b>, you will see Job Description details based on the job code. This information is hidden on a Pay/FTE Increase.</p> <ul style="list-style-type: none"> <li>The <b>SUPERVISOR DUTIES</b> and <b>ADDITIONAL DEPARTMENT DUTIES AND DEPARTMENTAL PREFERENCES</b> fields can be edited. These fields are required.</li> </ul> <div data-bbox="755 289 1450 590" data-label="Form"> <p><b>Classification</b></p> <p>Job Code 5578 Asst.Staff</p> <p>Department PRV100 Office of the Provost</p> <p>Reports to EMPLID 002398 Peggy Brown</p> </div> <div data-bbox="256 1052 1474 1507" data-label="Form"> <p><b>Supervision</b></p> <p>Does this position have any supervisor duties?</p> <p>*Supervisor Duties? <input type="text" value="Team Leader"/></p> <p>*Job Title and Number Supervised <input type="text" value="Supervisor - 3"/></p> <p><b>Additional Department Duties and Departmental Preferences</b></p> <p>Additional Department Duties and Departmental Preferences</p> <p>Additional department duties here. Additional</p> </div>



8

On the **Compensation and Funding** page you will provide details on the position funding and salary.

- **FULL/PART TIME** and **EMPLOYEE TYPE** fields will be defaulted if modifying an existing position. If creating a new position Full/Part Time will be calculated based on the FTE/Standard hours entered.
- **FTE** and **STANDARD HOURS** calculate based on the other. If you enter FTE then the Standard Hours will be calculated and vice versa.

PreAuthorization - Step 1 : Compensation and Funding Form ID 103586

Any fields that appear in RED are invalid values based on previous selections or defaulting data that is not valid for this form. These values will need to be changed before the form is submitted.

**Compensation & FTE**

Full/Part Time: Full-Time Employee Type: Salaried

\*FTE:  Standard Hours:

Prior Incumbent Comp \$

**Proposed Pay**

Pay Type	*Bi-Weekly Rate \$	Annual Amount \$	Base Pay	Insert A Row
1 Default NA Annual	<input type="text" value="1600.000000"/>	41600.000000	Yes	+
2	1600.000000	41600.000000		

2 rows

9

The **Proposed Pay** segment will populate with the employee's current pay and can be changed. The first row will reflect the employee's base salary and any additional components of pay will be indicated in additional rows.

If you need to add additional components of pay, click the **INSERT A ROW** button and fill in the required fields.

Pay Type	*Bi-Weekly Rate \$	Annual Amount \$	Base Pay	Insert A Row
1 Default NA Annual	<input type="text" value="2000.000000"/>	41600.000000	Yes	+
2	1600.000000	41600.000000		

2 rows



10

If you are modifying an existing position you will see a Segment with the **Current Position Funding**. This includes the HR Combo Code or codes the position is paying from and the percent distribution.

If you need to modify the current funding click the slider button next to **DO YOU WANT TO OVERRIDE THE CURRENT FUNDING?** field. Otherwise, you can skip this segment.



Once you indicate you wish to override the current funding you will be presented with some options.

- Copy all funding rows to the New Distribution by clicking the **COPY ALL FUNDING ROWS TO NEW DISTRIBUTION**. This is a great approach to take if the Combo Codes are the same but you need to change the distribution.
- Copy individual funding rows to the New Distribution by clicking the **SELECT** button in the grid.
- If you have copied down all funding rows but wish to remove them all at once, click the **DESELECT ALL FUNDING ROWS FROM THE NEW DISTRIBUTION** button.

Do you want to override the current funding?  Yes

Include any rows you want to keep from current funding by using one of the buttons below or the select box next to the individual funding row.  
The "Copy All Funding Rows to Payment Funding" button will copy all funding rows from the Current Position Funding into the Payment Funding.  
The "Remove All Position Funding Rows from Payment Funding" will remove all rows that were copied from the Current Position Funding.

Dist %	Select	HR Combo Code	Account	Fund	Org	Function	Entity	Source	Purpose	Project
1	100.000000	<input type="checkbox"/> No	000075193	511011	MISCA	PRH00100	00116	00000		

1 row



11

The **New Funding** segment will only be visible if you are Creating a New Position or Modifying an Existing Position and you indicated you need to override the current funding. In addition to the copying functions discussed previously, you can also add existing combo codes or create new combo codes to add to the funding distribution grid.

**New Distribution**

Build new funding in the table below. Include any rows you want to keep from current funding. Use the + and - buttons on the far right side of the table to add or delete rows as needed. Delete any rows without a funding percent/amount. Funding percent must total to 100%.

	Dist %	Dist Amount \$	Select/Create Combo Code	HR Combo Code	Account	Fund	Org	Function	Entity	Source	Purpose	Project
1	100.000000	52000.000000	Select/Create Combo Code	000075193	511011	MISCA	PRH00100	00116	00000			

**New Distribution Total**

Percent Total 100.00

- Click the **SELECT/CREATE COMBO CODE** button. A new window will open where you can use the fields displayed to search for an existing combo code. It is recommended you include as many filters as you know to narrow the results.
- If you are unable to find your combo code after searching you will have the option to create a new combo code. At a minimum you must select an **ACCOUNT, FUND, ORG, FUNCTION** and **ENTITY**. IF you do not have an **ENTITY**, enter 00000. Note: Other fields may be required depending on your selection to these main five requirements.
- Use the **ADD A ROW BUTTON** to add more rows to the grid as needed.
- Be sure to indicate the **PERCENTAGE DISTRIBUTION** or **DISTRIBUTION AMOUNT** for each row. Note: The percentage and amount calculate back and forth based on the proposed annual salary entered above.
- The total for the grid can be seen in the **New Distribution Total** segment. This must be at 100% to submit the form.



12

Finally, you will be asked to respond to some questions regarding the funding of the position.

Indicate in the **HOW WOULD THE DEPARTMENT'S TOTAL HEADCOUNT CHANGE?** field whether it would increase, decrease or have no change.

Indicate in the **WHAT IS THE STATUS OF THIS ACTION'S FUNDING?** how the position will be funded.

Options include:

- 100% grant funded
- Fund currently in department accounts
- Funding needed from accounts outside the department
- New funding accounts are being established
- Other source

Next, select No or Yes to indicate if **DOES THIS ACTION REQUIRES AN INCREASE IN OVERALL BUDGET COSTS?**

Use the **FUNDING EXPLANATION** field to provide additional funding details, especially to further explain any of the answers to the previous questions.

13

Attach any required documents or use the **ADD** button to add additional attachments.

Status	Action	Description	Instructions	File Name	Delete
1	<input checked="" type="checkbox"/>	<a href="#">View</a>	Org Chart	A new position has been requested. Please attach an org chart.	TestDoc.pdf <a href="#">Replace</a>
2	<input checked="" type="checkbox"/>	<a href="#">View</a>	Employee Resume	The jobcode has been changed. Please attach the employee resume.	TestDoc.pdf <a href="#">Replace</a>
3	<input checked="" type="checkbox"/>	<a href="#">View</a>	Justification	Attach the justification for the requested action.	TestDoc.pdf <a href="#">Replace</a>

14

Enter comments if needed.

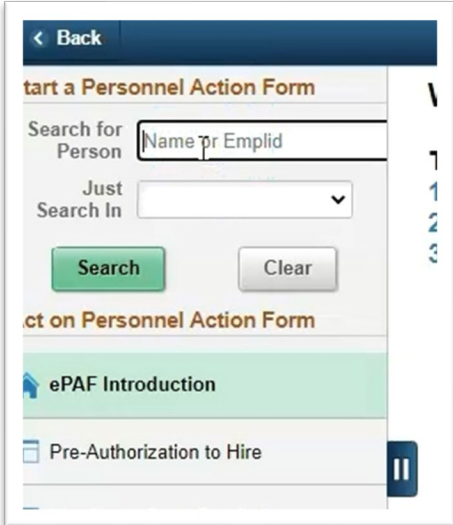
**SUBMIT** the form to send the form through the approval process.

A helpful tip: Make a note of the Form ID as this will be used later in the process.

15 Once your preauthorization request for a reclassification/promotion, FTE increase, or pay increase has been approved, return to the [EPAF HOMEPAGE](#) to complete the job change.

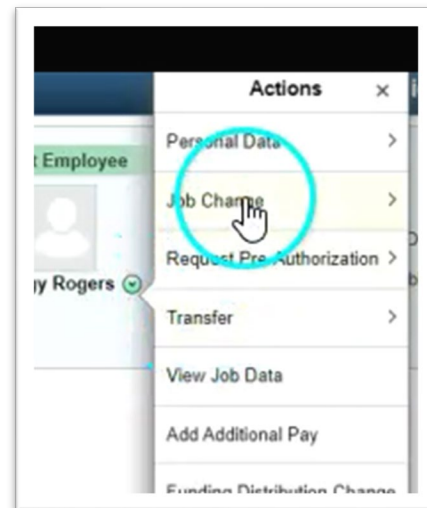


16



Begin by searching for that employee in the [SEARCH FOR PERSON](#) field.

Once you find the employee/record you wish to take action on, click the Action drop-down and select [JOB CHANGE](#) and then either [RECLASSIFICATION](#) or [PAY/FTE INCREASE](#).





17

The first page you will encounter is a **Search**. The purpose of this search is to find the Preauthorization form that was approved and granted permission to complete this job change. This is the point where having previously noted the Form ID comes in handy. There are a number of other search fields that help to narrow down your results if you do not recall the Form ID.

NOTE: The Employee and Display Name are visible in the search results.

18

The form will begin with the **Job Details** page where data from the Preauthorization is defaulted. Fields that are open for edit can be modified. Any field that is read-only cannot be modified and would require a new pre-authorization if a change is needed.

In the Position Classification segment, enter the **EFFECTIVE DATE** of the requested change.

Also, in this segment, indicate whether this employee will be a **DEPARTMENT HEAD** or a **BUDGET HEAD**.



<p>19</p>	<p>In the Time segment the <b>TIME SUPERVISOR APPROVER</b> field can be modified. In most cases, this is the same employee as the Reports to Emplid field. If you need to change the “Reports to” supervisor, use a different job change form for that.</p> <div data-bbox="873 277 1425 457" data-label="Form"> </div> <p>If the position is located on the Norman campus, you will also have the ability to select the time keeping options. Choose from <b>WEB CLOCK</b>, <b>TIME CLOCK</b>, <b>MOBILE PUNCH</b> or <b>TIME SHEET USER</b>. You may also select if the employee is working a <b>9/80 SCHEDULE</b>.</p> <div data-bbox="256 632 1463 909" data-label="Form"> </div>
<p>20</p>	<p>The <b>Campus Address</b> segment will also populate with data from the preauthorization form but can be modified—specifically the <b>LOCATION</b>. NOTE: the street address, city, state and postal code will populate based on the location selected and is not editable.</p> <p>A <b>ROOM NUMBER</b> is required. This can be a department office if the employee does not have a separate room number.</p> <div data-bbox="764 972 1458 1335" data-label="Form"> </div>



21

In the **Work Location Details** you will be asked to provide details on **WHERE THE EMPLOYEE WILL BE PERFORMING WORK FOR OU** and **WHERE THE EMPLOYEE WILL BE LIVING DURING THEIR OU EMPLOYMENT?**. If the employee will be working or living outside the United States or US Territories select **FC** for Foreign Country.

If the employee will be telecommuting, you will need to request approval and should check the **“WILL YOU BE ASKING FOR APPROVAL FOR TELECOMMUTING?”** box Yes.

**\*\*\*COVID Response: If the employee is remote working as part of the university’s COVID-19 response, the telecommuting agreement does not need to be completed.**

NOTE: You should also provide the employee with the Telecommuting Work Agreement which can be found on the HR website or by contacting your HR Business Partner.

22

The next page reviews **Hours and Pay**.

The **Hours and Pay** segment will also populate with data entered on the preauthorization form. NOTE: While these fields are editable, you will not be able to select a higher **FTE** or more **STANDARD HOURS** than was requested on the Preauthorization. For example, if a .5 FTE was in the original request you cannot change FTE to 1.0. If this change is needed, you must complete a new Preauthorization request.

23

The **Components of Pay** segment is populated with data from the **Proposed Pay** segment of the preauthorization. If you need to add additional components of pay, click the **INSERT A ROW** button and fill in the required fields.

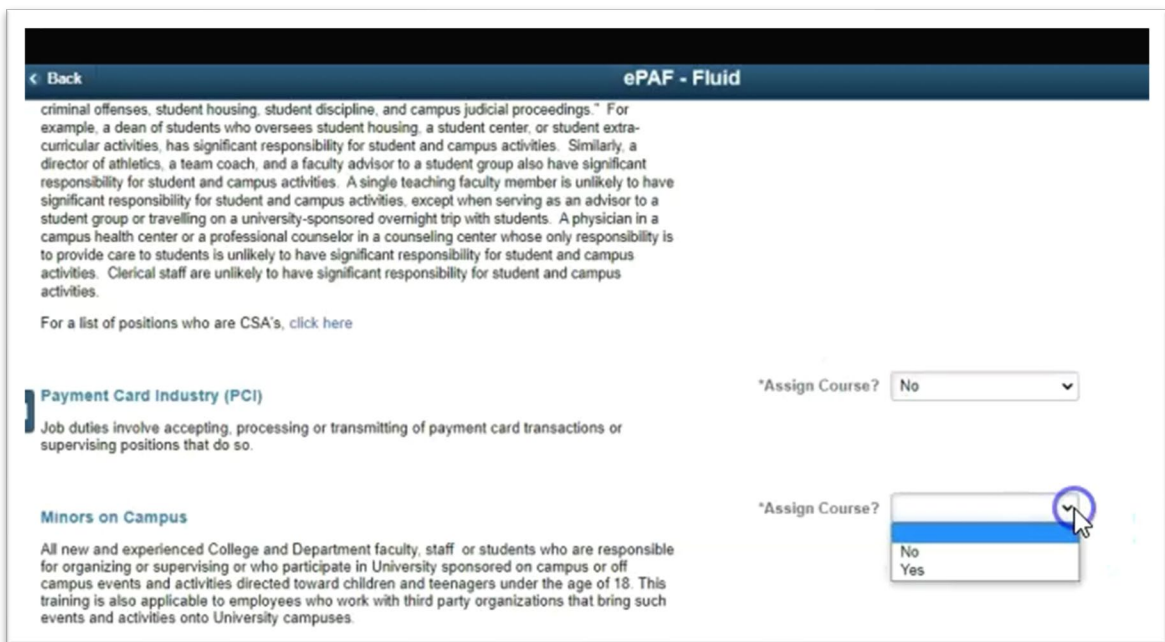
Click **NEXT**.

Pay Type	*Bi-weekly Rate \$	Annual Amount \$	Base Pay	Insert A Row
1 Default NA Annual	2000.000000	52000.000000	Yes	+
2	2000.000000	52000.000000		

24

The next page is used to update any **Required Training**. You will see the course name and the course description on the left. To assign a course to an employee, select Yes from the dropdown next to the **ASSIGN COURSE?** Field.

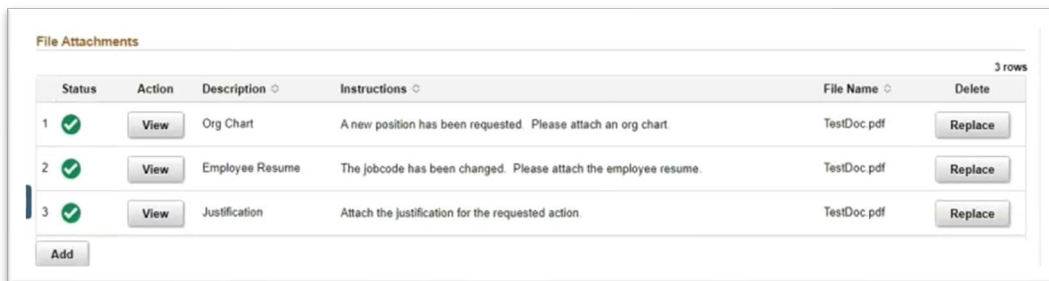
All courses require a response of Yes or No.  
Click **NEXT** to continue.



The screenshot shows a form titled "ePAF - Fluid" with a "Back" button. It contains several sections with descriptions and "Assign Course?" dropdown menus. The first section is about "criminal offenses, student housing, student discipline, and campus judicial proceedings." The second section is "Payment Card Industry (PCI)" with a description of job duties. The third section is "Minors on Campus" with a description of training requirements. The "Assign Course?" dropdown for PCI is set to "No", and the dropdown for Minors on Campus is open, showing "No" and "Yes" options.

25

The final page of the form is the **Action and Attachments** page. The **ACTION** field will display the action that is being taken with the form and may require the selection of a **REASON**. The **File Attachments** segment will again display with any required documents showing a red exclamation mark.



Status	Action	Description	Instructions	File Name	Delete	
1	<input checked="" type="checkbox"/>	View	Org Chart	A new position has been requested. Please attach an org chart.	TestDoc.pdf	Replace
2	<input checked="" type="checkbox"/>	View	Employee Resume	The jobcode has been changed. Please attach the employee resume.	TestDoc.pdf	Replace
3	<input checked="" type="checkbox"/>	View	Justification	Attach the justification for the requested action.	TestDoc.pdf	Replace

3 rows


Add

You will also see the comments segment collapsed. Click on the arrow to open the comments if you need to provide any additional comments.



The screenshot shows a collapsed "Comments" section with a downward arrow and a text input field containing the word "comment".



26	<p>Click the <b>SUBMIT</b> button to submit the form to send it through approval routing.</p>  A screenshot of a web form's navigation bar. It contains three buttons: 'Previous' (grey), 'Save' (grey), and 'Submit' (green). A mouse cursor is positioned over the 'Previous' button.
----	--