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OVERVIEW/GETTING STARTED

What is an ePAF?
The Electronic Personnel Action Form (ePAF) is an electronic tool used to enter data related to an employee’s (faculty or staff) job.

What is an eForm?
An eFORM is any electronic form that replaces hardcopy forms.

Getting Help
If you have problems while using the ePAF system, please send an email to: ePAF Support
Please include a screen shot and details of any problems you are having. If you have any questions, you may call HR Records, 271-2180.

How do I log in?
In order to use the ePAF system, you will need to go to the jumpoff page listed below, and log into the PeopleSoft Home Page.

http://www.ouhsc.edu/jumpoff/

THINGS TO REMEMBER

The ePAF is a Legal Document
Please be mindful of the comments made on the ePAF. Comments will be considered a permanent part of the employee’s job record and will reflect on the University.

How ePAF Works
The way ePAF works is based on 8 different employee groups which dictate the items and pages that you see in the ePAF and how the ePAF routes:

Volunteers ▪ Faculty ▪ Resident ▪ Student
   ▪ Hourly Staff ▪ Salaried Staff ▪ Temporary
   ▪ PPP ▪ Student Assistant ▪ Volunteer
   ▪ Appoint a only for Volunteer maintaining
   campus building and systems access.

When to Terminate an Employee
Terminate an employee only when the individual is leaving the OUHSC campus permanently, or becoming a volunteer, or becoming a temporary employee (special pay).

For those employees who are changing status to volunteer or temporary employee, after the Termination ePAF is processed by Human Resources, a Hire ePAF can be submitted to reappoint. Please ensure the
effective date used on the Hire ePAF is greater than (not equal) to the previous termination date. If the dates are the same, this causes issues within Benefits Administration.

**Employees Only Receiving PPP Payments**

Employees who will only be paid a PPP (Professional Practice Plan) must first have a primary appointment as an affiliate, which is referred to as a zero (0) record. For more information on how to hire an affiliate, please refer to section Hire for Affiliate Only.

After the primary appointment (zero record) has been approved by HR Records, a second Hire ePAF can be submitted to create the PPP record, i.e. the 10 record. For more information on how to hire a PPP, please refer to section Hire for PPP.

PPP records do not have position numbers.

**Additional Pay eForm**

The Additional Pay eForm is used to pay non-base salary compensation such as:

<table>
<thead>
<tr>
<th>NonBase Compensation</th>
<th>Payroll Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retro Pay</td>
<td>030</td>
</tr>
<tr>
<td>Lump Sum Payment</td>
<td>031</td>
</tr>
<tr>
<td>Technology Allowance</td>
<td>143</td>
</tr>
<tr>
<td>Supplemental Exception</td>
<td>144</td>
</tr>
<tr>
<td>Resident Extra Duty</td>
<td>146</td>
</tr>
<tr>
<td>On Call</td>
<td>147</td>
</tr>
<tr>
<td>Shift Differential</td>
<td>148</td>
</tr>
<tr>
<td>Incentive Earns Other OUP</td>
<td>162</td>
</tr>
</tbody>
</table>

For more information regarding the Additional Pay eForm or if there is an issue with a current Additional Pay eForm, please contact Payroll Services, 271-2055.

**Retiring Faculty with Title Change**

When retiring a faculty member, if the faculty member’s title is going to change after retirement, first do a Job Change ePAF to change the employee’s title, and then process the Termination ePAF. If a department wishes to change the title of a person who has already retired, the department must contact the Provost Office.
**Employees Transferring to Another Department**

If an active employee is moving from one department to another, the department that is gaining the employee will need to do a Hire ePAF. The ePAF will also route through the department from which the employee is leaving. This is done to notify all pertinent people in the “old” department that an employee is leaving. The position/department that the employee will be leaving appears on the ePAF under “Job Transferring From.”

![eForm ID: 29336](image)

**Email Notifications**

Email notifications are sent to the ePAF initiator throughout the routing process every time there is an action performed on the ePAF. For example, if the ePAF is put on HOLD, an email notification is sent to the initiator. When the same ePAF is finally approved, a second email notification will be sent to the initiator.

Approvers within the routing process will also receive an email notification when an ePAF is in his/her worklist.

Individuals who have a back-up role in the ePAF routing process will not receive email notifications, nor will the ePAF be sent to his/her worklist.

If a user wish not to receive email notifications, the notifications can be turned off. From the main menu, select My System Profile. Under Workflow Activities, unclick “email user.” Keep in mind that this option is an all or nothing function. Thus, turning off notifications will apply to any other types of notifications that are received from different applications.

**Shared Employees**

For employees who are shared between departments, ePAFs are initiated by the primary department. For the non-primary department(s), the primary department will have to be contacted to make any changes. The ePAF will be routed to any departments for approval in which the system indicates a change.
**Buttons Not to Use**

**Browser Buttons:** Please do not use the browser’s back and forward buttons.

**The Reassign Button:** OUHSC does not use this feature. The person to which the ePAF is reassigned must have the same role and department security as the individual attempting to reassign the ePAF. The worklist is a delivered Oracle page, thus the button cannot be removed.

**Back-Up Roles**

Back-up Approver(s) for ePAF do not actually “Approve” ePAFs; one must “Resubmit” the ePAF. To perform these functions, refer to the section on How to Resubmit, Change, or Withdraw an ePAF.

Resubmitting an ePAF will send it to the next individual in the routing process.

**Sharing an Approval Role**

If an approval role is shared by multiple individuals, the worklist is also shared. To ensure one person is not attempting to approve an ePAF that has already been approved by the other, the “Refresh” button can be used to update the worklist. This will not refresh the other individual’s worklist.
ePAF FORM TYPES AND THEIR USES

**Hire eForm:**
- anything that involves a job posting
- transferring an employee from one department to another; the receiving department will do the Hire ePAF
- promotion within the same primary department or promotional transfer into a different primary department

**Job Change eForm:**
- any change that occurs within the same primary department such as title change, salary change, source change, reclassification, FTE change, and additional titles

**Termination eForm:**
- discontinuing employment at OUHSC due to retirement or other reasons

**Leave of Absence eForm:**
- paid leave of absence
- unpaid leave of absence
- return from leave
- long-term disability
- long-term disability with pay
- short-term disability with pay
- return from disability
- extension of leave

DEPARTMENT SELF SERVICE

The navigation to Department Self Service is: Main Menu > Department Self Service

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print ePAF</td>
<td>Used to print ePAFs</td>
</tr>
<tr>
<td>ePAF Home Page</td>
<td>Used to initiate, approve, change, or view ePAFs or employee’s personal data.</td>
</tr>
<tr>
<td>OUHSC Position Data</td>
<td>Used to create position numbers that do not already exist.</td>
</tr>
<tr>
<td>I-9 &amp; E-Verify Home Page</td>
<td>Used to create the online Form I-9 and to complete E-Verify. Please refer to the Electronic I9 Reference Guide and the E-Verify Reference Guide.</td>
</tr>
<tr>
<td>Security eForm Home Page</td>
<td>This function is not currently being used and may not be visible to user depending on one’s security.</td>
</tr>
</tbody>
</table>
**ePAF Home Page Overview**

This is the ePAF home page with selections for *My Worklist, Start a New ePAF, Resubmit, Change or Withdraw an ePAF* and *View Employee History*.

**Electronic Personnel Action Form (ePAF) Home Page**

- **My Worklist**
  - Work the items that have been routed to you.
- **Start a New ePAF**
  - Start a new ePAF, which will then be routed to the appropriate approvers.
- **Resubmit, Change, or Withdraw an ePAF**
  - Make changes to an ePAF that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.
- **View Employee History**
  - Use this link to view the ePAF history for an employee.

**My Worklist**

*My Worklist* will display any ePAs that need approved before they can be passed on to the next step in the routing process. When an ePAF is electronically approved, the ePAF is date stamped with the time, date, and the approver’s USER ID.

*Transaction Log*

<table>
<thead>
<tr>
<th>Log Instance</th>
<th>Current Date/Time</th>
<th>Role Name</th>
<th>User ID</th>
<th>User Description</th>
<th>Form Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>09/19/2008 1:44:02PM</td>
<td>OUHSC GT Payroll Coordinator</td>
<td>HRPAYBD1</td>
<td>Donna Marie Buton</td>
<td>Submit</td>
</tr>
<tr>
<td>2</td>
<td>09/19/2008 1:44:59PM</td>
<td>OUHSC GT Department Approver</td>
<td>CCLEGG</td>
<td>Cynthia Blair Clepp</td>
<td>Approve</td>
</tr>
</tbody>
</table>

To open the worklist, select *My Worklist* or select the worklist quick link located in the top right corner of the screen.

**Electronic Personnel Action Form (ePAF) Home Page**

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

The primary approver will receive an email notification when there is an item ready for evaluation within the worklist.

Click on the desired link for the ePAF to be evaluated.
Start a New ePAF
This link allows the initiation of a new ePAF including a new hire, transfer, status change, source change, termination, leave of absence, and etc.

Resubmit, Change, or Withdraw an ePAF
This link allows for making a change or withdrawing an ePAF that has not yet been fully executed into the system.

Forms that have a status of executed cannot no longer be manipulated.

View Employee History
This link allows the viewing of all form types that have been done for a particular employee.

WORK AN ePAF
Evaluating an ePAF means that the eform’s content is reviewed. Once the ePAF has been evaluated, the options are:

<table>
<thead>
<tr>
<th>Button</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve</td>
<td>Use to approve an ePAF and automatically send it to the next approver.</td>
</tr>
<tr>
<td>Deny</td>
<td>Use to reject an ePAF and permanently end its processing.</td>
</tr>
<tr>
<td>Recycle</td>
<td>Use to send the ePAF back to the initiator. This will trigger the routing process to start over once the initiator resubmits.</td>
</tr>
<tr>
<td>Hold</td>
<td>Use to make a comment or change without sending the ePAF onto the next approver. The ePAF will remain in the worklist until another button is chosen.</td>
</tr>
<tr>
<td>Close</td>
<td>Use to close the ePAF and keep it in the worklist until approved, denied or recycled.</td>
</tr>
</tbody>
</table>
VIEW AN ePAF

Use this option to determine the status of an ePAF.

Step 1:  Go to the ePAF Home Page and choose View Employee History.

Step 2:  Enter search criteria using any of the existing values. The employee ID or ePAF form ID are the quickest ways to search.

Step 3:  Click on any part of the link to view the desired ePAF.
Step 4: After the form opens, click the “Next” button at the bottom of the page to view the transaction history and status of an ePAF.

---

ePAF TRANSACTION HISTORY AND STATUS

There are three sections to the history page.

**Section 1: FormList Fields**

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>eForm ID</strong></td>
<td>Every ePAF has a number assigned to it that is unique only to that eform.</td>
</tr>
<tr>
<td><strong>Workflow Form Type</strong></td>
<td>Describes the type of ePAF it is.</td>
</tr>
</tbody>
</table>
Workflow Form Status | Describes the status of the ePAF.
---|---
Original Operator | Lists the individual who initiated the ePAF with the date and time it was submitted.
Last Operator | Lists the last person to touch the ePAF within the routing process.
Next Approving RoleName | Lists the role name of where the ePAF was sent. Click on the link *Who can work this form?* to find out who has that particular role.

**Section 2: Process Visualizer**

This allows anyone viewing the ePAF to see the actual route the eform took or will take during the approval process. Under each role, after approval, the number of days or hours the ePAF sat in that particular worklist is displayed.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td>Indicates that the ePAF has been approved or submitted by that particular role.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Icon" /></td>
<td>Indicates this role was skipped or will be skipped during the routing process.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td>Indicates that the ePAF is in the worklist of the individual who has this role.</td>
</tr>
<tr>
<td><img src="image4.png" alt="Icon" /></td>
<td>Indicates that this role is in the routing process, and the ePAF has not yet arrived at this role.</td>
</tr>
</tbody>
</table>
**Section 3: Transaction Log**

This section lists the step by step status of an ePAF along with the date and time stamp of the action taken.

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
<th>ePAF Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>The ePAF initiator has submitted the ePAF, and no one has approved this ePAF as of yet.</td>
<td>Can be resubmitted, changed, or withdraw.</td>
</tr>
<tr>
<td>Partially Approved</td>
<td>At least one approver has approved the ePAF.</td>
<td>Can be resubmitted, changed, or withdraw.</td>
</tr>
<tr>
<td>Authorized</td>
<td>The approval process is complete.</td>
<td>No action can be taken.</td>
</tr>
<tr>
<td>Executed</td>
<td>The ePAF has been fully processed and the information reflected on the ePAF has been fed into job data.</td>
<td>No action can be taken.</td>
</tr>
<tr>
<td>Denied</td>
<td>An approver has rejected an ePAF and permanently ended further processing.</td>
<td>No action can be taken.</td>
</tr>
<tr>
<td>Withdraw</td>
<td>Initiator or approver has withdrawn the ePAF and permanently ended further processing.</td>
<td>No action can be taken.</td>
</tr>
</tbody>
</table>
HOW TO RESUBMIT, CHANGE, OR WITHDRAW AN ePAF

Use this link when an ePAF has already been submitted, and a change needs to be made or the ePAF needs to be withdrawn. In order to make changes or withdraw, ensure the ePAF has not been “executed” or fully processed. To view an ePAF, please refer to section View an ePAF.

**Step 1:** Go to ePAF Home Page.

**Step 2:** Select Resubmit, Change, or Withdraw an ePAF

**Step 3:** Select the form type (hire, termination, etc.)

**Step 4:** Enter the search criteria (name, employee ID, etc.)
**Step 5:** Review the form content of the ePAF.

**To make a change to an ePAF:**
- Make the necessary change(s).
- Document change(s) in the comments box.
- Select the “Resubmit” button.

**Note:** Resubmitting an ePAF will trigger the entire routing process to start over.

**To withdraw an ePAF:**
- Make a comment explaining why the ePAF is to be withdrawn.
- Select the “Withdraw” button.
- This permanently ends processing of the ePAF. It can still be viewed.

**To cancel an ePAF:**
- Make a comment explaining why the ePAF is to be cancelled.
- Select the “Cancel” button.
- This permanently ends processing of the ePAF. It can still be viewed.

**COMPENSATION AND ACCOUNT DISTRIBUTIONS**

The compensation and account distribution page displayed depends on the employee group and is based only on those groups that are paid by OUHSC; thus affiliate distributions (for example, VA) are not used in ePAF.

Listed below are the components of the distribution:

<table>
<thead>
<tr>
<th>Department</th>
<th>Indicates all the departments in which the employee works.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number</td>
<td>Applies only to primary appointments. PPP and temporary (special pay) appointments do not have position numbers.</td>
</tr>
<tr>
<td>HR Account Code</td>
<td>Used to indicate what sources are used to pay the employee. These are comprised of the GL Acct, Org, Project/Grant, Fund, Program, and Subclass.</td>
</tr>
<tr>
<td>Dist%</td>
<td>The percentage of the distribution in correlation to the compensation paid out of an HR account code.</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Dist Amount</td>
<td>The amount of compensation to be paid out of that particular account.</td>
</tr>
</tbody>
</table>

**Faculty Distribution and Compensation without Affiliate**

*Affiliate Monthly* is grayed out when the affiliate box on the first page is not checked. See section *Hire Form* for more information.

The Account Distribution only refers to the compensation located in *EOM Salary*.

![Compensation Data](image)

**Faculty Distribution and Compensation with Affiliate**

*Affiliate Monthly* is an open field when the affiliate box on the first page is checked. See section *Hire Form* for more information.

The Account Distribution only refers to the compensation located in *EOM Salary*. If there is no EOM salary, the Account Distribution will not be visible. (See screen shot on next page.)
PPP Distribution with no Compensation

The PPP ePAF has no field for a monthly compensation due to the possibility of the payment varying each month. Thus, the distribution is based off the number of account codes used.

For example, if three account codes are used, two of the distributions are 33.333 and the third distribution is 33.334. Remember the total distribution must equal 100.000%.

Temporary Employee Distribution

There is no compensation due to the possibility of the payment varying each month.

The distribution is based off the number of account codes used. Same concept as the PPP distribution.
Volunteers

This employee group is not compensated by OUHSC, thus there is no distribution or compensation page.

LOCATING AN ACCOUNT CODE

Step 1: In the Hire or Job Change ePAF, click on the magnify glass.

Step 2: Insert the account spread information into the look up fields to narrow your search to a specific account code and click on the “Look Up” button.

Step 3: In the search results, click anywhere on the link to choose the desired account code to add it to the account distribution page.
ADDING AN ACCOUNT CODE

Step 1: Click the plus sign (+) to add an extra row or the minus sign (-) to remove a row.

Step 2: Enter the position number for the department you are adding. When you tab out of the field, the department associated with that position number will automatically populate.

Step 3: Enter the HR Account Code or create an account. To create an account code, refer to section Creating an Account Code. To locate an already existing account, refer to section Locating an Account Code. After entering the account code, tab out of the field and the components of the code should automatically populate.

Step 4: Enter the dollar amount to be paid from each account. You can click on the reconciliation button ( ⇥ ) to automatically balance the distribution. The total percentage must equal 100.000%.

CREATING AN ACCOUNT CODE

An account code can be created in the Hire or Job Change ePAF if one does not already exist, provided that all of the components of the spread already exist in the Oracle Financial system. If any of the components do not exist in Financials, an ECAV will need to be completed.

Step 1: In the Hire or Job Change ePAF, click on the “Create” button.
Step 2: Key in the fields below, or use the hourglass to look up a list of valid values. When done, click on the “Find/Create” button.

If the account code that already exists, the system will display the existing account code. A new account will not be created.

If the account code does not exist, the message below will pop up as a notification that the new account code has been created. Click the “OK” button.
Step 3: Click the “OK” button to add the account code to the distribution.

**POSITION DATA**

Each department has access to their position information in Oracle. Departments can also add new position numbers when needed.

Position numbers are 8 digits long. The system will not allow duplicates of position numbers.

PPPs (Professional Practice Plan), volunteers, and temporary employees do not have position numbers.

The system updates position data automatically when a change is made to the corresponding employee’s job record through ePAF. Never make changes to the position number; allow the system to work as designed.

The system will update job code, FTE, and employee ID. If an employee’s department needs to be changed, a new position number with the correct department ID will need to be used or created, if not already in existence.

**View Position Data**

**Step 1:** Select Department Self Service and then OUHSC Position Data on the menu.
Step 2: Search by any of the fields below.

Step 3: To view the history of a position number, click the “Include History” button. You can scroll through the multiple entries using the arrows located in the top right corner or the ‘View All’ link.

Step 4: Scroll through the multiple entries using the arrows located in the upper right corner or click the “View All” link.
**Add a New Position Number**

The position number must exist in OUHSC Position Data before it can be assign to an employee in an ePAF.

**Step 1:** Click the *Add a New Value* tab, enter the position number and click the “Add” button.

**Step 2:** Enter the required information:
- Effective Date - **must be one day less than the effective date used on the ePAF**
- Position Status – always set to “Approved”
- Job Code
- Department HR ID
- FTE

**Step 3:** Leave the Emplid field blank. The system will update the position data after the ePAF has been processed by Human Resources.

**Step 4:** Save

**TERMINATION FORM**

Enter the “Last Day of Service.” The system will add one day to this day for a true termination date.

When the action of “Retirement” is chosen, the reason of “Normal Retirement” is defaulted. After submission, the ePAF will route to the Retirement Coordinator to confirm the type of retirement. In the event, the reason needs changed, the Retirement Coordinator will make the change.

The Form Messages box is something that has to be checked before submitting the form. Checking the box is an attestation that the message has been read.
Upload and attach any documents pertaining to the termination or retirement, such as a resignation letter.

If the termination date needs to be changed on a termed employee, please send an email to the Records Office indicating the termination date has changed. Submitting an ePAF to attempt to change the termination date for an employee who is already terminated cannot be done.

Retiring a faculty member with a title change is a two-step process:

1. Initiate a Job Change ePAF to change title to “Emeritus.” Be sure to define if the separation will be a termination or retirement in the comments section.
2. After HR has approved and processed the Job Change, initiate the Termination/Retirement ePAF. Note the form ID of the previous Job Change in the comments section.

If a title needs to be changed for an individual who is already retired, contact the Provost Office for instructions.

**LEAVE OF ABSENCE FORM**

This form is used to put an employee out on a paid leave of absence, return from leave, or extension of leave. Each action requires an ePAF. The Expected Return Date will not automatically return an individual from leave. If the exact return date is unknown, give an estimation.

Because of TAL, an employee cannot be put on an unpaid leave of absence in the system. All unpaid leave is tracked on the timesheet in TAL.
An Extension of Leave can be processed if the expected return date needs to be extended by checking the box circled below.

**JOB CHANGE FORM**

*Job Change for Faculty without Affiliate*

**Personal Info:** Displays the information that is currently in the system.

**New Job Information:** In the open fields, enter the information that is changing, if any.

**Affiliate Check Box:** Do not check the box.
Page 2

**Personal Info:** Displays the information that is currently in the system.

**Tenure Information:** Check the override box to change the tenure date, if necessary.

**Primary Title:** Reiterates the primary title that was chosen on page 1.

**Additional Title(s):** To add an additional title, add a row by clicking on the plus sign (+) on the right hand side. Fill in the information in the open fields provided on the new row. If an Endowed Chair is added, check the box under the Endowed Chair column and type in the open field provided.
**Personal Info:** Displays the information that is currently in the system.

![Personal Info Table]

**Compensation Data:** Because there is no affiliate appointment, the *Affiliate Monthly* is grayed out.

![Compensation Data Table]

Check the box *Annual Salary above includes Administrative Supplement* if the salary contains an administrative supplement. If the box is checked, another section will pop up to input the supplement and to explain the reason for the supplement as shown below. The supplement will need to be included into the total monthly compensation.

![Supplement Input Section]

*Total FTE* is the sum of the Base FTE and the Affiliate FTE. In this scenario, there is no affiliate appointment, thus the Affiliate FTE is zero (0).
Account Distribution: To add an account code, please refer to section Adding an Account Code. To locate an account code, please refer to the section Locating an Account Code.

Personal Info: Displays the information that is currently in the system.

Actions & Action Reasons: Describes the action(s) that will be reflected on the job record.

File Attachments: Upload any supporting documents pertaining to the actions taken on this form. In order to attach a document, the documents must first be scanned onto the computer.

Comments: Make any comments deemed necessary. Be mindful that the comments will become a permanent part of the employee’s record and will reflect upon the University.
Job Change for Faculty with Affiliate

Page 1

Personal Info: Displays the information that is currently in the system.

New Job Information: In the open fields, enter the information that is changing, if any.

Page 1 Continued

Affiliate Check Box: Check the box if there is an affiliate appointment.
Page 2

**Personal Info:** Displays the information that is currently in the system.

**Tenure Information:** Check the override box to change the tenure date, if necessary.

**Primary Title:** Reiterates the primary title that was chosen on page 1.

**Additional Title(s):** To add an additional title, add a row by clicking on the plus sign (+) on the right hand side. Fill in the information in the open fields provided on the new row. If an Endowed Chair is added, check the box under the Endowed Chair column and type in the open field provided.
Page 3

**Personal Info:** Displays the information that is currently in the system.

**Compensation Data:** Because it was indicated on the first page that there is an affiliate appointment, the *Affiliate Monthly* is an open field to enter the monthly compensation.

![Compensation Data Table]

Check the box *Annual Salary above includes Administrative Supplement* if the salary contains an administrative supplement. If the box is checked, another section will pop up to input the supplement and to explain the reason for the supplement as shown below. The supplement will need to be included into the total monthly compensation.

![Supplement Details]

Page 3 Continued

*Total FTE* is the sum of the Base FTE and the Affiliate FTE.

The FTE is based on the amount of compensation for both base and affiliate. In this scenario, because the
monthly compensation for both base and affiliate is $1.00 each, and the total compensation is $2.00, and the total FTE is 1.0, the system calculates the base and affiliate FTE each to be .50 FTE. If the total FTE is not meant to be 1.0, adjust the total FTE to what is should be, and the base FTE and affiliate FTE will recalculate accordingly.

**Account Distribution:** The account distribution is only for the EOM salary. The Affiliate portion is not included, because the University does not pay the affiliate portion. To add an account code, please refer to section Adding an Account Code. To locate an account code, please refer to the section Locating an Account Code.

**Personal Info:** Displays the information that is currently in the system.

**Actions & Action Reasons:** Describes the action(s) that will be reflected on the job record.

**File Attachments:** Upload any supporting documents pertaining to the actions taken on this form. In order to attach a document, the documents must first be scanned onto the computer.
Comments: Make any comments deemed necessary. Be mindful that the comments will become a permanent part of the employee’s record and will reflect upon the University.

PERSONAL DATA

Do not use all caps.

Personal Info

First, Middle, Last Name: The employee’s name must appear exactly as it does on the Social Security card. For foreign nationals that have not received a social security card, but have applied for one, use the name that is on the receipt provided by the Social Security Administration or the name on the work authorization documents.

Email Address: Add a personal address for the incoming employee in order for the individual to receive the automated emails to set up his/her user id and password.

If an email is not included, the automated emails will be sent to the person who initiates the Hire ePAF. The message below will pop up; click the “OK” button to continue. Do not enter the ouhsc.edu email address.

The user id and password must be completed in order for the new employee to sign the electronic I-9.

The first automated email will be generated 5-10 minutes after the Hire ePAF has been submitted.
Home Address and Phone
OUHSC does not use a mailing address, thus the home address should be where the employee wants to receive mail.

No punctuation or symbols are to be used in the addresses.

Do not abbreviate the city name, for example, do not use “OKC” for Oklahoma City.

Campus Address and Phone
Building: When the building abbreviations is entered in to the field, the street address, city, state, and postal code will auto-populate.

Room #: Enter the room number for which the employee will be located. If there is not a specific location within the building, this field can be left blank.

Phone: Enter the departmental phone number.

Phone Extension: Enter the extension of the employee, if applicable.

Click on the “Next” button to continue to page 2.
**Personal Info**

This displays the employee’s name. Ensure the order of the name is correct: last name, first name, middle name. If the name is in the wrong order or the name is misspelled, return to the previous page to make the correction. Once this page is submitted, the name cannot be changed. Contact HR Records for further instructions, 271-2180.

**Identity Info**

Use the information found on the faculty application form or the Employee Personal Data Form (PDF) to fill out the information. The PDF can be found in the new hire packet located online.

**Volunteer:** If the individual is to be hired as a volunteer, click the volunteer box. This will narrow down the information that is required.

**Veteran Status:** If a veteran status has been entered, the separation date field will appear. Fill in the separation date.
HIRE FORM

Hire for Faculty without Affiliate

Page 1

Personal Info: Displays the employee’s name, employee id, and other information.

Hire Form Data: Input the information pertaining to the hire. When you choose employee group of Faculty, the affiliate check box appears.

**Effective Date** is the date the employee will start work.

**Employee Group** identifies what type of employee is hired. This will also drive what types of pages are seen by the individual completing the ePAF.

**Job Code** is attached to a specific title. If the job code is unknown, the title can be searched by clicking on the magnify glass next to the open field.

**Department** refers to the employee’s primary department.

**Location Code** is the city or town where the individual will be performing job duties.

Page 1 Continued

**Environment** refers to the types of training required for the specific job duties. Check all that apply.
Affiliate Check Box:  Do not check the box.

Page 2

Personal Info:  Displays the employee’s name, employee id, and other information.

Tenure Information:  Choose the appointment type from the drop down box by clicking on the arrow.

Primary Title:  Reiterates the primary title that was chosen on page 1.

Additional Title(s):  To add an additional title, add a row by clicking on the plus sign (+) on the right hand
Fill in the information in the open fields provided on the new row. If an Endowed Chair is added, check the box under the Endowed Chair column and type in the open field provided.

**Personal Info:** Displays the employee’s name, employee id, and other information.

**Compensation Data:** Because there is no affiliate appointment, the *Affiliate Monthly* is grayed out.

- **Total FTE** is the sum of the Base FTE and the Affiliate FTE. In this scenario, there is no affiliate appointment, thus the Affiliate FTE is zero (0).

**Other Faculty Information:** Input total FTE and PPP earnings potential.

*Total FTE* is the sum of the Base FTE and the Affiliate FTE. In this scenario, there is no affiliate appointment, thus the Affiliate FTE is zero (0).

**PPP Earnings Potential** is the estimated earnings a faculty member may receive in PPP earnings.
**Account Distribution:** Fill in the position number, HR account code, and the distribution amount.

*Position Number* is assigned for each department in which the employee will be working. The position number must exist in Position Data and be in the status of “Approved.”

To find a vacant position number, click on the magnify glass to the right of the position number field. The title associated with the job code does not have to match. When the ePAF is executed into the system, the system will change the job code on the position number to match what was entered on the ePAF. For more information regarding the position number, please refer to section Position Data.

To add an *HR Account Code*, please refer to section Adding an Account Code. To locate an account code, please refer to the section Locating an Account Code.

*Distribution Amount* refers to the amount of money that will be withdrawn from that particular HR Account Code. The total must equal the *EOM Salary*. In this scenario, the EOM salary equals $1.00, thus the distribution amount must equal $1.00.

**Personal Info:** Displays the employee’s name, employee id, and other information.

**Transfer from Norman campus?** If the employee is a transfer from the Norman campus only, please check this box. The department will need to request the leave balance from the Norman campus and make the adjustment during payroll entry.

**Form Message:** The box must be checked on all form messages. The individual who checks the box is attesting that the message was read and understood.
File Attachments: Upload any required new hire documents. In order to attach a document, the documents must first be scanned onto the computer.

Comments: Make any comments deemed necessary. Be mindful that the comments will become a permanent part of the employee’s record and will reflect upon the University.

The “Submit” button will send the ePAF to the next approver.

Hire for Faculty with Affiliate

Page 1

Personal Info: Displays the employee’s name, employee id, and other information.

Hire Form Data: Input the information pertaining to the hire. When you choose employee group of Faculty, the affiliate check box appears.

Effective Date is the date the employee will start work.

Page 1 Continued

Employee Group identifies what type of employee is hired. This will also drive what types of pages are
seen by the individual completing the ePAF.

*Job Code* is attached to a specific title. If the job code is unknown, the title can be search by clicking on the magnify glass next to the open field.

*Department* refers to the employee’s primary department.

*Location Code* is the city or town where the individual will be performing job duties.

*Environment* refers to the types of training required for the specific job duties. Check all that apply.

**Affiliate Check Box:** Check the Affiliate box to include the faculty member’s affiliate appointment.

---

**Personal Info:** Displays the employee’s name, employee id, and other information.

**Tenure Information:** Choose the appointment type from the drop down box by clicking on the arrow, **▼**.

---

**Primary Title:** Reiterates the primary title that was chosen on page 1.
**Additional Title(s):** To add an additional title, add a row by clicking on the plus sign (+) on the right hand side. Fill in the information in the open fields provided on the new row. If an Endowed Chair is added, check the box under the Endowed Chair column and type in the open field provided.

<table>
<thead>
<tr>
<th>#</th>
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<th>End Date</th>
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<tr>
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<td>8/1/2012</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Page 3

**Personal Info:** Displays the employee’s name, employee id, and other information.

**Compensation Data:** Because it was indicated on page one (1) that there is an affiliate appointment, the Affiliate Monthly is an open field to enter the monthly compensation.

Check the box *Annual Salary above includes Administrative Supplement* if the salary contains an administrative supplement. If the box is checked, another section will pop up to input the supplement and to explain the reason for the supplement as shown below. The supplement will need to be included into the total monthly compensation.

Page 3 Continued
**Other Faculty Information:** Input total FTE and PPP earnings potential.

*Total FTE* is the sum of the Base FTE and the Affiliate FTE.

The FTE is based on the amount of compensation for both base and affiliate. In this scenario, because the monthly compensation for both base and affiliate is $1.00 each, and the total compensation is $2.00, and the total FTE is 1.0, the system calculates the base and affiliate FTE each to be .50 FTE. If the total FTE is not meant to be 1.0, adjust the total FTE to what is should be, and the base FTE and affiliate FTE will recalculate accordingly.

**PPP Earnings Potential** is the estimated earnings a faculty member may receive in PPP earnings.

**Account Distribution:** Fill in the position number, HR account code, and the distribution amount.

*Position Number* is assigned for each department in which the employee will be working. The position number must exist in Position Data and be in the status of “Approved.”

To find a vacant position number, click on the magnify glass to the right of the position number field. The title associated with the job code does not have to match. When the ePAF is executed into the system, the system will change the job code on the position number to match what was entered on the ePAF. For more information regarding the position number, please refer to section **Position Data**.

To add an *HR Account Code*, please refer to section **Adding an Account Code**. To locate an account code, please refer to the section **Locating an Account Code**.

**Distribution Amount** refers to the amount of money that will be withdrawn from that particular HR Account Code. The total must equal the *EOM Salary*. In this scenario, the EOM salary equals $1.00, thus the distribution amount must equal $1.00.
Page 4

**Personal Info:** Displays the employee’s name, employee id, and other information.

---

**Transfer from Norman campus?** If the employee is a transfer from the Norman campus only, please check this box. The department will need to request the leave balance from the Norman campus and make the adjustment during payroll entry.

**Form Message:** The box must be checked on all form messages. The individual who checks the box is attesting that the message was read and understood.

**File Attachments:** Upload any required new hire documents. In order to attach a document, the documents must first be scanned onto the computer.
Comments: Make any comments deemed necessary. Be mindful that the comments will become a permanent part of the employee’s record and will reflect upon the University.

The “Submit” button will send the ePAF to the next approver.

Hire for Affiliate Only

Page 1

Personal Info: Displays the employee’s name, employee id, and other information.

Hire Form Data: Input the information pertaining to the hire. When you choose employee group of Faculty, the affiliate check box appears.

Effective Date is the date the employee will start work.

Employee Group identifies what type of employee is hired. This will also drive what types of pages are seen by the individual completing the ePAF.

Job Code is attached to a specific title. If the job code is unknown, the title can be search by clicking on the magnify glass next to the open field.

Department refers to the employee’s primary department.

Location Code is the city or town where the individual will be performing job duties.

Environment refers to the types of training required for the specific job duties. Check all that apply.
**Affiliate Check Box:** Check the Affiliate box for the faculty member’s affiliate appointment.

**Personal Info:** Displays the employee’s name, employee id, and other information.

**Tenure Information:** Choose the appointment type from the drop down box by clicking on the arrow,  

**Primary Title:** Reiterates the primary title that was chosen on page 1.

**Additional Title(s):** To add an additional title, add a row by clicking on the plus sign (+) on the right hand side. Fill in the information in the open fields provided on the new row. If an Endowed Chair is added, check the box under the Endowed Chair column and type in the open field provided.
Personal Info: Displays the employee’s name, employee id, and other information.

Compensation Data: Because it was indicated on page one (1) that there is an affiliate appointment, the Affiliate Monthly is an open field to enter the monthly compensation. The EOM Salary will have a zero (0) amount since this faculty member is an affiliate only.

Annual Salary above includes Administrative Supplement should not be checked since this faculty member is an affiliate only.

Other Faculty Information: Input total FTE and PPP earnings potential.

Total FTE is the sum of the Base FTE and the Affiliate FTE. Because this faculty member is affiliate only, the Base FTE will be zero.

PPP Earnings Potential is the estimated earnings a faculty member may receive in PPP earnings.

Affiliate Position # is the same as any other position number. To find a vacant position number, click on the magnify glass to the right of the position number field. The title associated with the job code does not have to match. When the ePAF is executed into the system, the system will change the job code on the position number to match what was entered on the ePAF. For more information regarding the position number, please refer to section Position Data.
**Personal Info:** Displays the employee’s name, employee id, and other information.

![Personal Info](image)

**Transfer from Norman campus?** If the employee is a transfer from the Norman campus only, please check this box. The department will need to request the leave balance from the Norman campus and make the adjustment during payroll entry.

**Form Message:** The box must be checked on all form messages. The individual who checks the box is attesting that the message was read and understood.

**File Attachments:** Upload any required new hire documents. In order to attach a document, the documents must first be scanned onto the computer.

![File Attachments](image)

**Comments:** Make any comments deemed necessary. Be mindful that the comments will become a permanent part of the employee’s record and will reflect upon the University.

The “Submit” button will send the ePAF to the next approver.

![Comments](image)
**Hire for PPP**

After the initial appointment has been approved by HR, the department can submit a hire for the PPP for those employees who will receive PPP compensation.

**Page 1**

**Personal Info:** Displays the employee’s name, employee id, and other information.

**Hire Form Data:** Input the information pertaining to the hire. When you choose employee group of Faculty, the affiliate check box appears.

*Effective Date* should be the same as on the initial faculty appointment.

*Employee Group* will be PPP.

*Job Code* is attached to a specific title. If the job code is unknown, the title can be searched by clicking on the magnify glass next to the open field.

*Department* refers to the employee’s primary department.

*Location Code* is the city or town where the individual will be performing job duties.

*Environment* refers to the types of training required for the specific job duties. Check all that apply.
Page 2

**Personal Info:** Displays the employee’s name, employee id, and other information.

![Personal Info Table]

**Account Distribution:** No position number and no compensation are recorded on the PPP ePAF. To add an HR Account Code, please refer to section Adding an Account Code. To locate an account code, please refer to the section Locating an Account Code.

*Distribution %* refers to the percentage of money that will be withdrawn from that particular HR Account Code. The percentage will be divided by the number of HR accounts, and the percentage must equal 100.000%. For example, if there are four accounts, the percentage for each account would be 25.000.

<table>
<thead>
<tr>
<th>Department</th>
<th>HR Account Code</th>
<th>Create</th>
<th>GL Accnt</th>
<th>Org</th>
<th>Project/Grant</th>
<th>Fund</th>
<th>Program</th>
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<td></td>
<td></td>
<td>0.00</td>
</tr>
</tbody>
</table>

Tot Pct: 0.000

Page 3

**Personal Info:** Displays the employee’s name, employee id, and other information.

![Personal Info Table]

**Transfer from Norman campus?** If the employee is a transfer from the Norman campus only, please check this box. The department will need to request the leave balance from the Norman campus and make the adjustment during payroll entry.

**Form Message:** The box must be checked on all form messages. The individual who checks the box is attesting that the message was read and understood.

![Form Messages Table]
File Attachments: Upload any required new hire documents. In order to attach a document, the documents must first be scanned onto the computer.

Comments: Make any comments deemed necessary. Be mindful that the comments will become a permanent part of the employee’s record and will reflect upon the University.

The “Submit” button will send the ePAF to the next approver.

CANDIDATE SEARCH

Candidate not in the Database

If the four required fields, First Name, Last Name, Social Security Number, and Date of Birth of the desired individual are not in the database, the “Add” button will appear as shown below.

After choosing the “Add” button, the Personal Data page will pop up to fill in the biographical information. For more information regarding how to fill out the Personal Data pages, please refer to section Personal Data.
**Candidate in the Database**

**Searching for Candidate**

If the desired individual already exists in the database via the employee ID, or there is a close match to the name entered into the search fields, the *Person Results* will appear.

**Search by Name:** It is important to ensure that the individual chosen in *Person Results* is the desired individual. The search will pull up all individuals with similar names, as shown below. To prevent choosing the incorrect individual, the more fields that are used, i.e. Middle Name, Date of Birth, Social Security Number, will narrow down the choices, and reduce the risk of creating a duplicate employee ID.

![Search by Name](image1.png)

**Search by Employee ID:** Search by the employee ID, if known. This will reduce the risk of choosing the incorrect individual or creating a duplicate employee ID, as shown below.

![Search by Employee ID](image2.png)
If the desired individual appears in the *Person Results*, click the arrow next to the zero (0) record row to choose that individual.

If the desired individual has an active job record, clicking on the “i” button (;left) next to the arrow will display where the individual is currently working at OUHSC.

**Employment Status Indicators**

Information exists = 

Information does not exist =  

HR: Information in the HR database, usually just Personal Data
Job: Job data
Act: Indicates if the employee is active.

For example, the indicators below mean there is HR and job data present; however, the employee is not currently active.
PERSONAL DATA CHANGE eFORM

Step 1: Start at ePAF Home Page and choose Start a New ePAF.

Step 2: Choose Add Personal Data eForm.

Step 3: Search by any of the criteria listed below. The easiest way is to use the employee ID.

Step 4: There are four sections of information that can be changed/corrected on the Personal Data eForm: Name, Campus Address, Personal Information, and Ethnic Group(s).

The information on the right side (blue) represents the information currently in PeopleSoft. To correct inaccurate information, make the corrections in the open fields on the left side (red). If a field doesn’t need to be changed, leave the pre-populated information in the field.
**Form Message:** The box must be checked on all form messages. The individual who checks the box is attesting that the message was read and understood.

**File Attachments:** Upload any required new hire documents. In order to attach a document, the documents must first be scanned onto the computer.

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### REQUIRED ATTACHMENTS

Departments have the ability to attach documents to the ePAF to expedite review and approval.

**Preferred Standards for ePAF Document Attachment**

A single “pdf” document will be created by scanning the pertinent documents, usually using an eCopy machine, and compiling all scans into a single document.

The preferred naming format for a document is: `<Lastname><FirstInitial><MiddleInitial>-<process>.pdf`

For example, the supporting documents for processing a hire ePAF for Michael Donald Smith would be scanned into a single “pdf” named “Smithmd-hire.pdf”.

**Faculty Hire Documents**

- Letter of Offer (Final Provost Signature – Provost Office adds)
- Preliminary Letter of Offer/Letter of Offer under 60K
- Curriculum Vitae
- Personal Data Form
- Loyalty Oath
- Employee Role Based Access Worksheet
- Confidential and Proprietary Information Disclosure
- Wage Beneficiary Designation Form
- I-9 and back up documentation (if not electronic form)

**Staff Hire Documents**

- Personal Data Form
- Loyalty Oath
Staff Handbook Acknowledgement
Employee Role Based Access Worksheet
Confidential and Proprietary Information Disclosure
Wage Beneficiary Designation Form
I-9 and back up documentation (if not electronic form)
Application
Cover Letter/Resume (preferred, not required is application is attached)

**Termination/Resignation (Staff and Faculty)**
Resignation Letter

**Documents that Should Not be Attached to the ePAF:**

- Payroll
- Foreign National Information Form

- HR Records
- PayCard Request Form

- Departmental Tier 1
- Computer Account Request & Policy (if not completed through automated process)

- Provost’s Office
- Affirmative Action Summary

- Employee Health
- Vaccine History Form

**College Specific Documents**
Each college may have documents they wish to attach that are specific to that college and not a part of the Provost and HR processes. All college specific documents attached to an ePAF must be titled in an intuitive way and end with the suffix of the initials of the college. For example, a Lab Agreement document for the College of Pharmacy should have a title such as “labagreement” and have the suffix “COP” so that the title of the document is “labagreement-COP.pdf.”

**ATTACH DOCUMENTS TO A SUBMITTED ePAF**
Documents can be attached to an ePAF after it has already been submitted without having to “Resubmit.” This functionality is part of hire, job change, leave of absence, and termination ePAFs. It does not matter at what state the ePAF is in during the routing process, including executed.

**Step 1:** Navigate to *ePAF Home Page.*

**Step 2:** Choose *View Employee History.*

**Step 3:** Search for the desired form to which to attach the document(s).
**Step 4:** Open the form.

**Step 5:** Scroll to the bottom of the page to the **File Attachment** section and click on the “**Add File Attachment**” button.

![Add File Attachment button](image)

**Step 6:** Upload the document.

**Step 7:** Label document.

**Step 8:** Click the “**Next**” button at the bottom of the page.

![Next button](image)

**Step 9:** On the second page, click the “**Review**” button to save the attachment. If the “**Review**” button is not clicked, the document will not be saved on the ePAF.

![Review button](image)
PRINT ePAF
This function does not pertain to the Personal Data eform.

Setting up a Run Control ID

**Step 1:** For initial set up to print an ePAF, click the *Add a New Value* tab.

**Step 2:** Type any word to use as the run control ID, and click the “Add” button.

**Step 3:** Enter the employee’s ID and the form ID to print. Choose whether or not to print the comments by checking the box to print the comments, or unchecking the box to not print the comments.
Step 4: Click on the *Details* link. Ensure the server listed is PSNT.

Step 5: Click on the *View Log/Trace* link.

Step 6: Click on the *OUGTPRNT* link that is followed by “.PDF.”
Step 7: Print the PDF. This is an example of how the printed version will look. Because this faculty member is an affiliate only, there is no funding distribution.