

# Evaluating an ePAF to Hire/Rehire a Temporary Employee

## (Student Worker, Adjunct Faculty, Temporary Staff)

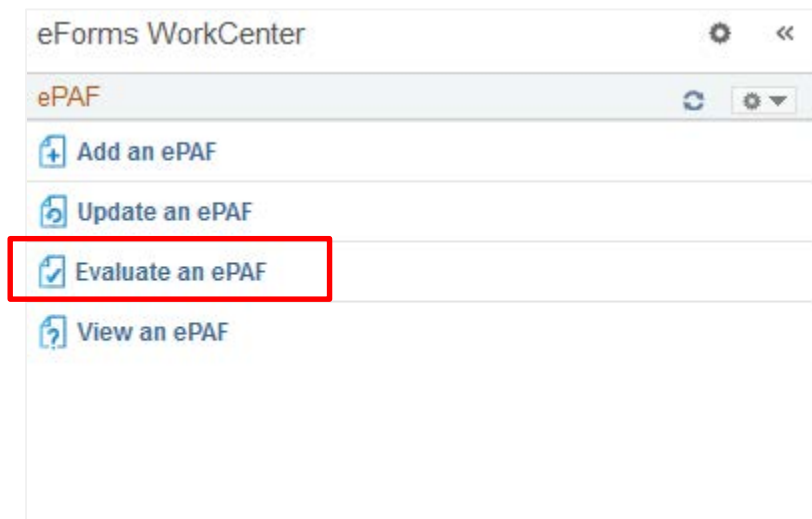
Log into my.SMU using your SMU username and password.

1. Click on **Main Menu**
2. Click on **Manager Self Service**
3. Click on **eForms WorkCenter**



### Using the ePAF Features

#### ePAF Tasks



The ePAF process includes four types of functional “tasks” to work with the records. The ePAF tasks are defined as:

**Add** – This is the task that starts the ePAF transaction, by creating a Hire (or Rehire) record.

**Update** – If an Initiator saves an ePAF record without submitting it for approval, the user can resume working with the record using the Update task. Update is


also used when a form is recycled (explained below) so that the initiator can update the record and resubmit it for approval. If the ePAF needs to be cancelled so that its processing will be cancelled, the Update task allows the initiator to withdraw the ePAF.

**Evaluate** – The ePAF approver completes this task. The approver can review the record and record the appropriate action: Approve, Recycle, or Deny.

**View** – The View task allows the user to view the ePAF but no actions or edits can be made.

## Evaluating an ePAF Record

To consider an ePAF for approval (or other decision), click on **Evaluate an ePAF**. To see all records that are ready for approval consideration, click Search – ***without entering any criteria***. Populate one or more of the criteria fields to search for a specific record.

 **SEARCH : Evaluate an ePAF eForm**

**Search by:**

Form ID

Empl ID

Empl Record

Form Type


Name

Form Condition


Department



Form Status



Original Operator

Original Date  

Last Operator

Last Date  

Personalize   Find   View All     First 1-2 of 2 Last											
Form ID	Form Type	Form Condition	Form Status	Empl ID	Empl Record	Name	Department	Original Operator	Original Date	Last Operator	Last Date
100005	HIRE	Default	Pending		0		213800		2016-05-05		2016-05-05
100036	HIRE	Default	Pending		0		213800		2016-05-09		2016-05-10

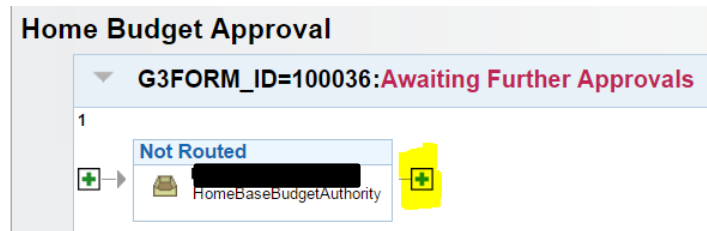
- Results will be displayed below the search fields.
- Click on any link associated with the record you want to evaluate. Details of the PAF record will be displayed on the screen.
- Use the scroll bar on the right side of the page to view all of the job information.
- Click **Next** to advance to the Ad Hoc Approval Workflow page. Please note that this page is informational only, unless you need to insert a one-time Ad Hoc approver somewhere in the workflow framework.

## Adding an Ad Hoc Approver

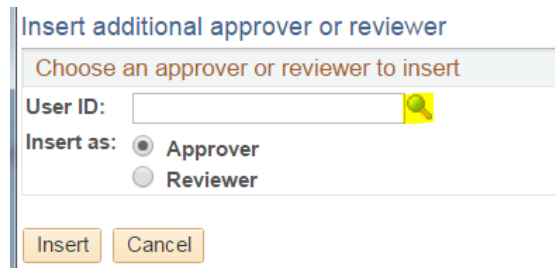
If the PAF record requires an additional review and approval by someone not included in the approval workflow, you can insert an Ad Hoc (one-time) approver.

Determine where the additional approver needs to be added in the workflow that is displayed on the screen. *Note:* This approver cannot be the *first* approver on the record.

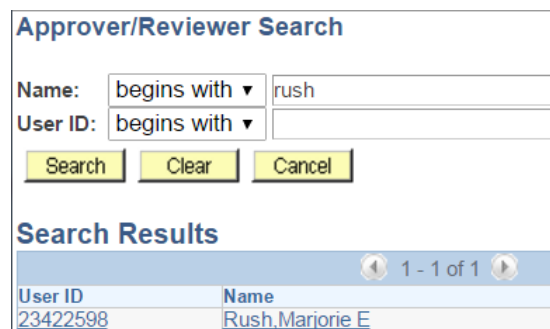
1. Click the **+** button within the workflow steps to insert the ad hoc approver.



2. Enter the **SMU ID number** of the ad hoc approver, or use the lookup tool to search for the ad hoc approver's ID number.



3. The Approver/Reviewer Search box will display the full list of potential ad hoc approvers. To define your search, you may either enter the approver's name (last name, first name) or part of the name. If you know what the approver's SMU ID number begins with, enter part of that value in the User ID field. Click **Search** to locate the approver's information.




User ID	Name
23422598	Rush, Marjorie E

4. Click the **approver's name or ID** to insert the User ID field on the original lookup pop-up box.

Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID:   Rush, Marjorie E

Insert as: ☒ Approver ☐ Reviewer

5. Click **Insert**.

**CAUTION!** If you insert an ad hoc approver, you must click the **Save Routing Changes** button near the bottom of the page or else the ad hoc approver will be dropped from the approval workflow! (Note: There is **not** a prompt to save changes before leaving the page.)

**Final Approvals**

▼ G3FORM\_ID=100036:Awaiting Further Approvals

1

Not Routed

Multiple Approvers  
HR\_GT\_HR

Not Routed

Multiple Approvers  
HR\_GT\_PY

Comment History

6. Click **Next** to advance to the 3<sup>rd</sup> page of the ePAF record.

FILE ATTACHMENTS


	Upload	View	Description	Doc Id	
1	<input type="button" value="Upload"/>	<input checked="" type="button" value="View"/>	Other	289843232016-05-10-09.43.47	<input type="button" value="Delete"/>

- From the *Submit* page click **View** to see attachments or upload additional documents by selecting **Add File Attachment**.

## Comments

If there are comments on the record from either the Initiator or previous approvers, the comments will be displayed on the page in the Comments section.

You may add comments to the ePAF record by clicking on the arrow to the left of the word “Comments” at the bottom of the page. The comment field will open so that an entry can be made. You can cut-and-paste information into the Comments field.

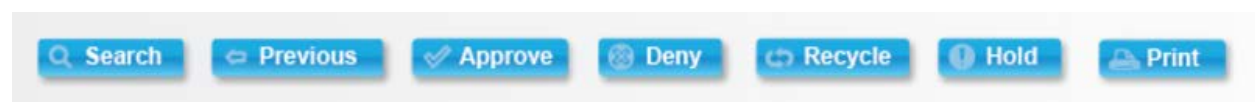
 COMMENTS

**CAUTION!** Comments on the ePAF record are viewable by all users who have access to the record, and comments cannot be deleted once the record has been saved or submitted. Comments become a part of the employee's "permanent" record. Therefore, use discretion to ensure that all comments are appropriate and relevant to the record or transaction.

### Taking Action on the ePAF Record

At the bottom of the page, several "action" buttons appear. Click the appropriate button to indicate the decision for the record.

Please note that the record cannot be edited. If changes are required, add Comments to indicate what needs to be updated, then click Recycle to return the record to the Initiator.



- **Search** – Return to the Search page
- **Previous** – Scroll to a previous page in the same record
- **Approve** – Indicate approval of the record; workflow will consider each subsequent step to determine additional approval requirements
- **Deny** – Indicate that the record is to be cancelled without consideration of modifying details for resubmission
- **Recycle** – Return the record to the Initiator so that details can be modified and resubmitted for approval consideration (all approvals are reset and the approval workflow will begin again)
- **Hold** – Indicates that the record is in a pending status with the person who applied the Hold status
- **Print** – *This feature is currently disabled*

## Next Steps after Approval

Once you click Approve on the ePAF record, the Results page reflects the approval. The Approval Workflow then considers the next step based on details of the PAF. You will see at which step the workflow stopped, pending the next approval.

The screenshot displays the 'TASK : Evaluate a Hire eForm' Results page for eForm ID 100036. The page is divided into three main sections, each representing a step in the approval workflow:

- Principal Investigator:** This section shows a status of 'Approved' with a green checkmark. The approver is 'Principal Investigator' and the timestamp is '05/10/16 - 12:25 PM'. Below this is a 'Comment History' link.
- Home Budget Approval:** This section shows a status of 'Pending' with a yellow clock icon. The approver is 'HomeBaseBudgetAuthority' (timestamped '05/10/16 - 12:25 PM') and the next approver is 'Rush, Marjorie E' (labeled 'Inserted Approver'). Below this is a 'Comment History' link.
- Financial Line Approvals:** This section shows a status of 'Not Routed' with a blue icon. The approver is 'DistributionBudgetAuthority'. Below this is a 'Comment History' link.

Each section includes a header with the form ID and project ID, and a 'View/Hide Comments' link. The overall status of the workflow is 'Awaiting Further Approvals'.

The Approval Workflow will present the record to each approver in the order outlined on the page. You do not need to take any further action for this ePAF record.

## Understanding the Approval Workflow

The required approvals are determined systematically, based on ePAF rules that SMU has implemented. Some fundamental Approval Workflow concepts to understand are:

1. The approvals listed up to and including the Financial Line Approvals will be required for the record.
2. The approvals listed beginning with Federal Work Programs may be required, based on the details of the PAF record. The workflow process evaluates each approval step when that step is reached. In other words, the determination of whether the *next* approval step is required is made after the *previous* approval has been submitted.
3. If there is only one person who can submit the specific type of approval, that person's name will appear on the page. If there are multiple people who can approve PAFs for a specific

condition (e.g. Federal Work Programs), the list of potential approvers can be viewed by clicking the Multiple Approvers link for that approval step.

4. If an approver is listed on the PAF record in more than one approval section, his or her initial approval will be applied to all approval steps on the record. The subsequent automatic approvals are indicated as “AutoApproved” – but the approval may not be displayed at the time of the initial approval if there are other approvers listed in between steps; rather, the Auto Approval will occur as each step is considered sequentially by the approval workflow process.

The types of approvals considered as part of the Approval Workflow are:

**Principal Investigator** – Displays only if applicable (all of part of the PAF funding is associated with a sponsored project (G%)).

**Home Budget Authority** – Displays the name of the person who is responsible for the financial activity of the Home Base Org.

**Financial Line Approvals** – Displays the name of the person who is responsible for the financial activity of the department(s) to which the employee’s wages will be charged.

**Federal Work Programs** – Displays the list of approvers for jobs all or partially funded by a work study program.

**Additional Approvals** – Displays the list of approvers for the International Office, Grants (for jobs all or partially funded by a sponsored project), and the Provost Office (faculty PAFs and student Teaching Assistants who are teaching).

**Final Approvals** – Displays the list of approvers for the final review and approval by either HR or Payroll (depending on the type of PAF submitted).