Submitting an ePAF to Hire/Rehire Student Worker

Getting Started

Before you begin the ePAF submission process, gather the key pieces of information necessary.

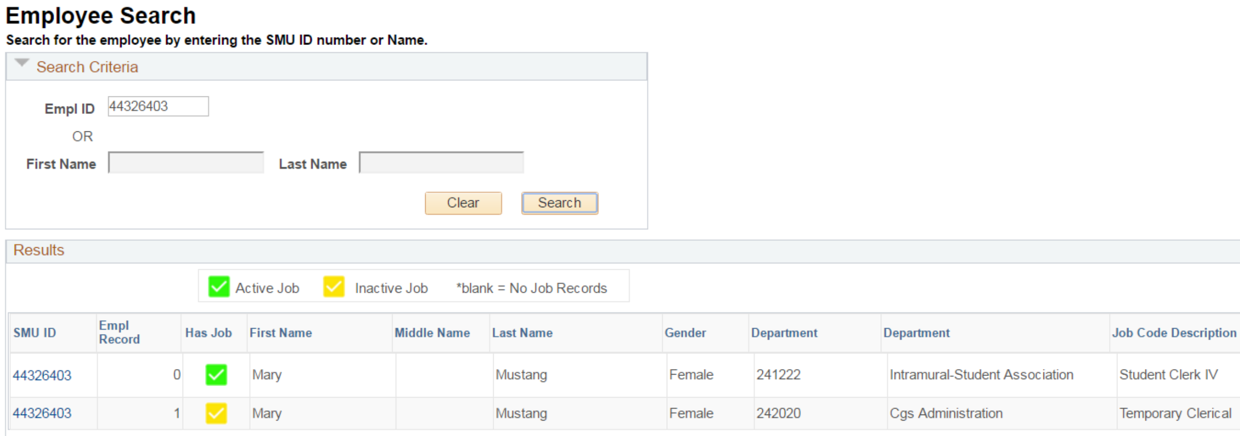
1. Employee's SMU ID number (preferred) or full legal name.
2. Job details
    a. Type of employee (Temp staff, student worker, etc.)
    b. Begin date
    c. End date (for any type of temporary employee)
    d. Home Base Org
    e. Scheduled hours per week / Work schedule
    f. Immediate Supervisor's ID number
    g. Location where services will be performed
    h. Department contact (for ePAF questions) – if different than person initiating the record.
3. Compensation details
    a. Pay rate
    b. Earnings distribution for funding of payments
    c. Attachments (optional for most, but required if employee is teaching for credit)

Once you have obtained the needed information, you can now start the ePAF submission process in my.SMU.

1. **Log into my.SMU** using your SMU username and password.
2. Click on **Main Menu**
3. Click on **Manager Self Service**
4. Click on **eForms WorkCenter**

Initiating a New ePAF Record

1. To initiate an ePAF for a newly hired or rehired employee, click on **Add an ePAF**.
2. Search for the employee by entering their SMU ID or their first and last names. (*Note*: Wild Card searches may be performed.)
3. Click **Search**. You will be presented with results to choose from.

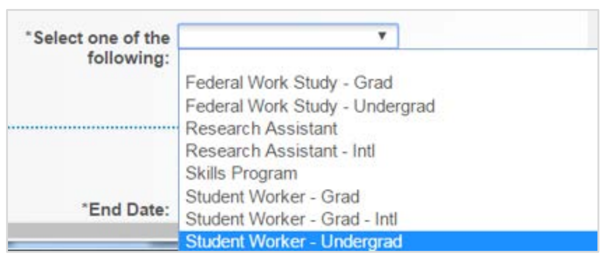


The search results indicate the employee's job activity, if any. The page uses a color coded scheme to indicate if the employee has a currently active job or if they have worked for SMU previously.

4. **Click the employee's ID number** in the left column. This will launch the new Hire/Rehire ePAF record form.

Completing a New ePAF Record

Under **Employee Group Selection,** select the **type of job** for which the employee is being hired. Options will be displayed based on the selection that was made.



Job Information

Once the employee's job has been selected, the appropriate Job Information section will appear on the page. Complete the fields in the section. (Fields that are required are identified by an asterisk in front of the field label). Populate the optional fields if the information provides meaningful information to you or any of the approvers who will review the record.

Begin Date – The date the employee's job is to begin.

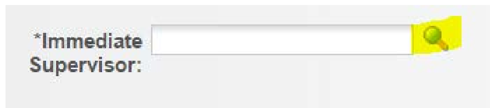
End Date – The date the employee's job is to end. Refer to the posted [Payroll Processing Schedule] for the established student worker date restrictions for the fiscal year.

Home Base Org – The department to which the employee's record is assigned. This will be used to determine the Budget Authority for PAF approval, and will determine which TIMEaccess approver will have access to the employee's time records.

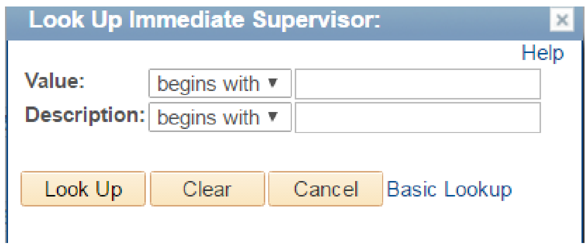
Scheduled Hours per Week – The expected number of hours to be worked each week. (Does not feed to the time records)

Immediate Supervisor ID – The person who will be managing the employee's work.

Click the lookup button to search for the supervisor's SMU ID number.



The ***Look Up Immediate Supervisor*** window will pop up:



Value: Enter part of the supervisor's SMU ID number.

Description: Enter part of the supervisor's name.

Additional Employment Info

Indicate where the employee will be performing the services for SMU. If the employee will be working in a state other than Texas, or outside of the U.S., additional fields will be presented to collect information about the employee's work location.

This section also displays the employee's U.S. Person status (based on active immigration records maintained by SMU's International Office).

Department Contact Information

The Contact ID field will be prepopulated with the ID of the user who initiated the record. This field may be edited prior to the record being submitted for approval.

The Contact Phone field is populated with the Campus Phone number of the person indicated in the Contact ID field. This value may be edited.

Actions at the bottom of the first page of the ePAF record

Click **Next** to continue populating the information for the ePAF.

Alternatively, you may click **Save** to retain the information you have already entered on the record (to resume working with it at a later time – using the Update an ePAF link).

CAUTION! If you click **Close** in the lower right corner of the page without saving the record first, the information you entered will be lost and the record will be discarded.

Second Page of ePAF Record

Header Information

The employee's name and Employee ID are displayed here.

Compensation

Indicate the rate of pay. For many jobs, there is only one method for paying the employee. However, for some jobs, you may be presented with options for how the employee is to be paid.

Earnings Distribution

Indicate the Fund, Department (Org), and Project values to which the employee's wages are to be charged. Additional lines for distribution may be added by clicking the **+** sign at the right side of the existing row. (You may need to scroll to the right to access the button.)

The percentage for the first row of earnings distribution will be prepopulated with 100.00 (percent). This may be modified as appropriate if additional lines of funding are added. Note that the total percentage of funding must equal 100.00 percent before the record can be saved or submitted for approval.

File Attachments

You may attach files to the record. All users who have access to the record will be able to view the attachments. An approver can also add attachments to the record as he or she is reviewing the record before indicating the approval action.

To add the first attachment, click the **Upload** link. Browse to locate the file to be attached to the PAF record. Indicate the type of attachment by selecting one of the Description options (required).

To add another attachment, click the **Add File Attachment** to create an additional row to which you can attach another file.

Comments

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 you may type your entry. Please know that you can cut-and-paste information into the Comments field.

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.

Actions at the bottom of the second page of the ePAF record

If the ePAF record **is not** ready to be submitted for approval, you may click **Save** to retain the information you have already entered on the record (to resume working with it at a later time – using the Update an ePAF link).

If the ePAF record **is** ready to be submitted for approval, click **Submit** to finalize the information on the ePAF and to initiate the approval routing workflow.

When you click submit, the **Results** page will display the Approval Routing that has been systematically determined based on details of the ePAF.

ePAF Actions

At various stages of the initiation, approval review, and historical view of the ePAF, the user is presented with action buttons at the bottom of each page in the record. These actions are:

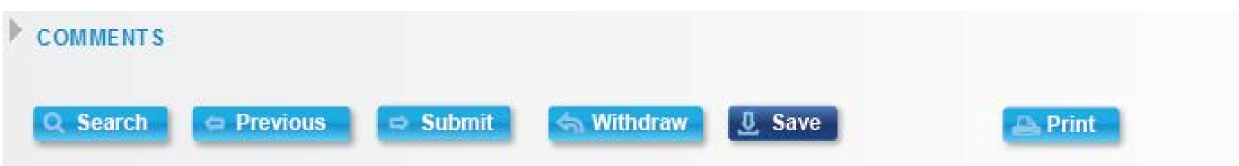
Search – Return to the Search page

Previous – Scroll to a previous page in the same record

Next – Scroll to the next page in the same record

Submit – Submit the record for approval; triggers the initial approval routing workflow (action only available to the Initiator)

Save – Save the record without submitting for approval.



Third Page of ePAF Record

Results: **Approval Workflow**

After submitting the record, the Approval Workflow considerations are displayed on the Results page. Some fundamental 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 (if all or part of the PAF funding is associated with a sponsored project (G%)).

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

Financial Line Approvals – Displays the name of the person 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).

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.

Wild Card Searches

If you want to search for an employee by name but you are not certain of the exact spelling, you can use a “wild card” search. Type in part of the name (either First Name or Last Name, or both) and use the % symbol to represent the rest of the spelling. Notice in the example below that you can place the % anywhere in the partially-spelled name to represent missing letters.