



PEOPLESOFT

**HCM**

## eForms Overview

As of June 6, 2017

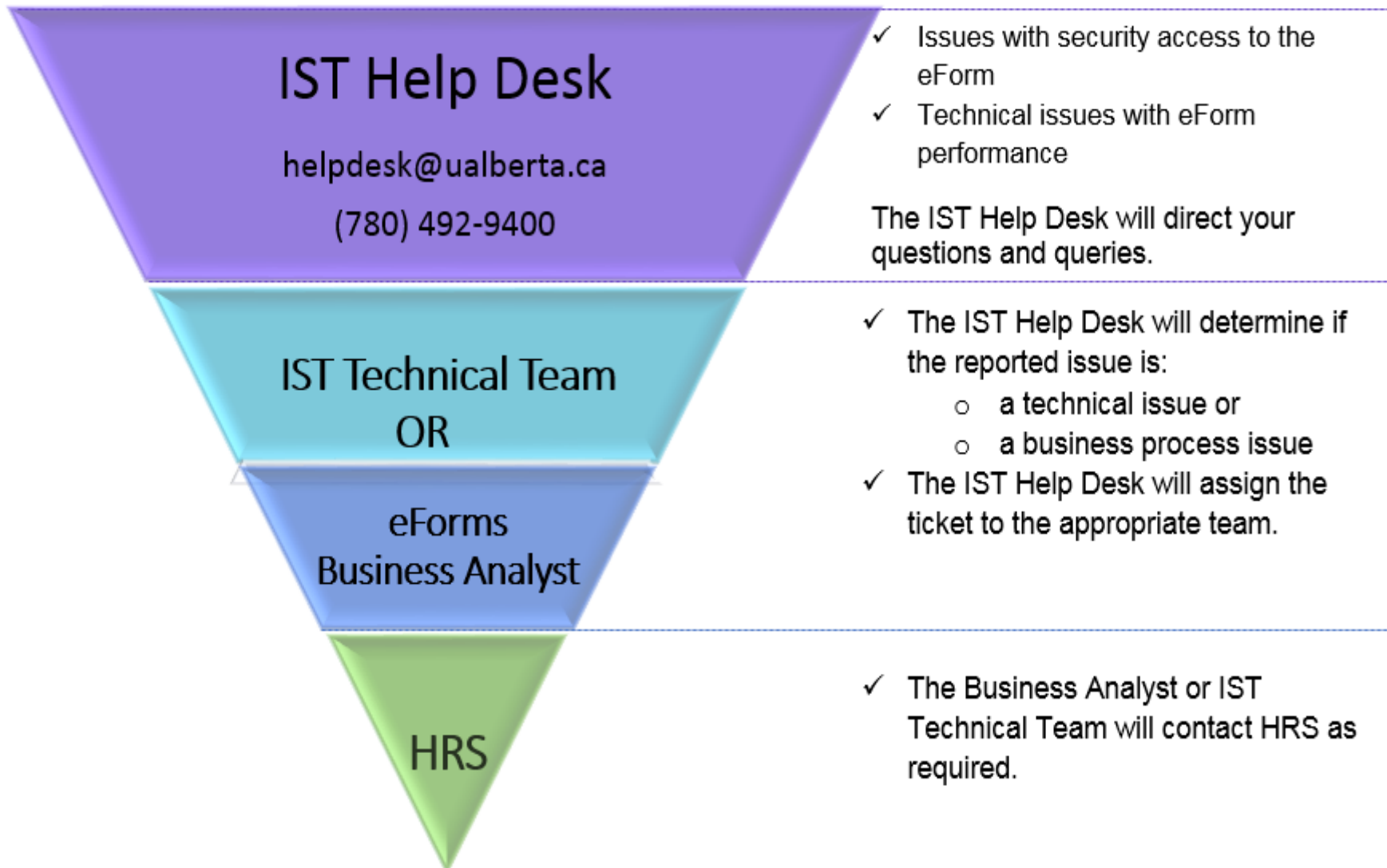
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## Objectives

- Review of HR Taxonomy
- Review the Highlights of eForms
- Demonstration of eForms in Action

# Agenda

1. eForm Help Model
2. eForms & the Benefits
3. HR Taxonomy
4. eForm Types
5. Standard Use
6. Person ID Search
7. eForms Demonstration



## What are eForms?

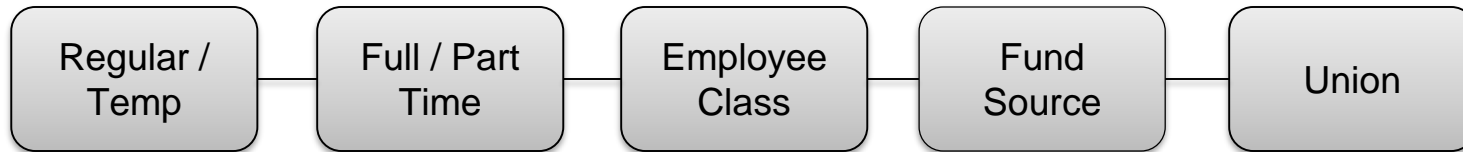
- Capture employee information and related approvals
- HR eForms - Electronic Personnel Action Forms (ePAF)

## Benefits of Using eForms

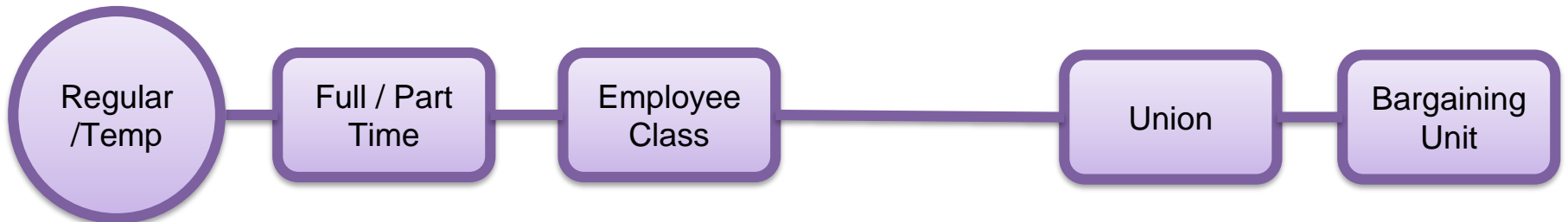
- Faster than paper forms
- Data integrity
- Built-in rules
- Ability to Track the Form
- Integration
- Audit trail

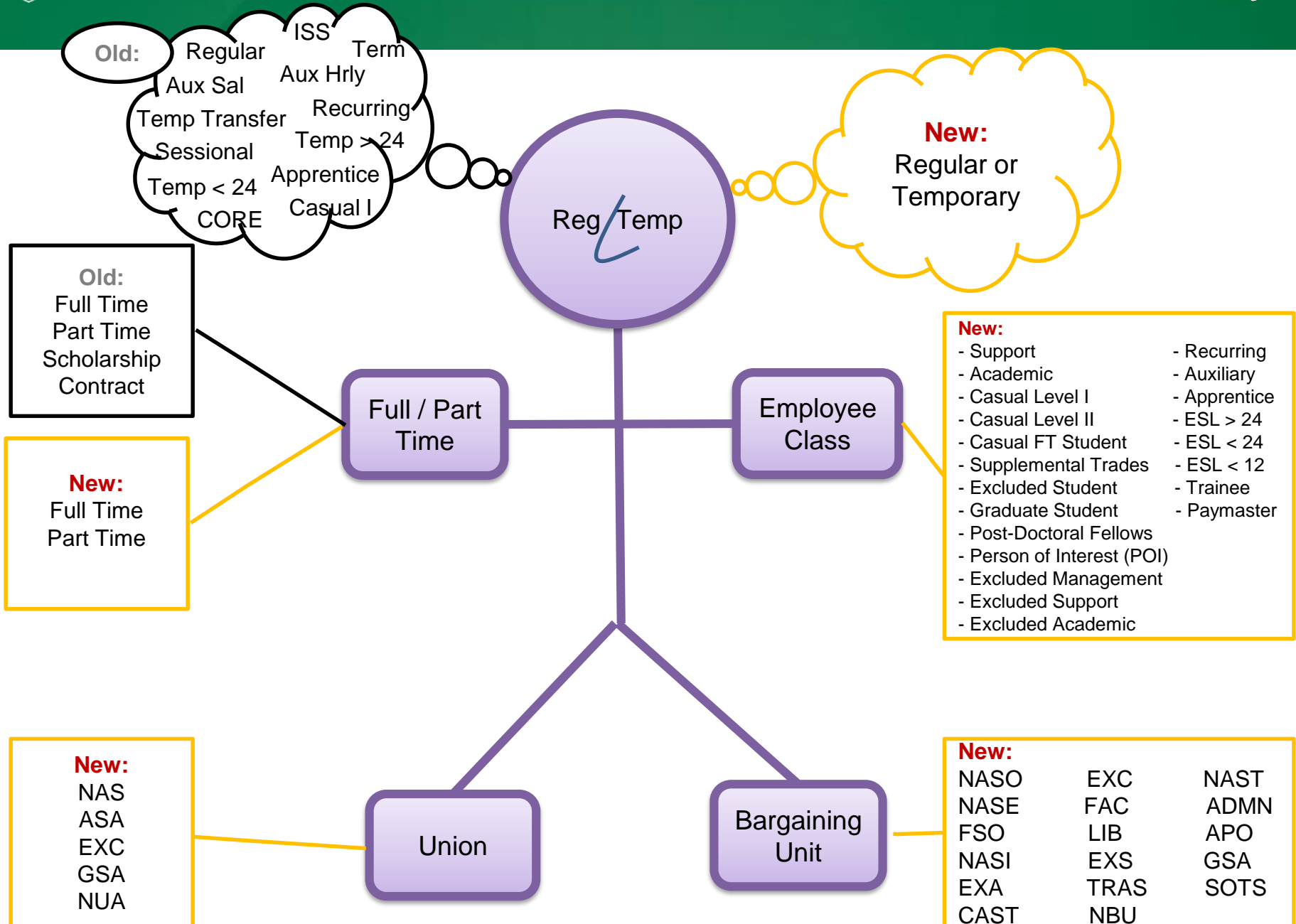
# HR Taxonomy

OLD



NEW



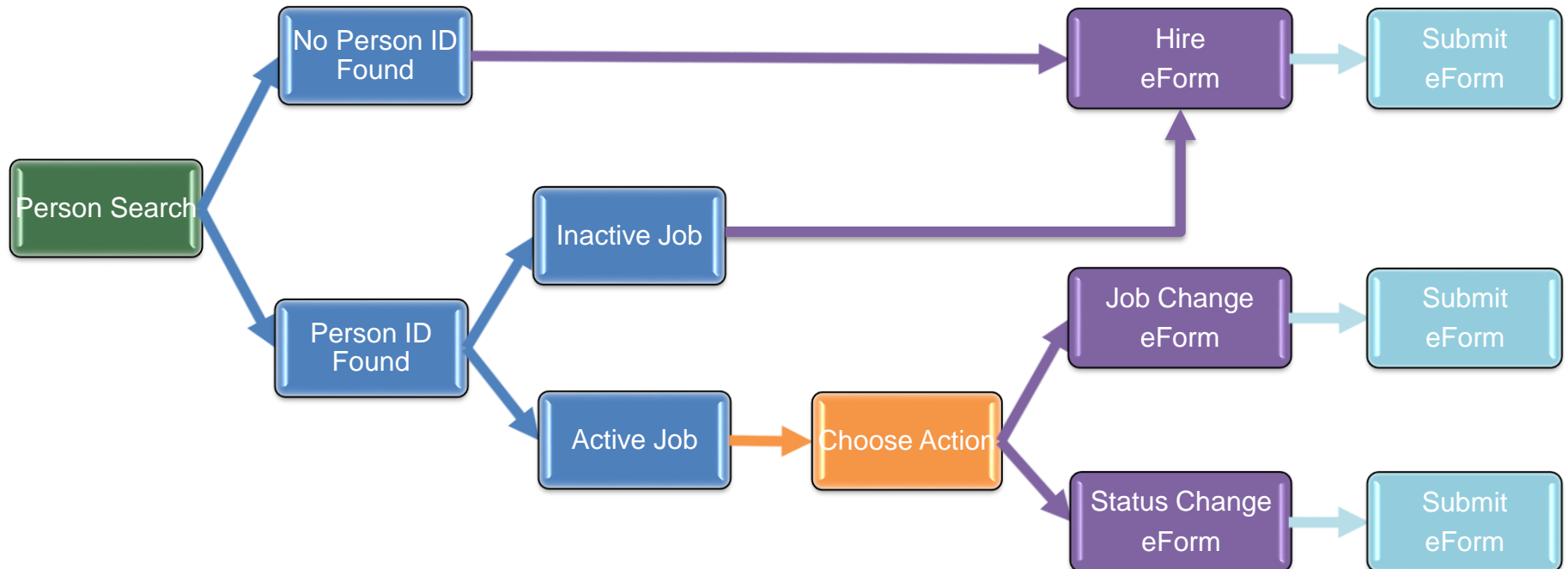




## eForm Type

- Hire
- Job Change
- Status Change

## eForm Type Decision Tree



GT eForms WorkCenter

G3 WC Nav Formatter

eForm

Add an eForm

Update an eForm eForm

View an eForm eForm

## SEARCH : View a UofA eForm

Search by:

 Form ID 

 Form Type 

 Form Condition 

 Form Status 

 Department 

 Empl ID 

 Original Operator 

 Original Date 

 Last Operator 

 Last Date 



Personalize | Find | View All | First 1-29 of 29 Last

Form ID	Form Type	Form Condition	Form Status	Department	Employee Group	Job Effective Sequence	Job Effective Date	Empl Record	Original Operator	Original Date	Last Operator	Last Date
100528	EJOB_HIRE	STUDENT	Executed	360710	(blank)	(blank)	(blank)	(blank)	CCURRIE1	2017-03-30	SSP	2017-03-30
100484	EJOB_CHG	Academic	Pending	360710	(blank)	(blank)	(blank)	(blank)	MHENDERS	2017-03-17	TMISH	2017-03-17
100592	EJOB_STAT	Default	Executed	360710	100	0	2016-11-01	(blank)	CCURRIE1	2017-04-05	TAC	2017-04-05

Form ID	Form Type
100528	EJOB_HIRE
100484	EJOB_CHG
100592	EJOB_STAT

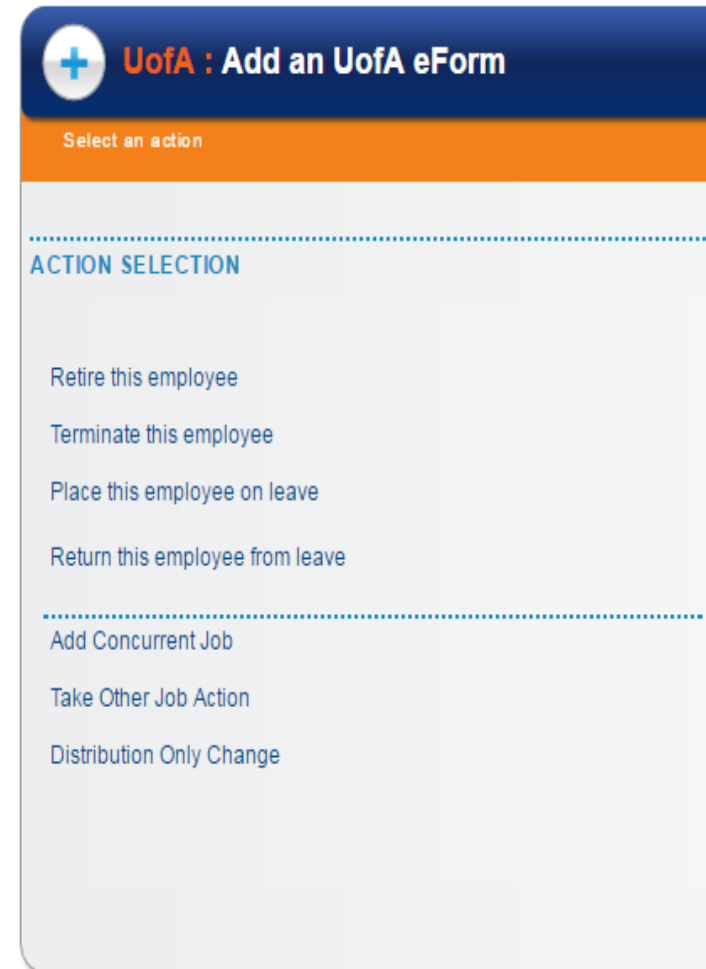


## Status Change

- ✓ Retire this employee
- ✓ Terminate this employee
- ✓ Place this employee on leave
- ✓ Return this employee from leave

## Job Change

- ✓ Add Concurrent Job
- ✓ Take Other Job Action
- ✓ Distribution Only Change



The screenshot shows a mobile application interface for selecting an action. At the top, there is a blue header with a white plus sign icon and the text "UofA : Add an UofA eForm". Below the header is an orange bar with the text "Select an action". The main content area is light gray and contains a section titled "ACTION SELECTION" in blue, uppercase letters. Below this title, there are five blue text options: "Retire this employee", "Terminate this employee", "Place this employee on leave", "Return this employee from leave", and "Add Concurrent Job". A horizontal dotted line separates the first four options from the last one. Below the dotted line, there are two more blue text options: "Take Other Job Action" and "Distribution Only Change".

The Action Selection will automatically determine the type of eForm used

## eForm Standard Use

- All fields are case sensitive. Use upper and lower case formatting for first and last name – i.e. John Doe
- Fields marked with an asterisk (\*) are REQUIRED fields
- When you TAB from field to field ensure the processing icon no longer appears before you move through to another field
- The [Highlights](#) feature within eForms helps you to identify any changes made - Button is located in the upper right corner of the page
- The [Versions](#) feature is used to view the previous version of the record before changes were made - Button is located in the upper right corner of the page
- Use the Calendar icon when selecting a date

## Probation Dates – enter the end date of the probationary period

- First Probation – Faculty Only – As per the Collective Agreement – Duration 4 Years – e.g. July 1, 2017 – June 30, 2021
- Not Applicable – Use when probation is not a requirement
- Probation – For Support Staff /TRAS/ATS/APO/FSO as per the Collective Agreement for each Employee Type
- Second Probation – Faculty Only – Duration 2 Years – Never used on Hire
- Trial – Used for internal Support Staff movement – 3 months in length

## Probation Date – Tips

- ✓ If a probation date is entered then the Continuing Appt Date should be left blank
- ✓ A Continuing Appt Date is the date you finished your probation
- ✓ You should never have both dates entered at the same time
- ✓ FSO and APO have a Continuing Appointment Date
- ✓ Faculty and a Librarian have a Tenure Date
- ✓ To enter a Continuing Appt Date for an FSO/APO select Not Applicable for probation type and then enter the Continuing Appointment Date

## Important Highlights – Person ID Search

Every Form requires a search to find an existing Person ID

- If a Person ID is known, search by it. If the search returns a Person ID, USE IT on the eForm
- If searching by Person ID or SIN, do not add other personal information in the search
- All forms are case sensitive - you may need to use different formats when using the name as a search criteria ( use Person ID or SIN whenever possible) or add a Birth Date in your search
- Searching the database takes time – ensure the processing icon has completed before going to the next step
- If you receive a ‘no search returned results’ message then you may continue to Add Person for Hire



**Demo**

**End**

**ft**

# Hire

For Academic, Support, Student, Paid and Unpaid Person of Interest

Examples of when to use the Hire form:

- Hire a new employee
- Hire an existing employee (Academic, Support and Student):
  - ... Into a different department
  - ... Into a different job

**Note:** do not use the Hire form to extend an appointment – use the Job Change form

## **Before creating a Hire eForm ensure you have the following information:**

- Effective Date
- Position Number (Position Hire)
- Job Code (Non-Position Hire)
- Combination Code
- Position Number or Supervisor ID of the person the employee will report to
- Completed and scanned documents that are required to be attached to the form
- Pop Up Blockers – ensure you allow

**Step 1 – Conduct a Search**

**Step 2 – Add Person for Hire**

**Step 3 – Enter Person's Personal Information**

**Step 4 – Enter Basic Job Information**

**Step 5 – Enter Job Information**

**Step 6 – Enter Compensation Information**

**Step 7 – Enter Direct Deposit Bank Information**

**Step 8 – Enter Education Information (Academic Staff only)**

**Step 9 – Enter U of A Specific Information**

**Step 10 – Submit eForm for Approval**

## Important Highlights – Hire eForm

- Do not process eForms with an Effective Date prior to November 1, 2016
- To Transfer a person who is NOT in a Department you have access to, a HIRE form should be used
- Temporary Job Codes should no longer be used. They are only available because some Active Job records are still associated with them
- Correct the Temporary Job Code on the eForm before submitting
- Step 3 – A Primary Address (In Canada) must be entered in the Address 1 field – used for pay cheque and T4 purposes
- Postal code format requires a space - Ex. T3A 0L9
- Enter the Home Phone number without spaces or separations – eForms will format

## Important Highlights – Hire eForm cont'd

- Step 5 – If changing the Reports To or Supervisor ID, the system will allow only one field to be populated
- Step 5 – You can SAVE the eForm at the end of this step
- Select the Earnings Code *before* selecting the Combo Code
- Compensation Distribution – Remember to scroll to the right to enter the percentage of distribution – must total 100%

## eForms Submission

- Always include a 'Reports To' position number or Supervisor ID
- Do not override position data for a permanent change to a position
- If a position change is required submit a PIF before you submit the eForm
- Reports To only changes can be submitted through the Reports To Application for upload into PeopleSoft
- Submit a PIF if changes to be made to a position are as follows:
  - Business Title
  - Hours per Week
  - FTE
  - Regular/Temporary
  - Job Code

## Job Change eForm

For Academic, Support, Student, and Paid Person of Interest

Examples of when to use the Job Change eForm:

- Distribution (Combination Code) changes
- Internal promotions or transfers
- Extend an appointment
- Employee attribute or type changes
- Salary Changes
- Change Standard hours
- Add a Concurrent Job (Only for your Department)

**Note:** this form is now available for all Paid Person Types



**Step 1 – Conduct a Search**

**Step 2 – Select the Employee Record**

**Step 3 – Select an Action**

**Step 4 – Enter Job Change Details**

**Step 5 – Enter Compensation Information**

**Step 6 – Enter U of A Specific Information**

**Step 7 – Submit eForm for Approval**

## Important Highlights – Job Change Form

- Step 3 – From the Search Results page, choose the **Active Job** row, then select the Action which would initiate the activity you want to do
- Example: Action – Appointment Extension
  - Select menu item ‘Take Other Job Action’
  - Change the date in the \*Appointment End Date field OR
- Example: Action – Transfer a Casual employee to a Position,
  - You must change the Empl Group first to reflect the new type. This will refresh the form
- Change the Job Code or Position. The form will refresh to reflect what you have chosen and provide the fields that require input
- Step 3 – Once the action has been selected, the eForm ID is assigned.
- Ensure the Effective Date entered is correct

## Important Highlights – Job Change Form – Cont'd

- If you change the effective date or employee group the system will blank out the information on the form and you will have to enter all the information again
- To Transfer a person who is NOT in a Department you have access to, a HIRE form should be used
- Step 4 – Intermittent Work option should be clicked if a Support employee is working less than 40% of a full-time workload
- Step 4 – At the end of this step you can [SAVE](#) the eForm
- When returning to the form for completion use the [Update an eForm](#) menu option

## Important Highlights – Job Change Form – Cont'd

- Step 5 – Compensation Information - Refer to the [Human Resource Services](#) web site for details on what an employee is eligible for
- Leave the [Step](#) field blank for an Academic staff member
- When using the Distribution Only form for a GRAF Student or Scholarships, you may encounter a validation message indicating the compensation rate needs to be changed. To fix this issue, close out of the form and use the 'Other Job Change' action instead of the Distribution Only action. This will allow you to make the changes in the Job Information section as well as the Compensation Information section.
- Stat Deduction Distribution refers to the Statutory Deductions that are deducted for the employee
- Step 6 – U of A Information – Working outside of Province Option is checked when the employee's home address is local but the employee is working in a different Province
- Step 7 – Submit eForm for Approval – If the Action/Reason is not available, leave the default entries in and use the Comments section to record the actual action and reason for the Job Change

## Status Change eForm

For Support Staff

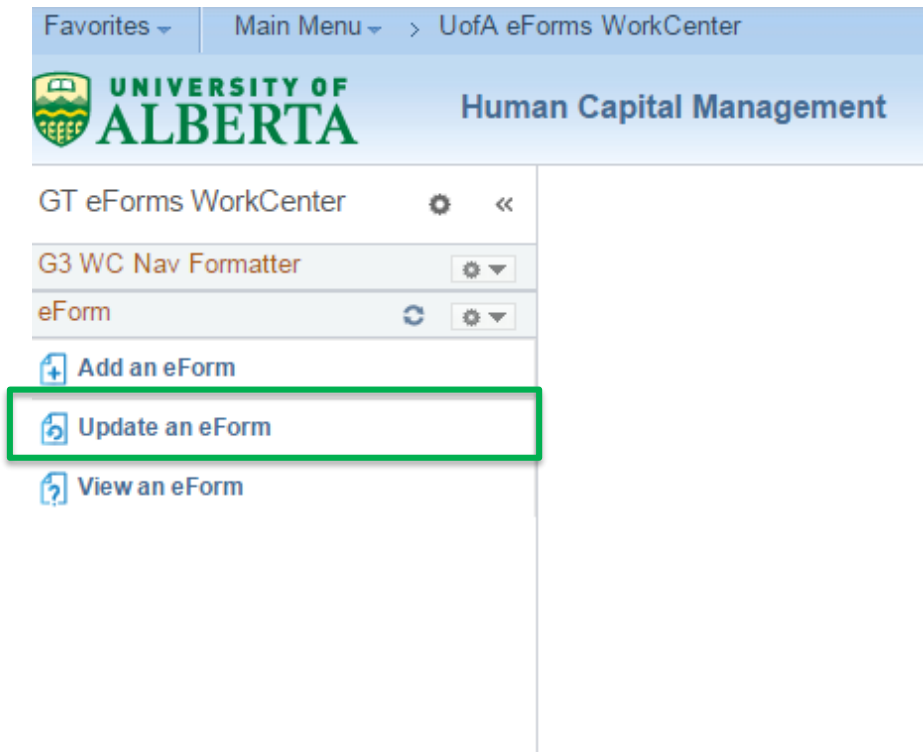
Examples of *Go-Live* actions for the Status Change eForm:

- Employee Initiated Terminations
  - Vacation Payout Worksheet must be attached
- Recurring Employee on Leave
- Recurring Employee Return from Leave
- Retirement for Support Staff without Bridge Benefits


Any other actions should be submitted to HRS on a Paper Form

# UofA eForms WorkCenter

Navigation: Main Menu > UofA eForms WorkCenter



Favorites ▾ Main Menu ▾ > UofA eForms WorkCenter

 UNIVERSITY OF ALBERTA Human Capital Management

GT eForms WorkCenter ⚙️ <<

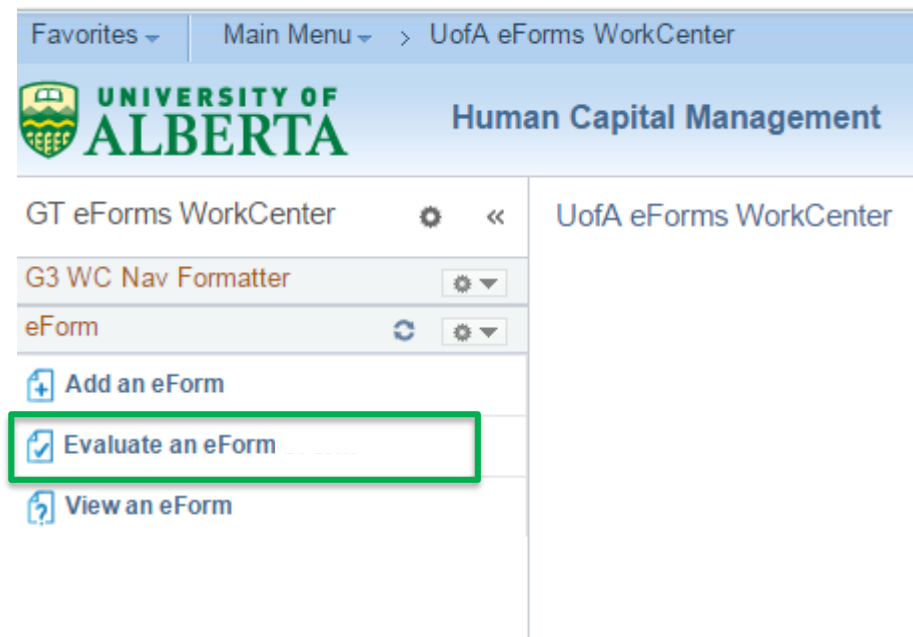
G3 WC Nav Formatter ⚙️ ▾

eForm ↻ ⚙️ ▾


[+ Add an eForm](#)

[🔄 Update an eForm](#)

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G3 WC Nav Formatter ⚙️ ▾

eForm ↻ ⚙️ ▾

[+ Add an eForm](#)

[☑ Evaluate an eForm .....](#)

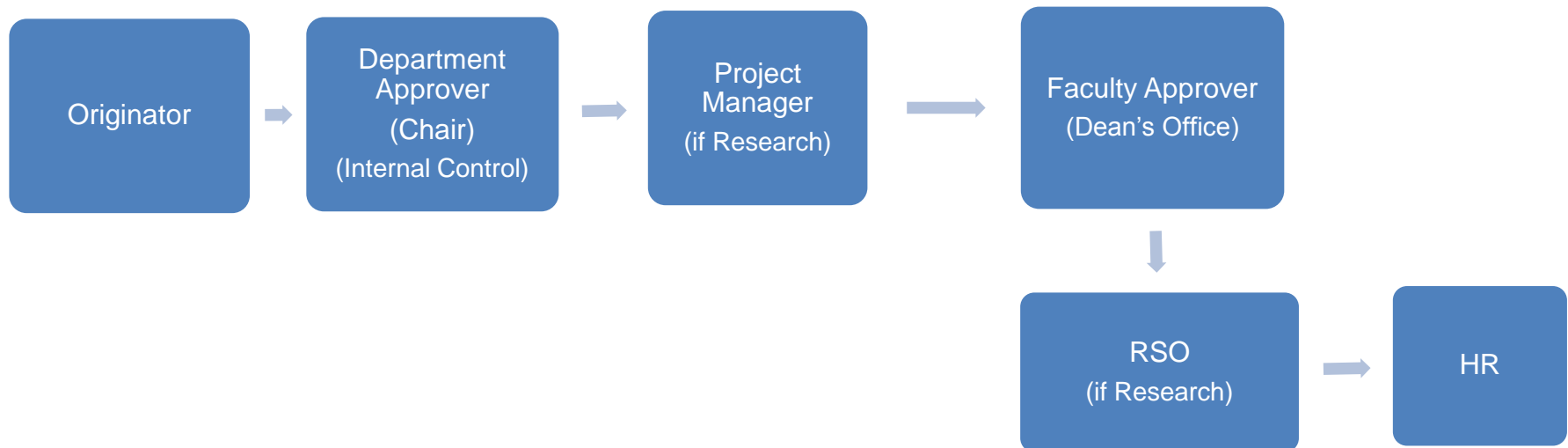
[? View an eForm](#)

## Originator Role – Academic, Support and Student

- Only one Originator Role (previous version had multiple roles)

Originator	Security Role Name
All Originators	ePAF Personnel Contact

## WORKFLOW & APPROVAL – Academic / POI

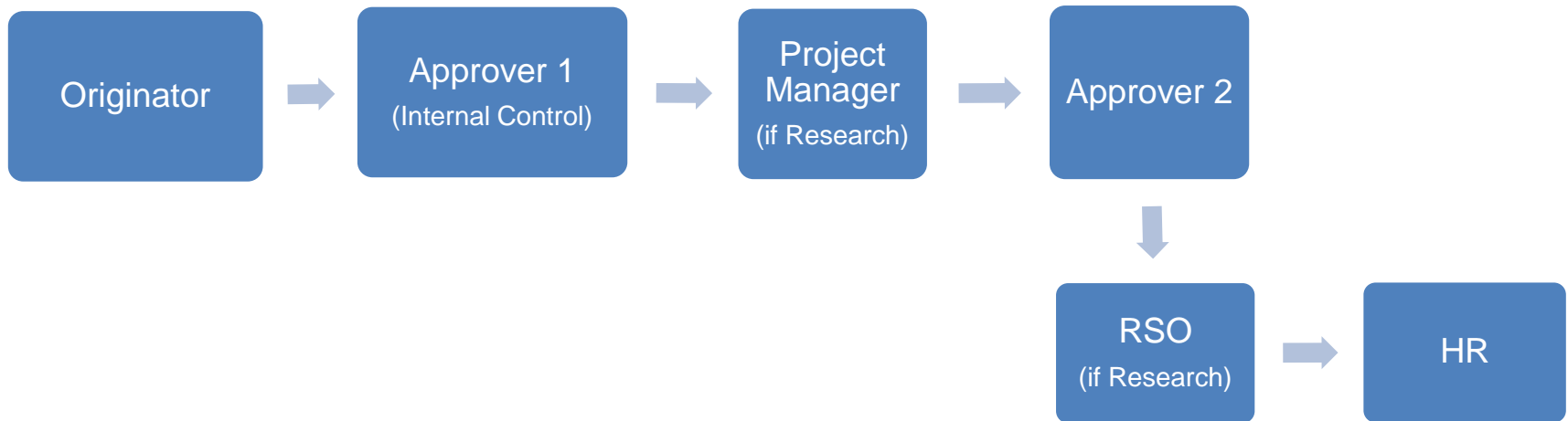




## Approver Roles – Academic

Academic Approver	Security Role Name
Department	ePAF Department
Project Manager (if Research)	ePAF Project Manager
Faculty	ePAF Faculty
Research Services Office (if Research)	ePAF Research Services
HRS – Academic Staff Admin	ePAF Academic Staff Admin

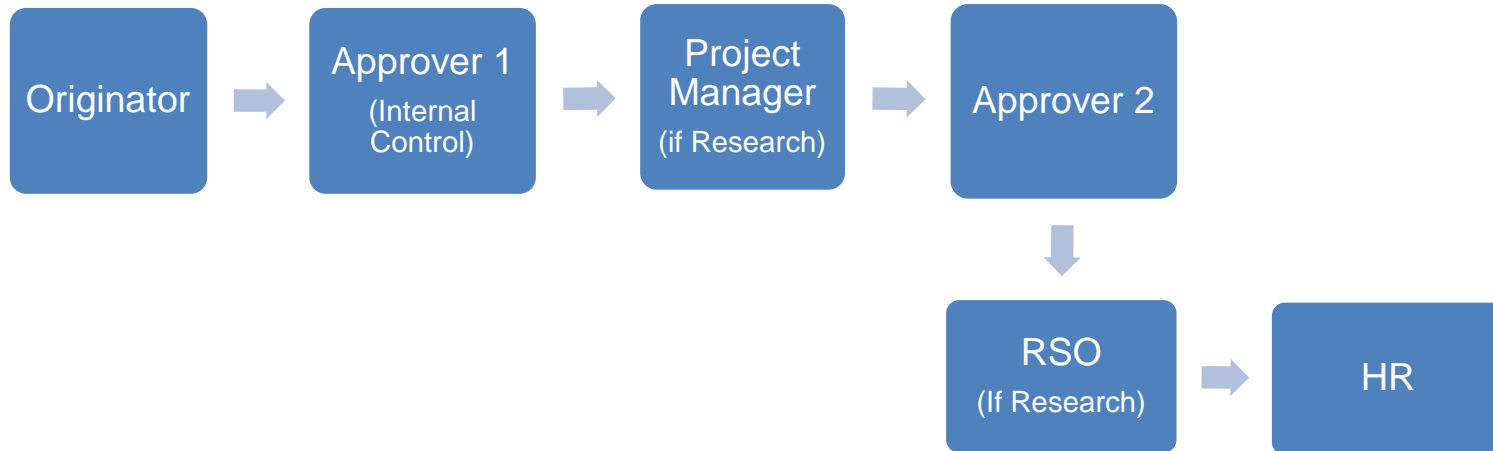
## WORKFLOW & APPROVAL- Support



## Approver Roles – Support

Support Approver	Security Role Name
Supervisor/Manager	ePAF Supervisor Manager
Project Manager	ePAF Project Manager
Department/Faculty	ePAF Department Faculty
Research Services Office (if Research)	ePAF Research Services
HRS – HR Terms and Conditions	ePAF HR Terms and Conditions

## WORKFLOW & APPROVAL- Student



## Approver Roles – Student

Student Approver	Security Role Name
Student Approver 1	ePAF Student Approver 1
Project Manager	ePAF Project Manager
Student Approver 2	ePAF Student Approver 2
Research Services Office (if Research)	ePAF Research Services
HRS – Staff and Student Payment	ePAF Staff and Student Payment

## Approving eForms

Three ways to access and Approve eForms:

- Access via the link in the email
- Access via the Worklist
- Access via the menu “Evaluate an eForm”


## Workflow and Approvals



- Originator can't submit their own form
- Originator can't submit and approve an eForm. There must be at least one other approval.
- Approver can't approve an eForm related to their own Job record
- If a user has both Approver 1 and Approver 2 roles and has approved form at the first level, it will skip over (auto approve) the second (user won't need to approve form twice)
- All eForms will flow through HRS for final approval prior to loading into PeopleSoft HCM




## eForm Stages


Form Stage	Indicates
Saved	Form not submitted
Pending	No Approvals yet
Partially Approved	At least one approval
Withdrawn	Originator withdrew the form
In Error	Form requires HR attention to investigate
Authorize	All approvals complete; ready to load into PeopleSoft HCM
Denied	Approver denied the form
Executed	Loaded into PeopleSoft HCM
On Hold	Approver requires more time to action


Favorites ▾ | Main Menu ▾
 Home | **Worklist** | Add to



**Human Capital Management**

Self-Service Center  


 Direct Line Reports  

 Pending Approvals


 Personal Information







Favorites ▾ | Main Menu ▾ > Worklist ▾ > Worklist


**Human Capital Management**

**Worklist**  
 Worklist for RWOLKOW: Puditw Tunmuy

Detail View Worklist Filters   Feed ▾

Worklist Items						Personalize   Find   View All  	First  1 of 1  Last
From	Date From	Work Item	Worked By Activity	Priority	Link		
Pelqomeqw Guvko	05/11/2017	Notification Worklist		<input type="text"/>	<a href="#">Hire:Support:SCI Physics Admin:Duke:2017-06-01</a>	Mark Worked	Reassign



## E-mail Notifications

- Originators
  - When form is approved (at each approval stage)
  - When form is Recycled or Denied
  - When form is executed
  
- Approvers
  - When form is in their worklist
  
- HR
  - Working Outside of Province
  - Retro Distribution of Pay
  - Updates Required to Department Budget Table (DBT)

## Resources

- eForms site – **[se2.ualberta.ca/eForms](https://se2.ualberta.ca/eForms)**
- **IST Help Desk**  
**[helpdesk@ualberta.ca](mailto:helpdesk@ualberta.ca) / phone: (780) 492-9400**
- eForms security form send to **[aissecurityforms@ais.ualberta.ca](mailto:aissecurityforms@ais.ualberta.ca)**

- Be sure to copy down the Empl ID and eForm ID when creating a new employee. You can capture this information when saving the form or submitting
- Do not enter comments until you are ready to actually submit the form. The comment automatically saves what you have entered and if you move from the comment section you cannot edit or delete
- When you first select a job record (Empl Record) the form may flip to a different record. Ensure the correct job record is indicated before submitting the form

- Probation date does not populate the correct date, it is off by one day. You will need to manually correct
  - Example: Probation date - May 1, 2017 – April 30, 2018 NOT May 1, 2017 - May 1, 2018
- For support hourly boot pay, enter \$6.00 for ongoing payment on the form
- For salaried enter the monthly amount of \$12.00 and it will apply to the semi-monthly amount of \$6.00
- Shift Premium for Salaried employees works the same, enter the monthly amount and it will apply the semi-monthly payment in additional pay

# Handouts

1. Slide Presentation
2. Job Aids
3. Attachment Requirements

