Hourly Transfer-Continuing EPAF (HRLTRN)

Use this EPAF Approval Category to transfer a hourly TOP or AFSCME employee to a different continuing position.

1. Select “New EPAF” from the EPAF main menu.

2. On the “New EPAF Person Selection” screen:
   a. Enter the NMU IN of the employee in the ID field and then press the tab key. The individual's name will then appear to the right. **Verify you have the correct employee before proceeding.**
   b. Enter the date of the transfer to the new position number in the effective date field in the format displayed.
   c. Click on the Approval Category drop-down arrow to display the list.
   d. Select “Hourly Transfer-Continuing, HRLTRN.”
   e. Click “Go.”
3. On the “New EPAF Job Selection” screen:
   a. Click the radio button next to the line listed as the primary job – the position number the employee is transferring from.
   b. Click “Next Approval Type.”

4. The “New EPAF Job Selection” screen will display again:
   a. Type in the appropriate position number in the position box and “00” in the suffix box on the “New Job” line for the position number the employee is transferring to.
   b. Press the tab key to populate the remaining fields.
   c. Click “Go.”
5. The next screen displayed is the “Electronic Personnel Action Form” screen. In the “End a Job Assignment” section:
   a. Personnel Date – enter the date one day prior to the date the employee transferred to the new position number (usually the last date they worked in the old position number.)
   b. Jobs Effective Date – usually the same as the personnel date typed in above if the EPAF is being processed timely. However, if payroll has already been processed for that pay period (the transfer is retroactive), the Jobs Effective Date should be entered as the end date of the most recently processed pay period which will be a Saturday.

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Date: MM/DD/YYYY*</td>
<td>11/01/2011</td>
<td>11/30/2011</td>
</tr>
<tr>
<td>Jobs Effective Date: MM/DD/YYYY*</td>
<td>11/01/2011</td>
<td>11/30/2011</td>
</tr>
<tr>
<td>Job Change Reason: *(Not Enterable) REDUC</td>
<td></td>
<td>TRANS</td>
</tr>
<tr>
<td>Job Status: (Not Enterable)</td>
<td>Active</td>
<td>T</td>
</tr>
</tbody>
</table>

6. On the same page, under the “Update Employee Record” area:
   a. Employee Class Code – enter the appropriate code for the new position:
      i. GT – TOP Web Time Entry
      ii. GH – TOP UltraTime (select AIS employees)
      iii. FT – AFSCME 8 hour shift
      iv. FO – AFSCME 10 hour shift (select Public Safety Officers)
      v. FP – AFSCME 12 hour shift (select Steam Plant & MGH Security employees)
   b. FT/PT Status – the default is for full-time, change to part-time if needed.
   c. Home Organization – enter the department organization number for the department in which the employee will be working.
   d. District Code – select the appropriate district code from the drop-down box.
7. On the same page, under the “Create a New Hourly Job” area:
   a. Personnel Date – defaulted based on date entered on the NEW EPAF Person Selection screen and cannot be updated
   b. Salary Grade – enter appropriate grade for the new position:
      i. TOP - 4A, 4B, 4C, or 4D
      ii. AFSCME –1, 2, 3, 4, 5, 6, 7, F1, F2, F3, P1, P2, or P3
   c. Regular Rate – enter the rate of pay.
   d. FTE – change the default accordingly if the employee is less than 1.0 FTE.
   e. Hours per Pay – change the default accordingly if the employee works less than 80 hours in a pay period.
   f. Timesheet Orgn - this is the department organization number.
   g. Job Begin Date & Jobs Effective Date – these are usually both the same as the personnel date if the EPAF is being processed timely. However, if payroll has already been processed for the pay period that included the date of transfer (the transfer is retroactive), the Job Begin Date and Jobs Effective Date should be entered as the begin date of the current or next pay period which will be a Sunday.
   h. Job Change Reason – select an appropriate job change reason from the list for the transfer. Appropriate transfer job change reasons are:
      i. PROM – Promotion (select only if transferring to a higher level position)
      ii. TRANS – Transfer
         *Please call Julane at x1493 if you are unsure which code to select.*
   i. The three remaining fields in this section are defaulted and for payroll requirements only.

---

Create a New Hourly Job, 000628-00 Principal Secretary II

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Date: MM/DD/YYYY (Not Enterable)</td>
<td></td>
<td>12/01/2011</td>
</tr>
<tr>
<td>Salary Grade: *</td>
<td></td>
<td>4A</td>
</tr>
<tr>
<td>Regular Rate: *</td>
<td></td>
<td>13.00</td>
</tr>
<tr>
<td>FTE: *</td>
<td></td>
<td>1.0</td>
</tr>
<tr>
<td>Hours per Pay: *</td>
<td></td>
<td>80</td>
</tr>
<tr>
<td>Timesheet Orgn: *</td>
<td></td>
<td>257100</td>
</tr>
<tr>
<td>Job Begin Date: MM/DD/YYYY *</td>
<td></td>
<td>12/01/2011</td>
</tr>
<tr>
<td>Jobs Effective Date: MM/DD/YYYY *</td>
<td></td>
<td>12/01/2011</td>
</tr>
<tr>
<td>Job Change Reason: *</td>
<td></td>
<td>PROM, Promotion</td>
</tr>
<tr>
<td>Job Status: (Not Enterable)</td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>Contract Type: (Not Enterable)</td>
<td></td>
<td>P</td>
</tr>
<tr>
<td>Step: (Not Enterable)</td>
<td></td>
<td>0</td>
</tr>
</tbody>
</table>
8. Scroll down the page to the “Routing Queue” section, type or use the looking glass to select the appropriate username for each approval level listed. The HR/Benefits approval levels will only have one option available.

Routing Queue

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 - (DEPT) Department Head</td>
<td>TSETHOF</td>
<td>Approve</td>
</tr>
<tr>
<td>20 - (HR2) HR Approval after Dept Head</td>
<td>JCAPPO</td>
<td>Approve</td>
</tr>
<tr>
<td>40 - (BENEF) Benefits FY1</td>
<td>KDEPETRO</td>
<td>Approve</td>
</tr>
<tr>
<td>99 - (HR2) HR Apply</td>
<td>LHERMAN</td>
<td>Apply</td>
</tr>
</tbody>
</table>

9. Enter comments if needed to clarify the content of the EPAF.

10. Click “Save” on the bottom of the screen.

11. After saving the EPAF you will receive the following message “Your change was saved successfully.” The EPAF has a transaction status of “Waiting” since it has not been submitted yet.

12. Click “Submit” to process.

Electronic Personnel Action Form

- Your change was saved successfully.
- Enter the information for the EPAF and either Save or Submit.

Name and ID: Doe Jane, 00283204
Transaction: 7627
Transaction Status: Waiting
Approval Category: Hourly Transfer-Continuing, HRLTRN

Save [ ] Submit [ ] Delete [ ]
13. Upon successful submission, you will see the following message, “The transaction has been successfully submitted.” Ignore all warning messages. See the “Common EPAF Errors” to correct any error messages received. The EPAF now has a transaction status of “Pending” and is awaiting action by the first approver in the routing queue.

Electronic Personnel Action Form

- The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID: Doe Jane, 00283204
Transaction: 7697
Transaction Status: Pending
Approval Category: Hourly Transfer-Continuing, HRLTRN

Query Date: Dec 01, 2011