ePAR Tips & Best Practices

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Did you know: You can use the Collaborate Button to Make Comments?

The “comments” field is open to initiators for editing before the ePAR is submitted. Once submitted the “comments” field and many other fields (e.g. Name, DOB, etc.) are no longer open for editing. If the ePAR is denied back to the initiator most fields (including the comments) will reopen for corrections. To make changes or add comments during the approval process any individual with access to the ePAR can use the Collaborate button at the top of the screen. This can create a time savings when a correction needs to be made as the ePAR does not always need to be sent back to the initiator and complete the entire approval process again. The Collaborate feature allows for ePAR initiators or approvers to add comments and conversation strings.

Examples of when the Collaborate feature may be helpful are listed below:

- Updating an Employee First or Last Name that was misspelled.
- Related ePARs, when multiple ePARs are required.
- When processing multiple ePARs to ensure that information from another ePAR is not overridden by the 2nd ePAR pulling outdated information.
- Updating DOB or SSN.
- Notes about the action that may affect how the ePAR is processed.
- Edits required before the ePAR can be approved.

How to use the Collaborate Button:

A. Click the Collaborate Icon

B. Enter comment. Click Submit.

C. Once the page updates Click Okay.
D. Others can add additional comments or reply to current comments. The Number of replies are indicated. And conversations can be expanded or minimized.

E. Writing will appear within the icon once comments have been added to the Collaborate button.
Did you know: You can request updates through the Collaborate button?

When the ePAR is submitted to the workflow many fields become closed to editing. Users with access to the ePAR may request changes and include additional comments using the “Collaborate” button at the top of the screen. The Collaborate feature allows for ePAR initiators or approvers to add comments and conversation strings.

This field may be used during any stage of the workflow by any user with access to the ePAR. For information on the collaborate button functionality or how to use it click HERE.

Examples of edits that may be requested with the Collaborate button:
- Updating an Employee First or Last Name that was misspelled.
- Updating DOB or SSN.
- Edits required before the ePAR can be approved.

Did you know: The position number auto populates job info?

If entered first, the position number on the job information screen will populate all fields EXCEPT: Job Indicator, Expected Job End Date, Office Code and Empl Class. Entering the position number first will save time as the initiator would otherwise have to enter this information manually.

For non-paid employees or a person of interest that does not have a position number, job and department information will need to be manually entered by the initiator.
Did you know: Standard Hours drives the FTE calculation?

If the standard hours are entered into the ePAR before FTE, the standard hours will auto-populate the FTE calculation. Entering the standard hours first will save time and increases accuracy as the initiator will not have to calculate or manually enter the employee’s FTE.

A. Enter the standard hours value.
B. Hit the “tab” key or click FTE box to auto populate new FTE.
Understanding “Is this a PAID staff or faculty working less than 12 months?”

This field is used to indicate Staff and Faculty who work with a contract of less than 12 months. It is not used for grad students. Grad students are not paid on “contract pay.” For grad students, or faculty and staff working full 12 months indicate “No”. See the Employee Classification Mini-Manual for employee classes for which initiators would indicate “Yes.”

By answering “Yes” to the question above AND selecting a faculty related employee class, two additional pages are added to the ePAR.

1. Faculty Services Page: This page is added to an ePAR after a faculty related employee class has been selected. It should be completed for Faculty ONLY. The Faculty Services page of ePAR used for record keeping purposes including tenure status (full-time faculty), and per credit hourly rate tracking requirements (part-time faculty). Please see below for which fields to complete for faculty.
2. **Contract Pay Page:** This page is added after selecting “yes” to the 12 month question discussed above. It is used by Payroll for setting up the contract pay start and end dates as stated in the employee’s Appointment Letter or Offer Letter. Contract pay ensures that employees working less than 12 months are only paid during the time they are working.

- Faculty working a 9, 10, or 11-month contract that are paid on contract pay have the option of spreading their salary over 12 months however, that is indicated by the employee outside of the ePAR process.
- New Contract Employees who do not start on the day of an allowable contract term, are considered late starts. Their *contract begin date* will be their date of hire or start date and their *contract end date* will be the allowed end date of that particular contract term.

![Create UVM Hire Request](image)

**Understanding the Expected End Date field**

This field is for **Graduate Students Only**. For a less than 12 month grad student this field must be filled out as it indicates that a term row will be entered into PeopleSoft at the time the ePAR is processed. This allows for grad students to term without an additional ePAR action being created and processed and reduces the possibility of over payment to the employee after they have completed their work assignment.

If left blank for a 12 month grad **NO term date will be entered** and an additional ePAR will need required in order to terminate that individual.

Click [HERE](#) to view the Employee Class Definitions Mini-Manual for approximate term dates for Grad Students.
Processing Multiple ePARs

At times employees may have multiple ePARs being processed. There are implications of multiple ePARs processed at once as well as steps to ensure the ePARs are processed correctly.

How does an initiator know if there are multiple ePARs being processed for an employee?

Pending ePARs link

A. Go to ePAR collection and click “Add” under the ePAR collection desired to begin creating the new ePAR.
B. On the ePAR Action/Reason Page click “Pending ePARs”

C. The next screen will indicate pending ePARs.
   - No Pending ePARs
   - Pending ePARs listed
**ePAR Transaction Inquiry**

- Go to the ePAR Transaction Inquiry and search employee name or Empl ID and “In Workflow” ePAR status. If results populate then there are ePARs that have not been processed.

**ePAR Global Inquiry**

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**Why is it important to notify Payroll multiple ePAR are being processed?**

It is important to notify payroll when multiple ePARs are being processed because it may affect the order in which the ePARs are processed. This is because when ePARs are initiated they pull information that has been processed. When an employee has more than one ePAR in the workflow to be processed some information may be overridden. This is because the 2nd ePAR that is initiated will pull old information that has not been updated by the first ePAR. Therefore, when the 2nd ePAR is processed it may “undo” some of the changes indicated in the 1st ePAR.

**Overriding processed information can be avoided by:**

A. Notifying payroll that there are multiple approved ePARs an employee to be processed.

B. Waiting for the 1st ePAR to process before creating another ePAR for that employee.

**How do you let payroll know that there are multiple ePARs being processed?**

A. **Action/Reason Page: Related ePARs Field**
   - Indicate there are related ePARs. If you can include other ePAR numbers that is best but not always an option if other ePARs have not been created yet.
   - This field is only open before the initiator submits the ePAR.

B. **Collaborate Button**
   - This field may be used during any stage of the workflow by any user with access to the ePAR.
   - Indicate there are related ePARs. Include other ePAR numbers, add to the conversation string with ePAR numbers as additional ePARs are created.
   - For information on the collaborate button functionality or how to use it click [HERE](#).
Secure: Uploading Documents to ePAR
Documents uploaded into the ePAR system are only viewable by users with access to the ePAR. As access to departments is closely managed and only granted to those who process or approve ePARs the system is secure and sensitive employee information may be attached (e.g. Offer letters, I-9s, W-4, etc.) ePARs cannot be deleted therefore information contained or attached in an ePAR will be retained and is searchable.

Legal documents (e.g. severance agreements) should not be uploaded into ePARs. If there are legal documents related to the ePAR action, complete a file transfer to payroll@uvm.edu. Payroll will in turn send the documents to Benefits Processing. When sending documents please include the ePAR number. Questions can be discussed with the HR Representative or Labor and Employee Relations Representative.

Unsecure: Saving ePARs/ePAR Documents in Employee Departmental File
Saving ePAR information in departmental employee files is strongly discouraged. Access to employee departmental files is not managed by HR or payroll (owners of sensitive employee and payroll data) and are more likely to result in a breach of information. While employee departmental files may contain employee job and performance data, they should not contain sensitive employee information including ePARs, pay rate information, DOB, SSN, or employee personal contact information.

Did you know: You can use the “Jump to” button to save time?
You can use the “Jump to” button to save time when editing or viewing an ePAR that has been saved and/or submitted.

A. Access desired ePAR.
B. Scroll to the bottom of the first page – Review Action/Reason.
C. Click the drop down arrow and select the page you would like to “jump to.”
D. Click the “Jump to” button (indicated in yellow above).
Using the saved searches functionality:
The saved search functionality under ePAR Transaction Inquiry increases user efficiency by reducing time to enter individual search fields. This functionality can be especially useful for users initiating and approving ePARs within multiple business units or departments. Saved search allows a user to save common searches by creating a search that once selected will populate multiple fields.

1. Enter desired search criteria
2. Optional: Use magnifying glass to lookup unknown values by description (See note below)
3. Click “Save search Criteria”
4. Type Description and Click Apply

Save Search As
Save Search As: Chemistry In Process

Use drop down to select any saved search and auto-populate search fields.
Note: If the search value is unknown, click the magnifying glass to look up the value by description.

ePAR Transaction Inquiry Search Functionality – Personalize Button

ePAR Transaction Inquiry has a feature that allows users to personalize the ePAR results table. Users have the ability to move columns, to change what appears under the ePAR Details or Employee Details tab, and the order in which they appear.

How to use the personalize the ePAR inquiry search view:

A. Go to ePAR Transaction Inquiry and click search. For quicker results create a search that will limit the number of results (e.g. an employee name.)

B. Click the personalize link within the search table.
C. There are two tabs ePAR Details and Employee Details. If the tab does not have any values beneath it in the column order it will not appear. Use the up and down arrows to arrange columns in desired order for each tab. Click “Okay” to save personalization.

Resources

- **Human Resources**
  - Telephone: 656-3150
  - Email: hrsinfo@uvm.edu
- **Payroll Services**
  - Telephone: 656-6600
  - Email: payroll@uvm.edu

Helpful Links

- [PeopleSoft Login](#)
- [Action/Reason Definitions Mini Manual](#)
- [Employee Class Definitions](#)
- [ePAR Navigation Manual](#)
- [ePAR Mini Manual Page](#)

Suggestions? Updates? Please send an e-mail to ePar@uvm.edu

This document is designed to be used online and has a number of embedded links to processes and additional information. We discourage the printing of manuals as they are updated frequently and consume paper resources when printed.