



Transfer ePAR

Note: 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.

If you have questions about information in this mini-manual, or, if after reading the entire manual, you cannot find the information you need, please e-mail psguides@uvm.edu.

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Background

This guide is to give you an overview of the creation and initiation of ePAR's in UVM People Soft. The fields, some required, are reviewed in this manual as they pertain to the Document Collection. There are specific details included in each Document that provide direction that may be specific to the type of employee that the action is for, such as a graduate student, faculty or staff.

The Transfer ePAR (which includes the transfer release) is initiated by the hiring department (the department TO which the employee is transferring).

The department FROM which the employee is transferring receives the transfer release request and approves it. (The transfer release request is routed directly to the department and not the Dean's Office. Once the releasing department approves the request, the hiring department modifies the transfer ePAR and then it is routed to the Dean's Office.)

Transfer/Lateral

This ePAR is used to move an employee (resulting from recruitment or waiver) to a different job/position number with no change in compensation. Required: Job offer letter for staff and appointment letter/contract for faculty, Officers of Administration and coaches. Salary Distribution Information required only when department or funding (source or percentages) changes.

Step 1: Log in and Search

- a) Log in to PeopleSoft using the Human Resources Login www.uvm.edu/~erp/portal
- b) **Navigation:** UVM ePARs>ePAR Collection >Transfer>Add



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- c) You will begin by searching for the employee by Social Security Number or First and Last Name. Enter the search fields and click Search. Check the box for the applicable employee in the first column and press Next.

Navigation: Favorites | Main Menu > * UVM ePARs > ePAR Collection

Collaborate | Attach

Create UVM Transfer Request

Step 1 of 3: ePAR - Employee Selection Help

Transaction Details

ePAR Action:	Transfer	Action:		Document ID:	Transfer
ePAR #:	NEXT	Reason Code:		Document Instance:	0
ePAR Status:	Initial	Effective Date:	08/12/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Search Criteria

Empl ID:

First Name:

Last Name:

Social Security #:

Department:

Position Number:

Business Unit:

Empl Class:

Search Results First 1 of 1 Last

	Empl ID	Name	Empl Record	Position Number	Department	Description	Job Code	Description	Business Unit	Empl Class	Social Security #
<input checked="" type="checkbox"/>			0	001681	52040	Art & Art History	2031	Office/Prgm Support Generalist	05	12MthStaff	XXX-XX-9029



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Step 2: ePar Action/Reason

This portion of the form initiates the action to move the employee from their current department to the new department. The effective date should be the first working day the employee will be in the new department.

NOTE: If the employee is PAID Staff or Faculty working less than 12 months please refer [Create Contract Pay](#)

Favorites | Main Menu > Smart Solutions > Document Framework > Document Collection

Collaborate Attach

▼ Action/Reason Selection

*Action:	Transfer	*Reason:	Lateral
Old Effective Date:	01/01/2015	Old Effective Sequence:	0
*Effective Date:	07/01/2015	Effective Sequence:	0
Is this a staff or faculty working less than 12 months?:		Fiscal Year: 2016	
<input type="radio"/> Yes <input checked="" type="radio"/> No			
Requester's Dept ID:	11280	Payroll Svcs	
Current Empl Department:	11280	*Employee's New Dept:	11300
PeopleAdmin Action/Posting #:		Human Resource	
Comments:			
Related ePARs (If Any):			

Previous Next

▼ Audit Details

Entered By:	Updated By:
Entered On:	Updated On:



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Step 3: ePAR Transfer Request initiation

This portion requests the release of this employee to your department.

- a) Add any comments and check the field 'I confirm the information entered is accurate' and then click "Confirm".



Create UVM Transfer Request

Step 3 of 3: ePAR Transfer release initiation



Entered By:	Entered On:	Document Status: Initial
Updated By:	Updated On:	Sub Status: Add Entry Additional Info

Please check the box below to request release of this employee to your Department.

Comments:

☐ I confirm the information entered is accurate

Confirm

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- b) Save the ePAR and click 'Ok' to return to the transaction. The department where release is being requested from will receive an email to approve the release.



Step 4: Modify Transfer ePAR

You will receive an email when the department has approved the release of the employee.

To complete the transfer ePAR initiation:

- Navigation:** UVM ePARs>ePAR Collection>Transfer>Modify
- Click Search and click on the applicable Request ID

Document Console

Use Saved Search:

ePAR # equal to

ePAR Action equal to

ePAR Status equal to

Empl ID equal to

First Name begins with

Last Name begins with

[Search](#) [Clear](#) [Advanced Search](#) [Save Search Criteria](#) [Delete Saved Search](#) [Personalize Search](#)

ePAR Details [Personalize](#) [First](#) 1 of 1

Request ID	View Name	Effective Date	Action	Reason	Document Status
1 XFR0000061	ePAR Transfer Read	08/18/2015	Transfer	Transfer	Initial Released

Step 5: ePAR Transfer/Lateral- Personal Information

Fields open for editing, required or otherwise, are highlighted.

Note 3-1: Proper formatting of Business and Check address is Department on the first line and Building and Room # on the second. For on campus addresses no City, State and Zip is needed. Check address will auto populate when Business Address is entered. Unless the employee works off campus the Check Address should be an on campus location and will most often match the Business Address.

Note 3-2: Phone Information is for Business on the ePAR. Entry of cell and home phone #'s can be done via Self Service.



c) When you are finished press Next to proceed to Step 6.

Navigation: Favorites | Main Menu > Smart Solutions > Document Framework > Document Collection

Collaborate Attach

Create UVM Transfer Request

Step 3 of 7: ePAR Transfer- Personal Information Help

Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Lateral	Document Instance:	0
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Historical ePARs	Empl ID:	Pending ePARs	Empl Rcd:	3
				Last Personnel Action:	
				Last Transaction Date:	

Business Address Information

	Current Value	New Value
Address Line 1:	Payroll Services	<input type="text" value="Payroll Services"/>
Address Line 2:	Waterman Bldg Rm 237	<input type="text" value="Waterman Bldg Rm 237"/>
Address Line 3:		<input type="text"/>
City:		<input type="text"/>
State:		<input type="text" value="VT"/>
Postal Code:		<input type="text"/>

Note 3-1 (Red arrows point from the note to the New Value input fields for Address Line 1 and Address Line 2)

Check Address Information

	Current Value	New Value
Address Line 1:	Payroll Services	<input type="text" value="Payroll Services"/>
Address Line 2:	Waterman Bldg Rm 237	<input type="text" value="Waterman Bldg Rm 237"/>
Address Line 3:		<input type="text"/>
City:		<input type="text"/>
State:		<input type="text" value="VT"/>
Postal Code:		<input type="text"/>

Business Phone Information

	Current Value	New Value
Telephone:	802	<input type="text"/>
Preferred:	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Note 3-2 (Red arrow points from the note to the New Value input field for Telephone)

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Step 6: ePAR Transfer/Lateral- Job Information

NOTE: Fields open for editing, required or otherwise, are highlighted.

If this employee is Faculty please refer to the [Faculty Services Page](#) for more information.

Note 4-1: Either enter the position number if known or select the magnifying glass associated with position. Once open, enter the department number associated with this job. All positions within this department will be displayed. Select the appropriate one and all fields EXCEPT Job Indicator, Expected Job End Date, Officer Code and Empl Class will auto populate. Make any necessary corrections to the auto populated fields. IF you are hiring a non-paid without a position number, you will need to populate required fields manually.

Note 4-2: This field is for Graduate Students Only. For a less than 12 month grad this field must be filled out since a term row will be entered into People Soft for them. If the Grad is 12 month please indicate a future term date by indicating it here. If left blank for a 12 month grad NO term date will be entered. A new ePAR will need to be entered when the grad needs to be terminated. Link to Graduate Student Mini Manual on page 40.

Note 4-3: A link to Employee Class Definitions is on page 40. If this is a Faculty hire, information regarding the special Faculty Services page can be found on page 37.

Note 4-4: Officer Code is detailed on the Offer/Appointment Letter.

d) When you are finished press Next to proceed to Step 7.



Create UVM Transfer Request

Step 4 of 7: ePAR Transfer- Job Information



Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Lateral	Document Instance:	0
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Historical ePARs	Empl ID:	Pending ePARs	Empl Rod:	3
				Last Personnel Action:	
				Last Transaction Date:	

Work Information

	Current Value		New Value
Job Indicator:	Primary Job		Primary Job
Position Number:	018426	Administrative Professional-	00020312 Student Services Professional
Business Unit:	10	Finance & Admin	01 Genl. Institutional
Department:	11280	Payroll Svcs	30410 Student & Community Relations
Location Code:	160	Waterman Bldg	042 Booth House
Reports To:	00022702	Administrative Svcs Manager	020143 Student/Acad Svcs Mngr
Expected Job End Date:			

Note 4-1

Note 4-2

Job Information

	Current Value		New Value
Job Code:	3031	Administrative Professional	3471 Student Svcs Professional
Standard Hours:	37.50		37.50
Classified Indicator:	Classified		Classified
Empl Class:	12MthStaff		
Officer Code:	None		None
FTE:	1.000000		1.000000
FLSA Status:	No FLSA Required		No FLSA Required
Union Code:	NU	Non Union	NU Non Union
Regular Shift:	Not Applicable		

Note 4-3

Note 4-4

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Audit Details



Step 7: ePAR Transfer/Lateral-Employment, Time & Labor

NOTE: Fields open for editing, required or otherwise, are highlighted. When you are finished press Next to proceed to Step 8.

Favorites | Main Menu > Smart Solutions > Document Framework > Document Collection

[Collaborate](#) [Attach](#)

Create UVM Transfer Request

Step 5 of 7: ePAR Transfer - Employment, Time & Labor [Help](#)

Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Lateral	Document Instance:	<u>0</u>
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Preiss, Katrina M Historical ePARs	Empl ID:	0031359 Pending ePARs	Empl Rcd:	3
				Last Personnel Action:	
				Last Transaction Date:	

Employment Data

	Current Value	New Value
Working Title:	Assistant Payroll Manager	<input type="text" value="Student Svcs Professional"/>

If there is an approved working title enter here →

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Audit Details



Step 8: ePAR Transfer/Lateral-Compensation

Fields open for editing, required or otherwise, are highlighted.

Note 6-1: Since this ePAR is used for Transfers that include compensation changes, the data on this page is open for editing. Please enter the current Rate code, either hourly or annual, and the current compensation.

When you are finished press Next to proceed to Step 9.

Favorites | Main Menu > Smart Solutions > Document Framework > Document Collection

Collaborate Attach

Create UVM Transfer Request

Step 6 of 7: ePAR Transfer- Compensation [Help](#)

Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Lateral	Document Instance:	0
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Preiss, Katrina M Historical ePARs	Empl ID:	0031359 Pending ePARs	Empl Rcd:	3
				Last Personnel Action:	
				Last Transaction Date:	

Compensation

	Current Value	New Value
Total Comp Rate Change:	0.000000	187.361667
Total Comp Percent Increase:	0.000	8.904

Job Pay Components

Current Pay Components		New Pay Components	
Rate Code	Comp Rate	Rate Code	Comp Rate
1 NAANNL	50503.32	1 NAANN	55000.00

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Audit Details



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Step 9: ePAR Transfer/Lateral-Department Budget

NOTE: Fields open for editing, required or otherwise, are highlighted.

- Search by either Department or Project to retrieve the correct combo code. Kronos employees should enter Department 00001 and Combo Code Kronos_fscm1.
- You may enter any number of combo codes and appropriate distribution %'s, however they can only be for the effective date of the hire. Subsequent distribution changes should be submitted electronically to retro after the employee has been hired into People Soft.

File Favorites Main Menu Smart Solutions Document Framework Document Collection

Save Collaborate Attach

Create UVM Transfer Request

Step 7 of 7: ePAR - Department Budget [Help](#)

Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Lateral	Document Instance:	0
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Historical ePARs	Empl ID:	Pending ePARs	Empl Rcd:	3
				Last Personnel Action:	
				Last Transaction Date:	

Dept Budget

New Funding

	Department	Project	Combination Code	Account	Fund	Program	Source	Operating Unit	Function	Purpose	Property	Chartfield 3	Distribution %	
1	11300													+ -

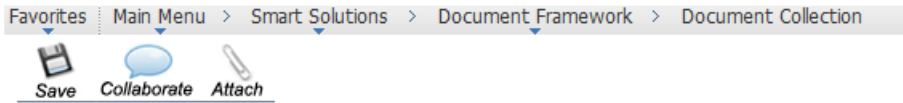
[Previous](#)

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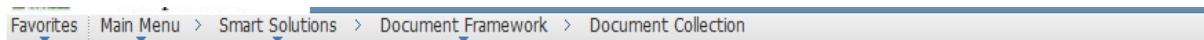


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- c) At this time your ePAR is ready for processing. You may use the Collaborate button or attach documents to the ePAR at this time if you wish, once complete you may hit save.



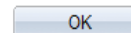
- d) You will then receive a message that the ePAR has been saved but not submitted.



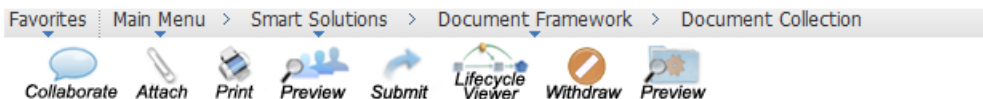
ePAR Status

Warning: ePAR HIR0000953 has been saved, but not submitted.

Click OK to return to the transaction to Submit.



- e) Select OK to submit the ePAR to work Flow. It is also at this time that the ePAR has been assigned a number.
- f) By clicking on the Lifecycle Viewer you will be able to see where in the Work Flow your ePAR is located at.



Update UVM Hire Request



Transfer/Reorganization

This ePAR is used to move an employee to a different department with no change in position number, title or compensation due to reorganization. Required: Salary Distribution information required only when department or funding (source or percentages) changes.

Step 1: Log in and Search

- Log in to PeopleSoft using the Human Resources Login www.uvm.edu/~erp/portal
- Navigation:** Smart Solutions>Document Framework>Document Collection and select the Transfer ePAR action.
- You will begin by searching for the employee by Social Security Number or First and Last Name. Check the box next to the Name and press Next.

Create UVM Transfer Request

Step 1 of 3: ePAR - Employee Selection

Transaction Details

ePAR Action:	Transfer	Action:		Document ID:	Transfer
ePAR #:	NEXT	Reason Code:		Document Instance:	0
ePAR Status:	Initial	Effective Date:	08/12/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Search Criteria

Empl ID:	<input type="text"/>
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Social Security #:	<input type="text"/>
Department:	<input type="text"/>
Position Number:	<input type="text"/>
Business Unit:	<input type="text"/>
Empl Class:	<input type="text"/>

Search Results

Empl ID	Name	Empl Record	Position Number	Department	Description	Job Code	Description	Business Unit	Empl Class	Social Security #
<input checked="" type="checkbox"/>		0	001681	52040	Art & Art History	2031	Office/Prgm Support Generalist	05	12MthStaff	XXX-XX-9029



Step 2: ePar Action/Reason

- This portion of the form initiates the action to move the employee from their current department to the new department. The effective date should be the first working day the employee will be in the new department.
- If the employee is PAID Staff or Faculty working less than 12 months please refer to [Create Contract Pay](#) for more information.

Favorites | Main Menu > Smart Solutions > Document Framework > Document Collection

Collaborate Attach

▼ Action/Reason Selection

*Action:	Transfer	*Reason:	Lateral
Old Effective Date:	01/01/2015	Old Effective Sequence:	0
*Effective Date:	07/01/2015	Effective Sequence:	0
Is this a staff or faculty working less than 12 months?:		Fiscal Year: 2016	
<input type="radio"/> Yes <input checked="" type="radio"/> No			
Requester's Dept ID:	11280	Payroll Svcs	
Current Empl Department:	11280	*Employee's New Dept:	11300
PeopleAdmin Action/Posting #:		Human Resource	
Comments:			
Related ePARs (If Any):			

Previous Next

▼ Audit Details

Entered By:	Updated By:
Entered On:	Updated On:



Step 3: ePAR Transfer Request initiation

This portion requests the release of this employee to your department.

- a) Add any comments and check the field 'I confirm the information entered is accurate' and then click "Confirm".

PeopleSoft

UVM ePARs

Save Collaborate Attach

Create UVM Transfer Request

Step 3 of 3: ePAR Transfer release initiation

Entered By: Entered On: Document Status: Initial
Updated By: Updated On: Sub Status: Add Entry [Additional Info](#)

Please check the box below to request release of this employee to your Department.

Comments:

☐ I confirm the information entered is accurate

Confirm

Previous

- b) Save the ePAR and click 'Ok' to return to the transaction. The department where release is being requested from will receive an email to approve the release.

Step 4: Modify Transfer ePAR

You will receive an email when the department has approved the release of the employee.

To complete the transfer ePAR initiation:

- c) **Navigation:** UVM ePARs>ePAR Collection>Transfer>Modify
- d) Click Search and click on the applicable Request ID



Document Console

Use Saved Search:

ePAR #	equal to	<input type="text"/>
ePAR Action	equal to	<input type="text"/>
ePAR Status	equal to	<input type="text"/>
Empl ID	equal to	<input type="text"/>
First Name	begins with	<input type="text"/>
Last Name	begins with	<input type="text"/>

[Search](#)

[Clear](#)

[Advanced Search](#)

[Save Search Criteria](#)

[Delete Saved Search](#)

[Personalize Search](#)

ePAR Details					
ePAR Details		Employee Details			
Request ID	View Name	Effective Date	Action	Reason	Document Status
1	XFR0000061	08/18/2015	Transfer	Transfer	Initial Released

Step 5: ePAR Transfer/Reorganization- Personal Information

Fields open for editing, required or otherwise, are highlighted. When you are finished press Next to proceed to Step 6.

Note 3-1: Proper formatting of Business and Check address is Department on the first line and Building and Room # on the second. For on campus addresses no City, State and Zip is needed. Check address will auto populate when Business Address is entered. Unless the employee works off campus the Check Address should be an on campus location and will most often match the Business Address.

Note 3-2: Phone Information is for Business on the ePAR. Entry of cell and home phone #'s can be done via Self Service.



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Favorites | Main Menu > Smart Solutions > Document Framework > Document Collection

Collaborate Attach

Create ePAR Transfer Request

Step 3 of 7: ePAR Transfer- Personal Information Help

Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Reorganization	Document Instance:	0
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Historical ePARs	Empl ID:	Recurring ePARs	Empl Rcd:	3
				Last Personnel Action:	
				Last Transaction Date:	

Business Address Information

	Current Value	New Value
Address Line 1:	Payroll Services	Payroll Services
Address Line 2:	Waterman Bldg Rm 237	Waterman Bldg Rm 237
Address Line 3:		
City:		
State:		
Postal Code:		

Note 3-1

Check Address Information

	Current Value	New Value
Address Line 1:	Payroll Services	Payroll Services
Address Line 2:	Waterman Bldg Rm 237	Waterman Bldg Rm 237
Address Line 3:		
City:		
State:		
Postal Code:		

Business Phone Information

	Current Value	New Value
Telephone:	802/656-	
Preferred:	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Note 3-2

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Step 6: ePAR Transfer/Reorganization- Job Information

Fields open for editing, required or otherwise, are highlighted. When you are finished press Next to proceed to Step 7.

NOTE: If this employee is Faculty please refer to the [Faculty Services Page](#) for more information.

Note 4-1: Either enter the position number if known or select the magnifying glass associated with position. Once open, enter the department number associated with this job. All positions within this department will be displayed. Select the appropriate one and all fields EXCEPT Job Indicator, Expected Job End Date, Officer Code and Empl Class will auto populate. Make any necessary corrections to the auto populated fields. IF you are hiring a non-paid without a position number, you will need to populate required fields manually.

Note 4-2: This field is for Graduate Students Only. For a less than 12 month grad this field must be filled out since a term row will be entered into People Soft for them. If the Grad is 12 month please indicate a future term date by indicating it here. If left blank for a 12 month grad NO term date will be entered. A new ePAR will need to be entered when the grad needs to be terminated. Link to Graduate Student Mini Manual on page 40.

Note 4-3: A link to Employee Class Definitions is on page 40. If this is a Faculty hire, information regarding the special Faculty Services page can be found on page 37.

Note 4-4: Officer Code is detailed on the Offer/Appointment Letter.



Favorites Main Menu > Smart Solutions > Document Framework > Document Collection

Collaborate Attach

Create UVM Transfer Request

Step 4 of 7: ePAR Transfer- Job Information Help

Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Reorganization	Document Instance:	0
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Historical ePARs	Empl ID:	Pending ePARs	Empl Rcd:	3
				Last Personnel Action:	
				Last Transaction Date:	

Work Information

	Current Value		New Value
Job Indicator:	Primary Job	Note 4-1	Primary Job
Position Number:	018426 Administrative Professional		00020312 Student Services Professional
Business Unit:	10 Finance & Admin		01 Genl. Institutional
Department:	11280 Payroll Svcs		30410 Student & Community Relations
Location Code:	160 Waterman Bldg		042 Booth House
Reports To:	00022702 Administrative Svcs Manager		020143 Student/Acad Svcs Mngr
Expected Job End Date:		Note 4-2	11

Job Information

	Current Value		New Value
Job Code:	3031 Administrative Professional	Note 4-3	3471 Student Svcs Professional
Standard Hours:	37.50		37.50
Classified Indicator:	Classified	Note 4-4	Classified
Empl Class:	12MthStaff		
Officer Code:	None		None
FTE:	1.000000		1.000000
FLSA Status:	No FLSA Required		No FLSA Required
Union Code:	NU Non Union		NU Non Union
Regular Shift:	Not Applicable		

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Step 7: ePAR Transfer/Reorganization-Employment, Time & Labor

Fields open for editing, required or otherwise, are highlighted. When you are finished press Next to proceed to Step 8.

Favorites | Main Menu > Smart Solutions > Document Framework > Document Collection

Collaborate Attach

Create UVM Transfer Request

Step 5 of 7: ePAR Transfer - Employment, Time & Labor [Help](#)

Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Reorganization	Document Instance:	<u>0</u>
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Historical ePARs	Empl ID:	Pending ePARs	Empl Rod:	3
				Last Personnel Action:	
				Last Transaction Date:	

Employment Data

Working Title:	<div>Current Value Assistant Payroll Manager</div>	<div>If there is approved working title enter here</div>	<div>New Value Student Svcs Professional</div>
----------------	--	--	--

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Audit Details



Step 8: ePAR Transfer/Reorganization-Compensation

Fields open for editing, required or otherwise, are highlighted. When you are finished press Next to proceed to Step 9.

Note 6-1: Since this ePAR is used for Transfers that include compensation changes, the data on this page is open for editing. Please enter the current Rate code, either hourly or annual and the current compensation.

Navigation: Favorites | Main Menu > Smart Solutions > Document Framework > Document Collection

Collaborate | Attach

Create UVM Transfer Request

Step 6 of 7: ePAR Transfer- Compensation Help

Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Reorganization	Document Instance:	0
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Empl ID:	Empl Rcd:
Historical ePARs	Pending ePARs	3
	Last Personnel Action:	
	Last Transaction Date:	

Compensation

	Current Value	New Value
Total Comp Rate Change:	0.000000	-2,104.305000
Total Comp Percent Increase:	0.000	-100.000

Job Pay Components

Current Pay Components

	Rate Code	Comp Rate
1	NAANNL	50503.32

Note 6-1

New Pay Components

	Rate Code	Comp Rate		
1			+	-

Previous Next

Audit Details



Mini-Manual

Step 9: ePAR Transfer/Reorganization-Department Budget

Fields open for editing, required or otherwise, are highlighted.

- Search by either Department or Project to retrieve the correct combo code. Kronos employees should enter Department 00001 and Combo Code Kronos_fscm1.
- You may enter any number of combo codes and appropriate distribution %'s, however they can only be for the effective date of the hire. Subsequent distribution changes should be submitted electronically to retro after the employee has been hired into People Soft.

Favorites | Main Menu | Smart Solutions | Document Framework | Document Collection

Save Collaborate Attach

Create UVM Transfer Request

Step 7 of 7: ePAR - Department Budget [Help](#)

Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Reorganization	Document Instance:	0
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Historical errors	Empl ID:	Pending ePARs	Empl Rod:	3
				Last Personnel Action:	
				Last Transaction Date:	

Dept Budget

New Funding

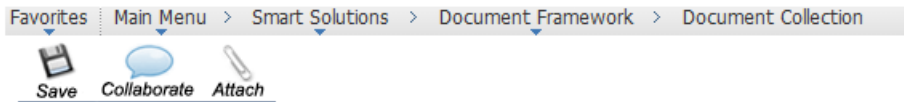
	Department	Project	Combination Code	Account	Fund	Program	Source	Operating Unit	Function	Purpose	Property	Chartfield 3	Distribution %	
1	11300													

[Previous](#)

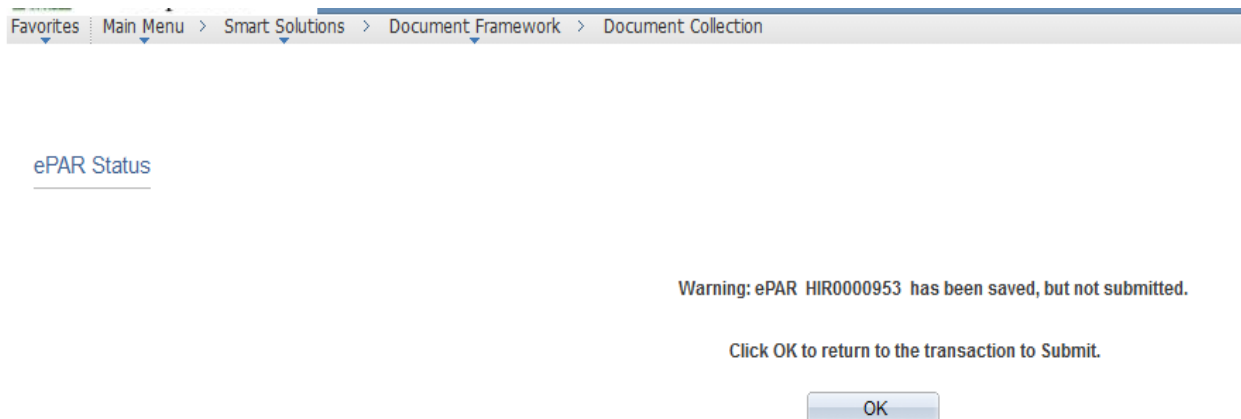


Mini-Manual

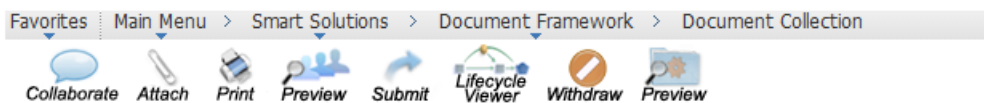
- c) At this time your ePAR is ready for processing. You may use the Collaborate button or attach documents to the ePAR at this time if you wish, once complete you may hit save.



- d) You will then receive a message that the ePAR has been saved but not submitted.



- e) Select OK to submit the ePAR to work Flow. It is also at this time that the ePAR has been assigned a number.
- f) By clicking on the Lifecycle Viewer you will be able to see where in the Work Flow your ePAR is located at.



Update UVM Hire Request



Transfer/Transfer

This ePAR is used to move an employee to a different department with no change in position number, title or compensation.

Note: An action/reason of Transfer/Pay Rate Change and Transfer/Promotion will be added in the future. In the interim use Transfer/Transfer to move an employee from one job/position number to another job/position number (resulting from recruitment or waiver) with a change in compensation.

Required: Salary Distribution Form required only when department or funding (source or percentages) changes. If no Salary Distribution Form required, a comment on PA Form is required.

Step 1: Log in and Search

- a) Log in to PeopleSoft using the Human Resources Login www.uvm.edu/~erp/portal
- b) **Navigation:** Smart Solutions>Document Framework>Document Collection and select the Transfer ePAR action.
- c) You will begin by searching for the employee by Social Security Number or First and Last Name. Check the box next to the Name and press Next




Mini-Manual

Favorites | Main Menu > * UVM ePARs > ePAR Collection

Collaborate Attach

Create UVM Transfer Request

Step 1 of 3: ePAR - Employee Selection 

Transaction Details

ePAR Action:	Transfer	Action:		Document ID:	Transfer
ePAR #:	NEXT	Reason Code:		Document Instance:	0
ePAR Status:	Initial	Effective Date:	08/12/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Search Criteria

Empl ID:

First Name:

Last Name:

Social Security #:

Department:

Position Number:

Business Unit:

Empl Class:

Search

Search Results First 1 of 1 Last

	Empl ID	Name	Empl Record	Position Number	Department	Description	Job Code	Description	Business Unit	Empl Class	Social Security #
<input checked="" type="checkbox"/>			0	001681	52040	Art & Art History	2031	Office/Prgm Support Generalist	05	12MthStaff	XXX-XX-9029

Next

Step 2: ePar Action/Reason

This portion of the form initiates the action to move the employee from their current department to the new department. The effective date should be the first working day the employee will be in the new department.

If the employee is PAID Staff or Faculty working less than 12 months please refer to [Create Contract Pay](#) for more information.



Mini-Manual

Navigation: Favorites | Main Menu > Smart Solutions > Document Framework > Document Collection

Collaborate Attach

Action/Reason Selection

*Action:	Transfer	*Reason:	Lateral
Old Effective Date:	01/01/2015	Old Effective Sequence:	0
*Effective Date:	07/01/2015	Effective Sequence:	0
		Fiscal Year:	2016
Is this a staff or faculty working less than 12 months?: <input type="radio"/> Yes <input checked="" type="radio"/> No			
Requester's Dept ID:	11280	Payroll Svcs	
Current Empl Department:	11280	*Employee's New Dept:	11300 Human Resources
PeopleAdmin Action/Posting #:			
Comments:			
Related ePARs (if Any):			

Previous Next

Audit Details

Entered By:
Entered On:

Updated By:
Updated On:



Step 3: ePAR Transfer Request initiation

This portion requests the release of this employee to your department.

- Add any comments and check the field 'I confirm the information entered is accurate' and then click "Confirm".
- Save the ePAR and click 'Ok' to return to the transaction.
- The department where release is being requested from will receive an email to approve the release.

PeopleSoft

UVM ePARs > ePAR Collection

Save Collaborate Attach

Create UVM Transfer Request

Step 3 of 3: ePAR Transfer release initiation

Entered By: Entered On: Document Status: Initial
Updated By: Updated On: Sub Status: Add Entry [Additional Info](#)

Please check the box below to request release of this employee to your Department.

Comments:

☐ I confirm the information entered is accurate

Confirm

Previous

Step 4: Modify Transfer ePAR

You will receive an email when the department has approved the release of the employee.

To complete the transfer ePAR initiation:

- Navigation:** UVM ePARs>ePAR Collection>Transfer>Modify



b) Click Search and click on the applicable Request ID

Document Console

Use Saved Search:

ePAR #	equal to	<input type="text"/>
ePAR Action	equal to	<input type="text"/>
ePAR Status	equal to	<input type="text"/>
Empl ID	equal to	<input type="text"/>
First Name	begins with	<input type="text"/>
Last Name	begins with	<input type="text"/>

[Search](#) [Clear](#) [Advanced Search](#) [Save Search Criteria](#) [Delete Saved Search](#) [Personalize Search](#)

[ePAR Details](#) [Employee Details](#) [Personalize](#) [First](#) [1 of 1](#)

Request ID	View Name	Effective Date	Action	Reason	Document Status
1 XFR0000061	ePAR Transfer Read	08/18/2015	Transfer	Transfer	Initial Released

Step 5: ePAR Transfer/Transfer- Personal Information

Fields open for editing, required or otherwise, are highlighted. When you are finished press Next to proceed to Step 6.

Note 3-1: Proper formatting of Business and Check address is Department on the first line and Building and Room # on the second. For on campus addresses no City, State and Zip is needed. Check address will auto populate when Business Address is entered. Unless the employee works off campus the Check Address should be an on campus location and will most often match the Business Address.

Note 3-2: Phone Information is for Business on the ePAR. Entry of cell and home phone #'s can be done via Self Service.



Favorites | Main Menu > Smart Solutions > Document Framework > Document Collection

[Collaborate](#) [Attach](#)

Create UVM Transfer Request

Step 3 of 7: ePAR Transfer- Personal Information [Help](#)

Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Transfer	Document Instance:	0
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Historical ePARs	Empl ID:	Pending ePARs	Empl Rod:	3
				Last Personnel Action:	
				Last Transaction Date:	

Business Address Information

	Current Value	New Value
Address Line 1:	Payroll Services	<input type="text" value="Payroll Services"/>
Address Line 2:	Waterman Bldg Rm 237	<input type="text" value="Waterman Bldg Rm 237"/>
Address Line 3:		<input type="text"/>
City:		<input type="text"/>
State:		<input type="text"/>
Postal Code:		<input type="text"/>

Note 3-1 →

Check Address Information

	Current Value	New Value
Address Line 1:	Payroll Services	<input type="text" value="Payroll Services"/>
Address Line 2:	Waterman Bldg Rm 237	<input type="text" value="Waterman Bldg Rm 237"/>
Address Line 3:		<input type="text"/>
City:		<input type="text"/>
State:		<input type="text"/>
Postal Code:		<input type="text"/>

Business Phone Information

Telephone:	Current Value	New Value
	802/656-0557	<input type="text"/>
Preferred:	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Note 3-2 →

[Previous](#) [Next](#)

Audit Details



Step 6: ePAR Transfer/Transfer- Job Information

Fields open for editing, required or otherwise, are highlighted. When you are finished press Next to proceed to Step 7.

If this employee is Faculty please refer to [Faculty Services Page](#) for more information.

Note 4-1: Either enter the position number if known or select the magnifying glass associated with position. Once open, enter the department number associated with this job. All positions within this department will be displayed. Select the appropriate one and all fields EXCEPT Job Indicator, Expected Job End Date, Officer Code and Empl Class will auto populate. Make any necessary corrections to the auto populated fields. IF you are hiring a non-paid without a position number, you will need to populate required fields manually.

Note 4-2: This field is for Graduate Students Only. For a less than 12 month grad this field must be filled out since a term row will be entered into People Soft for them. If the Grad is 12 month please indicate a future term date by indicating it here. If left blank for a 12 month grad NO term date will be entered. A new ePAR will need to be entered when the grad needs to be terminated. Link to Graduate Student Mini Manual on page 40.

Note 4-3: A link to Employee Class Definitions is on page 40. If this is a Faculty hire, information regarding the special Faculty Services page can be found on page 37.

Note 4-4: Officer Code is detailed on the Offer/Appointment Letter.



Create UVM Transfer Request

Step 4 of 7: ePAR Transfer- Job Information



Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Transfer	Document Instance:	0
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Empl ID:	Empl Rcd:
Historical ePARs	Pending ePARs	3
	Last Personnel Action:	
	Last Transaction Date:	

Work Information

	Current Value		New Value
Job Indicator:	Primary Job		Primary Job
Position Number:	018426	Administrative Professional	001157
Business Unit:	10	Finance & Admin	01
Department:	11280	Payroll Svcs	11300
Location Code:	160	Waterman Bldg	160
Reports To:	00022702	Administrative Svcs Manager	00023553
Expected Job End Date:			11

Note 4-1

Note 4-2

Job Information

	Current Value		New Value
Job Code:	3031	Administrative Professional	3051
Standard Hours:	37.50		37.50
Classified Indicator:	Classified		Classified
Empl Class:	12MthStaff		12MthStaff
Officer Code:	None		None
FTE:	1.000000		1.000000
FLSA Status:	No FLSA Required		No FLSA Required
Union Code:	NU	Non Union	NU
Regular Shift:	Not Applicable		

Note 4-3

Note 4-4

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Audit Details



Mini-Manual

Step 7 ePAR Transfer/Transfer-Employment, Time & Labor

Fields open for editing, required or otherwise, are highlighted.

Favorites | Main Menu > Smart Solutions > Document Framework > Document Collection

[Collaborate](#) [Attach](#)

Create UVM Transfer Request

Step 5 of 7: ePAR Transfer - Employment, Time & Labor [Help](#)

Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Transfer	Document Instance:	<u>0</u>
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Historical ePARs	Empl ID:	Pending ePARs	Empl Rcd:	3
				Last Personnel Action:	
				Last Transaction Date:	

Employment Data

Working Title:	<div>Current Value Assistant Payroll Manager</div>	<div>If there is an approved working title update here</div>	<div>New Value Admin Analyst/Planner</div>
----------------	--	--	--

[Previous](#) [Next](#)

Audit Details



Step 8: ePAR Transfer/Transfer-Compensation


Fields open for editing, required or otherwise, are highlighted. When you are finished press Next to proceed to Step 9.

Note 6-1: Since this ePAR is used for Transfers that include compensation changes, the data on this page is open for editing. Please enter the current Rate code, either hourly or annual and the current compensation.

Favorites | Main Menu > Smart Solutions > Document Framework > Document Collection

Collaborate Attach

Create UVM Transfer Request

Step 6 of 7: ePAR Transfer- Compensation 

Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Transfer	Document Instance:	0
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		




Employee Details

Name:	Preiss, Katrina M Historical ePARs	Empl ID:	0031359 Pending ePARs	Empl Rcd:	3
				Last Personnel Action:	
				Last Transaction Date:	

Compensation

Total Comp Rate Change:	Current Value 0.000000	Note 6-1	New Value 0.000000
Total Comp Percent Increase:	0.000		0.000

Job Pay Components

Current Pay Components		New Pay Components	
Rate Code	Comp Rate	Rate Code	Comp Rate
1 NAANL	50503.32	1 NAANN 	50503.32  

Previous Next

Audit Details



Step 9: ePAR Transfer/Transfer-Department Budget

Fields open for editing, required or otherwise, are highlighted.

- Search by either Department or Project to retrieve the correct combo code. Kronos employees should enter Department 00001 and Combo Code Kronos_fscm1.
- You may enter any number of combo codes and appropriate distribution %'s, however they can only be for the effective date of the hire. Subsequent distribution changes should be submitted electronically to retro after the employee has been hired into People Soft.

Favorites | Main Menu | Smart Solutions | Document Framework | Document Collection

Save Collaborate Attach

Create UVM Transfer Request

Step 7 of 7: ePAR - Department Budget [Help](#)

Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Transfer	Document Instance:	0
ePAR Status:	Initial	Effective Date:	07/01/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Preis, Katrina M Historical ePARs	Empl ID:	0031359 Pending ePARs	Empl Rcd:	3
				Last Personnel Action:	
				Last Transaction Date:	

Dept Budget

New Funding

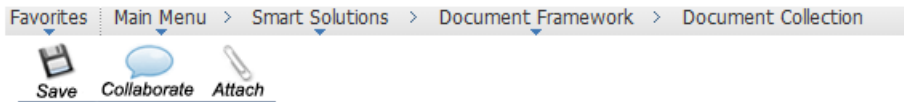
	Department	Project	Combination Code	Account	Fund	Program	Source	Operating Unit	Function	Purpose	Property	Chartfield 3	Distribution %		
1	11300														

[Previous](#)

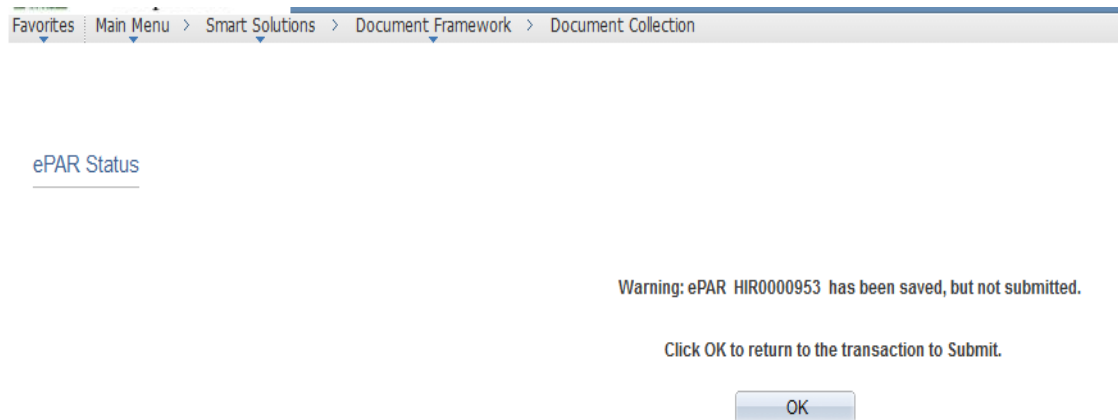


Mini-Manual

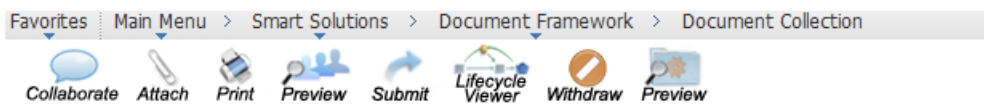
- a) At this time your ePAR is ready for processing. You may use the Collaborate button or attach documents to the ePAR at this time if you wish, once complete you may hit save.



- b) You will then receive a message that the ePAR has been saved but not submitted.



- c) Select OK to submit the ePAR to work Flow. It is also at this time that the ePAR has been assigned a number.
- d) By clicking on the Lifecycle Viewer you will be able to see where in the Work Flow your ePAR is located at.



Update UVM Hire Request



Faculty Services Page

This page is only displayed for faculty positions (empl class xMthFac).

For new hires the tenure data is all that needs to be updated. You will be directed to this screen after the Job Information screen.

Favorites

Main Menu > Smart Solutions > Document Framework > Document Collection

Collaborate

Attach

Create UVM Hire Request

Step 5 of 8: ePAR Hire - Faculty Services

?

Help

Transaction Details

PAR Action: Hire

Action: Hire

Document ID: Hire

ePAR #: NEXT

Reason Code: Hire

Document Instance: 0

ePAR Status: Initial

Effective Date: 07/01/2015

Document Status: Initial / Add Entry

Effective Seq: 0

Employee Details

Name:

Empl ID:

Empl Rcd: 0

Last Personnel Action:

Last Transaction Date:

Additional Faculty Information

Tenure Status:

Tenure Status Change?:

Base Salary:

Two Most Recent Non-Tenure Track Appointment Information

(Complete this section if the faculty member previously held an NTT faculty appointment in the department.)

1st Most Recent Position

Most Recent Appointment/Position:

Prior Credit Hour Rate:

Number of Courses (Optional) (Only if Option B is selected):

Number of Course Equivalents (Optional) (Only if Option B is selected):

Prior Hourly Rate:

2nd Most Recent Position

Most Recent Appointment/Position:

Prior Credit Hour Rate:

Number of Courses (Optional) (Only if Option B is selected):

Number of Course Equivalents (Optional) (Only if Option B is selected):

Prior Hourly Rate:

Previous

Next

Updated 9/23/2015

Ctrl+Home to Table of Contents

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Create Contract Pay

This page is only displayed if the answer is 'yes' to the question 'Is this a PAID staff or faculty working less than 12 months?'

Use the following screen to enter valid contract terms.

SPECIAL NOTE: You may not make contract term changes during the academic year. Please contact Human Resources or Payroll Services if you have questions.

Favorites Main Menu > Smart Solutions > Document Framework > Document Collection

[Collaborate](#) [Attach](#)

Create UVM Hire Request

Step 7 of 8: ePAR Hire - Create Contract Pay [Help](#)

Transaction Details			
PAR Action:	Hire	Action:	Hire
ePAR #:	NEXT	Reason Code:	Hire
ePAR Status:	Initial	Effective Date:	07/01/2015
		Effective Seq:	0
Document ID:	Hire	Document Instance:	0
Document Status:	Initial / Add Entry		

Employee Details		
Empl ID:	Empl Rcd:	Last Personnel Action:
Name:	Contract ID:	Last Transaction Date:
Hj, Heo		

Contract Information	
*Contract End Date:	*Contract Begin Date:
<input type="text"/>	<input type="text"/>

Please see Employee Class Definitions for allowable Contract Terms

[Previous](#) [Next](#)

Audit Details	
Entered By:	Updated By:
Entered On:	Updated On:



Release Employee

The department where the employee currently works will receive an email requesting release.

- Navigation:** UVM ePARs>ePAR Collection>Transfer>Release
- Click 'Search' and then click on the Applicable Request ID

Document Console

Use Saved Search:

ePAR #	equal to	<input type="text"/>
ePAR Action	equal to	<input type="text"/>
ePAR Status	equal to	<input type="text"/>
Empl ID	equal to	<input type="text"/>
First Name	begins with	<input type="text"/>
Last Name	begins with	<input type="text"/>

[Search](#) [Clear](#) [Advanced Search](#) [Save Search Criteria](#) [Delete Saved Search](#) [Personalize Search](#)

ePAR Details [Personalize](#) [Find](#) [View All](#) [First](#) [1-2 of 2](#) [Last](#)

Request ID	View Name	Empl ID	Empl Record	Name	Action	Reason
1 XFR0000060	ePAR Transfer Initiater		0		Transfer	Transfer
2 XFR0000057	ePAR Transfer Initiater		0		Transfer	Transfer

- Review each page and click 'Next'.
- On final page, check 'I confirm releasing the Employee', enter a comment (required) and click 'Release Confirm'



c) Save the ePAR and click 'Ok' to return to the transaction.



UVM Transfer Release

Step 3 of 3: ePAR Transfer Release



Entered By: [redacted]	Entered On: 08/04/2015 4:18PM	Document Status: Initial	
Updated By: [redacted]	Updated On: 08/04/2015 4:18PM	Sub Status: Initiated	Additional Info

Please check the box below to release this employee to the requesting Department.

Comments:

☐ I confirm releasing the Employee

Release Confirm

Previous

Jump To: Step 3) ePAR Transfer Release



Resources

Relevant UVM Departments

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

Helpful Links

- [PeopleSoft Sign on Screens](#)
- [Graduate Student Paperwork Mini Manual](#)
- [Employee Class Definitions](#)
- [ePAR Navigation Manual](#)

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.