



ePAR Tips & Best Practices

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

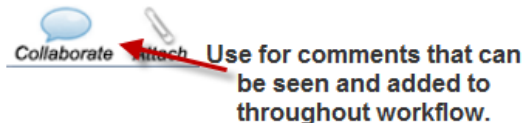
The “comments” field is open to initiators for editing before the ePAR is submitted. Once submitted the “comments” field and many other fields (e.g. Name, DOB, etc.) are no longer open for editing. If the ePAR is denied back to the initiator most fields (including the comments) will reopen for corrections. 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- When processing multiple ePARs to ensure that information from another ePAR is not overridden by the 2nd ePAR pulling outdated information.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:

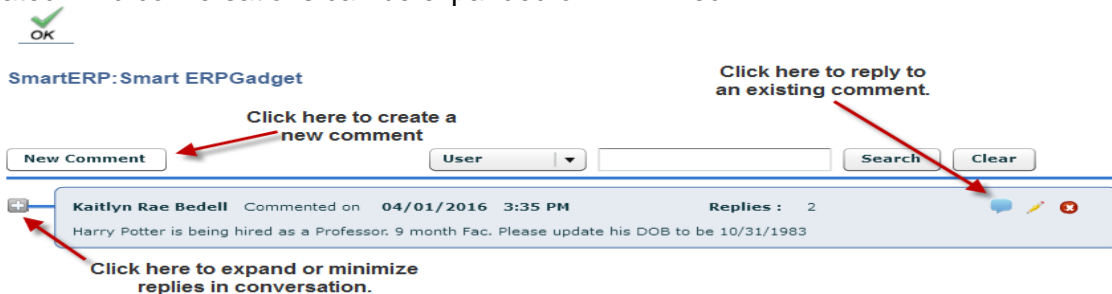
A. Click the Collaborate Icon



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.

Collaborate Attach

Create UVM Transfer Request

Step 4 of 7: ePAR Transfer- Job Information Help

Transaction Details

ePAR Action:	Transfer	Action:	Transfer	Document ID:	Transfer
ePAR #:	NEXT	Reason Code:	Transfer	Document Instance:	0
ePAR Status:	Initial	Effective Date:	01/01/2016	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Solo, Han Historical ePARs	Empl ID:	0134916 Pending ePARs	Empl Rcd:	0
				Last Personnel Action:	
				Last Transaction Date:	

Work Information

	Current Value		New Value
Job Indicator:	Primary Job		<input type="text"/>
Position Number:	002206	Office/Prgrm Support Genl-Kelly Dutra	<input type="text" value="00010007"/> Associate Professor-Vacant
Business Unit:	05	Arts And Sciences	<input type="text" value="13"/> Medicine
Department:	52250	Music & Dance	<input type="text" value="55500"/> Anesthesiology
Location Code:	143	Southwick Complx	<input type="text" value="220"/> MFU-Fletcher
Reports To:	001248	Chairperson-D. Toner Jr.	<input type="text" value="00022450"/> Chairperson-Vacant
Expected Job End Date:			<input type="text" value="01"/>

Job Information

	Current Value		New Value
Job Code:	2031	Office/Prgrm Support Generalist	<input type="text" value="0891"/> Associate Professor
Standard Hours:	37.50		<input type="text" value="37.50"/>
Classified Indicator:	Classified		<input type="text" value="Unclassified"/>
Empl Class:	12MthStaff		<input type="text"/>
Officer Code:	None		<input type="text" value="None"/>
FTE:	1.000000		<input type="text" value="1.000000"/>
FLSA Status:	Nonexempt		<input type="text" value="No FLSA Required"/>
Union Code:	NU	Non Union	<input type="text" value="NU"/> Non Union
Regular Shift:	Not Applicable		<input type="text"/>

Fields that auto populate from position number

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➤ 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.



Create UVM Pay Change Request

Step 3 of 5: ePAR Change- Job Information



Transaction Details

ePAR Action:	Pay Change	Action:	Pay Rate Change	Document ID:	Pay Rate Change
ePAR #:	NEXT	Reason Code:	Change in FTE	Document Instance:	0
ePAR Status:	Initial	Effective Date:	04/01/2016	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Solo, Han Historical ePARs	Empl ID:	0134916 Pending ePARs	Empl Rcd:	0
				Last Personnel Action:	
				Last Transaction Date:	

Work Information

	Current Value		New Value
Job Indicator:	Primary Job		Primary Job
Position Number:	002206	Office/Progm Support Genl-Kelly Dutra	002206
Business Unit:	05	Arts And Sciences	05
Department:	52250	Music & Dance	52250
Location Code:	143	Southwick Complx	143
Reports To:	001248	Chairperson-D. Toner Jr.	001248

Job Information

	Current Value		New Value
Job Code:	2031	Office/Prgm Support Generalist	2031
Standard Hours:	37.50		20.00
Classified Indicator:	Classified		Classified
Empl Class:	12MthStaff		12MthStaff
Officer Code:	None		None
FTE:	1.000000		0.533330
FLSA Status:	Nonexempt		Nonexempt
Union Code:	NU	Non Union	NU
FICA Status:	Subject		Subject
Regular Shift:	Not Applicable		Not Applicable

1. Enter new standard hours

2. Hit "Tab" key or click FTE box. FTE will auto populate based on std hours.

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➤ Understanding “Is this a PAID staff or faculty working less than 12 months?”

Action/Reason Selection

*Action: *Reason:

*Effective Date: Effective Sequence: Fiscal Year:

Is this a PAID staff or faculty working less than 12 months?: ☒ Yes ☐ No

PeopleAdmin Action/Posting #:

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.

ePAR #: NEXT Reason Code: Hire Document Instance: 0

ePAR Status: Initial Effective Date: 01/01/2016 Document Status: Initial / Add Entry

Effective Seq: 0

Employee Details

Name: Potter, Harry Empl ID: Empl Rcd: 0

Last Personnel Action: Last Transaction Date:

Additional Faculty Information

Tenure Status: Tenure Status Change?:

Base Salary:

Current Action

Position Title:

Per Credit Hour Rate: Hourly Rate/Salary (for salaried faculty only):

Total Number of Credit Hours:

Total Number of Course Equivalents (Optional):

Previous Position/Last Position Held

Position Title:

Per Credit Hour Rate: Hourly Rate/Salary (for salaried faculty only):

Total Number of Credit Hours:

Total Number of Course Equivalents (Optional):

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- 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

Step 8 of 9: ePAR Hire - Create Contract Pay



Transaction Details

ePAR Action:	Hire	Action:	Hire	Document ID:	Hire
ePAR #:	NEXT	Reason Code:	Hire	Document Instance:	0
ePAR Status:	Initial	Effective Date:	01/01/2016	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Empl ID:	Empl Rcd:	Last Personnel Action:
Name: Potter, Harry	Contract ID:	Last Transaction Date:

Contract Information

*Contract End Date:

See the Employee Class Definitions Mini-Manual for allowable contract terms.

*Contract Begin Date:

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➤ 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

- Go to ePAR collection and click "Add" under the ePAR collection desired to begin creating the new ePAR.
- On the ePAR Action/Reason Page click "Pending ePARs"



Create UVM Change Request

Step 2 of 9: ePAR - Action/Reason



Transaction Details

ePAR Action:	Change	Action:		Document ID:	Job Change
ePAR #:	NEXT	Reason Code:		Document Instance:	0
ePAR Status:	Initial	Effective Date:	04/07/2016	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Last Name, First Name	Empl ID:	0114673	Empl Rcd:	0
	Historical ePARs		Pending ePARs	Last Personnel Action:	
				Last Transaction Date:	

Click Here

- The next screen will indicate pending ePARs.
 - No Pending ePARs

Pending ePARs

ePAR #: NEXT
 Empl ID: 0000000 Last Name, First name
 Effective Date: 04/07/2016
 Action:
 Empl Rcd: 0
 ePAR Action: Change
 Reason Code:

No Pending ePARs are available.

[Return](#)

- Pending ePARs listed

Pending ePARs

ePAR #: NEXT
 Empl ID: 0000000 LastName, FirstName
 Effective Date: 05/02/2016
 Action:
 Empl Rcd: 0
 ePAR Action: Change
 Reason Code:

Pending ePARs							Personalize	Find	View All	First	1 of 1	Last
	Request ID	Go To Transaction	Effective Date	Effseq	ePAR Status	Action	Reason Code					
1	LEA0000000	Go To Transaction	04/27/2016		Workflow	Return from Leave	Return From Leave					

[Return](#)



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

Use Saved Search:

ePAR # equal to

ePAR Action equal to

ePAR Status equal to In Workflow

Empl ID equal to

First Name begins with ha

Last Name begins with solo

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

ePAR Details

Document Status	Action	Name	Empl ID	Reason
1 Workflow Human Resources	Pay Rate Change	Solo, Han	0134916	Change in FTE
2 Workflow Payroll	Data Change	Solo, Han	0134916	Reports To Change

➤ 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:

- Notifying payroll that there are multiple approved ePARs an employee to be processed.
- 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 related to ePAR 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.

The screenshot shows the ePAR system interface. At the top, there are icons for Collaborate, Attach, Print, Workflow, Lifecycle Viewer, and Preview. Below these, there are fields for ePAR Action, ePAR #, ePAR Status, Action, Reason Code, Effective Date, Effective Seq, Document ID, Document Instance, and Document Status. The ePAR # is CHA0002302, and the Document ID is Job Change. The ePAR Status is In Workflow, and the Document Status is Workflow / Awaiting Payroll Approval.

Below the ePAR details, there is a section for Employee Details. The Name is Solo, Han, and the Empl ID is 0134916. The Empl Rcd is 0, and the Last Personnel Action is Pending ePARs. The Last Transaction Date is not specified.

Below the Employee Details, there is a section for Action/Reason Selection. The *Action is Data Change, and the *Reason is Reports To Change. The Old Effective Date is 09/01/2015, and the Old Effective Sequence is 0. The *Effective Date is 01/01/2016, and the Effective Sequence is 0. The Fiscal Year is 2016.

Below the Action/Reason Selection, there is a section for PeopleAdmin Action/Posting #, Comments, and Related ePARs (If Any). The Comments field is empty, and the Related ePARs field is empty.

At the bottom, there is a section for the Jump To button. The Jump To button is highlighted in yellow, and a dropdown menu is open showing the following options: Step 1) ePAR - Review Action/Reason, Step 2) ePAR Change - Review Personal Information, Step 3) ePAR Change - Review Job Information, and Step 4) ePAR Change - Review Employment, Time & Labor. The first option, Step 1) ePAR - Review Action/Reason, is selected. Arrows point to the dropdown arrow and the Jump To button with the following instructions: "1. Click drop down arrow then select page." and "2. Click arrow to jump to page selected."

At the bottom right, there is a Next button. Below the Jump To button, there is a section for Audit. The Audit section shows the Entered By field as Kaitlyn Rae Bedell and the Updated By field as Kaitlyn Rae Bedell. The Entered On field is 04/07/2016 10:54AM, and the Updated On field is 04/07/2016 10:57AM.

- Access desired ePAR.
- Scroll to the bottom of the first page – Review Action/Reason.
- Click the drop down arrow and select the page you would like to “jump to.”
- 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.

Navigation: Favorites | Main Menu | * UVM ePARs | ePAR Transaction Inquiry

The University of Vermont
PeopleSoft HR 9.2

ePAR Global Inquiry

Click "Advanced Search" for additional search fields

Use Saved Search: [Dropdown]

Search criteria fields:

- ePAR #: equal to [Text]
- ePAR Action: equal to [Dropdown]
- ePAR Status: equal to [Dropdown]
- Empl ID: equal to [Text]
- First Name: begins with [Text]
- Last Name: begins with [Text]

Buttons: Search, Clear, **Advanced Search**, Save Search Criteria, Delete Saved Search, Personalize Search

ePAR Global Inquiry

Use Saved Search: [Dropdown]

Search criteria fields:

- ePAR #: equal to [Text]
- ePAR Action: equal to [Dropdown]
- ePAR Status: equal to **In Workflow**
- Empl ID: equal to [Text]
- First Name: begins with [Text]
- Last Name: begins with [Text]
- Business Unit: equal to [Text]
- Department: equal to **52090**
- Position Number: equal to [Text]
- Action: equal to [Text]
- Reason Code: equal to [Text]
- Job Code: equal to [Text]
- Employee Class: equal to [Text]

Buttons: Search, Clear, Basic Search, **Save Search Criteria**, Delete Saved Search, Personalize Search

1. Enter desired search criteria

2. Optional: Use magnifying glass to lookup unknown values by description (See note below)

3. Click "Save search Criteria"

Save Search As

Save Search As: **Chemistry In Process**

Buttons: Apply, Cancel

4. Type Description and Click Apply

ePAR Global Inquiry

Use Saved Search: **Chemistry In Process**

Search criteria fields:

- ePAR #: equal to [Text]
- ePAR Action: equal to [Dropdown]
- ePAR Status: equal to **In Workflow**
- Empl ID: equal to [Text]
- First Name: begins with [Text]
- Last Name: begins with [Text]
- Business Unit: equal to [Text]
- Department: equal to **52090**
- Position Number: equal to [Text]
- Action: equal to [Text]
- Reason Code: equal to [Text]
- Job Code: equal to [Text]
- Employee Class: equal to [Text]

Buttons: Search, Clear, Basic Search, Save Search Criteria, Delete Saved Search, Personalize Search

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.

Click drop down. Select "Description"

Look Up Look Up

Search by: **Department** begins with Search by: **Description** begins with **chem**

Look Up **Cancel** **Advanced Lookup** **Look Up** **Cancel** **Advanced Lookup**

Search Results **Search Results**

Only the first 300 results can be displayed. Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last View 100 First 1 of 1 Last

Department	Description
00001	General University
00003	Treasury Operations
03340	Human Resources/Pensions
10000	Presidents Ofc
10030	VP HR,Diversity&MulticAffairs
10040	Chief Diversity Office
10050	Women's Center
10060	Affirm Action / Equal Opp

Description	Department
Chemistry	52090

1. Type description

2. Click Lookup

3. Select desired 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.)

ePAR Global Inquiry

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

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

- B.** Click the personalize link within the search table.

ePAR Global Inquiry

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

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

Click Here to personalize tabs and search fields

ePAR Details **Personalize** **Find** First 1-2933 of 2933 Last

ePAR Details	Employee Details
Request ID	View Name
Effective Date	Action
Reason	Document Status



- 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.

ePAR Details

Personalize Column and Sort Order

Select column then move the location by clicking up or down arrows

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

Tab ePAR Details (frozen)

Request ID (frozen)

View Name (frozen)

Effective Date

Action

Reason

Document Status

Tab Employee Details

Empl ID

Name

Empl Record

Business Unit

Department

Description

Position

Job Code

Description

Empl Class

Employee Type

TABS

Hidden

Frozen

Sort Order

Descending

Check box to hide column from view

Check box to freeze column in view when scrolling

OK Cancel Preview Copy Settings

➤ 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.