ePAF Frequently Asked Questions—HR 2-2-2016

1. What evidence do we have that the ePAF system is improving processing?

As part of the 2015 F&A Business Process Suggestions, departments made many requests for automated workflow for financial transactions.

- Workflow allows departments to track their forms as the forms travel through the approval process.
- No more lost documents.
- Less paper.
- Multiple Funding Sources on one transaction
- Reduce process time
- Ensure 100% compliance of the University policy on approval process

2. Approvals take too long—need and want ability to scroll down the form, not click thru screens

UMass Boston is leading the effort with the university IT office and other campuses to improve ePAF. The following changes have been approved by the VCs on the 5 campuses and the Resources Management Board. Vendor will begin right away.

- single page approval
- action center(summary of worklist)
- proxy (delegation)

3. Attachments don’t always upload or are not always accessible

The only case we are aware of is when the file name exceeds 30 characters, which is the limit. If there are other attachment issues, please contact HR.

4. Where do the attachments “go”? How can they be retrieved or accessed in the future?

Attachments stay with the ePAF. They are always retrievable with the ePAF.

5. Changes cannot be done at all approval levels—“reprocessing” returns the form back to initiator.

The system is designed to keep the initiator and all approvers informed when a change is made. This allows all to have the same information.

6. Returning ePAF to initiator requires all approvers to reapprove.

Yes. If a change is made, all approvers should have the opportunity to see the ePAF again.
7. Some approvers are bypassed (e.g. students go directly to Student Employment? grad assistants go directly to Graduate Studies? Split-funded employees only go to one unit, not all?)

- The university IT office is programming an email notification for a department and student job code combination for students and grad assistants. These emails will go to a designated person in the department when an ePAF is initiated.
- Employees—Within one college: the assistant dean will approve the ePAF for both departments.
- Employees—Intercollege: The employee’s home department can send an email to the collaborating college requesting approval. When approval is received (email or other documented approval), the ePAF can be approved by the assistant dean of the employee’s home department. Attach approval to the ePAF.

8. Sometimes an “override” is needed from HR regarding action or reason codes for the transaction.

   HR will monitor missing codes, and will add PeopleSoft action reason codes to ePAF system as needed.

9. Some approvers are getting ePAFs that they aren’t “really” expected to approve.

   This is the result of too much security. HR will meet with the department to review access issues.

10. What are the different approver roles? What permissions do initiators have that approvers have or don’t have?

    Following are the initiator/approver roles. Numbers 6, 10 and 12 are not used at UMass Boston. Numbers 15 & 16 are system indicators only.
11. Cannot print the final form and have anything that is readable or useful.

Transaction history is easily viewable. HR will be happy to schedule a training or create a handout explaining this process. This is a paperless system.

12. Can positions be repurposed on ePAF?

Repurposing positions should be done with the Budget and Financial Planning Office and HR prior to initiating the ePAF. One ePAF supports one position.

13. Multiple ePAFs cannot be created for the same employee at the same time.

True. Once an employee Id.# is in process in ePAF, the transaction must be approved by HR before a new ePAF can be initiated for the same employee.

14. How far back can an ePAF be used for retroactive payments?

If the retroactive payments go back further than one year, use a paper PA form.

Let HR know if there are other issues or if you need additional information for these items.