

Step How to Process a Status Change eForm

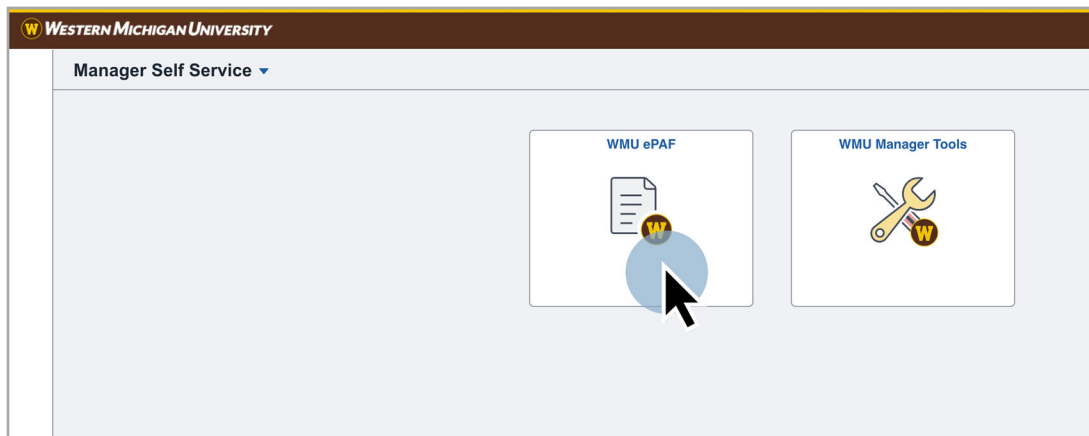
Navigation: Main Menu > Manager Self Service > WMU ePAF tile

Choosing an action

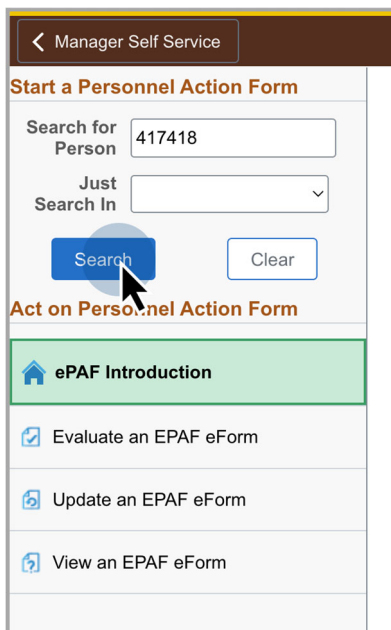
1 In this document, we will review how to process terminations, resignations, retirements and some leave of absence (LOA) transactions.

Let's look at Termination or Resignation.

2 Select the WMU ePAF tile from the Manager Self Service homepage.

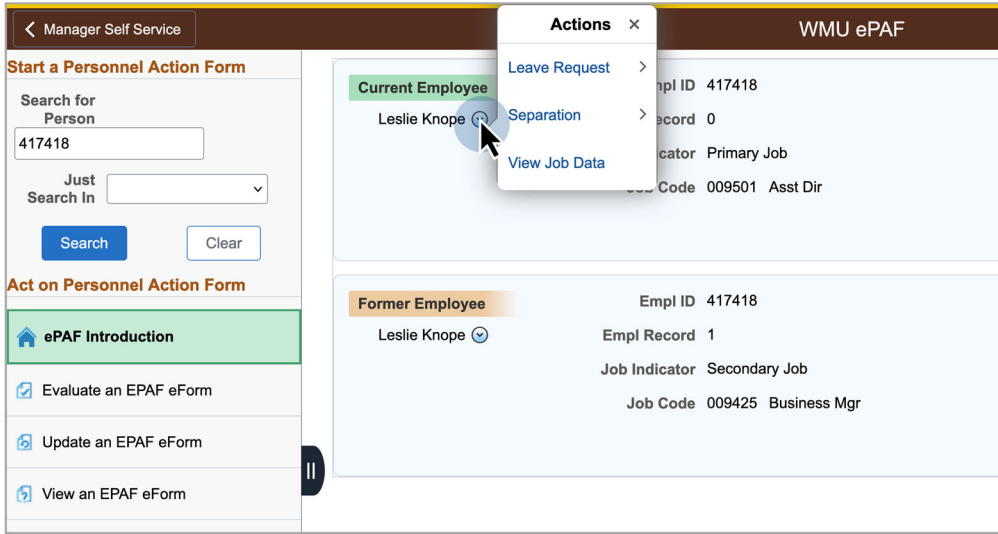


3 Search for employees to take action on by entering the Empl ID or Name within the Search for Person box. ePAF will display all the employee's empl records.

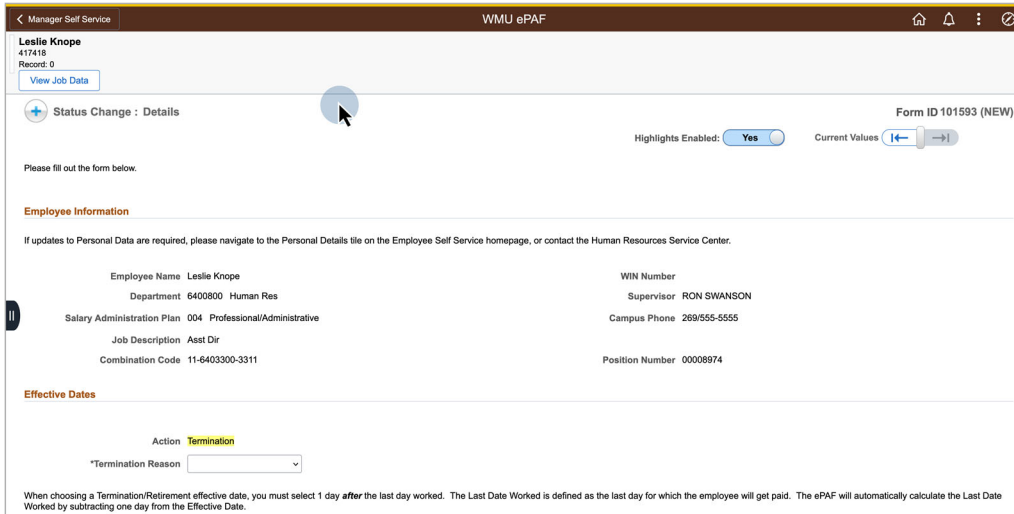

 A screenshot of the "Search for Person" form within the Manager Self Service interface. The form is titled "Start a Personnel Action Form" and is located under a "Manager Self Service" breadcrumb. It contains a "Search for Person" text input field with the value "417418". Below this is a "Just Search In" dropdown menu. There are two buttons: a blue "Search" button and a white "Clear" button. A blue circular callout with a white mouse cursor arrow points to the "Search" button. Below the search section is a section titled "Act on Personnel Action Form" which contains a list of actions: "ePAF Introduction" (highlighted in green), "Evaluate an EPAF eForm", "Update an EPAF eForm", and "View an EPAF eForm".



- 4 From within the Empl Record box, click the down arrow next to the employee's name. Select the Separation link, then select the Terminate reason from within the Related Actions menu.



- 5 The form will display the employee's job information.





6 The action field will populate with termination and cannot be changed once the form is opened.

7 Select the appropriate reason from the dropdown. Only valid options will display based on the employee's employee group.



8 Use the calendar icon to enter the effective date of the termination. By definition, the Effective Date is one day after the Last Date Worked.

Administration Plan 004 Professional/Administrative
Job Description Asst Dir
Combination Code 11-6403300-3311

Action **Termination**

Termination Reason **Resignation**

When choosing a Termination/Retirement effective date, you must select one day from the Effective Date.

*Effective Date

Last Date Worked

[Click here](#) for more information regarding resignation policies.

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

9 The Last Date Worked will automatically calculate by the Effective Date entered, and will be read-only.

Action **Termination**

*Termination Reason **Resignation**

When choosing a Termination/Retirement effective date, you must select 1 day **after** the Last Date Worked by subtracting one day from the Effective Date.

*Effective Date **04/01/2024**

Last Date Worked 03/31/2024

Please visit the [HR website](#) for more information regarding resignation policies.



10 If the Termination Reason selected is Death, the form will require the Date of Death.

Combination Code 11-6403300-3311

Calendar [X]

March 2024

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Current Date

Action **Termination**

*Termination Reason **Death**

*Effective Date **04/01/2024**

*Date of Death **03/14/2024**

Last Date Worked **03/31/2024**

the [HR website](#) for more information regarding resignation policies.

11 Uploading an attachment(s) might be required depending on the information entered into the form. Select the attachment type from the Description dropdown, then click the Upload button to browse your device to select the file. Click the My Device icon, search for and select the file, then click the Upload button. Click Done in the upper right-hand corner to be taken back to the form. If more than one file needs to be attached, click the Add button to repeat the process.

File Attachments

Attachment Required	Upload	Description	File Name	Delete
1	Upload	<input checked="" type="checkbox"/> Separation Acceptance Letter <input type="checkbox"/> Separation Letter		Delete

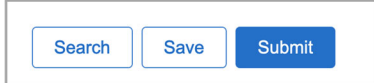
Add

11 Enter any relevant information in the Comments box.

Comments

[Text Area]

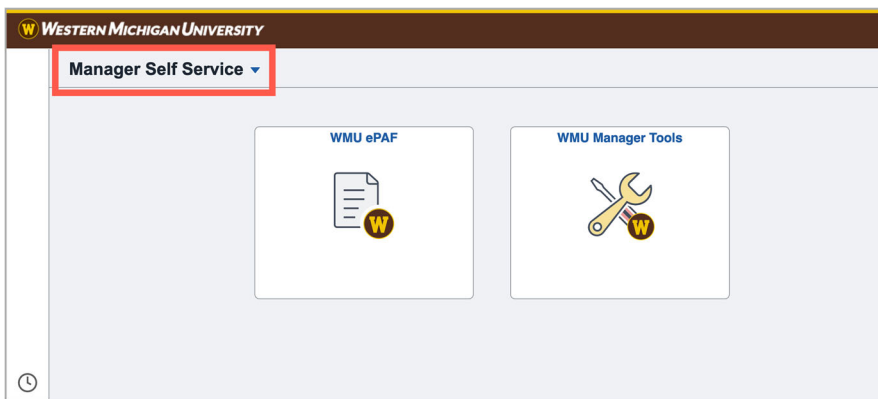
- 12 Click Submit to initiate the approval process.



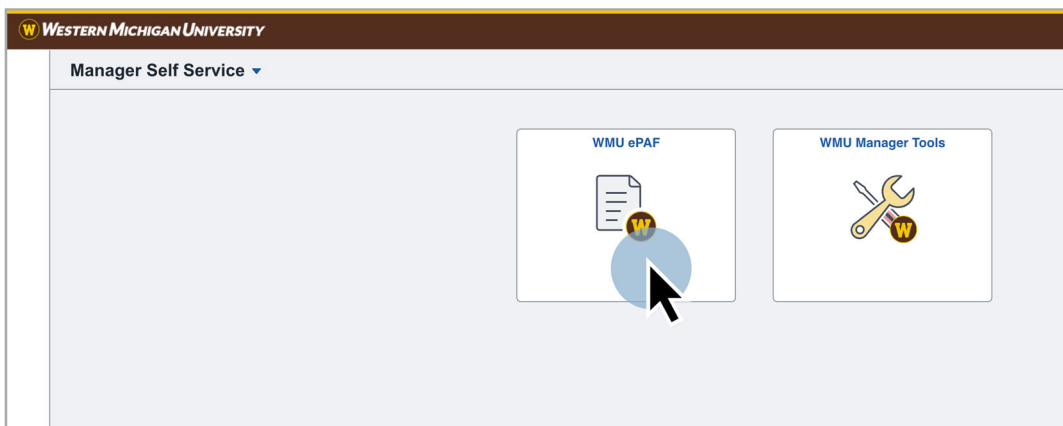
A horizontal form containing three buttons: "Search" (light blue), "Save" (light blue), and "Submit" (dark blue).

Completing the Retirement Form

- 1 Navigate to the Manager Self Service Homepage.



- 2 Click on the WMU ePAF tile.



- 3 Search for employees to take action on by entering the Empl ID or Name within the Search for Person box. ePAF will display all the employee's empl records. Review the applicable empl record.



Manager Self Service WMU ePAF

Start a Personnel Action Form

Search for Person
417418
Just Search In
Search Clear

Act on Personnel Action Form

- ePAF Introduction
- Evaluate an EPAF eForm
- Update an EPAF eForm
- View an EPAF eForm

Current Employee	Empl ID 417418	Department 6400800 Human Res
Leslie Knope	Empl Record 0	Business Unit WMICH Western Michigan University
	Job Indicator Primary Job	Supervisor Ron Swanson
	Job Code 009501 Asst Dir	Position Number 00008974
		Salary Admin Plan 004 Professional/Administrative

Former Employee	Empl ID 417418	Department 6400800 Human Res
Leslie Knope	Empl Record 1	Business Unit WMICH Western Michigan University
	Job Indicator Secondary Job	Supervisor Chris Traeger
	Job Code 009425 Business Mgr	Position Number 00008976
		Salary Admin Plan 004 Professional/Administrative

4 From within the Empl Record box, click the down arrow next to the employee's name. Select the Separation link, then select the Retire reason from within the Related Actions menu.

Actions

- Leave Request
- Separation
- View Job Data

Current Employee
Leslie Knope

Empl ID 417418
Empl Record 0
Job Indicator Primary Job
Job Code 009501 Asst Dir

Former Employee
Empl ID 417418

5 The form will display the employee's job information.

Employee Information

If updates to Personal Data are required, please navigate to the Personal Details tile on the Employee Self Service homepage, or contact the Human Resources Service Center.

Employee Name Leslie Knope	WIN Number
Department 6400800 Human Res	Supervisor RON SWANSON
Salary Administration Plan 004 Professional/Administrative	Campus Phone 269/555-5555
Job Description Asst Dir	Position Number 00008974
Combination Code 11-6403300-3311	

Effective Dates

Action Retirement

*Action Reason



6 The action field will populate with termination and cannot be changed once the form is opened.

Effective Dates

Action **Retirement**

*Action Reason

When choosing a Termination/Retirement effective date, you must select 1 day **after** the Last Date Worked by subtracting one day from the Effective Date.

7 Select the appropriate reason from the dropdown. Only valid options will display based on the employee's employee group.

Action **Retirement**

*Action Reason

When choosing a Termination/Retirement effective date, you must select 1 day **after** the Last Date Worked by subtracting one day from the Effective Date.

8 Use the calendar icon to enter the effective date of the termination. By definition, the Effective Date is one day after the Last Date Worked.

Administration Plan 004 Professional/Administrative

Job Description Asst Dir

Combination Code 11-6403300-3311

Action **Retirement**

*Action Reason **Retired**

When choosing a Termination/Retirement effective date, you must select 1 day **after** the Last Date Worked by subtracting one day from the Effective Date.

*Effective Date

Last Date Worked

Calendar

April 2024

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

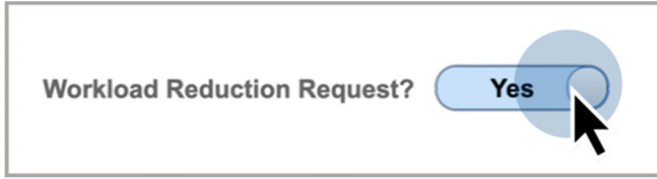
9 The Last Date Worked will automatically calculate by the Effective Date entered, and will be read-only.

*Effective Date **04/01/2024**

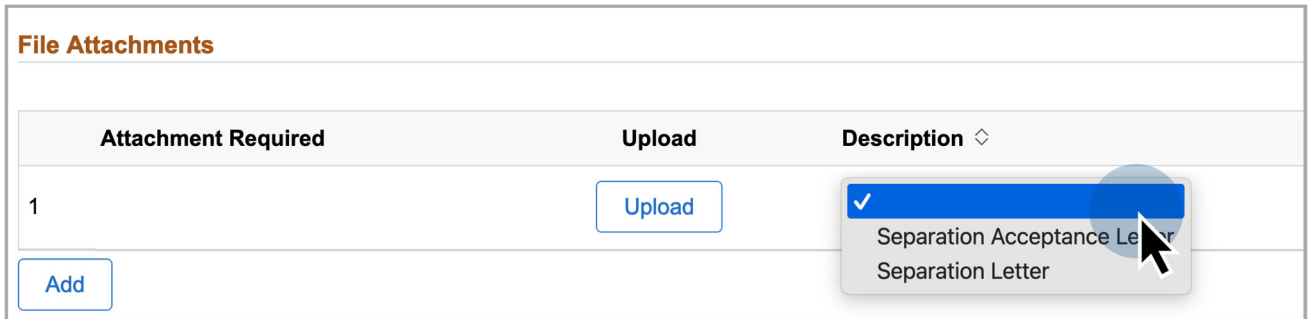
Last Date Worked 03/31/2024

[HR website](#) for more information regarding resignation policies.

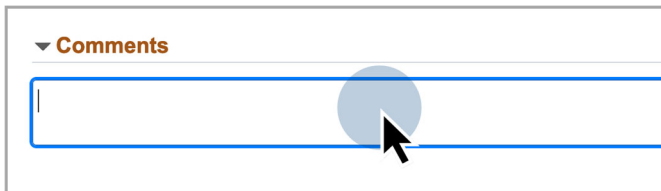
10 If the employee retiring is a faculty member, click the slider to Yes if the faculty is requesting a workload reduction.



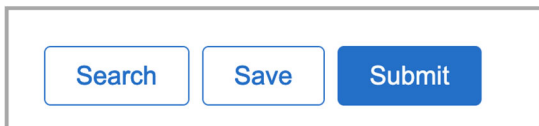
11 Uploading an attachment(s) might be required depending on the information entered into the form. Select the attachment type from the Description dropdown, then click the Upload button to browse your device to select the file. Click the My Device icon, search for and select the file, then click the Upload button. Click Done in the upper right-hand corner to be taken back to the form. If more than one file needs to be attached, click the Add button to repeat the process.



12 Enter any relevant information in the Comments box.

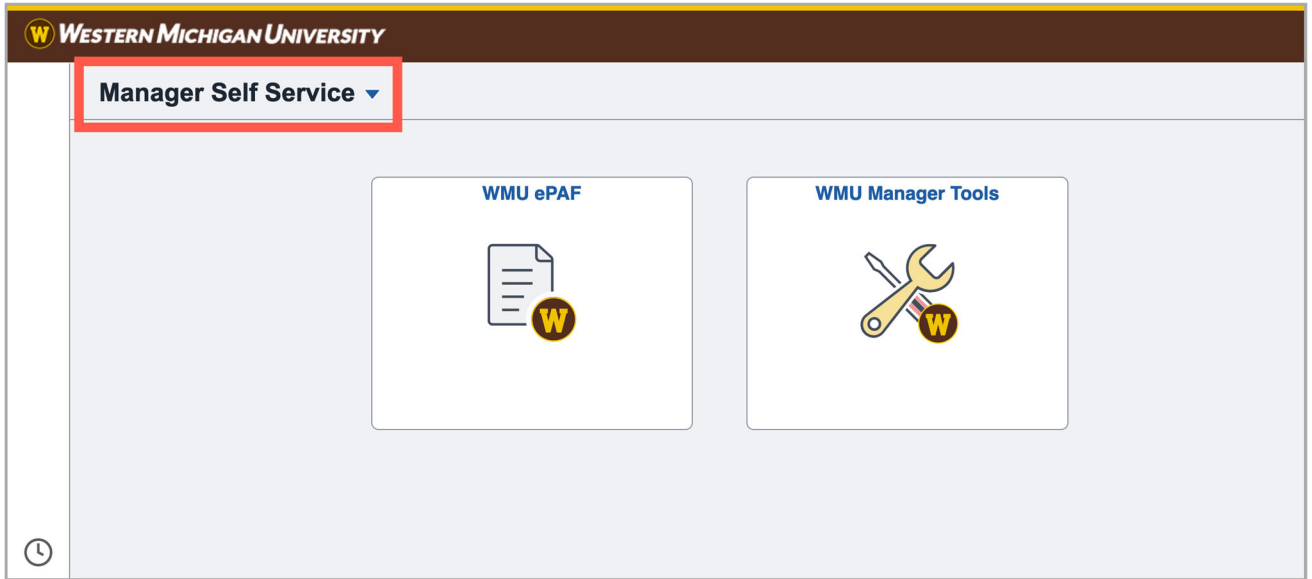


13 Click Submit to initiate the approval process.

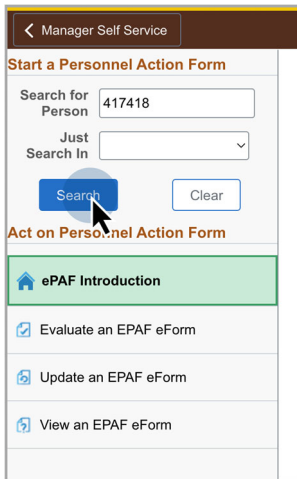


Leave of Absence

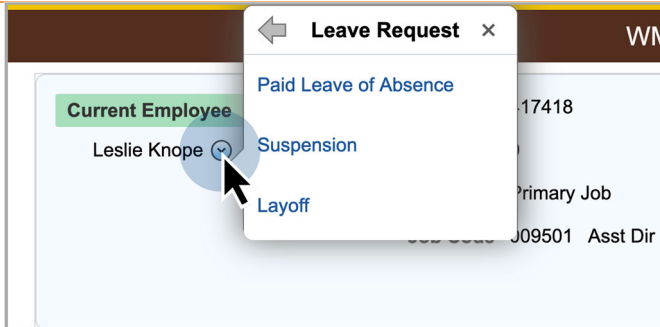
1 Let's review how to complete a Leave of Absence. Open the WMU ePAF tile from Manager Self Service.



2 Search for employee to take action on by entering the Empl ID or the name in the Search for Person field.



3 Select Action from the dropdown of related actions, which will vary depending on the employee group.

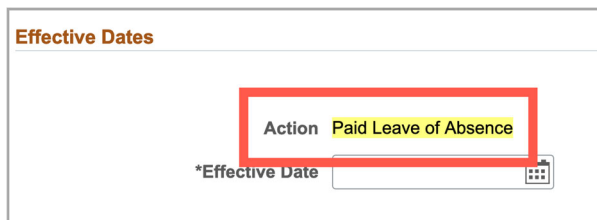


- If the employee is not currently on leave, select either:
 - Paid Leave of Absence
 - Unpaid Leave of Absence
 - Suspension
 - Layoff

- If the employee is currently on leave, select either
 - Return from Leave
 - Leave Extension
 - Recall from Suspension
 - Recall from Layoff

Note: Some actions will not show if the employee does not qualify

- 4** The Action field will be read-only and default based on the Related Action selected.



- 5** Enter the First Day of Leave. This is the first day you will not be at work due to the leave.



Personal Data are required, please navigate to the Personal Details tile on the Employee Self Service homepage, or contact your HR representative for assistance.

Employee Name Leslie Knope
Department 6400800 Human Resources
Primary Administration Plan 004 Professional/Administrative
Job Description Asst Dir
Combination Code 11-6403300-3311

Action **Paid Leave of Absence**

*Effective Date

Calendar X
April 2024
S M T W T F S
1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30
Current Date

6 On the form, select the appropriate reason for the leave. Some Actions will have the Reason defaulted on the form and cannot be changed.

Leave Request Information

*Paid Leave Reason Administrative Leave

Expected Return Date

Do not provide specific medical information

7 If an expected return date for the employee is known, enter in the Expected Return Date.

Combination Code 11-6403300-3311

Dates

Action **Paid Leave of Absence**

*Effective Date 04/01/2024

Request Information

*Paid Leave Reason Administrative Leave

Expected Return Date

Do not provide specific medical information

Calendar X
April 2024
S M T W T F S
1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30
Current Date



8 Enter any relevant information regarding the leave request.

*Leave Purpose

Will be on administrative leave until May 31st

9 On the next page, fill out the Leave Priority grid and indicate which Leave Types the employee would like to use during the leave of absence.

Leave Priority

*Priority	*Leave Type	*Begin Date	*End Date	Exhaust All Leave	Number of Hours
1	Sick Leave	04/01/2024	05/31/2024	Yes	

10 You can either indicate the number of hours per day for the Leave Type, or click the Exhaust button to indicate you would like to use all of the hours available.

Exhaust All Leave

Yes

11 Read the acknowledgement regarding the leave, then select Yes from the dropdown.

R Business Partner: <https://wmich.edu/hr/representatives>

*Acknowledge

Yes

12 Uploading an attachment(s) might be required depending on the information entered into the form. Select the attachment type from the Description dropdown, then click the Upload button to browse your device to select the file. Click the My Device icon, search for and select the file, then click the Upload button. Click Done in the upper right-hand corner to be taken back to the form. If more than one file needs to be attached, click the Add button to repeat the process.

File Attachments

Status	Upload	Description ▾	File Name ▾	Delete
1	<input type="button" value="Upload"/>	<input checked="" type="checkbox"/> LOA Medical Letter		<input type="button" value="Delete"/>

13 Enter any relevant information in the Comments box.

Comments

|

14 Click submit to initiate the workflow process.

Evaluate an eForm

In this document, we will discuss how to evaluate and approve a form. If you are a designated workflow approver, you can use these steps to find and review forms that need your approval.

There are three ways to access your pending forms.

- As a form approver, you will receive an email notification with a link to the form. If you click on the link in the email, you can evaluate and approve forms as soon as they are routed to you. #

eForm 101543 - Status Change Routed for approval



OIT-PSHR-Info@wmich.edu <OIT-PSHR-Info@wmich.edu>
To: Ron Swanson

eForm 101543 - Status Change was routed for approval.

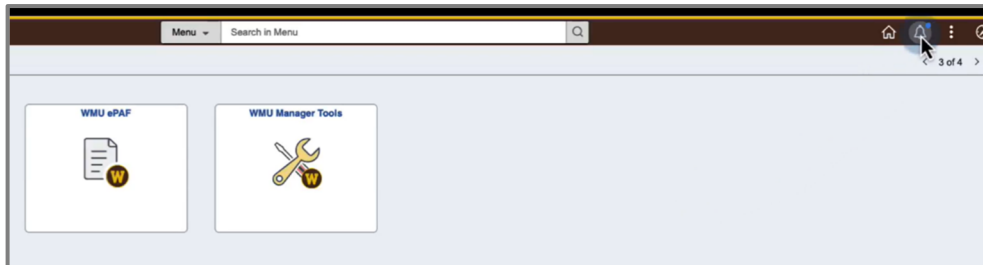
See below for any comments related to this form:

** Donna Meagle
** Mon, Apr 15 24, 02:09:28 PM
Resigning due to better job opportunity

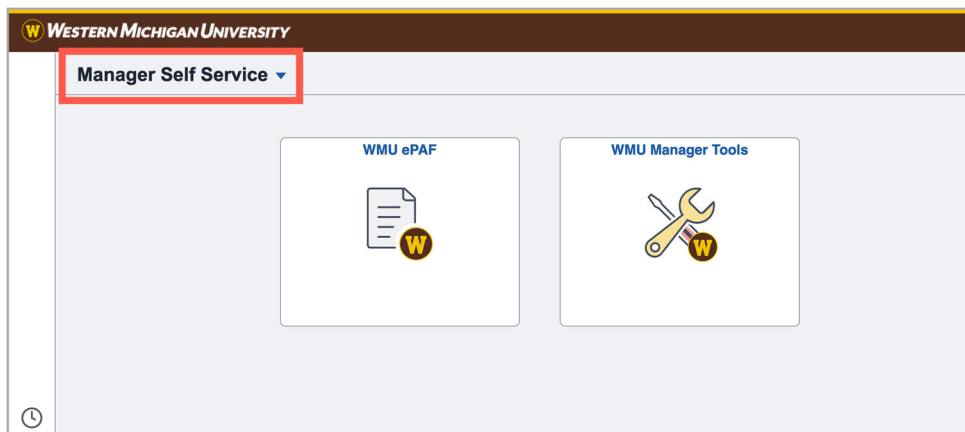
To review this form, click the link below:

https://pshrst1.cc.wmich.edu:15091/psp/HCL/EMPLOYEE/HRMS/c/G3FRAME.G3SEARCH_FL.GBL?Page=G3SEARCH_FL&Action=U&G3FORM_ID=101543&G3FORM_TASK=EVL

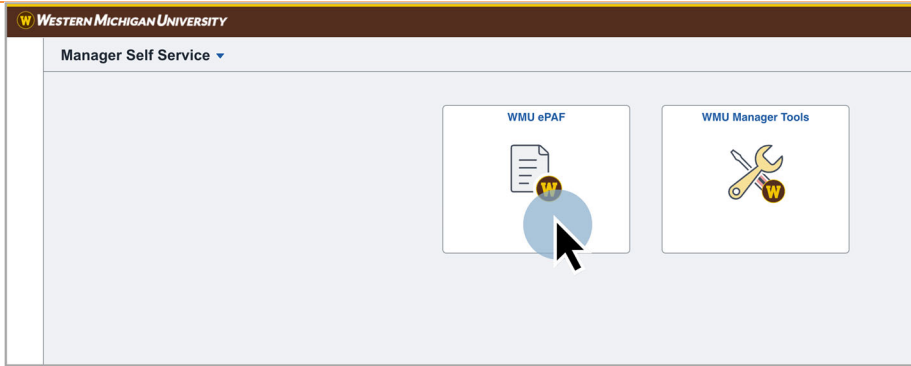
- Any pending forms will appear when clicking the bell icon. Simply click on the link within the Notifications menu to navigate to the form.
- Access pending forms through the ePAF Homepage. Using this method, you can see all forms awaiting your approval and act on one or more forms in a row. #



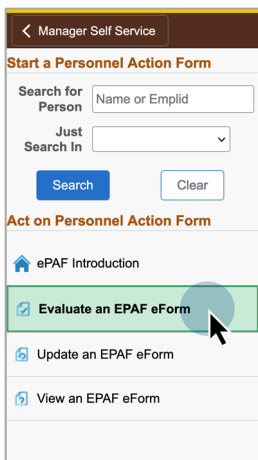
2 Navigate to the Manager Self Service homepage.



3 Click on the WMU ePAF tile.



- 4** Click the Evaluate an EPAF eForm link to search for your Pending forms.



- 5** On the search page, you can search by any combination of the fields available to narrow your search.

Note: When accessing forms from the Evaluate link, you will only see forms where you are the current approver.

Click Search to display your search results.



Start a Personnel Action Form

Search for Person: Just Search In:

Act on Personnel Action Form

- [ePAF Introduction](#)
- [Evaluate an EPAF eForm](#)
- [Update an EPAF eForm](#)
- [View an EPAF eForm](#)

Search by:

Form ID:

Form Type:

Form Status:

Empl ID:

WIN Number:

First Name:

Last Name:

Department:

Action:

Action Reason:

6 Search results will appear in a grid at the bottom of the page. Click on any column heading to sort that column. For example, click the Last Name column heading to sort your forms alphabetically.

Click any part of the link to access that form for evaluation.

Form ID	Form Type	Form Status	Empl ID	Empl Record	WIN Number	First Name	Last Name	Department	Department Description	Job Code	Job Description	Action	Action Reason	Original Date	Last Date
1	101537	STATUSCHG	Pending	417422	0	(blank)	Ben Wyatt	6400800	Human Res	FACI30	Assistant Professor	RET	RAT	2024-04-15	2024-04-15
2	101543	STATUSCHG	Pending	417418	0	(blank)	Leslie Knope	6400800	Human Res	009501	Asst Dir	TER	RES	2024-04-15	2024-04-15
3	101544	STATUSCHG	Pending	417423	0	(blank)	Andy Dwyer	6400800	Human Res	009534	Data Analyst	TER	RES	2024-04-15	2024-04-15

Note: If your search returns a single result, you'll skip the result list and go directly into the form

7 Review the information on each page. If the form spans more than one page, click Next to continue through each page.

8 After review, if the form needs to be Denied or Recycled click the Deny/Recycle Form to Yes, then enter an explanation in the Deny/Recycle comment box provided. Comments are required to take either action.

Deny will terminate the form and no other users may take action.

Recycle will send the form back to the initiator for revisions.

Approver Actions

Use the Yes/No slider below if you wish to Recycle (send back for revisions) or Deny the form. Then, enter any relevant comments or instructions for the form creator. Once a comment is entered, you may click the Recycle or Deny button towards the end of the page.

Deny/Recycle Form? Yes

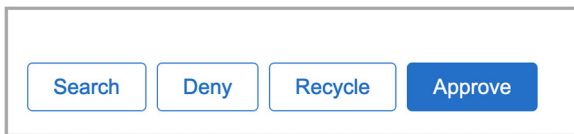
*Deny/Recycle Comments



9 When you reach the last page of the form, scroll to the bottom of the page to find the Form Action buttons.

Click the Approve button to approve the form and advance the form to the next approver, if any.

Otherwise, click the Deny or Recycle button. You will only be able to Deny or Recycle the form if comments were entered in the Deny/Recycle comments box.



10 After Evaluating a form, you will be re-directed to a Results page.

On the Results page, you can review the current status of the approval workflow, as well as review all previous form actions.

✓ **Status Change : Results**

You have successfully approved your eForm.
The eForm has been routed to the next approval step. April Ludgate

[View Approval Route](#)

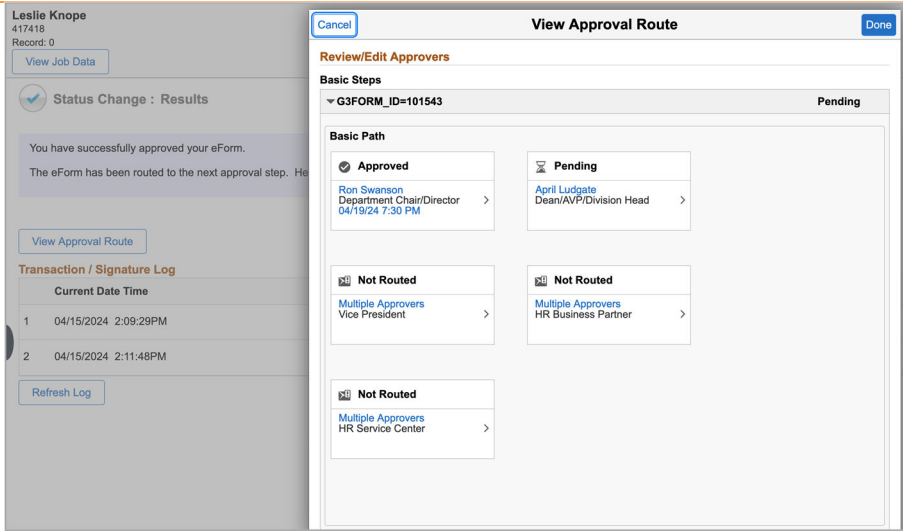
Transaction / Signature Log

	Current Date Time	Step Title	Description	Form Action	Time Elapsed
1	04/15/2024 2:09:29PM	Initiated	Donna Meagle	Submit	
2	04/15/2024 2:11:48PM	Department Chair/Director	Ron Swanson	Approve	2 minutes

Click the View Approval Route button to open a window showing the current state of the approval workflow.

For forms still in progress, the next approver will show in Pending status. Previous approvers will show in Approved status. Future approvers will show in Not Routed status.

For completely approved forms, all approvers will show in Approved status. Completely approved forms are considered Authorized.



11 If you want to evaluate another form in your results list, expand the left side menu by clicking the center-left blue button and repeat your search.

