GT ePAF™ Solution Highlights

Managing Personnel Actions with Electronic Forms

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ePAF™ Features

ePAF™ is Gideon Taylor's flagship eForm suite, a family of delivered eForm templates that provide comprehensive coverage of all personnel actions. **ePAF™** has been implemented at top enterprises in the United States and Canada, including the University of Florida, Alliant TechSystems, University of Oklahoma, Blue Cross Blue Shield of Tennessee, University of British Columbia, Wakefern Food Corp and the University of Houston.

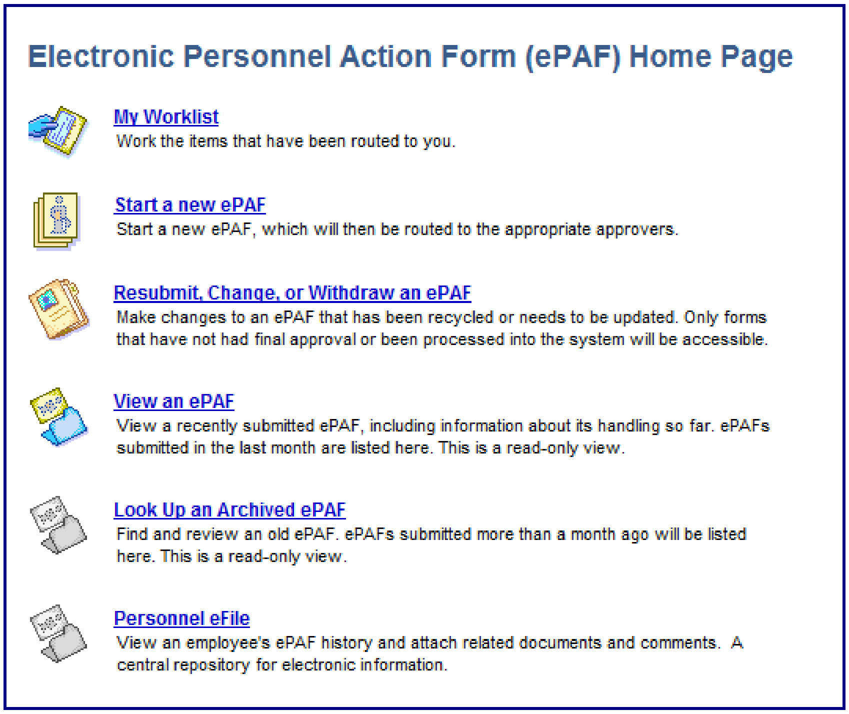

Figure 1 – ePAF™ Home Page

The three primary ePAF™ forms – Hire, Job Change and Change Employment Status – provide a simple, efficient interface to request, approve and execute all personnel actions, including:

- **Hire eForm** – Hires, rehires, transfers, additional jobs
- **Job Change eForm** – Pay changes, promotions / demotions, reclassifications, FTE changes, funding changes, data changes, position changes
- **Change Employment Status eForm** – Terminations, retirement, leaves of absence

Our ePAF™ forms are always optimized for our clients to leverage the unique efficiencies latent in their business processes.

Our experience in this area is unparalleled, and we are confident that ePAF™ represents the most mature and successful solution available for automating personnel actions in PeopleSoft.

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> *"ePAF™ vastly reduces the amount of time spent by UCF departments and UCF Human Resources in updating employee records with different job actions. ePAF™ also reduces errors by narrowing down the job action choices throughout the process."*
> *- Justin Amick, HR Representative, University of Central Florida*

Hire eForm

Taking on the crucial task of getting new people into Job Data, the Hire eForm simplifies this complex process for the end-user and speeds the transactions into the system – up to five times faster than a paper system!

Benefits

- **Simple, powerful search** – the Hire eForm has a powerful but simple Search page that can return results from Person Data, a recruiting solution and an LDAP directory – all from the same search! This saves data re-entry and prevents duplicate ID creation.
- **Flexible integration with recruiting systems** – Frequently a hiring decision is made early in the recruiting process, but the remaining busywork of pushing the candidate through to the right status in the recruiting software still has to be done. The Hire eForm allows you to initiate a hire from a recruiting solution, like PeopleSoft's TAM or PeopleAdmin, at earlier statuses (set according to your choice), eliminating the busywork. You can also start a hire directly from a POI record, an LDAP directory entry, an existing employee record (additional job), or from scratch.
- **Pre-population of personal and job data** – Data is pulled from appropriate sources to pre-populate the Hire eForm. This includes Person Data, TAM, LDAP, and Job Requisition data stores.
- **Early creation of Emplid** – The Hire eForm actually creates Person Data for the new employee while the Hire eForm is being filled out. As a result, the initiator knows the new employee's Emplid before they are even hired. This often expedites Emplid-dependent business processes like issuing keys and parking passes, network security requests, etc., and in general facilitates the transition from applicant to employee.
- **Naturally unfolding pageflow** – The pageflow of the Hire eForm changes based on the data entered, displaying and collecting only the fields and information necessary for that type of employee. Aggressive defaulting and valid value restricting methodologies cut entry time and slash error rates.
- **Completely customizable approval process** – Easy, online approval process management allows you to set up any number of approvers, and conditionally change approvers for different business cases.
- **Easy core office review with automatic entry** – There is no data entry to do or copying to supervise; the core office personnel review the eForm and hit the Approve button, and the eForm enters itself into PeopleSoft!
- **Solution stability across HCM versions** – The PS-delivered eApplications, and the core Person and Job components themselves, seem to change significantly with every new PeopleSoft version. The Hire eForm stabilizes this process by providing front-end form pages that don't have to change with the PS versions, and a back-end solution you control.

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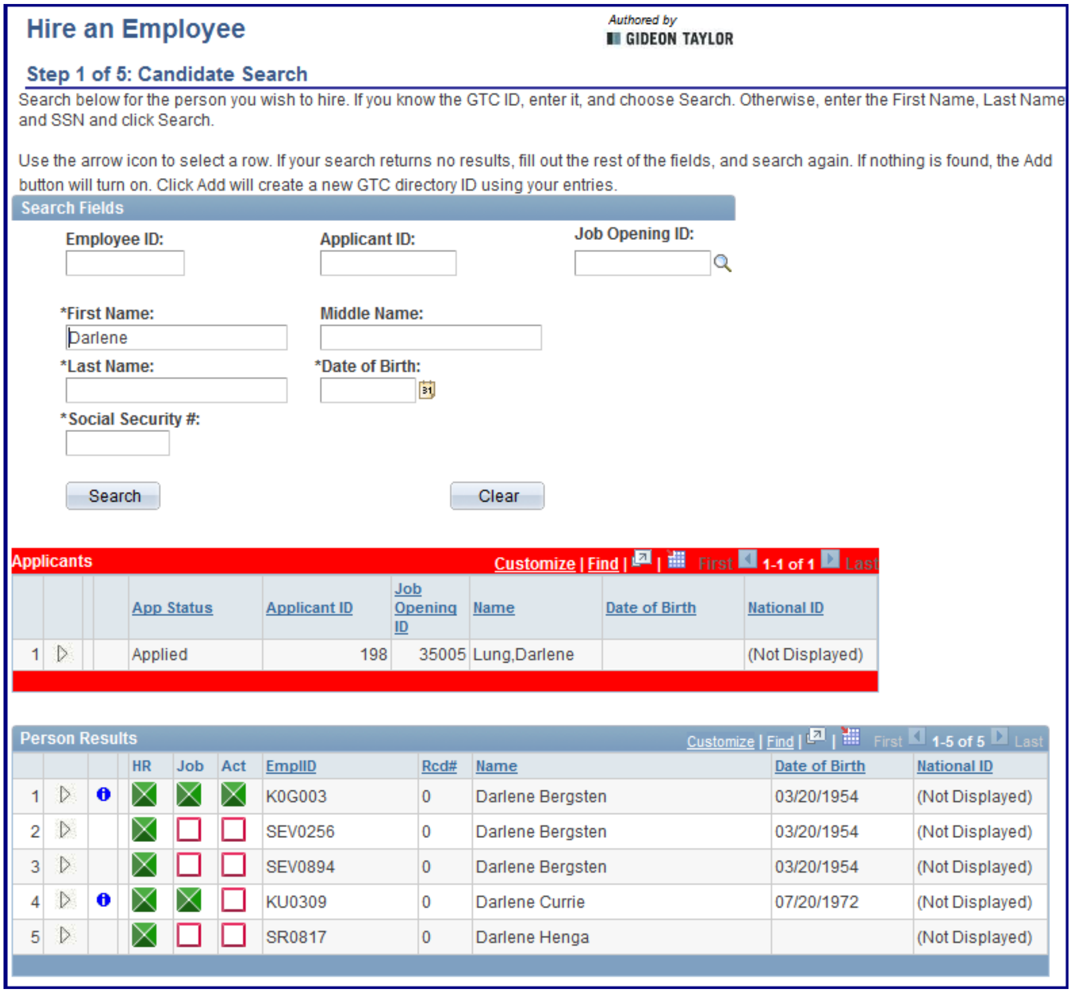

Hire an Employee

Authored by GIDEON TAYLOR

Step 1 of 5: Candidate Search

Search below for the person you wish to hire. If you know the GTC ID, enter it, and choose Search. Otherwise, enter the First Name, Last Name and SSN and click Search.

Use the arrow icon to select a row. If your search returns no results, fill out the rest of the fields, and search again. If nothing is found, the Add button will turn on. Click Add will create a new GTC directory ID using your entries.

Search Fields

Employee ID: | Applicant ID: | Job Opening ID:

*First Name: Darlene | Middle Name:

*Last Name: | *Date of Birth:

*Social Security #:

Search | Clear

Applicants — Customize | Find | First 1-1 of 1 Last

			App Status	Applicant ID	Job Opening ID	Name	Date of Birth	National ID
1	▷		Applied	198	35005	Lung,Darlene		(Not Displayed)

Person Results — Customize | Find | First 1-5 of 5 Last

			HR	Job	Act	EmplID	Rcd#	Name	Date of Birth	National ID
1	▷	i	☒	☒	☒	K0G003	0	Darlene Bergsten	03/20/1954	(Not Displayed)
2	▷		☒	☐	☐	SEV0256	0	Darlene Bergsten	03/20/1954	(Not Displayed)
3	▷		☒	☐	☐	SEV0894	0	Darlene Bergsten	03/20/1954	(Not Displayed)
4	▷	i	☒	☒	☐	KU0309	0	Darlene Currie	07/20/1972	(Not Displayed)
5	▷		☒	☐	☐	SR0817	0	Darlene Henga		(Not Displayed)

Figure 2 – Hire eForm Search Page with Applicant and Person results

Key Features

- **Combined search minimizes duplicates and data reentry** – The Hire eForm searches across multiple data sources for identities and identifying information. These sources can include:
  - **PeopleSoft Person Data, including POIs**
  - **PeopleSoft Job Data**
  - **Recruiting Solutions – PeopleSoft or 3rd Party**
  - **LDAP Directories**
  - **Custom Person Data Repositories**

  As shown in **Figure 2**, a simple search returns results from multiple sources. A simple row of icons indicates if the person is already in PeopleSoft HR, if they have a job, and if that job is active. This

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gives the end-user information that helps insure that the user selects the correct individual. This approach has dramatically reduced duplicate Employee ID creation for our clients.

- **Simplified for users** – The Hire eForm presents a department-centric view of hire-related actions. All the end user needs to know is that they are adding someone to their department who isn't already there. Whether it is a new hire, a rehire, a transfer or an additional job, they choose Hire. Logic is built into the Hire eForm to automatically detect which action should be taken upon entry into PeopleSoft.

Hire eForm – Resulting Action

When the Hire eForm has received all necessary approvals, its Integration Broker Handler works through Component Interfaces to execute the hire. Person Data, including Employee ID creation, happens when the eForm is started, so when it executes it updates Job Data, Position Data and any other components called for by the business process.

Job Change eForm

The Job Change eForm does the heavy lifting in the ePAF™ family. This eForm handles all of the changes to Job Data that don't involve a status change, and single-handedly slashes training time for departmental users with a guided, hard-to-mess-up pageflow.

Actions performed by this eForm include pay changes, promotions / demotions, reclassifications, FTE changes, funding changes, data changes, position changes, and more.

Benefits

- **Pre-populated with current job data** – Users see the form filled with the current information from Job Data, and simply change what needs to be changed.
- **At-a-glance review** – Approvers and reviewers see a one-page, at-a-glance comparison of the proposed changes to the previous values, side by side, with changed values highlighted. See **Figure 5**.
- **Auto-calculation of Action / Reason combinations** – We build your action / reason logic into the eForm, so users just change fields, and the eForm generates the appropriate action / reasons – including multiple effective-sequenced rows when appropriate. That means you can often replace multiple manual transactions with one eForm!
- **One simple form, lots of actions** – Instead of choosing from a long list of possible forms, users can go to one eForm and request any changes they need. By gathering the most critical fields first, the Job Change eForm can make a complex process look very simple. Following the logical paths designed in the GT eForms™ setup tables, the eForm shows only those fields that are needed for that particular action.
- **Integrated support for funding changes** – Our library of Job Change eForm templates includes multiple approaches to handling funding changes. They simplify the process by removing or defaulting fields and reducing valid values, adding calculators and easy Reconcile features, and even supporting multiple date ranges.
- **All those great eForms benefits** – As enumerated for the Hire eForm, you get guided pageflow, customizable approvals, solution stability, and of course, automatic entry into the PeopleSoft system!

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Key Features

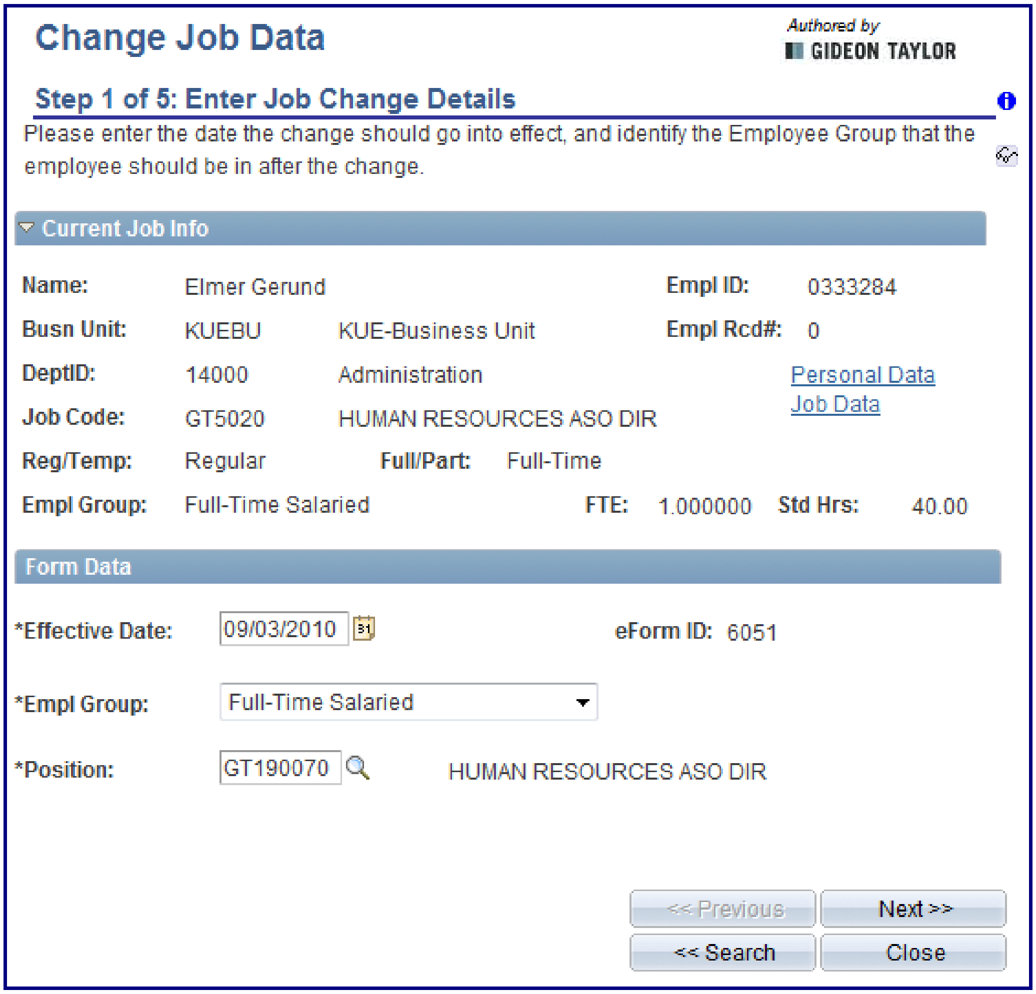

Figure 3 – Front page of the Job Change eForm template

- **Pre-populated, simple, guided pageflow** –As shown in **Figure 3**, the Job Change eForm presents pre-populated pages with simple options. Depending on the values gathered on the first page, the form can dynamically show different pages next. In any case the user is led page by page through the form to submittal.

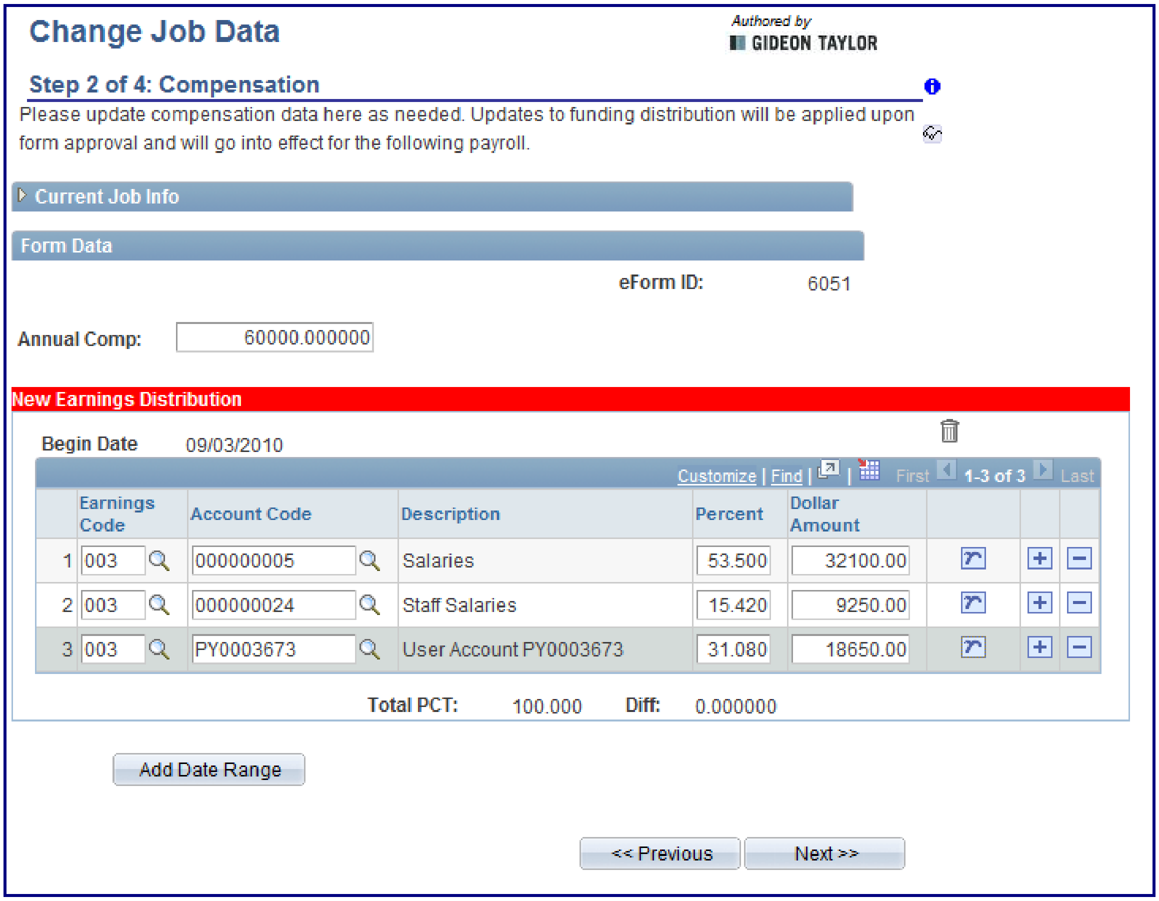

Figure 4 – Job Change Compensation page with funding changes

- **Embedded funding changes** – The Job Change eForm presents simplified funding grids that are customized to the specific business processes of the client. Since it is developed as a bolt-on, we can add work-saving tools like the Reconcile button, which alters the chosen row to make the totals match. Valid accounts can be restricted by department security or other standards.

  If needed, the funding grid can even allow the addition of multiple date ranges, effecting additional future-dated funding changes all from one transaction! That means that when a temporary funding source is entered, the change back from that source can be scheduled at the same time.

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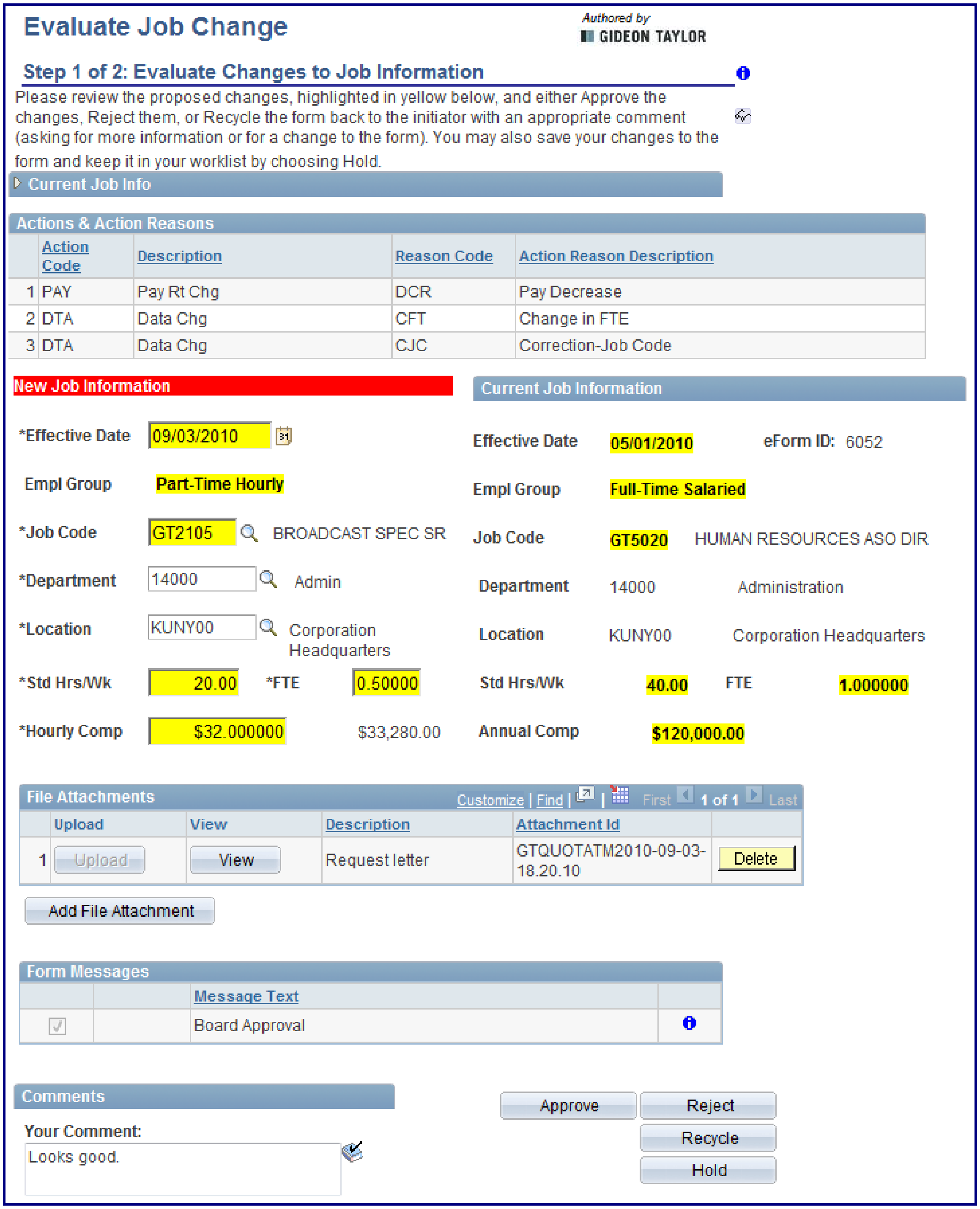

Evaluate Job Change

Authored by GIDEON TAYLOR

Step 1 of 2: Evaluate Changes to Job Information

Please review the proposed changes, highlighted in yellow below, and either Approve the changes, Reject them, or Recycle the form back to the initiator with an appropriate comment (asking for more information or for a change to the form). You may also save your changes to the form and keep it in your worklist by choosing Hold.

Current Job Info

Actions & Action Reasons

	Action Code	Description	Reason Code	Action Reason Description
1	PAY	Pay Rt Chg	DCR	Pay Decrease
2	DTA	Data Chg	CFT	Change in FTE
3	DTA	Data Chg	CJC	Correction-Job Code

New Job Information

*Effective Date: 09/03/2010
Empl Group: Part-Time Hourly
*Job Code: GT2105 BROADCAST SPEC SR
*Department: 14000 Admin
*Location: KUNY00 Corporation Headquarters
*Std Hrs/Wk: 20.00 *FTE: 0.50000
*Hourly Comp: $32.000000 $33,280.00

Current Job Information

Effective Date: 05/01/2010 eForm ID: 6052
Empl Group: Full-Time Salaried
Job Code: GT5020 HUMAN RESOURCES ASO DIR
Department: 14000 Administration
Location: KUNY00 Corporation Headquarters
Std Hrs/Wk: 40.00 FTE: 1.000000
Annual Comp: $120,000.00

File Attachments Customize | Find | First 1 of 1 Last

	Upload	View	Description	Attachment Id	
1	Upload	View	Request letter	GTQUOTATM2010-09-03-18.20.10	Delete

Add File Attachment

Form Messages

	Message Text
✓	Board Approval

Comments

Your Comment: Looks good.

Approve Reject Recycle Hold

Figure 5 – Job Change Evaluate page with side-by-side comparison

- **Side-by-side Evaluate and View page** - The ability for approvers and reviewers to see changes side by side, with highlighted differences, makes decision-making fast and easy.

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Job Change eForm – Resulting Action

When fully authorized, the Job Change eForm updates Job Data and sometimes Position Data. It can be taught to deal with future-dated rows or historical rows according to the client's business practice – we call this "mid-stack" processing. Whatever your manual business process is, if it is consistent, we can teach the Job Change eForm to do it.

Change Employment Status eForm

The Change Employment Status (CES) eForm is the fast, simple way to handle status changes. With just a few fields to fill out, this eForm moves requests for terminations, retirements, leaves of absence and returns from leave through approvals and into the system with minimum fuss.

Benefits

- **Setup-configurable actions and action reasons** – Business analysts can choose what valid values are available, and to whom.
- **Separate Form Type allows simplicity –** By making Change Employment Status separate from the Job Change eForm, the user sees fewer fields, as shown in **Figure 6**. Also, because CES actions often follow different routings than other job changes, the separate CES Form Type makes it easy to configure a different approval path.
- **All those great eForms benefits** – As enumerated for the Hire eForm, you get guided pageflow, customizable approvals, solution stability, and of course, automatic entry into the PeopleSoft system!

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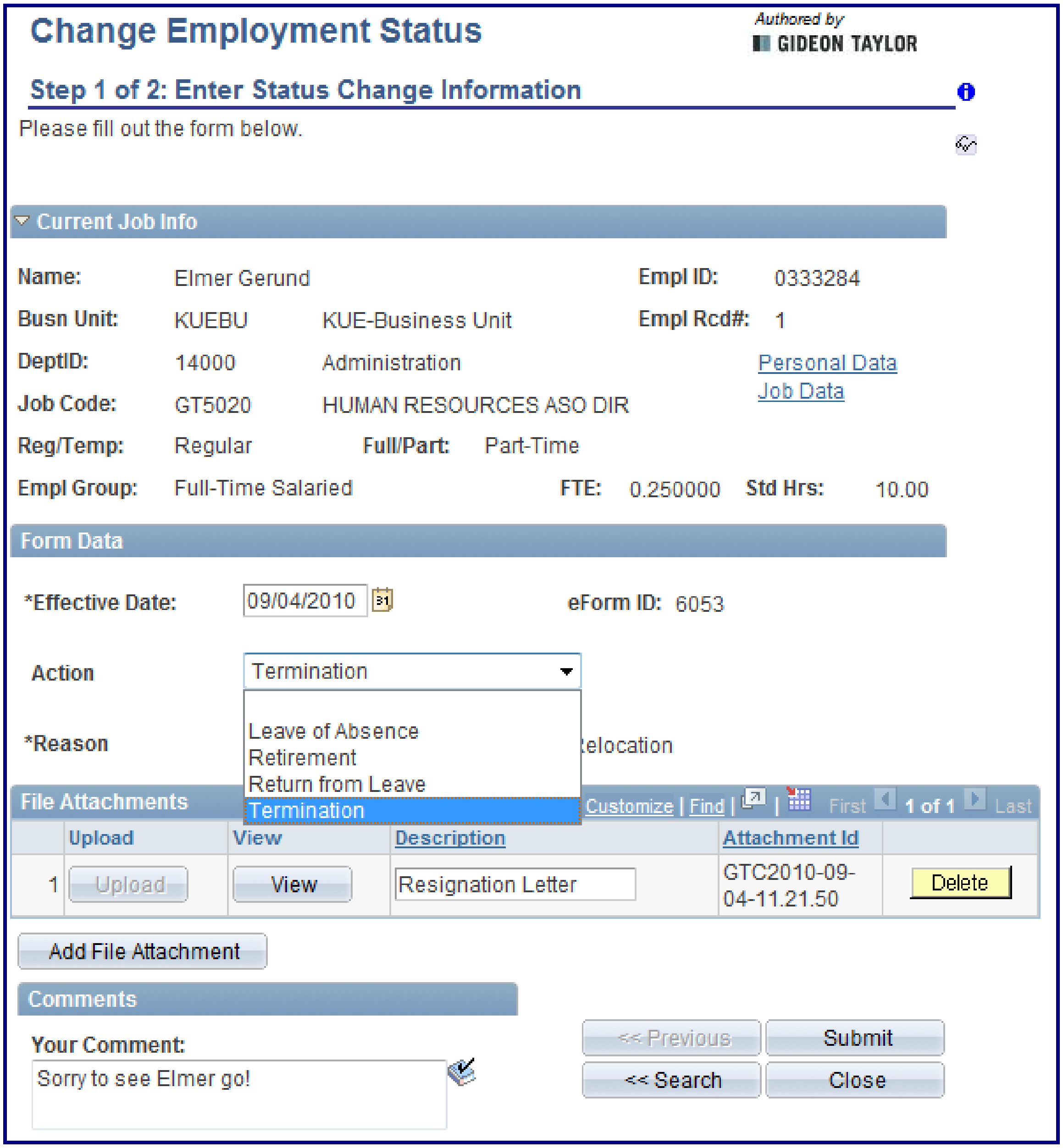

Figure 6 – Change Employment Status eForm

Key Feature

- **Context-Appropriate valid values** – The customizable setup tables that accompany the CES form allow the business owner to define what actions are appropriate based on type of employee. For example, a part-time employee cannot typically retire or take a paid leave of absence, so those values aren't displayed. This cuts down on processing errors.

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Change Employment Status eForm – Resulting Action

As with the other eForms, the CES form updates PeopleSoft through Integration Broker and Component Interface. It can also be easily configured to send additional notifications upon termination, such as to the Security Administrator to remove security access or the Property Office to arrange the collection of keys. It can even automatically turn off direct deposits or benefits, or kick off another eForm process to handle such tasks.

Routing on PeopleSoft HCM Hierarchies

All the ePAF™ forms can use delivered PeopleSoft hierarchies for routing purposes, and can be customized to route on custom hierarchies. These delivered hierarchies are already supported in the ePAF™ templates:

- **Department Security** – Users inherit access to certain nodes on the department tree. Routings to a certain role, like Department Head, can be restricted to those role members with security to the form subject's department.

  Our ***ePAF™ Department Security Override*** function allows you to correct exceptions where you want the routing to be different than the security.

- **Reports-To** – One employee's position "reports to" another employee's position. Given the one, we can route to the other. Again, we route to the role, and restrict to only the role member who is an incumbent in the reports-to position.

  Reports-To routing can be based either on the initiator's reporting relationship or the form subject's.

- **Supervisor ID** – One Job Record reports directly to another Emplid. As above, we can route on this basis, as well.

  Supervisor ID routing can be based either on the initiator's reporting relationship or the form subject's.

Figure 7 demonstrates how ePAF™ forms can actually branch to follow different hierarchies. For example, if non-positioned employees use Supervisor ID and positioned employees use Reports-To, an eForm started by the same initiator can route to the appropriate manager based on whether the form subject is in a position or not.

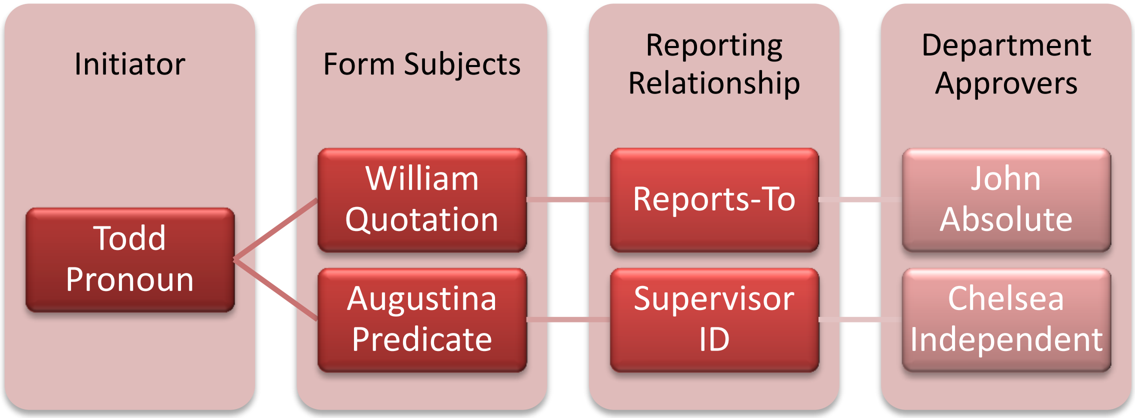

Figure 7 – Example of routings based on multiple PS hierarchies

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Documented Results

This is just a sampling of the impacts our clients have documented from their ePAF™ solutions:

Impact	Real-Life Example
Salary cost reduction	***U Utah: 88% decrease in over/comp time in first 6 months*** ***U Florida: Reduced 7 full-time positions through attrition over first two years***
Better and faster results	***U Houston: Average process time from 15 days to 3 days***
Less human effort	***U Florida: 75% reduction in total human effort***
More replicable business processes	***U Florida: Error rate from 68% to 1%***
Easier to train users	***U Florida: Reduced PAF training from 8 hours to 1½ hours***
More audit-friendly	***OUHSC: Internal auditors praised solution for ease of oversight*** ***U Alberta: Internal auditors asked for broader use of ePAF™***
Best storage / retrieval / permanence	***U Utah: Eliminated vexing problem of HR forms lost in routing***
GREEN SAVINGS – Reduced paper / material / storage costs	***BYU: Went from seven huge paper filing systems to one***

We're confident ePAF™ can make any personnel action process more efficient and effective. We look forward to discussing what ePAF™ can do for you!

Contact Us

Gideon Taylor can perform a live webcast for your organization to demonstrate GT eForms™ and ePAF™. Please contact us at info@gideontaylor.com or 801-434-7260 to schedule.

"If you have a need to make your work processes more efficient and effective, you owe it to yourself and to your organization to talk with Gideon Taylor."
- Julius Hilburn, Associate Vice President / Chief HR Officer, University of Oklahoma

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