Chapter 11

ePAR

**OVERVIEW**

The ePAR (Electronic Personnel Action Request) is a mechanism used by Administration to automatically process personnel actions in Oracle such as employee recruitment, a new hire, funding change or budget changes. Each type of personnel action will require a separate ePAR.

The ePAR system will automatically process actions through workflow within Oracle. The ePAR is created at the department/division level and automatically submitted to various approvers to review and approve. Approvers use Actions Awaiting Your Attention to approve the information based on the actions. Any ePAR correction will go back to the creator for correction and automatically re-routed to the appropriate approvers. Creators can view at any time the status of an ePAR while in the workflow process.

Depending upon the action request, 10 different ePAR transactions are used. Each ePAR type will be described in more detail later in this chapter.

- **Change in Normal Work Week** - to increase or decrease the work hours in a current position.
- **Salary Change** - to change the salary (increase or decrease) of a current employee.
- **End of Employment** - used when employee leaves the Medical College of Wisconsin. This ePAR is not used for a transfer.
- **Leave of Absence/Return from Leave** - for employees who will be taking any type of leave of absence (FMLA, Sabbatical, Military or unpaid leave of absences), or who are returning from a leave of absence.
- **Reclassification** - used when there has been a change in the value of the job resulting from a substantial change in duties and responsibilities.
- **Hire** - used to hire employees who are not currently employed by the Medical College of Wisconsin.
- **Promotion/Transfer** - used for both competitive and non-competitive promotions/ transfers.
• **Recruitment Unbudgeted** - used to initiate a new position which is not reflected in the current budget. Prior approval of the job description by HR Generalist is needed before processing this ePAR.

• **Recruitment Budgeted** - used to initiate the recruitment of a vacant position.

• **Funding Change** - used to change the funding sources or percentages of funding sources of a current employee. It is not used to increase or decrease the salary of an employee. It is used only for future changes.
WORKFLOW

The approval process consists of a creator and several approvers. Creators initiate the personnel action request, review the summary page and submit the request for approval. Electronic Personnel Action Requests (ePARs) can be submitted well in advance of the effective date allowing users to process employee changes. Before submitting the request, creators can see the list of approvers and can add approvers to the list for that specific action. As the ePAR goes through the workflow process, the Creator's Notifications Worklist will be updated enabling creators to know exactly where the ePAR is, who last approved it, and who currently needs to approve it.

Approvers can Approve, Reject, Return for Correction or Reassign the ePAR. Once the action request is approved, the ePAR will go to the next Approver(s) with Human Resources giving the final approval. If the transaction is returned anywhere in the workflow process, the ePAR will be returned to the Creator for correction and re-submitted to all approvers. Depending upon the department, division and transaction, the workflow process may be different. A Printable Page is available to Creators and Approvers.

Once the ePAR is approved and the system is updated, the Creator's Notifications Worklist is updated to reflect the ePAR process has been completed.
ORACLE END-USER MANUAL

ENTERING AN ePAR - CREATOR ACTIONS

Navigation Path: MCW ePAR

Log-In

1. After logging into Oracle, a Main Menu window will open. Responsibilities listed will depend on the user's security level.

2. To initiate an ePAR, click on the MCW ePAR. The MCW ePAR Main Menu screen opens.

3. Select the appropriate ePAR action.
Searches

Most ePAR actions begin with an employee name search. The Recruitment Budgeted e-PAR instead has Position searches available.

Search

1. After selecting the appropriate ePAR, enter the employee’s Last Name or other search criteria in the appropriate field. The fields are not case sensitive.

2. Click the GO button to initiate the criteria search.

3. Select the person’s name from the Search Results section by clicking on the Action icon. The specific ePAR action screen will open.

NOTE: Use a limited query to reduce the search list and to shorten the query time versus a blind query using only the wildcard (%). A limited query will use partial information and the wildcard (%). See Chapter 2 for more details on queries.

Example:
Admin% will bring back all position names that have Admin in the name such as Administrative Assistants or Administrative Coordinators.
Position Search

On some ePARs, a Position search is available for all active positions. It is recommended that users search by the Position Number instead of by Dept Number or Position Title to reduce the search list and shorten the query time. The Position search uses information from Position Control.

A Position is made up of three segments and is unique to each position. The middle segment is the Position Number. The Position segments are:

<table>
<thead>
<tr>
<th>Department Number</th>
<th>Position Number</th>
<th>Position Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>(leading zeros) two to three digits</td>
<td>(One to four digits)</td>
<td></td>
</tr>
<tr>
<td>000326</td>
<td>2972</td>
<td>Financial Analyst</td>
</tr>
</tbody>
</table>

In this example, the Position Number is: 2972.

1. Enter the Position Number.
2. Click Go button.
3. In the Positions Search Results region, select the Position.
4. Click the View button.
5. The screen opens with the current position information.
Effective Dates

When the specific ePAR action screen opens, the user will need to verify, change or enter the correct effective date before initiating a personnel action. The effective date of a new personnel action request must be on or after the date shown in the Information section. One of the benefits of the ePAR process is that it allows users to future date personnel actions.

If, however, an action is awaiting approval or was not completed, the action will be found in the All Actions Awaiting your Attention. The user will need to either Update or Delete the action before creating a new personnel action request.

It is important to review the comments and dates in the Warning section. The Effective Date must be on or after the date listed.

Delete or Update the action before creating a new personnel action request.
Common Links & Buttons

Several links or buttons are common within all ePAR actions. It is best to use one of the following links to move back a screen versus using the Browser Back button:

- **Home** - Clicking on this link will return the user to the **Main Menu** (Portal Page) window where another **Self Service** or **Application** selection can be accessed.

- **Logout** - Clicking on this link will return the user to the Oracle login screen.

Caution: Clicking on the **Close** box will close out the ePAR and Oracle. You will not get a warning message.

- **Cancel** - Cancels the action.
- **Back** - Returns to the previous page. Do not use the Back button in the Browser. You may lose information.
- **Next** - Continues the action.
- **Continue** - Continues the actions.
- **Tip** - Describes the field.
- **Changed field** - Designates the proposed changes made on a Review Screen of an ePAR.
- **Quick Select** - Allows user to quickly select from the results of a List of Values.
- **Trash Can** - Deletes the row.
Entering Fields

In completing ePARs, information is entered in fields in various ways. Below describes each type of entry.

- **Blank field**: Allows open-ended data entry. Type in the information required for that field.

- **Drop-Down Arrow**: Provides a limited list of items from which to select the most appropriate response.

- **Flashlight Icon**: Provides refined searching capabilities by selecting a filtered item to narrow a search. When clicking on the Flashlight button, another screen opens. Select the appropriate item in the drop-down list and then enter the first few letters in the text field. Both partial and wildcard (%) searches will further limit the search criteria. Then click the Go button and select the appropriate link to populate the field. See Chapter 2 – Queries for more information on partial and blind queries.

**NOTE**: The filtered search is sometimes case sensitive in the text field. Limited searches are recommended to shorten the query time by using partial information and the wildcard (%). For example: Nat%
Funding Lines

Multiple funding lines are available in General Ledger and Projects to fund the position both in the department and across departments. Funding in General Ledger is by Cost Center and requires the appropriate entry/selection of the Natural Account, Funds, Activity code and Actual Amount. When entering General Ledger information, no leading 000's are needed. Enter the fund numbers, if known, and tab to the next field. Once the Next button is selected, the zeros automatically populate the fields (i.e. 00039002).

When entering Project Funding information, users must use the Flashlight icon to select the appropriate value and to validate the entry. Only the Project Number and the Expenditure Type fields along with the Actual Amount need to be completed. The remaining information automatically populates the fields (Task Number, Expenditure Organization and Award Number).

NOTE: The ePAR system validates that the General Ledger and Grant Fundings are open or active based on the effective date. It does not validate whether the funds are available.

NOTE: When entering numbers for salary, do not use commas.

NOTE: The appropriate approver will automatically be added to the approval routing list if a cost center is selected outside the creator's department.
Review Changes

Before submitting the ePAR for approval, the creator has an opportunity to review the changes. The Review screen shows both the Current and the Proposed action changes and a list of all approvers in the order of the workflow approval process. Proposed changes made on the Review screen are marked with a blue-circled icon. Outside funding amounts and percentages are listed if applicable. If the changes are acceptable, the Submit button is selected for the action to go through the approval process. Approvers will see the Review page but not the approval routing list.

1. Review the Review screen for accuracy.
2. If changes need to be made, click the Back button, make the corrections and click the Next button until the Review screen re-appears.
3. If desired, print the Review by clicking the Printable Page button. Click the Print icon on the Browser Toolbar. Click the Browser Back button to return to the Review Page.
4. Click the Submit button for the action to go through the approval process.
Adding Approvers

The Creator can add other approvers to a specific ePAR action and select where to place the approvers on the approval list before submitting it for approval. Creators are not able to remove any approver on the approval list; only the HRIS Manager will be able to make permanent changes to the approval routing list or authorize access for ePAR.

1. Click the **Add Approvals** and **Recipients** button.
2. In the **Add Approver** field, enter the name and click the **Flashlight** icon.
3. The filtered screen opens.
4. Enter search criteria for the approver’s name.
5. Click on the **Quick Select** icon for Approver’s name.
6. The **Add Approver** field populates.
7. Select where the Approver should be in the Approver routing list by clicking the Drop-Down Arrow of the **Add Approver After** field.
8. Click the **Add** button. The added Approver’s name shows on the approver routing list.
   (Note: Adding an approver applies to only the current action.)
9. Click **Apply** button to add the Approver to the list.

**NOTE:** Only people who have ePAR access can be added to the **Approvers & Recipients** lists.
People to Notify

Using this feature allows the creator to notify other people on a current ePAR. For example, a Creator may want to notify a supervisor of the submittal and/or approval of the ePAR. The person who will be notified will receive a notification in the **Notifications Worklist** and can view the details of the ePAR. The notification is for informational purposes only.

1. Enter the name in the **Add Person to be Notified** field, click the **Flashlight** icon and follow the same process as when entering the Add Approver. Click **Add**. Click the checkbox of when the person is to be notified - On Submittal and/or On Approval. The person to be notified will receive a notification in the **Notifications Worklist** and can view the ePAR details.

2. Click **Add** button to add the person to notify to the Notification list.

3. Click **Apply** button to move to the next action.

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### Approvers and Recipients

<table>
<thead>
<tr>
<th>Order of Approval</th>
<th>Primary Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Rzeska, Lynice E 81000 Clinical Support</td>
</tr>
<tr>
<td>2</td>
<td>Weber, Theresa A 34190 Specialist</td>
</tr>
<tr>
<td>3</td>
<td>Schaaf, Roberta J 34000 Accountant</td>
</tr>
<tr>
<td>4</td>
<td>Welle-Bier, Lori 34030 Accountant</td>
</tr>
<tr>
<td>5</td>
<td>Hill, Jessica L 50000 Clinical Support</td>
</tr>
<tr>
<td>6</td>
<td>Schmitz, Panney A 30245 Manager</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Primary Job Title</th>
<th>Notify on Submittal</th>
<th>Notify on Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weise, Janice J 30029 IT Analyst</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

**Add Approvers and Recipients**
Submittal Options

Before submitting the ePAR for approval, the Creator has several options. The Creator can select one of the following:

- **Cancel** - Selecting the Cancel button cancels the action completely.

- **Printable Page** - Will create a printable page. Click on Print in the Browser. Use the Browser Back button to return to the Review page.

- **Back** - The Back button allows the user to go back a screen(s) to view or make corrections. (Caution: Do not use the Browser Back button on the top of the screen.)

- **Submit** - Clicking the Submit button initiates the workflow process and forwards the personnel action request to the next Approver.

### All Actions Awaiting Your Attention

Once the Creator selects the Next button, the action is saved for later update, deletion or submission. These ePAR’s will appear in the MCW All Actions Awaiting Your Attention link from the Main Menu. Selecting this link will open a screen showing all open actions. Before another action can be created for the same employee or position, the action must be either Update or Delete. If the Delete button is selected, the transaction will be deleted and another ePAR can be created for the employee. If the Update button is selected, the system will automatically return the user to the ePAR for completion. Changes or updates can then be made and submitted for approval.

All Actions Awaiting your Attention is also where returned ePARs will appear for further action if returned.

**NOTE:** If an ePAR is not completed or Oracle accidentally closes, the ePAR will be saved in the All Actions Awaiting your Attention if the Next button has been used at least once.
In the ePAR, notifications for specific actions are viewed in the **Notifications Worklist**. Notifications show the status of each ePAR transaction. If the Creator or Approver also has Purchasing Entry or Purchasing Approver responsibility, those PO notifications will also appear in the Notification Worklist. Likewise, the same information will appear in the **Notifications Summary** list for Purchasing.

**Caution**: Purchase Order approval must occur using the PO Responsibility.

By selecting a specific **View** in the **Notifications Worklist**, users can sort the notifications by categories:

1. From the ePAR Main Menu, select **MCW Notifications Worklist**.
2. The **Workflow** screen opens.
3. To sort the notifications, click on the **View** drop-down arrow. A drop-down list opens.
4. Select the appropriate **View** and click the **Go** button.

- **Open Notifications**: In most cases, the **Open Notifications** view is preferable. All open notifications will appear including open ePARs and open Requisitions. Go to the Purchasing Responsibility to take actions on PO’s.
- **All Notifications**: Shows both Open and Closed Notifications. Closed indicates your notification of the action has been completed. It does not indicate the ePAR has been closed. Cancelled indicates the transaction has moved to another approver and another notification will also be on the list.
- **FYI Notifications**: Transactions will appear which have been forwarded from another user. May include requests to review or more information. These actions will also appear in Open Notifications.
• **Notifications from Me:** Shows all actions that you have reassigned, requests for more information or returned. If a notification for request for more information is used, the notification will be removed from the Open Notification until the response returns. Consequently, it is important if you use the Request More Information feature that this view is used frequently to assure notifications are not misplaced.

• **To Do Notifications:** Indicates which actions still need to occur. These same actions will appear in Open Notifications.

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**Note:** Data in each column may be sorted by clicking on the name of the column.

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5. The selected Worklist view will appear. Review the **Subject** lines to select the appropriate action. Each subject line provides information about the transaction and approval process.

• The subject lines in the Open Notifications of the Creator will continue to be updated as the ePAR flows thru the approval process. It is important to not Close the transaction.

• The **Recruitment Budgeted** will indicate the position name.

• Other ePARs will indicate the name of the person the transaction will affect, the action needed and the name of the person to whom the ePAR was transferred.

6. Open any action by clicking on the **Subject** link.

• To open multiple **Notifications** at one time, check the appropriate **Select** boxes and click on the **Open** button. After the summary page opens, click on the **Continue** button to open the next action.

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**Caution:** Purchase Order approval must occur using the PO Responsibility.
Creators and Approvers will see different screens after selecting an action:

**Creators Notifications Worklist:**

*Creators* will see the approval history and if any action is needed. If an action is required, creators need to go to **MCW Actions Awaiting Your Attention**. If no action is required, click **Close** to remove the action from the **Notification Open** list. Click on **Return to Worklist** to select another action.

Clicking the **Close** button will remove the transaction from the user’s **Open Notifications**. It will now appear in the **All Notification** as cancelled.

Use the **Return to Worklist** to see additional Notifications.
1. After selecting a specific action, the **Approval History** screen opens.
2. To view the change(s) made on a specific action, click **here** to open the **Details** review page.
3. Review the information.
4. Take appropriate action. See next section on **Approving the ePAR** for a description on each action available.
APPROVING THE ePAR - APPROVER ACTIONS

Approval Options
All employee personnel action requests must go through an approval process. The approval process has been pre-determined with departmental feedback based on cost center and central approval process considerations within the department. Security is set by department, division, program and employee position that allows personnel actions only within that department. Changes to the approval routing must be submitted to the HRIS Manager. The Open Notifications indicates the actions that need approval.

1. Open Open Notifications. (See section on Notifications Worklist for more details.)
2. Open the selected action. The Details screen opens.
3. Click Here to open details.
4. Review Summary information. (Note: All changes are indicated with the blue dot.)
5. If desired, click on the Printable Page button for a copy of the Review information. Click on the Print icon in the Browser toolbar. Click on the Back button in the Browser toolbar to return to the Review page.
6. Click on Return to Notification button at the bottom of the screen.
7. Include a comment in the Note field for all Reject, Return or Reassign actions. After entering the note, select one of the actions described below:

- **Approve**: All information is correct. Selecting this option moves the action on to the next approver.
- **Reject**: Caution: Using "Reject" will cancel the action. The Creator will receive a message on the Notifications Worklist. Indicate a reason in the Note section before selecting Reject.
• **Return for Correction:** Indicate a reason for the return in the **Note** section before selecting **Return for Correction.** The action will be returned to the Creator for correction and resubmitted through the approval process starting from the beginning. The note will only appear in the comments sections of the **Notifications Worklist.**

• **Reassign:** Need to select one of two options. See more details in the following pages.

• **Request Information:** Allows Approver to ask either creator or others to provide more information. See more details in the following pages.

## Reassign

1. Select the appropriate choice

   a. **Delegate authority for responding:** This option will allow selection of another person to delegate approval of the action. Your name will appear on the approver history as if you approved the transaction. This is not a recommended option.

   b. **Transfer ownership of this notification:** This option will allow the selection of another person to approve in place of the approver. The other person's name will appear on the approver history. This is the **preferred option,** as it allows for a more accurate audit trail and approval history.

2. Include **Comments** on why the reassignment is made.

3. Click the **Submit** button to process the action to the next approver(s).
Request More Information

This option is helpful to ask for more information from any of the people on the Workflow list or any other user who has Oracle ePAR Creator or Approver access. The request for more information appears in the Notifications Worklist listed in the comments.

This is an example of the details from the response on the Request More Information:

More Information Requested: Dooley, Sierra requires approval on MCW Reclassification

From: Hanneman, Mary J
To: Gans, Debra
Sent: 11/12/2004 09:30:25
Closed: 11/12/2004 11:41:39
Notification ID: 102610

History:
Hanneman, Mary J (11/12/2004): Please forward her resume to me before I approve this action.

Note From Requestor:
ePAR ACTIONS

Change in Normal Work Week

The **MCW Change in Normal Work Week** ePAR is used to increase or decrease the work hours in a current position. For example, part-time hours can change from 20 hours a week to 25 hours a week. To comply with Federal obligations as an Affirmative Action employer, all positions except for Faculty, Research Assistants and Occasionals, must be posted for 72 hours before they can be filled.

When using the **Change in Normal Work Week** ePAR, it is critical that it only be used to change someone's hours and not to create new positions. For example, if an employee's casual position is changed to .5 FTE and if the casual position is not being replaced, use a **Change in Normal Work Week** ePAR. If, however, the casual position will be back filled, then the .5 FTE position must be posted since in this case a new position is being created and the old is not being eliminated.

**Definitions:**

- **Occasional** - Employees work less than three days or 24 hours in a calendar year. Positions do not need to be posted and no job description is required.

- **Seasonal** - Employees work more than three days or 24 hours in a calendar year but only during certain timeframes throughout the year (i.e. holiday season, school breaks, etc.). Positions must be posted and a job description is required.

- **Casual** - Employees work more than three days or 24 hours but less than 20 hours/week or 1,000 hours in a calendar year on an on-going basis. Positions must be posted and a job description is required.
1. Click on **MCW Change in Normal Work Week** ePAR on the **Main Menu**.
2. Search for the employee's **Last** name and click the **Go** button.
3. Select the person's name from the **Search Results** section by clicking on the Action icon.
4. The **Effective Date Options** screen opens.
5. If another action is pending approval for the same person, users will need to either **Update** or **Delete** that action first before creating another action.
6. Enter the **Effective Date** for change in normal work week.
7. Click the **Continue** button.

**NOTE:** The **Effective Date** needs to be on or after the date in the **Information** section.
8. The Employee Position Information screen opens.
9. Enter the Work Hours.
10. Select the Employment Category.
   - Under 20 hours/week, select Occasional, Seasonal or Casual
   - 20 hours - 39.9 hours, select Part Time
   - 40 hours a week, select Full Time
11. Click the Next button.

   **Policy:** Review MCW policy on Employment Category. (#2.3)

Caution: Changing the status from PT to FT or vice versa, will impact the employee's benefits.

12. The Assignment screen opens.
13. The Salary Basis field automatically defaults based on the Employment Category selected.
14. Select Change in Workweek from the Status Change Reason drop-down list.
15. Click the Next button.
16. A **Warning** message will appear at the top of the **Assignment** screen indicating the action will affect the employee's compensation. Click **Next** button to continue.
17. The Salary Change screen opens and shows the current salary and labor distribution in the upper region.

18. Select Change in Workweek from the Reason Description drop-down list.

19. Enter the annual or hourly salary depending on the change needed in the Total Salary field. The formula to calculate annual salary for hourly employees is: 
   \[(2080 \times \text{FTE} \times \text{Hourly Rate})\]

20. Enter the GL and/or Project Funding Lines fields.

21. Enter the Actual Amount(s). (The Actual Amounts should equal the Total Salary.)

22. Click the Next button.
23. The **Change in Normal Work Week Review** screen opens.

24. Review the **Proposed** changes for accuracy.

25. If needed, add **Approver(s)** and/or **Recipients**. (See the section on “Adding Approvers and/or Recipients” for more detail information.)

26. If desired, click on the **Printable Page** button to print the ePAR.

27. If the **Proposed** changes are accurate, click the **Submit** button for approvals.  
   (Click the **Close** window if you wish to come back to the action later. The ePAR can be found in **All Actions Awaiting your Attention**.)

28. A **Confirmation** message will appear near the top of the screen indicating the action has been submitted for manager approval.

29. Click **Home** button to return to the **Main Menu**.

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**Change in Normal Work Week Review**

- **Effective Date**: 11/13/04
- **Department**: Medicine Administration
- **Program**: SOMI/Clinical Support

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**Work Schedule**

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<tr>
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**Assignment**

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<tr>
<td>Pay Rate</td>
<td>MCOHW, Hourly</td>
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**Pay Rate**

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<tr>
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</tr>
</tbody>
</table>

**Comments**

| Comments to Approver | |

**Approvers and Recipients**

- **Current Approver**: Name
- **Pending Approver(s)**: Name
- **Recipients**: Name

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Salary Change

The **MCW Salary Change** ePAR is used to change the salary (increase or decrease) of a current employee. It is not used for funding reallocation.

1. Click on **MCW Salary Change** ePAR on the **Main Menu**.
2. The **Advanced Search** screen opens.
3. Search for the employee’s **Last Name** and click the **Go** button.
4. Select the person’s name from the **Search Results** section by clicking on the **Action** icon.
5. The **Effective Date Options** screen opens.
6. If another action is pending approval for the same person, users will need to either **Update** or **Delete** that action first before creating another action.
7. Enter the **Effective Date** of the salary change. (The Effective Date must be on or after the date listed in the **Information** section.)
8. Click the **Continue** button.

**NOTE:** Salary changes need to be effective for the next pay period (i.e. 11/16/04 or 12/1/04)
9. The **Salary Change** screen opens with the current salary and labor distribution in the upper region.

10. Select the appropriate **Proposed Salary Reason** from the **Reason Description** field. (If you are not sure which Reason to select, contact the HR Generalist.)

   - Job Evaluation
   - Market Adjustment
   - Acting Management (See Acting Appointments, **Policy #2.12**)
   - Interim Increase
   - Internal Equity
   - Fiscal Year Increase
   - Merit
   - Interim Increase Ended
   - Acting Management Ended

11. Enter **Total Salary** and the GL and/or Project Funding Lines.

12. Click the **Next** button.

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**NOTE:** The Total Salary and Actual Amount fields need to be equivalent.
14. Review the Proposed changes for accuracy.
15. If necessary, add Approvers and/or Recipients. (See the Section on “Adding Approvers or Recipients” for more detail information.)
16. If desired, click the Printable Page button to print the ePAR.
17. If the Proposed changes are accurate, click the Submit button for approvals. Click the Close window if you wish to come back to the action later. The ePAR can be found in All Actions Awaiting your Attention.
18. A Confirmation message will appear near the top of the screen indicating the action has been submitted for manager approval.
19. Click Home button to return to the Main Menu.
End of Employment

The MCW End of Employment ePAR is used when current employees leave the Medical College. If an employee is transferring or promoting to another department within MCW, do not complete the End of Employment ePAR; this will completely terminate the employee’s benefits/accruals and employment at the College. See the Promotion/Transfer ePAR for details on transfers. Be sure to send the Letter of Resignation separately to the Human Resources Office.

Policy: Review MCW policies on Resignation from Employment (#3.23), Discharge from Employment (#3.24) and Reduction in Force (#3.25).

1. Click on MCW End of Employment ePAR on the Main Menu.
2. Search for the employee’s Last Name and click the Go button.
3. Select the person’s name from the Search Results section by clicking on the Action icon.
4. The Effective Date Options screen opens.
5. Enter the End of Employment Effective Date and click the Continue button. (The effective date is the last day the employee physically worked at MCW.)
6. The End of Employment screen opens showing the current Employee Position Information in the upper region.

7. In the lower region of the form, click on the Reason drop-down list to select the appropriate reason for leaving.
   - Death
   - Involuntary - corrective action resulting in termination initiated by the employer.
   - Reduction in Force
   - Retirement
   - Voluntary - employee initiated.

8. Enter Comments if needed.

9. Click on the Reason for Ending Employment field Flashlight. Click on the Go button to view all selections. Click on appropriate reason to correspond with the Reason field. This field provides more detailed information as to why the employee is leaving.

10. Click on the Rehire Recommended field Flashlight to select Yes or No.

11. If the rehire recommendation is “No,” indicate in the Rehire Comments why the employee is not recommended for rehire. The Rehire Comments field is only completed when “No” is selected for the Rehire Recommended field.

12. If a supervisor leaves, a form will prompt the user to enter the New Supervisor’s name. This allows the listed supervisor to view employee information in Oracle Manager Views.

13. Click the Next button.

**NOTE:** If the Rehire answer is No, then complete the Rehire Comments field. (i.e. Lack of Proper Notice.)
15. Review the Proposed changes for accuracy.
16. If necessary, add Approver(s) and/or Recipients. (See the section on “Adding Approvers and/or Recipients” for more detail information.)
17. If desired, Click the Printable Page button to print the ePAR.
18. If the Proposed changes are accurate, click the Submit button for approvals.
   (Click the Close window if you wish to come back to the action later. The ePAR can be found in All Actions Awaiting your Attention.)
19. A Confirmation message will appear near the top of the screen indicating the action has been submitted for manager approval
20. Click Home button to return to the Main Menu.
Leave of Absence/Return from Leave

The MCW Leave of Absence/Return from Leave e-PAR is used for employees who will be taking a Family Medical Leave Act (FMLA), Leave of Absence (Non-Family Medical Leave Act (LOV), Sabbatical or a Military Leave or returning from a leave. This ePAR does not replace the forms supervisors and employees need to complete. See the HR Website for more information on Leaves of Absence.

1. Click on the MCW Leave of Absence/Return from Leave ePAR on the Main Menu.
2. The Advanced Search screen opens.
3. Search for the employee's Last Name and click the Go button.
4. Select the person’s name from the Search Results section by clicking on the Action icon.
5. The Leave of Absence/Return from Leave screen opens.
6. If another action is pending approval for the same person, users will need to either Update or Delete that action first before creating another action.
7. Click the Add Absence Request button to create a new Leave of Absence request.
8. The **Create an Absence Request** screen opens.
9. Complete the appropriate fields depending upon if the action is a Leave of Absence or a Return from Leave:
   - Select the appropriate **Type of Leave** (FMLA, LOA-Leave of Absence, Return from LOA/Sabbatical, or Sabbatical).
   - Enter the **Leave Effective Date**. If the action is a return from leave, enter the **Return from Leave Effective Date**. Enter date in MM/DD/YYYY format.
10. Click the **Next** button.
11. The **Leave of Absence Review** screen opens.
12. Review the **Proposed** changes for accuracy.
13. If needed, add **Approvers** and/or **Recipients**. (See the section on “Adding Approvers & Recipients” for more details.)
14. If desired, click the **Printable Page** button to print the ePAR.
15. If the **Proposed** changes are accurate, click the **Submit** button for approvals.
   (Click the **Close** window if you wish to come back to the action later. The ePAR can be found in **All Actions Awaiting your Attention**.)
16. A **Confirmation** message will appear near the top of the screen indicating the action has been submitted for manager approval.
17. Click **Home** button to return to the **Main Menu**.

---

### Leave of Absence Review

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Robin Duke M.D.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Medical College of Wisconsin</td>
</tr>
</tbody>
</table>

#### Current GL Funding Lines

<table>
<thead>
<tr>
<th>Company Const.</th>
<th>Current Account Fund</th>
<th>Activity Actual Amount</th>
<th>Actual Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>000100</td>
<td>000501</td>
<td>000601</td>
<td>0011440</td>
</tr>
</tbody>
</table>

#### Current Grant Funding Lines

<table>
<thead>
<tr>
<th>Project Number</th>
<th>Task Name</th>
<th>Task Number</th>
<th>Expenditure Organization</th>
<th>Award Number</th>
<th>Expenditure Type</th>
<th>Actual Amount</th>
<th>Actual Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Leave of Absence Review**

Review your changes and, if needed, attach supporting documents. You must click **Submit** to save your changes.

@ indicates changed item(s)

#### Absence Details

<table>
<thead>
<tr>
<th>Type of Leave</th>
<th>Current</th>
<th>Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave Effective Date</td>
<td>11/16/2004</td>
<td>11/16/2004</td>
</tr>
</tbody>
</table>

| Return from LOA Effective Date | 11/16/2004 |
| Pay Rate | |
| Weekly Hours | |

#### Comments to Approver

---

#### Approvers and Recipients

<table>
<thead>
<tr>
<th>Order of Approval</th>
<th>Approver</th>
<th>Primary Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>T</td>
<td>Stempka, Lynne R.</td>
<td>5100/CL81 Support</td>
</tr>
</tbody>
</table>
Reclassification

The **MCW Reclassification** ePAR is used when there has been a change in the value of the job resulting from a substantial change in duties or responsibilities. In order for the Office of Human Resources to process the Reclassification, **prior approval** from the Human Resources Generalist is required. Once the position is created, the Generalist will notify the department with the new position number. The **Reclassification** ePAR can then be created. Keep in mind, the position is reclassified, not the person in the position.

1. Click on **MCW Reclassification** ePAR from the **Main Menu**.
2. The **Advanced Search** screen opens.
3. Search for the employee's **Last Name** and click the **Go** button.
4. Select the person’s name from the **Search Results** section by clicking on the **Action** icon.
5. The **Effective Date Options** screen opens. (The Effective Date must be on or after the date listed in the **Information** section.)
6. Enter the **Effective Date** of the reclassification.
7. Click the **Continue** button.
8. The **Reclassification** screen opens.
9. Query for the **New Position Name** using the flashlight. The current position defaults. Delete the existing position and entry the new position using a %Wildcard if needed. Click **Go**. Then click on the appropriate **Quick Select** icon.
10. The **New Position Name** field populates.
11. Select **Reclassification** in the **Reclassification Change Reason** field.
12. Click the **Next** button.

13. The **Business Addresses** screen opens.
14. Enter the **Business Location**, **Room Number** and **Business Mail Location**.
15. Click the **Next** button.
16. The Change Manager screen opens.
17. If necessary, change the Manager Name field. (Note: The current manager’s name defaults.) The Manager Name field allows the listed manager to view employee information in Oracle Manager Views. (Note: It may not be the direct manager.)
18. If necessary, reassign direct reports to a new manager by clicking Assign to All button. Users can assign all direct reports to the same new manager or make individual assignments.
19. Click the Next button.

20. The Phone Numbers screen opens.
21. If necessary, enter changes or additions. Make sure both Home and Work phone numbers are listed.
22. Click the Next button.
23. The **Reclassification** salary change screen opens.
24. Select **Job Evaluation** in the **Reason Description** field.
25. If necessary, enter **Comments**.
26. Enter the salary change in the **Total Salary** field and adjust the **Actual Amounts** accordingly so they are equivalent.
27. Click the **Next** button.

**NOTE:** The **Total Salary** field must equal the **Actual Amount** totals.
28. The **Reclassification Review** screen opens.

29. Review the **Proposed** changes for accuracy.

30. If necessary, add **Approvers** and/or **Recipients**. (See the Section on “Adding Approvers or Recipients” for more detail information.)

31. If desired, click the **Printable Page** button to print the ePAR.

32. If the **Proposed** changes are accurate, click the **Submit** button for approvals.
   (Click the **Close** window if you wish to come back to the action later. The ePAR can be found in **All Actions Awaiting your Attention**.)

33. A **Confirmation** message will appear near the top of the screen indicating the action has been submitted for manager approval

34. Click **Home** button to return to the **Main Menu**.
Hire

The **MCW Hire** ePAR is used to hire all new employees.

1. Click on **MCW Hire** ePAR on the **Main Menu**.
2. Enter the new hire's **Last Name** and **First Name**.
3. Enter the **Social Security Number**.
4. In the **Hire Date** field, enter the new hire's first day of employment.
5. Click the **Next** button to check for potential duplicates and to hire the employee.
6. The **Person Details** screen opens. Verify the **Hire Date**.
   - If the social security number already exists, a **Warning** message will appear at the top of the screen. The **Social Security Number** warning message indicates the employee is a **Rehire**.
   - If the user is trying to hire an active employee, an **Error** message will appear at the top of the screen.

7. Enter the remaining information, specifically, the required fields with an asterisk symbol.

8. Click the **Next** button.

---

**NOTE:**
- Enter only the **Home Address**. Work address will be entered later.
- **City names cannot be abbreviated** (i.e., Mt. should be Mount). Follow the U.S. Postal Service guidelines. Click here for **MCW Communications Office** guidelines.
- **Enter both Home and Business phone numbers.** Click **Add Another Row** link to add the second phone number. If you don’t have a work phone number, enter the department’s phone number.
9. The **Assignment** screen opens.
10. Search and select the **new Position Name** using the Flashlight and then click **Quick Select**.
11. Select the **Change Reason** – either Rehire or New Hire.
12. Click the **Next** button.

<table>
<thead>
<tr>
<th>Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Assignment screen" /></td>
</tr>
</tbody>
</table>

13. The **Business Addresses** screen opens.
14. Select the **Business Location, Room Number** and **Business Mail Location**.
15. Click the **Next** button.
16. The **Other Required Information** screen opens. Check any the boxes that apply.
17. Select **Yes** or **No** for **US Citizen**.
18. If not a citizen, select the appropriate **Visa Type**.
19. Click the **Next** button.

<table>
<thead>
<tr>
<th>Other Required Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Other Required Information" /></td>
</tr>
</tbody>
</table>
20. The **Change Manager** screen opens.
21. Enter the new **Manager's** name.
22. Click the **Next** button.

**NOTE:** The **Manager Name** field allows the listed manager to view the employee information in Oracle **Manager Views**. It does not need to be the direct manager.

23. The **Salary Change** screen opens.
24. If necessary, enter **Comments**.
25. Enter the annual or hourly salary in the **Total Salary** field depending on the person. The formula to calculate the hourly salary is: $2080 \times \text{FTE} \times \text{Hourly Rate}$.
26. Complete the **GL** and/or **Project Funding Line** fields. Make the necessary changes if applicable.
27. Click the **Next** button.

**NOTE:** The **Total Salary** field must equal the **Actual Amounts** total.
28. The **New Hire Review** screen opens.
29. Review the **Proposed** changes for accuracy.
30. If the changes are not accurate, click the **Back** button to make changes or **Cancel** the action.
31. Enter Comments to Approver if applicable.
32. If necessary, add Approvers and/or Recipients. (See the section on “Adding Approvers & Recipients” for more detail information.)
33. If desired, click the Printable Page button to print the ePAR.
34. If the Proposed changes are accurate, click the Submit button for approvals.
   (Click the Close window if you wish to come back to the action later. The ePAR can be found in All Actions Awaiting your Attention.)
35. A Confirmation screen will appear near the top of the screen indicating the action has been submitted for manager approval.
36. Click Home button to return to the Main Menu.
Promotion/Transfer

The MCW Promotion/Transfer ePAR is used for both competitive and non-competitive transfers/promotions. Non-competitive promotions are strictly for faculty moving from one level to another. All non-faculty, non-competitive promotion/transfers need prior approval from the Employment Office.

The employee's current department will not need to process an e-PAR. Only the receiving department/division will process the Promotion/Transfer ePAR. This should be done after the employee has accepted the position and the employee has notified their current department. Complete the New Employee Orientation on-line registration form to notify the Employment Office of the promotion/transfer. Contact HRIS to receive access to the new employee so the Promotion/Transfer ePAR can be created.

1. Click on MCW Promotion/Transfer.
2. Search for the employee's Last Name and click the Go button.
3. Select the person's name from the Search Results section by clicking on the Action icon.
4. The Effective Date Options screen opens.
5. Enter the Effective Date when the Promotion/Transfer will occur. (The date defaults to the current date.)
6. Click the Continue button.
8. The **Transfer/Promotion** screen opens. The **New Position Name** field defaults to the current position. Delete the current position and select the new Promotion/Transfer position name by clicking the **Flashlight**. If the appropriate position does not exist, contact your HR Generalist.

9. Select the **Promotion/Transfer Change Reason** from the drop-down list.

- **Non-Competitive Promotion** - Position is not posted. Strictly for faculty moving from one level to another. All other non-faculty, non-competitive promotions need prior approval from the Employment Office. (i.e. Assistant Professor to Associate Professor).

- **Non-Competitive Transfer** - Position is not posted. All other non-faculty, non-competitive transfers need prior approval from the Employment Office. (i.e. Research Assistant to Postdoctoral Fellow).

- **Promotion** - When a current MCW employee moves into a position that is graded at a higher level than the position they currently hold. Position is posted for competitive applicant recruitment. (i.e. Administrative Assistant to Sr. Administrative Assistant).

- **Transfer** - When a current MCW employee moves into a position that is graded at the same level as the position they currently hold. Position is posted for competitive applicant recruitment. (i.e. Sr. Administrative Assistant to Sr. Administrative Assistant).

10. Click the **Next** button.
11. The **Business Addresses** screen opens.
12. Enter or change the **Business Location**, **Room** and **Business Mail Location**.
13. Click the **Next** button.

14. The **Change Manager** screen opens.
15. Verify the **Manager** field. If needed, enter or change the manager's name. This allows the listed manager to view the employee information in Oracle **Manager Views**. It may not be the direct manager.
16. Click the **Next** button.
17. The **Phone Numbers** screen opens.

18. Verify or enter both the **Home** and **Work** numbers. Click on the **Add Another Row** link to add another phone number and/or click on the **Trash Can** icon to delete an incorrect row.

19. Click the **Next** button.

20. The **Salary Change** screen opens. The upper region shows current employee information.

21. Select the appropriate reason from the **Reason Description** field.

22. Make **Total Salary** and **Funding Lines** changes and/or additions as necessary.

23. Click the **Next** button.

24. The **Promotion/Transfer Review** screen opens.

25. Review the **Proposed** changes for accuracy.

26. If any of the **Proposed** changes need to be corrected, click the **Back** button and make the changes. Once the changes are completed, click the **Next** button until the **Promotion/Transfer Review** screen re-appears.

27. If needed, add **Approvers** and/or **Recipients**. (See the section on “Adding Approvers & Recipients” for more details.)

28. If desired, print the ePAR by clicking the **Printable Page** button.

29. If the **Proposed** changes are accurate, click the **Submit** button for approvals.
   (Click the **Close** window if you wish to come back to the action later. The ePAR can be found in the **All Actions Awaiting Your Attention**.)

30. A **Confirmation** message appears at the top of the screen indicating the **Promotion/Transfer ePAR** was submitted for approval.
Recruitment Unbudgeted

Non Faculty

The MCW Recruitment Unbudgeted ePAR is used to initiate a new position, which is not reflected in the current budget. Prior approval of the job description is needed before processing this ePAR.

1. Click on MCW Recruitment Unbudgeted ePAR on the Main Menu.
2. The Recruitment Unbudgeted screen opens.
3. Enter the correct effective date. (Note: The system defaults to the current date.)
4. Search for the Position Title by clicking the Flashlight. (Note: Be careful to select the appropriate Employee Category and Payroll for the Position Title.)
5. Search for the correct Organization by clicking the Flashlight. (Note: The organization name is derived from division/department/program.)
6. Enter the Work Hours.
7. Select the checkboxes indicating the extent of assistance needed by the Employment Office.
8. Enter the Position's GL and/or Project Funding Lines. Be sure to use the Flashlight when entering the Project Funding Lines.
9. Click the Next button.

NOTE: When searching for Position Title or Organization, use a limited query (Med%). Pay special attention to all columns listed for the Position Title to select the correct position (i.e. Full Time, Part Time, Seasonal, Occasional, Casual Part Time, etc.).

NOTE: An Email Alert is sent the next day to the Creator with the Position Number and the corresponding position details once the transaction has gone through the entire approval process.
10. The **Recruitment Unbudgeted Review** screen opens.
11. Review the **Proposed** changes for accuracy.
12. If needed, enter **Comments** (i.e. Where the money is coming from for the position.)
13. If necessary, add **Approvers** and/or **Recipients**. (See the Section on "Adding Approvers or Recipients" for more detail information.)
14. If desired, click the **Printable Page** button to print the ePAR.
15. If the **Proposed** changes are accurate, click the **Submit** button for approvals.
   (Click the **Close** window if you wish to come back to the action later. The ePAR can be found in **All Actions Awaiting your Attention**.)
16. A **Confirmation** message appears at the top of the screen indicating the action has been submitted for manager approval.
17. Click the **Home** button to return to the **Main Menu**.
Recruitment Unbudgeted

Faculty

The **MCW Recruitment Unbudgeted** ePAR is used to initiate a new position, which is not reflected in the current budget. The process for unbudgeted recruitment for faculty is similar to non-faculty. The difference is funding lines are entered only after going to the **Next** screen and then coming Back.

1. Click on **MCW Recruitment Unbudgeted** ePAR on the **Main Menu**.
2. The **Recruitment Unbudgeted** screen opens.
3. Enter the correct effective date. (**Note:** The system defaults to the current date.)
4. Search for the **Position Title** by clicking the **Flashlight**. (**Note:** Be careful to select the appropriate **Employee Category** and **Payroll** for the **Position Title**).
5. Search for the correct **Organization** by clicking the **Flashlight**. (**Note:** The organization name is derived from division/department/program.)
6. Select the **Employment Category**.
7. Enter the **Work Hours**.
8. Select the checkboxes indicating the extent of assistance needed by the Employment Office.
9. Click the **Next** button. (**Note:** Do not complete the Funding Lines at this time.)

**NOTE:** Do not complete the Funding Lines at this time. Instead click the Next button.
10. The **Recruitment Unbudgeted Review** screen opens.
11. Click the form's **Back** button.

### Recruitment Unbudgeted Review

- **Effective Date:** 1/1/2004
- **Dept Number:** 000100
- **Position Title:** Associate Clinical Professor
- **Organization:** Medicine Administration
- **Job:** 71000 Faculty
- **Grade:**
- **Pay Basis:** NCW Salaried
- **Payroll:** NCW Monthly
- **Location:** HR-FEC
- **FTE:** 1
- **People Group:** FC
- **Employment Category:** FF
- **Company:** 000100
- **Department:** 000111
- **Division:** 000101
- **Program:** 000100
- **Reference Check:** N
- **Interviews:** N
- **No Assistance Requested:** Y
- **Advertisement:** N
- **Background Check:** N
- **Total External Salary:** $0.00
- **Total Salary:** $0.00

**Comments to Approver:**

**Approvers and Recipients**

1. **Roepke, Lynnae E:** S1000 Clinical Support
2. **Dorowich, Cheri:** L3410 Executive Assistant
3. **Kiang, Gary:** 30215 Assistant Director
4. **Schmitz, Penney A.:** 30245 Manager

**Recipient**

- **Notify on Approval:**
- **Notify on Submittal:**
- **Notify on Approval:**

**Add Approvers and Recipients**

Click on the **Back** button.
12. The **Recruitment Unbudgeted** screen reappears. (Note: **Job, Pay Basis, Payroll & People Group** fields are now populated.)

![Recruitment Unbudgeted](image)

13. Enter the **Position's GL and/or Project Funding Lines**. Be sure to use the **Flashlight** when entering the **Project Funding Lines**.

14. Click the **Next** button.

15. The **Recruitment Unbudgeted Review** screen opens.

16. Review the **Proposed changes** for accuracy.

17. If needed, enter **Comments**.

18. If necessary, add **Approvers and/or Recipients**. (See the Section on “Adding Approvers or Recipients” for more detail information.)

19. If desired, click the **Printable Page** button to print the ePAR.

20. If the **Proposed changes** are accurate, click the **Submit** button for approvals.
   (Click the **Close** window if you wish to come back to the action later. The ePAR can be found in **All Actions Awaiting your Attention**.)

21. A **Confirmation message** appears at the top of the screen indicating the action has been submitted for manager approval.

22. Click the **Home** button to return to the **Main Menu**.
Recruitment Budgeted

The **MCW Recruitment Budgeted ePAR** is used to initiate the recruitment of a vacant position.

1. Click on **MCW Recruitment Budgeted ePAR** on the **Main Menu**.
2. The **Search Positions** screen opens.
3. Enter the **Position Search Criteria** by **Position Number**.

**NOTE:**

A **Position** is made up of three segments and is unique to each position. The middle segment is the **Position Number**. The Position segments are:

<table>
<thead>
<tr>
<th>Department Number (leading zeros)</th>
<th>Position Number</th>
<th>Position Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>two to three digits</td>
<td>One to four digits</td>
<td>Administrative Assistant</td>
</tr>
</tbody>
</table>

4. Click the **Go** button.
5. Select the appropriate position from the **Positions Search Results** section by clicking the corresponding radial button (i.e. 000326.1684.Position Title)
6. Click the **View** button.
7. The **Recruitment Budgeted** screen opens.
8. Enter the appropriate **Effective Date**. (The current date defaults.)
9. Select the checkboxes indicating the extent of assistance needed by the Employment Office.
10. If necessary, change the **GL** and/or **Project Funding Lines** information.
11. Click the **Next** button to continue.

**NOTE:** Enter the estimated salary for the position. If funding is reallocated to different accounts, enter a zero in the **Actual Amount** fields(s) and add funding lines as appropriate.
13. Review the Proposed changes for accuracy.
14. If necessary, add Approvers and/or Recipients. (See the Section on "Adding Approvers or Recipients" for more detail information.)
15. If desired, click the Printable Page button to print the ePAR.
16. If the Proposed changes are accurate, click the Submit button for approvals.
   (Click the Close window if you wish to come back to the action later. The ePAR can be found in All Actions Awaiting your Attention)
17. A Confirmation message appears at the top of the screen indicating the action has been submitted for manager approver.
18. Click Home button to return to the Main Menu.
Funding/Reallocation Changes

Funding Change
The MCW Funding Change ePAR is used to change funding sources or percentages of a current employee. It is not used to increase or decrease the salary of an employee. It is used only for future changes.

Funding Reallocation
Reallocations of funding that have occurred in the past should be done on the on-line, fillable PAR located at: http://infoscope.mcw.edu/hr/oracle/onlinepars.html. The Funding Reallocation form is used to change funding sources or percentages in the past. Complete the form on-line, print it and send it to Payroll.

1. Click the MCW Funding Change.
2. The Advanced Search screen opens.
3. Search for the employee's Last Name and click the Go button.
4. Select the person's name from the Search Results section by clicking on the Action icon.
5. The Effective Date Options screen opens.
6. Enter the Effective Date of the funding change. (The Effective Date must be on or after the date listed in the Information section.)
7. Click the Continue button.
8. The Funding Change screen opens.
9. Select Change in Funding in the Reason Description drop-down list.
10. Enter the new General Ledger and/or Project Funding Lines change(s) by clicking the appropriate Add Another Row link.
11. Enter or select the appropriate account numbers along with the dollar amount distribution.
12. Click the Next button.
14. Review the Proposed changes for accuracy.
15. If necessary, add Approvers and/or Recipients. (See the section on adding “Approvers or Recipients” for more detail information.)
16. If desired, click on the Printable Page button to print the ePAR.
17. If the Proposed changes are accurate, click the Submit button for approvals.
   (Click the Close window if you wish to come back to the action later. The ePAR can be found in All Actions Awaiting your Attention.)
18. A Confirmation message will appear near the top of the screen indicating the action has been submitted for manager approval.
19. Click Home button to return to the Main Menu.
## Funding Change Review

<table>
<thead>
<tr>
<th>Position</th>
<th>0303111469 Assistant Professor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade</td>
<td>2000C - Faculty</td>
</tr>
<tr>
<td>Pay Basis</td>
<td>MO1 - Monthly</td>
</tr>
<tr>
<td>Location</td>
<td>HRIFEC</td>
</tr>
<tr>
<td>FTE</td>
<td>1</td>
</tr>
</tbody>
</table>

### Pay Rate

<table>
<thead>
<tr>
<th>Current</th>
<th>Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in Funding</td>
<td>0.00</td>
</tr>
<tr>
<td>Pay Rate</td>
<td>114400</td>
</tr>
<tr>
<td>Rate (Annual Equivalent)</td>
<td>114400.00</td>
</tr>
<tr>
<td>Paid By Memo</td>
<td>No</td>
</tr>
<tr>
<td>Outside Salary 1</td>
<td>0.00</td>
</tr>
<tr>
<td>Account 1</td>
<td>0.00</td>
</tr>
<tr>
<td>Outside Salary 2</td>
<td>0.00</td>
</tr>
<tr>
<td>Account 2</td>
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</tr>
<tr>
<td>Outside Salary 3</td>
<td>0.00</td>
</tr>
<tr>
<td>Account 3</td>
<td>0.00</td>
</tr>
<tr>
<td>Outside Salary 4</td>
<td>0.00</td>
</tr>
<tr>
<td>Account 4</td>
<td>0.00</td>
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<tr>
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<td>Account 5</td>
<td>0.00</td>
</tr>
<tr>
<td>Outside Salary 6</td>
<td>0.00</td>
</tr>
<tr>
<td>Account 6</td>
<td>0.00</td>
</tr>
<tr>
<td>Outside Salary 7</td>
<td>0.00</td>
</tr>
<tr>
<td>Account 7</td>
<td>0.00</td>
</tr>
<tr>
<td>Total External Salary</td>
<td>0.00</td>
</tr>
<tr>
<td>Total Salary</td>
<td>114400.00</td>
</tr>
<tr>
<td>Comments</td>
<td></td>
</tr>
</tbody>
</table>

### Funding Distribution

<table>
<thead>
<tr>
<th>Current</th>
<th>Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding Segment</td>
<td></td>
</tr>
<tr>
<td>Actual Amount</td>
<td>114400</td>
</tr>
<tr>
<td>Actual Percent</td>
<td>100</td>
</tr>
<tr>
<td>Comments to Approver</td>
<td></td>
</tr>
</tbody>
</table>

### Approvers and Recipients

#### Approvers

<table>
<thead>
<tr>
<th>Order of Approval</th>
<th>Approver Name</th>
<th>Primary Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hanneke, Mary J.</td>
<td>3204G Manager</td>
</tr>
<tr>
<td>2</td>
<td>Schaub, Robert J.</td>
<td>34000 Accountant</td>
</tr>
<tr>
<td>3</td>
<td>Stephens, Dorothy</td>
<td>M3245 Manager</td>
</tr>
<tr>
<td>4</td>
<td>Schmitz, Petna A.</td>
<td>M3245 Manager</td>
</tr>
</tbody>
</table>

#### Recipients

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Primary Job Title</th>
<th>Notify on Submission</th>
<th>Notify on Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repta, Lynne E.</td>
<td>51000, Clinical Support</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

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**Funding/Reallocation Changes**

**ePAR**

11/13/04
Various Error messages may occur. A **Warning** message indicates a validation problem that is not between the limits or ranges that were set. Usually the user can continue. (i.e. A warning message may occur if a social security number already exists in the system.

An **Error** message indicates there is something wrong and the user can't move forward until the error is corrected.

### Warning Messages:

Any ePAR:

**Warning**

**Problem:** Tried to delete an Approver from the Approver List.

**Solution:** Click the **Next** button to continue.

Any ePAR:

**Warning**

**Problem:** Entered a salary that is below or above the grade range.

**Solution:** Click the **Back** button to correct the salary.

### Error Messages:

**Error**

**Problem:** Approval problem.

**Solution:** Create a Magic ticket.

Any ePAR:

**Error**

**Problem:** Funding issue.

**Solution:** Check the grant end dates. May need to select another grant.
Any ePAR:

**Error**

**Warning:** The total salary entered does not match the total of the funding lines.

**Problem:** Total Salary field does not equal the Actual Amounts in the funding lines.

**Solution:** Click the **Back** button and check the funding lines and make necessary changes.

Any ePAR:

**Error**

**Warning:** Another action pending approval exists for this person. You cannot begin this action. View actions Awaiting Approval of Others for details, or contact your system administrator to enable concurrent actions.

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee Number</th>
<th>Effective Date</th>
<th>Department</th>
<th>Job</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sue Dean</td>
<td>11476</td>
<td>11/14/2004</td>
<td>Medicine Malignant Diseases Hematology</td>
<td>50/001, Clinical Support</td>
</tr>
<tr>
<td>Manager Name</td>
<td>Major Abu Haji MD</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Perform Action**

<table>
<thead>
<tr>
<th>Selected Action</th>
<th>Awaiting Approval Of Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Action</td>
<td></td>
</tr>
<tr>
<td>Oldnad</td>
<td></td>
</tr>
</tbody>
</table>

**Problem:** Unable to continue action

**Solution:** Previous ePAR action on this person must be canceled or completed before this action can be done.