Uploading Documents to ePAFs

The University of Florida uses electronic Personnel Action Forms (ePAF) to support various HR transactions such as hires (for faculty, TEAMS, OPS, and students), retirements, terminations, reclassifications, etc. As you submit an ePAF for approval, you will also be required to scan, upload, and label documents that need to be "attached" to the ePAF. This guide provides instructions on the following:

- Use the Documents button to submit supporting documentation for an ePAF
- View uploaded documents already submitted as part of an ePAF
- Upload additional or revised documents in support an ePAF
- Utilize best practices for scanning, storing, and sending supporting documentation (including files containing protected information such as Social Security numbers)
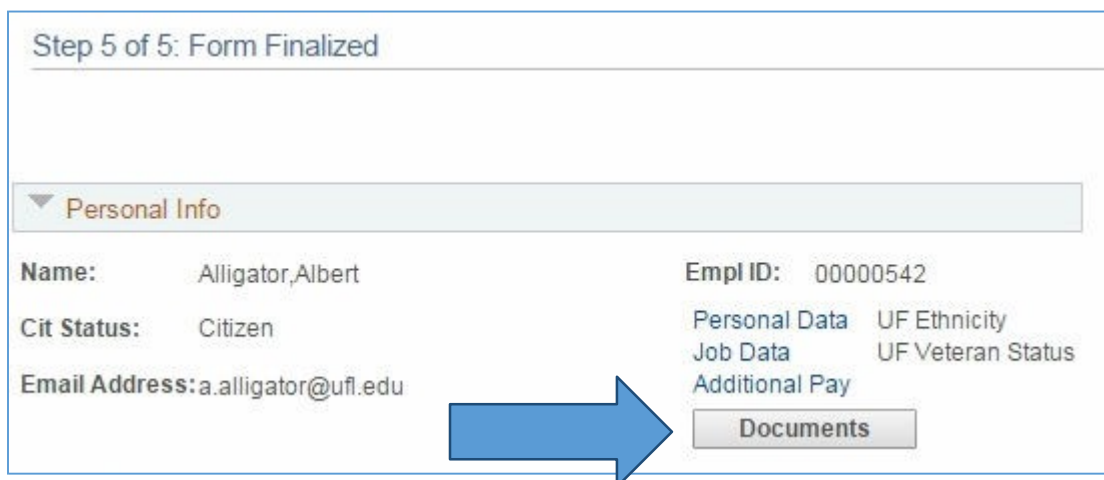
You will need the following security role for ePAF actions:
- UF_EPAF_DepartmentAdmin or
- UF_EPAF_Level 1 Approver

IMPORTANT: You must use either Internet Explorer (PC) or Safari (MAC) when using the EDM platform (i.e. the Documents button).

Completing an ePAF that requires supporting documents

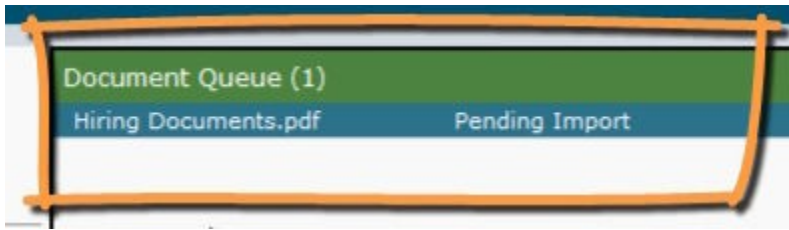1. ON the final screen of the ePAF, click the **Documents** button.

2. Click the **Upload File** icon at the top of the screen.

3. Click the **Browse** button and locate your supporting document.

4. Notice that the file is now listed in the **Document Queue** as "**Pending Import**."

On the left side of screen, the document properties are listed. In the main display area, there is a preview of the document itself.

IMPORTANT: PDF files are the most appropriate file format to attach to an ePAF. The system will accept other file formats as well (such as Word documents and Excel spreadsheets), but please avoid using these files types unless absolutely necessary. PDF files will preview in the main display area. Other file formats such as Word and Excel will not display a preview.

5. Under **Document type**, apply the appropriate label for the file you are about to attach to the ePAF. The type of ePAF you are working on will influence the Document type labels that appear.
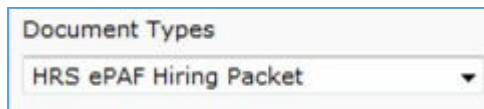
NOTE: A Hiring ePAF typically requires a large number of supporting documents. For your convenience, you can scan all supporting documentation into one file and then just apply the HRS ePAF Hiring Packet label. This will prevent you from having to label each supporting document separately. This is the only Document type that allows you to include more than one document. For all other ePAFs, you must scan, upload, and label each supporting document separately.

6. Double check to make sure the **File Type** matches with your document. To correct, click the dropdown menu and select another file type.

7. The **Document Date** will default to today's date. For your convenience, the remaining fields prepopulate based on the information you have already entered into ePAF.

8. To import the file officially, click the **Import** button.
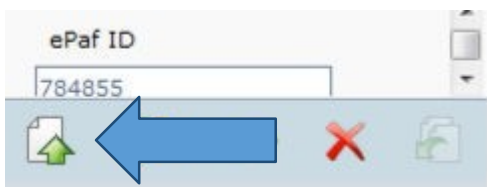
Notice that the file now shows as "**Imported Successfully**" in the **Document Queue**.

Viewing Your Uploaded Files

1. After you have loaded the supporting documentation for your ePAF, you can check your files by clicking the **View Documents** button. This will show you the complete list of documents you have attached to the ePAF.

2. At the top of the screen, you can see reference to the type of ePAF, the UFID of the individual, and the ePAF ID.
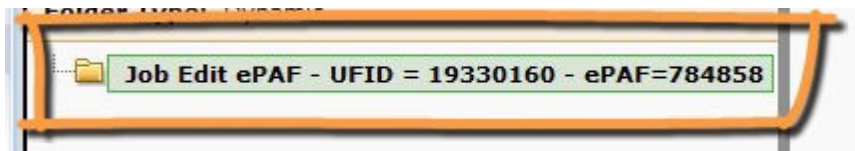
3. In the **Documents** section, you will find a list of all documents you have attached to the ePAF.
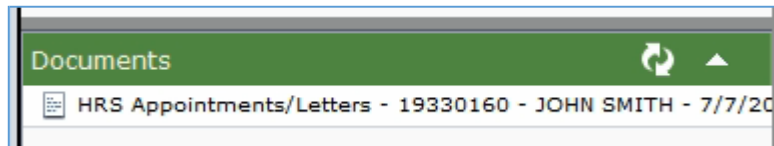
4. To review the document, click the file name. A PDF will display in the preview area. If you click a Word document or Excel spreadsheet, you will be prompted to Open or Save the file.

   NOTE: You cannot make any edits to a document already attached to the ePAF. If you do discover an error in a document already submitted, simply re-upload the document. Core office staff will review all documentation you upload and contact you with questions if necessary.

5. Once you are satisfied with the documents you have attached, you can close your active browser tab to return to the ePAF screen. Provided that you have already submitted the ePAF, you can simply exit myUFL at this point. However before you do, be sure to note the eForm ID in case you need to look up this ePAF in the future or make any necessary changes.

Uploading Additional or Revised Documents

1. If you need to attach additional documentation to an ePAF you have already submitted, visit the **ePAF Home Page** in myUFL and click **View an ePAF**.

2. Click the type of ePAF you submitted. For example, click the **View a Job Edit ePAF** link.

3. Enter the eForm ID and click **Search**.

4. On the ePAF screen that appears, click the **Documents** button to return to the list of files.

5. From here, follow the same instructions covered earlier to upload and import additional documentation.

Best Practices for Managing Your Documents

1. **Scan, upload, and label supporting documents separately.***
   One of the strengths of this new document management process for ePAF is that each individual supporting document can be appropriately labeled in the system. This makes for better file management and quality assurance in the university's critical HR processes. Your role in helping with this improved file management and quality control will be to scan, upload, and label each support document separately.

   *The **only** ePAF that allows you to scan all supporting documents into a single file is the Hiring ePAF. In this case, you can apply the HRS ePAF Hiring Packet label.

2. **Only use the Documents button at the conclusion of your ePAF.**
   Please submit your ePAF and *then* attach your supporting documentation. This will ensure that documents are routed appropriately. Please avoid clicking the Documents button before you reach the end of an ePAF.

3. **Do NOT upload extraneous documents to your ePAFs.**
   The ePAF Summary Page provides a great overview of a submitted ePAF. However, there is no need to scan and submit this page as a supporting document. The system will already attach your supporting documentation to the appropriate ePAF, so this extra document is not necessary. You also should NOT upload other extraneous documents such as the Hire Checklist and the New Hire Demographic Form to an ePAF.

4. **Follow UF protocol for handling restricted data.**
   According to the UF Privacy Office, emailing or instant messaging restricted data (such as Social Security numbers, driver's license numbers, and financial information) or saving it to a computer or device not managed by UF is strictly forbidden. Therefore, it is essential for your department to develop an appropriate workflow for managing the restricted data necessary for supporting ePAFs.

   Specific protocols related to restricted data are available at the following website:
   http://www.it.ufl.edu/wp-content/uploads/2012/10/PIIchecklist.pdf

As a general best practice, restricted data should *only* be saved to a secure UF Network location. For additional guidance, please work with your local IT support.

Additional Notes

- When an ePAF has been approved by Level 2, no further documents can be submitted.
- Level 1 Approvers: To approve the ePAF, go to Worklist. Select the relevant ePAF to view. Click the Documents button. Do not approve any ePAF until you have viewed all of the documents required. ePAFs can be approved, denied, or recycled, in the usual way.

Additional Help

- Employment Operations & Records: 392-2477 (TEAMS, USPS, Non-student OPS, Faculty, Fellowships, Grad Students, Students, House Staff)
- Student Employment: 392-2477 (Students)
- Payroll & Tax Services: 392-1231 (Foreign Nationals)
- UF Help Desk: 352-392-HELP or helpdesk@ufl.edu
- Federal Work Study Employment: 392-0296 (FWS)