Manual for Status Change ePAR
Status Change ePAR – Initiators, Supervisors, and Authorized Directors-Managers

Please click on the titles below for instructions on how to complete your Status Change ePAR request:

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**A. Introduction**

The Status Change ePAR will only be used for scenarios relating to a change in employment status:

- **Retirements**
- **Terminations** (i.e. resignations, ending temporary appointments early)
- **Leaves of Absences** (i.e. unpaid leaves, partial leaves, maternity and parental leaves)
- **Return Date Amendments** (i.e. extending leaves, ending leaves early)

**A-1. Navigating to the ePAR Home Page**

1. In order to access the ePAR home page, you must sign into [myInfo.sfu.ca](http://myInfo.sfu.ca)
2. Click on the **GT ePAR** link on the main menu

![GT ePAR link](image)

3. From the ePAR home page, there are four items that can be chosen:

<table>
<thead>
<tr>
<th>Item:</th>
<th>Objective:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a new ePAR</td>
<td>To initiate a new brand new ePAR for an employee. A brand new ePAR form ID number will be created whenever a new ePAR form is initiated.</td>
</tr>
<tr>
<td>Approve an ePAR</td>
<td>To approve an ePAR that you have preauthorized access or were granted special security access to approve.</td>
</tr>
<tr>
<td>View an ePAR</td>
<td>To view an ePAR at any stage in the workflow. View is read-only.</td>
</tr>
<tr>
<td>Resubmit, Change, or Withdraw an ePAR</td>
<td>To make changes to an ePAR that was submitted by the initiator. Only forms that had not been processed in the system can be accessed. The person who created the ePAR will be the only person that can make changes or cancel it.</td>
</tr>
</tbody>
</table>

**Only Supervisors and Authorized Directors/Managers can approve an ePAR**
A-2. Understanding your worklist

1. To navigate to your worklist, click on the Worklist link on the top of your screen.

2. The worklist is a quick access tool that includes pending ePARs for your action. Only the items that are assigned to you will appear on your worklist. Once the item has been actioned, it will disappear from your worklist.

<table>
<thead>
<tr>
<th>Item:</th>
<th>Example:</th>
<th>Objective:</th>
</tr>
</thead>
<tbody>
<tr>
<td>From</td>
<td>Name</td>
<td>The individual that sent the ePAR for approval. This is the typically the last person that worked on the form.</td>
</tr>
<tr>
<td>Date From</td>
<td>2016/06/06</td>
<td>The date that the individual sent the ePAR for your action.</td>
</tr>
<tr>
<td>Work Item</td>
<td>Notification Worklist</td>
<td>n/a</td>
</tr>
<tr>
<td>Worked By Activity</td>
<td>Notification</td>
<td>n/a</td>
</tr>
<tr>
<td>Priority</td>
<td></td>
<td>This is a drop down menu to help you organize your items. You can prioritize by: 1-High 2-Medium 3-Low</td>
</tr>
<tr>
<td>Link</td>
<td>STATUS:TER/RES [Employee Name] ######</td>
<td>Once clicked, this link will take you to the ePAR page that is awaiting your approval. In this example: • “STATUS” is the type of form that was submitted (Status Change Form) • “TER/RES” is the action and reason for the form (Termination/Resignation) • “[Employee Name]” is the name of the employee • “#######” is the eFORM ID number</td>
</tr>
<tr>
<td>-</td>
<td>Mark Worked</td>
<td>n/a</td>
</tr>
<tr>
<td>-</td>
<td>Reassign</td>
<td>This button allows you to redistribute the ePAR to another user. Once reassigned, the item will be removed from your worklist and will appear on the other user’s worklist. The other user must have preauthorized access or special security access in order to view the form. One you click the reassign button, you will be asked to...</td>
</tr>
</tbody>
</table>
A-3. Notification E-mails

You will receive notification e-mails (ACTION) informing you of ePARs pending your Approval or of the current Status (Processed, Denied, etc).

1. You will receive e-mail notifications for pending ACTION items to approve/resubmit/withdraw.

2. You will receive notification e-mails (FYI) informing you of the current status of your ePAR (Processed, Denied, etc.)
### B. Initiators

Initiators are individuals from each department who would start and fill out an ePAR for submission. Initiators are also the contact persons for any questions relating to the submitted ePAR. Instructions on how an initiator can create a Status Change ePAR can be found in the subsections below.

**B-1. Create a Status Change ePAR**

Once you have all the applicable documentation/information and are ready to begin, you will have to log in and create a brand new status change ePAR.

*Hint: All boxes that have an asterisk are required in order to save and submit the ePAR*

1. Sign into [myInfo.sfu.ca](#) → **GT ePAR** → **Create a new ePAR**
2. **Click on** Change Employment Status

![Image of Change Employment Status form]

- **Click here to create a Status Change ePAR**

3. **Search** for employee by entering Empl ID, Name, and/or Last name

![Image of Employee Search form]

If details are unknown, leave fields blank and select the **Search** button to view list of all available employees.
4. You will be directed to the Change Employment Status ePAR page (Step 1 of 2: Enter Status Change Information).

5. In the Form Data Section, click on the lookup icon to select the appropriate Action.
6. In **Reason Code**, click on the lookup icon to select the appropriate **Reason** (please note: the chosen “Action” will determine the available Reason Codes).

7. Enter in the appropriate **Date(s)**.

   ![Effective Date: 2016/06/10](image)

8. If applicable, enter in the appropriate details (i.e. reason for leave, performance assessment).

   ![Performance Assessment:](image)

9. If applicable, enter in all other required fields pertaining to your transaction. Please note that all unpaid leaves (including partial leaves) will prompt you to select an **Unpaid Leave Approving Director**.

   *Unpaid Leave Approving Director: additional approval by an "Approving Director" is only required for unpaid leaves*

10. To add file attachments (i.e. resignation letters, leave documents), click the **Add File Attachment** button

   ![Add File Attachment](image)

11. Select **attachment type** from drop down list and click on **Upload** to add attachment from your files.

   ![File Attachments](image)

12. If you would like to view the file you just uploaded click on **View**.

   ![File Attachments](image)

13. If the **Form Messages** box is shown, **read** the message text and **check off the box** to acknowledge the Form Message

   **Hint**: Messages are shown in the message text box informing you of any additional information in relation to your transaction.
Common *Form Messages* that could be shown:

<table>
<thead>
<tr>
<th>Message Text</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attach Extended Personal LOA Without Pay Form</td>
<td>You need to attach the Extended Personal Leave of Absence Without Pay Form completed by the employee to support the personal leave request.</td>
</tr>
<tr>
<td>Attach Required Forms for Maternity Leave</td>
<td>You need to attach 2 forms to support the maternity leave request: 1) Written request from the Employee 2) Confirmation of Date of Confinement from the Doctor or Midwife</td>
</tr>
<tr>
<td>Attach Proof of Birth to Support Parental Leave</td>
<td>You need to attach a copy of the birth certificate or proof of baby’s birth.</td>
</tr>
<tr>
<td>Attach Employment Separation Checklist</td>
<td>You need to attach the completed Employment Separation Checklist now or acknowledge that the completed checklist will be sent to Human Resources on or before the employee’s Last Day of Work.</td>
</tr>
<tr>
<td>Attach Letter of Resignation</td>
<td>You need to attach the employee’s letter of resignation to complete the resignation request. This can be a copy of the email received from the employee as long as it is sent through the SFU email account.</td>
</tr>
</tbody>
</table>

* Please note: The Extended Personal Leave of Absence Without Pay form must be completed by the employee since they would need to apply. However, the approval signatures on the form are not required since the approvals will be done electronically via automated workflow.

14. Enter in any **instructions/comments** about your transaction in the **Your Comments** box that may be of assistance in filling this request

**Hint:** Any comments that you record on this box after submission will not be deleted or edited. It will be displayed in a Comments History box.

15. The following four options are displayed. Click on the button in which you would like to proceed.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit</td>
<td>The ePAR will be submitted to the next approver in the workflow for further processing.</td>
</tr>
<tr>
<td>Save for Later</td>
<td>The ePAR is saved and placed on hold in its current stage. The ePAR can be completed at a later time.</td>
</tr>
</tbody>
</table>
16. If you click on the **Close eForm** button, a pop up message will appear. Click **Yes** to proceed or **No** to return back to the ePAR.

![Close eForm](image)

17. After the **ePAR is submitted** (when the Submit button is clicked), you will be directed to the following page (*Step 2 of 2: Form Finalized*). This page will confirm that you have successfully submitted the form and where/who it has gone to for further processing.

*Hint*: The system will automatically notify the next individual by sending them an email notification.

![Change Employment Status](image)
**Note:** If the “initiator” of the ePAR is the same person as the “Reports to Supervisor” and/or “Authorized Approving Director” for the employee, the ePAR will skip them in the workflow (since it is a repetitive action) and automatically route the ePAR to the next individual.

18. You have now submitted the ePAR to next individual for further processing. On the bottom of this page, there will be links to take you to other pages.
   - Go To Worklist – this will take you back to your Worklist
   - View This Form – this will allow you to view the ePAR in read-only view.
   - Return – this will take you back to the ePAR home page
   - Close This Form – this will take you back to the ePAR home page

B-2. **View an ePAR**

The View an ePAR link provides the user with a read-only view of any ePAR regardless of its workflow status. You cannot change or edit ePARs in this view.

*Hint:* You would only use this function to check the workflow status or review the history of a submitted ePAR.

For an in-depth explanation of workflow status, please refer to Appendix 1 – Workflow Status. Otherwise, proceed to the next step.

1. Sign into myInfo.sfu.ca → GT ePAR → View an ePAR

2. Search for employee by entering eForm ID, Empl ID, Name, and/or Last name
If details are unknown, leave fields blank and select the **Search** button to view list of all ePARs that have been submitted.

3. Click on your desired ePAR from the list.

4. You will be directed to the ePAR for a **READ-ONLY VIEW** (You will not be able to edit the ePAR)
5. Once you have viewed the information on the first page, click on *Next Page* button at the bottom of the page to view the second page.

6. On this second page, you can view the workflow status and processing history of the ePAR.

**B-3. Change or Cancel a request that has been submitted**

*Hint:* The Initiator will be the only one that can make changes or cancel the ePAR. You may also check your worklist to review any ePARs that have been recycled/sent back to you.
1. Sign into myInfo.sfu.ca → GT ePAR → Resubmit, Change, or Withdraw an ePAR

2. Search for employee by entering eForm ID, Empl ID, Name, and/or Last name
If details are unknown, leave fields blank and select the **Search** button to view list of all ePARS that you have initiated.

3. Click on desired ePAR from list to continue.

4. All fields are open to allow for changes to the ePAR.

5. Refer to **Comment History** if there are any further instructions of edits/amendments.

6. Make any applicable edits/amendments to the ePAR (i.e. changing Action/Reason, changing Effective Date).

7. Enter reason for changing details of the ePAR in **Your Comment Box** (Recommended Field).

8. The following three options are displayed. Click on the button in which you would like to proceed.

   - **Resubmit**: The ePAR will be submitted to the next approver in the workflow for further processing.
   - **Withdraw**: Cancels ePAR and ends processing completely. A reason must be provided in the **Your Comments** box.
Status Change ePAR – Initiators, Supervisors, and Authorized Directors/Managers

The ePAR is saved and placed on hold in its current stage. The ePAR can be completed at a later time.

B-4. Retrieving an ePAR that was Saved for Later

Hint: This process is similar to “Change or Cancel a Request that Has Been Submitted” (refer to Section B-3)

1. Sign into myInfo.sfu.ca → GT ePAR → Resubmit, Change, or Withdraw an ePAR

2. Enter eForm ID or other details to open ePAR and click the Search button. If details are unknown, leave fields blank and select the Search button to view list of all ePARs that you have initiated.

3. Click on desired ePAR from list to continue.

C. Reports to Supervisors and Authorized Approving Directors/Managers

Supervisor: The supervisor must approve the ePAR in order to submit the request to the HR Advisor (or Unpaid Leave Approving Director). The section below only applies to those supervisors who have not created an ePAR and will be receiving ePARs from their designated departmental Initiator. You will only be approving ePARs for employees that report directly to you.

**Authorized Approving Directors/Managers:** ePARs requesting Unpaid Personal Leaves require final authorization from a Director, Dean, AVP or VP level position. Please see below for further instructions.

Hint: Supervisors have the role as initiators and can create ePARs for their own reporting employees. Please disregard this section if you have already created and approved an ePAR for your employee.

C-1. Approve an ePAR

1. Sign into myInfo.sfu.ca → GT ePAR → Approve an ePAR or Worklist

2. Select the ePAR to approve form the Approve an ePAR link or from your Worklist link on your ePAR homepage.
Status Change ePAR – Initiators, Supervisors, and Authorized Directors-Managers

1. Approve an ePAR link

   I. Select Approve an ePAR to be directed to the page below.

II. If you do not know the eFORM ID or name of the employee, select SEARCH to view all ePARs waiting for your approval (Sample of search listed below).

   ![Search Criteria](image)

   - Enter in specified search criteria (eFORM ID, Empl ID, Name or Last Name)
   - or
   - Select Search to view all ePAR(s) waiting your approval.

   ![Search Results](image)
III. You will either be directed to the list above *(Select desired ePAR)* or to the *Status Change ePAR page*. (Note: If you are directed to the ePAR Status Change page immediately it means you only have one ePAR pending your approval).

b. Worklist

I. Select desired ePAR on your worklist.

3. Once the ePAR has been selected you will be directed to the *Evaluate Employment Status Change Request Page* (Step 1 of 2). See screenshot below for more details:
4. **Transaction Information**: This section contains information of the selected employee (e.g., eForm ID, Name, Empl ID, Position Number/Title, Grade, Department). The **Initiator’s** name and e-mail address is listed as well.

5. **Reports to**: Name and Position of the Supervisor.

6. **Form Data**: This section contains information of the transaction, such as Action, Effective Dates, Expected Return Dates, etc).

*Hint*: If you are not able to edit your desired fields you must send back the ePAR to the Initiator (with comments) – Refer to Section:
Below are the possible fields that may be reflected in **Form Data**.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action &amp; Reason Codes</td>
<td>Type of transaction.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>The start date.</td>
</tr>
<tr>
<td>Describe Reason for Leave</td>
<td>Only applies to Unpaid Personal Leave.</td>
</tr>
<tr>
<td>Percentage of time On leave</td>
<td>Only applies to Unpaid Personal Leave.</td>
</tr>
<tr>
<td>Expected Return Date</td>
<td>Applies to all types of Leaves.</td>
</tr>
<tr>
<td>Unpaid Leave Approving Director</td>
<td>Unpaid Personal leaves require Director/Dean/AVP/VP final approval prior to submitting the ePAR to the HR Advisor.</td>
</tr>
<tr>
<td>Last Date Worked</td>
<td>Only applies to Retirements &amp; Terminations.</td>
</tr>
<tr>
<td>Performance Assessment</td>
<td>Only applies to Retirements &amp; Terminations.</td>
</tr>
</tbody>
</table>

7. Click on **Add File Attachment** to upload any applicable documents.

8. **Form Messages**: Messages will be displayed informing you of any additional information about the transaction.

9. Enter in any **instructions/comments** about your transaction (Recommended).

**Hint**: Refer to comment history for any additional comments/instructions.
10. The following options are displayed:

<table>
<thead>
<tr>
<th>Option:</th>
<th>Description:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve</td>
<td>ePAR is approved and will be directed to the HR Advisor (or Unpaid Leave Approving Director) for review.</td>
</tr>
<tr>
<td>Back to Initiator</td>
<td>ePAR requires changes and is sent back to the initiator for revision. Reason must be provided in the Your Comments box.</td>
</tr>
<tr>
<td>Deny</td>
<td>Cancels ePAR and ends processing. Reason must be provided in the Your Comments box.</td>
</tr>
<tr>
<td>Save for Later</td>
<td>ePAR is saved in current stage (put on hold) and can be completed at a later time.</td>
</tr>
<tr>
<td>Return to Search</td>
<td>Returns you to the search page (ePAR will not be saved).</td>
</tr>
</tbody>
</table>

11. If all information in ePAR is accurate and require no changes, then click on the Approve button.

12. A pop-up message will appear. Click Yes to proceed, or No to return back to the ePAR.

13. The ePAR will now confirm submission and be directed to the HR Advisor (or Unpaid Leave Approving Director) for approval as shown in the Form Status and Workflow Routing (Step 2 of 2)
14. You have now approved the ePAR. On the bottom of this page, there will be links to take you to further pages.
   - **Go To Worklist** – this will take you back to your Worklist
   - **View This Form** – this will allow you to view the ePAR in read-only view.
   - **Return** – this will take you back to the ePAR home page
   - **Close This Form** – this will take you back to the ePAR home page

### C-2. Send ePAR back to the initiator

1. If the ePAR requires any changes or revisions, please enter your reasons in the **Your Comment** box and click the **Back to initiator** button. The ePAR will be directed back to the Initiator to be updated. Once the Initiator resubmits the ePAR, the form will require your approval again (Check your Worklist or the “Approve an ePAR” link on the homepage).

2. A pop-up message will appear as a reminder to provide information in the **Your Comment** box. Click **Yes** to proceed, or **No** to go back to the ePAR.

3. The ePAR will now confirm submission and will be sent back to the Initiator, as shown in the **Form Status** and **Workflow Routing**.
4. You have now sent the ePAR back to the initiator. On the bottom of this page, there will be links to take you to further pages.
   - Go To Worklist – this will take you back to your Worklist
   - View This Form – this will allow you to view the ePAR in read-only view.
   - Return – this will take you back to the ePAR home page
   - Close This Form – this will take you back to the ePAR home page

C-3. Denying an ePAR

1. If you decide to deny the request, enter the reason in the Your Comment box and click on the Deny button. The ePAR will permanently end processing at this point. The form will be archived.

2. A pop-up message will appear as a final check that you want to deny this ePAR and permanently end processing. Click Yes to proceed, or No to go back to the form.

3. The ePAR will now confirm submission and permanently end, as shown in the Form Status and Workflow Routing.
4. You have now denied the ePAR. On the bottom of this page, there will be links to take you to further pages.
   - Go To Worklist – this will take you back to your Worklist
   - View This Form – this will allow you to view the ePAR in read-only view.
   - Return – this will take you back to the ePAR home page
   - Close This Form – this will take you back to the ePAR home page

C-4. Saving an ePAR for later (put on hold)

1. If you do not have all the information required or have not completed the ePAR, you may choose to click the Save for Later button and return to the ePAR later to complete.
   *Hint: Comments are optional, but any comments that you record cannot be deleted or edited and will be displayed in the Comment History box.*

2. The ePAR will now confirm submission and the ePAR will be placed on hold, as shown in the Form Status and Workflow Routing. The ePAR will remain at the current approval stage in the workflow.

3. You have now saved the form for later. On the bottom of this page, there will be links to take you to further pages.
   - Go To Worklist – this will take you back to your Worklist
   - View This Form – this will allow you to view the ePAR in read-only view.
   - Return – this will take you back to the ePAR home page
   - Close This Form – this will take you back to the ePAR home page
C-5. Retrieving an ePAR that was Saved for Later

1. Sign into myInfo.sfu.ca → GT ePAR → Approve an ePAR or Worklist

2. Select either Approve an ePAR or Worklist to retrieve your saved ePAR.

3. Click on the desired the ePAR from your list to continue.

C-6. View an ePAR

The View an ePAR link provides the user with a read-only view of any ePAR regardless of its workflow status. You cannot change or edit ePARs in this view.

Hint: You would only use this function to check the workflow status or review the history of a submitted ePAR.

For an in-depth explanation of workflow status, please refer to Appendix 1 – Workflow Status. Otherwise, proceed to the next step.

1. Sign into myInfo.sfu.ca → GT ePAR → View an ePAR

2. Search for employee by entering eForm ID, Empl ID, Name, and/or Last name
If details are unknown, leave fields blank and select the **Search** button to view list of all ePARS that have been submitted.

![Search Criteria](image)

3. Click on your desired ePAR from the list.

4. You will be directed to the ePAR for a **READ-ONLY VIEW** (You will not be able to edit the ePAR)

5. Once you have viewed the information on the first page, click on **Next Page** button at the bottom of the page to view the second page.
6. On this second page, you can view the workflow status and processing history of the ePAR.

D. **Help and Troubleshooting**

If you require support or have any inquiries related to the ePAR, please email epar-support@sfu.ca

Please include details such as the eForm ID and employee ID on your email.
E. Appendix 1 – Workflow Status

As mentioned in Section B-2 and Section C-6, the View an ePAR link provides a read-only view of any ePAR regardless of its workflow status. The workflow status label tells the user where an ePAR currently stands in the system process. Below is a table of status labels and its meaning:

<table>
<thead>
<tr>
<th>Workflow Status Label</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>Initiator submitted the ePAR and is pending review.</td>
</tr>
<tr>
<td>Part Approved</td>
<td>ePAR was partly approved by some required roles and is currently pending approval from the remaining roles.</td>
</tr>
<tr>
<td>Denied</td>
<td>ePAR was denied and has permanently ended. It will not be processed.</td>
</tr>
<tr>
<td>On Hold</td>
<td>ePAR has been reviewed and was saved for later (placed on hold).</td>
</tr>
<tr>
<td>In Error</td>
<td>A system error occurred on the ePAR.</td>
</tr>
<tr>
<td>Executed</td>
<td>ePAR has been successfully executed in the system. The process has been completed.</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>Initiator cancelled and has permanently ended ePAR. It will not be processed.</td>
</tr>
</tbody>
</table>

There are two locations in which you can easily find the workflow status:

**Location 1: In your search results:**

1. Sign into myinfo.sfu.ca → GT ePAR → View an ePAR

   ![View an ePAR](image)

2. Enter the criteria in the search fields to limit your search results, or click on the Search button only to view ALL ePARs.
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Location 2: On second page of each ePAR:

1. Sign into myInfo.sfu.ca → GT ePAR → View an ePAR

2. Enter the criteria in the search fields to limit your search results, or click on the Search button only to view ALL ePARs.

3. Select the desired ePAR.

4. Click on Next button at the bottom of the page to view the second page.

5. On this second page, you will be able to view the workflow status of the ePAR under the Transaction/Signature Log section.