Electronic Personnel Action Forms - EPAF
Please note: Departments must go through EPAF training before permission to use EPAF’s can be granted.
EPAF Overview

The Electronic Personnel Action Form allows paperless processing of personnel actions for students and some temp hourly actions. This process enables MTSU to expedite personnel actions through an electronic approval process and provides an audit trail of approval/disapproval history for all processes applicable to student workers and terminating temporary hourly workers.
Electronic Personnel Action Form - EPAF

- The EPAF is originated in the department by the individual who is authorized to generate payroll transactions for the department. Once the EPAF is created, it is saved and submitted through an electronic approval routing queue. Each EPAF has mandatory approval levels developed by the Human Resource Services office.
Electronic Personnel Action Form EPAF

- EPAF Categories
  - HIRE
    - HIREST – Used to process individuals who have never worked in the position before.
    - HIRESW – Used ONLY by Financial Aid to process new work study positions.
    - GRHIST – Used to process individuals in grant positions who have never worked in that position before.
    - TAFHIR – Used to process individuals in TAF positions.
Electronic Personnel Action Form EPAF

- **EPAF Categories**
  - **Re-Hire**
    - **REHIST** – Used when a student has previously worked in a position.
    - **REHISW** – Used ONLY by Financial Aid to re-hire a work study student.
    - **GRRHST** – Used to re-hire a student into a grant position that they have previously worked in.
    - **TAFRAT** – Used to re-hire an individual into a TAF position
  - **Terminations**
    - **TERMST** – Used to end a position for a student worker.
    - **TERMTH** – Used to end a temporary hourly position.
    - **TERMSW** – Used ONLY by Financial Aid to end a work study position.
    - **GRTERM** – Used to end a grant funded student or temporary hourly position.
    - **TERMTH** – Used to terminate a TAF Position
Electronic Personnel Action Form
EPAF

- EPAF Categories
  - Pay Rate Change
    - RATEST – Used to change a pay rate on a student position.
    - RATESW – Used to change pay rate for work study position.
    - GRRATE – Used to change a pay rate on a student in a grant position.
    - TAFTOR – Used to change a pay rate on a TAF position.

- Timekeeping Org Change
  - TORGST – Used to change a T-Org on a position for a student worker.
  - TORGTH – Used to change T-org for temp hourly
  - TORGSW – Used ONLY by Financial Aid to change a T-Org on a work study position.
  - GRTORG – Used to change a T-Org on a grant funded student position.
  - TAFTOR – Used to change a T-Org on a TAF position.
Electronic Personnel Action Form (EPAF)

- Approval’s Required
  - **PI** – Principal Investigator – only for Grant Related EPAF’s.
  - **RS** – Research Services – only for Grant Related EPAF’s
  - **DEPTHD** – Department Head must approve all EPAF’s
  - **HRAPP** – Human Resource Services verifies and applies all EPAF’s

- Department Head’s may designate a Proxy Approver for EPAF’s.
Creating EPAF’s

Before you create an EPAF, you will need the individual’s Banner ID number, the position number, T-Org and date of action.

Log into your Pipeline Account, Click on RaiderNet and the Employee Tab.
Electronic Personnel Action Form
EPAF

Creating EPAF’s
- Click on the “Electronic Personnel Action Form” link
Electronic Personnel Action Form (EPAF)

Creating EPAF’s

- Click on the “New EPAF” link

- Enter the Banner ID (M number), hit tab and verify you have the correct name.
Creating EPAF’s

Query Date – this date should be the date of the event. It will default today’s date, but it’s best to change it to the event date. **YOU CANNOT USE AN EVENT DATE PRIOR TO THE DATE AUTHORIZED BY HR TO BEGIN WORK.** If someone started working prior to that date, contact HR.

Under “Approval Category” use the drop down and select your EPAF and click “Go”
Creating EPAF’s

- You will now see the job information for the individual. If you are using a HIRE EPAF, you will enter data in the “New Job” section.

You would enter the position number and suffix “00” for a new position and click “go”.

- There are no active jobs based on the Query Date.

- You can use the search to find specific positions.

- Click “All Jobs” to view all positions.

- Click “Go” to proceed with the search.
Creating EPAF’s

If you are using a Re-Hire EPAF, you would select the position you are re-hiring the individual into by clicking the radio button on the right:

You would then click “go”
Creating EPAF’s

- **The T-Org must be entered or you will not be able to submit.**
  PLEASE NOTE: **IF “T” IS NOT ENTERED A TIME SHEET WILL NOT BE GENERATED**

- **The search icon is not active for T-org’s**

- You can change the Job Effective Date and Pay Rate if you choose.

### Rehire Student into Same Position, 945860-00 College Work Study Program, Last Paid Date: May 15, 2014

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Status: (Not Enterable)</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Employee Class Code: (Not Enterable)</td>
<td>SW, College Work Study</td>
<td></td>
</tr>
<tr>
<td>19 Form Indicator: (Not Enterable)</td>
<td>Temporary</td>
<td></td>
</tr>
<tr>
<td>19 Expiration Date: MM/DD/YYYY (Not Enterable)</td>
<td>01/23/2017</td>
<td></td>
</tr>
<tr>
<td>Job Status: (Not Enterable)</td>
<td>Terminated</td>
<td>A</td>
</tr>
<tr>
<td>Step: (Not Enterable)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Jobs Effective Date: MM/DD/YYYY</td>
<td>05/14/2014</td>
<td>10/17/2014</td>
</tr>
<tr>
<td>Job Change Reason: (Not Enterable)</td>
<td>TERM</td>
<td>REHI</td>
</tr>
<tr>
<td>Time Entry Method: (Not Enterable)</td>
<td>Employee Time Entry via Web</td>
<td>W</td>
</tr>
<tr>
<td>Time Entry Type: (Not Enterable)</td>
<td>Pay Period Time Sheet</td>
<td>T</td>
</tr>
<tr>
<td>Time In/Out Ind: (Not Enterable)</td>
<td>Yes</td>
<td>Y</td>
</tr>
<tr>
<td>Regular Rate:</td>
<td>7.25</td>
<td>7.25</td>
</tr>
<tr>
<td>Timesheet Orgn: *</td>
<td>T16450</td>
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</table>
Routing Queue

The Routing Queue’s must be entered or you will not be able to submit your EPAF.

Use the search icon (magnifying glass) to find the correct user name for your approver.
Creating EPAF’s

Once you have entered your approvers, you will click on the “save” button at the bottom.

At the top of the page, you will see a green check if your EPAF was saved successfully. If so, then click “Submit” to submit the EPAF for approval.
Creating EPAF’s

- You will see at the top if your EPAF was successfully submitted.

![Electronic Personnel Action Form]

You will also see just below that, the “Errors and Warning Message” displays. Warning messages will not stop and EPAF from going through. Errors will stop the EPAF from going through.

- The warning message above will always be displayed. Disregard!

<table>
<thead>
<tr>
<th>Errors and Warning Messages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
</tr>
<tr>
<td>Rehire Student into Same Position</td>
</tr>
</tbody>
</table>

* - indicates a required field.
Electronic Personnel Action Form

EP AF

- Tracking EP AF’s
  - To review the status of an EP AF, the originator can log into Pipeline and under the “EP AF Originator Summary” link they can review EP AF actions:

- Under “Transaction Status” you can select for review:
Electronic Personnel Action Form (EPAF)

- Tracking EPAF’s
  - To review an EPAF, you select the individual and you will be able to review the entire EPAF.

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Transaction</th>
<th>Type of Change</th>
<th>Submitted Date</th>
<th>Effective Date</th>
<th>Transaction Status</th>
<th>Links</th>
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</thead>
<tbody>
<tr>
<td>Haynes, Alicia A.</td>
<td>M00021525</td>
<td>61739</td>
<td>Hire Student</td>
<td>Sep 18, 2014</td>
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<td>Waiting</td>
<td>Comments</td>
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<tr>
<td>Pub Safety Student Holiday Pay, 912880-00</td>
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<td>Jones, Andrew W.</td>
<td>M01103650</td>
<td>61738</td>
<td>Hire Student</td>
<td>Sep 17, 2014</td>
<td></td>
<td>Waiting</td>
<td>Comments</td>
</tr>
<tr>
<td>Student-Ind Cost Sponsor Prog, 224880-00</td>
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</tr>
<tr>
<td>Riehlke, Andrew E.</td>
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<td>61737</td>
<td>Rate Change Student</td>
<td>Sep 16, 2014</td>
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<td>Waiting</td>
<td>Comments</td>
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<tr>
<td>Student-Record Industry Mgmt, 145880-00</td>
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<tr>
<td>Stratton, Evan M.</td>
<td>M01220038</td>
<td>61759</td>
<td>Hire Student</td>
<td>Sep 12, 2014</td>
<td></td>
<td>Waiting</td>
<td>Comments Errors</td>
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<tr>
<td>Student Help-Recycling, 333880-00</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1 - 4 of 4
Electronic Personnel Action Form (EPAF)

- Deleting EPAF’s
  - If an EPAF was initiated, but not completed, the EPAF transaction will remain in the “waiting” status. Only “waiting” items can be deleted.
  - Go to EPAF Originator Summary and select the transaction you wish to delete and click the delete button.

- EPAF Approvers
  - The department head is generally the EPAF approver and will approve EPAF’s where before they were signing the PEF.
  - An approver can designate a “Proxy” approver. The Proxy can log in and approve EPAF’s.
Electronic Personnel Action Form

EPAF – What Else?

Troubleshooting:

- Have you done the Hiring Verification in Workflow? If not, you have to do so before attempting an EPAF to make sure whether or not the employee has to do employment paperwork. The EPAF system will not process if this paperwork has not been submitted.

- Is the type of EPAF you selected correct?

- EPAF’s contract type defaults to “secondary”, if this person does not have another job change to “primary”.

- Check for proper approval levels
EPAF Payroll Processing

Still having trouble processing your EPAF?

Our EPAF coordinator is Alicia Haynes @ x.2382. If no answer, Gwen Barrett @ x.2250 or Lisa Batey @ x.5712.
Questions?

Thank You For Attending!