Each time you want to hire or rehire a non-benefited employee (Student Worker, Temporary Hourly, Graduate Assistant and Adjunct Faculty), a hiring verification workflow must be processed **first, before** the EPAF.

The EPAF **cannot** be submitted until after you have received an email from HRS. The authorization card provided by HRS only acknowledges that the employee can start working, but you cannot initiate the EPAF until you get an e-mail from HR to proceed with the EPAF.

You **MUST** process a hiring verification workflow each time **BEFORE** you can process an EPAF. Temp Hourly and Graduate Assistant contracts are created with workflow information. If no workflow is processed, no contract can be created during the EPAF process.

Information needed to create an EPAF:
(Employee M#, Position #, Hire or End Date, Timekeeping Org & Pay rate)

- Position Number Questions? Contact – Susan England @5791, susan.england@mtsu.edu or Jennifer Coppinger@5377, jennifer.coppinger@mtsu.edu

Types of employees that you can do an EPAF for:

- **Student**: Someone taking classes at MTSU. You can check that status in Banner using form SFAREGQ. Position numbers usually end in 880,881,885. Student employees can work anytime (exceptions apply for international students). Students paid through Financial Aid are work-study students and their position numbers end in 860 and are only set up by the Financial Aid Office. Work Study students can only work when classes are in session and must have prior approval from Financial Aid to work at any other time in the work study position.

- **Temp Hourly**: Someone NOT taking classes. These position numbers usually end in 830 & 850. The Workflow/EPAF process will create an electronic contract that must be signed by the individual.
• **Graduate Assistant**: Graduate Student approved by the College of Graduate Studies. GA positions will end in 945 (Administrative), 940 (Research), 950 (Teaching), and 955 (Coaching-Athletics).

• The Workflow/EPAF process will create an electronic contract that must be signed by the individual.

• Please note, before you submit a GA EPAF, you must complete and submit a Graduate Assistant Summary Form to the Graduate Studies office. GA Summary Forms are located on the Graduate Studies web page. [Research/Teaching](#) or [Administrative](#).
EPAF Status

Status Types:
Approved – EPAF has been approved by approver and is waiting for HR to apply to job record (processed daily by HR)
Completed – EPAF has been finalized. Employee should have time sheet
Pending – EPAF waiting for Approver to approve.
Void – EPAF has been voided.
Waiting – EPAF has not been submitted or EPAF has errors.

(Check the EPAF Status)
1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form” section, click on “EPAF Originator Summary” link.
4. Once in this link, you should see the tab “current or history” – select History
5. The “Transaction Status” can be “All” or “Completed” – Select “All”
6. Find the Employee Name.
7. Look under transaction status (this will tell you the status of the EPAF).

EPAF Routing Queue

(Set Up Default Routing Queue)
1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form” section, click on the “EPAF Original Summary” link.
4. Click on the “Default Routing Queue” link.
5. Click on drop down arrow beside “Approval Category”
6. Select the EPAF.
7. Enter all approval levels:
   a. Click on “the drop down arrow” to select Approval Level.
   b. Click on “Q,” to select User Name.
   c. Required Action - select Approve (except for Approval Level 99 Required Action = Apply)
8. Click “Save and Add New Rows” button.

EPAF (Submit)

(EPAF Saved, but Not Submitted)
1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form” section, click on the “EPAF Original Summary” link.
4. Click on employee name.
5. Click “Update” button.
6. Click “Save” button at the top of page. Green check will appear.
7. Click “Submit” button. The transaction message “has been successfully submitted” will appear

EPAF (Delete or Void)

(EPAF Needs to Be Deleted or Voided)
1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form” section, click on the “EPAF Original Summary” link.
4. Click on employee name.
5. Click “delete” or “void” button. The transaction message “has been deleted or voided” will appear
Types of EPAF (Students & Work Study)

Hire-the individual HAS NOT worked in position number before:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HIREST</td>
<td>Process a NEW student worker hire</td>
</tr>
<tr>
<td>HIRESW</td>
<td>Process a NEW Federal Work Study position <em>(Financial Aid Office Only)</em></td>
</tr>
<tr>
<td>GRHIST</td>
<td>Process a NEW student hire into a grant position</td>
</tr>
<tr>
<td>TAFHIR</td>
<td>Process a NEW student hire into a TAF position</td>
</tr>
</tbody>
</table>

Re-hire-the individual HAS worked in position number before:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>REHIST</td>
<td>Process a REHIRE of a student worker position</td>
</tr>
<tr>
<td>REHISW</td>
<td>Process a REHIRE of Federal Work Study position <em>(Financial Aid Only)</em></td>
</tr>
<tr>
<td>GRRHST</td>
<td>Process a REHIRE of a student into a grant position</td>
</tr>
<tr>
<td>TAFRHR</td>
<td>Process a REHIRE of a student into a TAF position</td>
</tr>
</tbody>
</table>

Terminations

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TERMST</td>
<td>Process a termination of a student position or a grant student position</td>
</tr>
<tr>
<td>TERMSW</td>
<td>Terminate a Work Study position <em>(Financial Aid Office Only)</em></td>
</tr>
<tr>
<td>TERMTA</td>
<td>Process a termination of a student TAF position</td>
</tr>
</tbody>
</table>

Pay Rate Change

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RATEST</td>
<td>Process a Pay Rate Change for a student worker position</td>
</tr>
<tr>
<td>GRRATE</td>
<td>Process a Pay Rate Change for a student grant position</td>
</tr>
<tr>
<td>TAFRAT</td>
<td>Process a Pay Rate Change for a student TAF position</td>
</tr>
</tbody>
</table>

Timekeeping Org Change

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TORGST</td>
<td>Process a Timekeeping Location Change for a student position</td>
</tr>
<tr>
<td>TORGSW</td>
<td>Timekeeping location <em>(Financial Aid Office Only)</em></td>
</tr>
<tr>
<td>GRTORG</td>
<td>Process a Timekeeping Location Change for a student grant position</td>
</tr>
<tr>
<td>TAFTOR</td>
<td>Process a Timekeeping Location Change for a student TAF position</td>
</tr>
</tbody>
</table>
Creating an EPAF (Hire – Student Worker)
(Individual has never worked in this position number before)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
4. Enter the Banner ID number (M number) of the employee. The M must be capitalized, no spaces.
5. Hit tab or enter button on the keyboard. The employee name will appear.
6. Change query date to the effective date (today’s date will default). Employee hire date (00/00/0000 - two digit month & day and four digit year).
7. Click on drop down arrow beside “Approval Category” - Select the EPAF – HIREST
8. Click “Go” or “All Jobs” - Any positions this employee has had will appear with “All Jobs” selection. This information is needed for Step #12. Make a note!
   a. If a list of the employee job assignments appear and the status is active, the contract type for the new EPAF will be Secondary.
   b. If a list of the employee job assignments appear & the status is terminated or no active job assignments appear, the contract type for the new EPAF will be Primary.
   c. If the position number you plan to use is listed STOP! You must use a rehire EPAF, not a hire EPAF.
9. Enter position number. Basic information should default in once entered; ie, job title, time sheet org, etc.
10. Enter suffix number 00.

11. Click on New job.
12. Verify assignments (see number 9 above).
13. Verify the pay rate. Minimum wage will default. If other than minimum wage, enter rate.
14. Enter the timesheet-orgn. The “T” must be in front of the number (no spaces) for the employee to get a timesheet.
15. Enter approval level 10. Click on ☒ to select Department head – Required Action = Approve.
16. Enter approval level 99. Click on ☒ to select HR Appliers – Required Action = Apply.
17. Click “Save” button at the top of page. Green check will appear.
18. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!

Errors and Warning Messages: The “Encumbrance Warning” will always display. Disregard.

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<tr>
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<tbody>
<tr>
<td>Student Hire</td>
<td>WARNING</td>
<td><em>WARNING</em> Encumbrance has been set to 0, because method is Value Input.</td>
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</tbody>
</table>

A. If “Error Warnings” appear, the EPAF has not been submitted.
   i. Correct Errors
   ii. Click “Save” button at the top of page. Green check will appear.
   iii. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!

B. If the “Error Warnings” below appear, click delete button. You need to verify that:
   i. You created a hiring verification workflow and;
   ii. You received the e-mail from HR that you could proceed with the EPAF.

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<td>ERROR</td>
<td><em>ERROR</em> Unable to complete initial edit execution (Oracle Error -1001).</td>
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<tr>
<td>Student Hire</td>
<td>ERROR</td>
<td><em>ERROR</em> Invalid Employee Class Code.</td>
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</table>
EPAF (Grant Hire – Student Worker)

(Individual has never worked in this position number before)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
4. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
5. Hit tab or enter button on the keyboard. **The employee name will appear.**
6. Change query date to the effective date (today’s date will default). **Employee hire date. (00/00/0000 - two digit month & day and four digit year).**
7. Click on drop down arrow beside “Approval Category” and select the EPAF - **GRHIST**
8. Click “Go” or “All Jobs” – All jobs will display any active or terminated positions.
   Any positions this employee has had will appear with “All Jobs” selection. This information is needed for Step #12. Make a note!
   a. If a list of the employee job assignments appear and the status is active, the contract type will be Secondary.
   b. If a list of the employee job assignments appear & the status is terminated or no active job assignments appear, the contract type will be Primary.
   c. **If the position number you plan to use is listed STOP!** You must use a rehire EPAF, not a hire EPAF.
9. Enter position number. **Basic information should default in once entered; ie, job title, time sheet org, etc.**
10. Enter suffix number. **00.**
11. Click “Go” button which will take you to the body of the EPAF. Verify your job begin date is correct. You can change it.
12. Verify Contract Type, which will default to “Secondary.” **Only Change to Primary if the employee has no active job assignments (see number 8 above).**
13. Verify the pay rate. **Minimum wage will default.** If other than minimum wage, enter rate.
14. Enter the timesheet-orgn. **The “T” must be in front of the number (no spaces) for the employee to get a timesheet.**
15. Enter approval level 5. **Click on “🔍🔍” to select PI – Principal Investigator – Required Action = Approve.**
16. Enter approval level 20. **Click on “🔍🔍” to select RS – Research Services – Required Action = Approve.**
17. Enter approval level 99. **Click on “🔍🔍” to select HRAPP - HR Appliers – Required Action = Apply.**
18. Click “Save” button at the top of page. **Green check will appear.**
19. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

**Errors and Warning Messages:** The “Encumbrance Warning” will always display. **Disregard.**

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A. If “Error Warnings” appear, the EPAF has not been submitted.
   i. Correct Errors
   ii. Click “Save” button at the top of page. **Green check will appear.**
   iii. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

B. If the “Errors Warnings” below appear, **click delete button.** You need to verify that:
   i. You created a hiring verification workflow and;
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1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
4. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
5. Hit tab or enter button on the keyboard. **The employee name will appear.**
6. Change query date to the effective date (today’s date will default). **Employee hire date. (00/00/0000 - two digit month & day and four digit year).**
7. Click on drop down arrow beside “Approval Category” and select the EPAF - **TAFHIR**
8. Click “Go” or “All Jobs” – All jobs will display any active or terminated positions.
   Any positions this employee has had will appear with “All Jobs” selection. This information is needed for Step #12. Make a note!
   a. If a list of the employee job assignments appear and the status is active, the contract type will be Secondary.
   b. If a list of the employee job assignments appear & the status is not active or no active job assignments appear, the contract type will be Primary.
   c. **If the position number you plan to use is listed STOP! You must use a rehire EPAF, not a hire EPAF.**
9. Enter position number. **Basic information should default in once entered; ie, job title, time sheet org, etc**
10. Enter suffix number. **00.**

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   iii. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

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   i. You created a hiring verification workflow and;
   ii. You received the e-mail from HR that you could proceed with the EPAF.
EPAF (ReHire – Student Worker)
(Individual HAS worked in this position number before)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form”
4. Click on the “New EPAF” link.
5. Enter the Banner ID number (M number) of the employee. The M must be capitalized, no spaces.
6. Hit tab or enter button on the keyboard. The employee name will appear.
7. Change query date. Employee hire date (00/00/0000 - two digit month & day and four digit year)
8. Click on drop down arrow beside “Approval Category” and select the EPAF- REHIST
9. Click “All Jobs” button. All active and terminated positions will be displayed!
10. Click the “Radio Button” on the right hand side on the position to rehire (should be in terminated status).

11. Click “Save” button at the top of page. Green check will appear.
12. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!

Errors and Warning Messages: The “Encumbrance Warning” will always display. Disregard.

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<td><em>ERROR</em> Invalid Employee Class Code.</td>
<td></td>
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EPAF (Grant ReHire – Student Worker)
(Individual HAS worked in this position before)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form”
4. Click on the “New EPAF” link.
5. Enter the Banner ID number (M number) of the employee. The M must be capitalized, no spaces.
6. Hit tab or enter button on the keyboard. The employee name will appear.
7. Change query date. Employee hire date (00/00/0000 - two digit month & day and four digit year)
8. Click on drop down arrow beside “Approval Category” and select the EPAF- GRRHST
9. Click “All Jobs” button. All active and terminated positions will be displayed!
10. Click the “Radio Button” on the right hand side on the position to rehire (should be in terminated status).

11. Click “Go” button.
12. Verify the pay rate. Minimum wage will default. You can change it.
13. Enter the timesheet-orgn. The “T” must be in front of the number (no spaces) for the employee to get a timesheet.
14. Enter approval level 5. Click on “🔍🔍” to select PI – Principal Investigator – Required Action = Approve.
15. Enter approval level 20. Click on “🔍🔍” to select RS – Research Services – Required Action = Approve.
16. Enter approval level 99. Click on “🔍🔍” to select HRAPP - HR Appliers – Required Action = Apply.
17. Click “Save” button at the top of page. Green check will appear.
18. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!

Errors and Warning Messages: The “Encumbrance Warning” will always display. Disregard.

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<td>Student Hire</td>
<td>ERROR</td>
<td><em>ERROR</em> Invalid Employee Class Code.</td>
</tr>
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EPAF (TAF ReHire – Student Worker)
(Individual HAS worked in this position before)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form”
4. Click on the “New EPAF” link.
5. Enter the Banner ID number (M number) of the employee. The M must be capitalized, no spaces.
6. Hit tab or enter button on the keyboard. The employee name will appear.
7. Change query date. Employee hire date (00/00/0000 - two digit month & day and four digit year)
8. Click on drop down arrow beside “Approval Category” and select the EPAF- Select - TAFRHR
9. Click “All Jobs” button. All active and terminated positions will be displayed!
10. Click “Radio Button” on the right hand side on the position to rehire (should be in terminated status).

13. Enter the timesheet-orgn. The “T” must be in front of the number (no spaces) for the employee to get a timesheet.
14. Enter approval level 10. Click on “🔍🔍” to select Department head – Required Action = Approve
15. Enter approval level 30. Click on “🔍🔍” to select Dean or Vice President – Required Action = Approve.
16. Enter approval level 35. Click on “🔍🔍” to select TAFINI - TAF Initial Review – Required Action = Approve.
17. Enter approval level 40. Click on “🔍🔍” to select TAFAPP - TAF Approval – Required Action = Approve.
18. Enter approval level 99. Click on “🔍🔍” to select HRAPP - HR Appliers – Required Action = Approve.
19. Click “Save” button at the top of page. Green check will appear.
20. Click “Submit” button.
21. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!

Errors and Warning Messages: The “Encumbrance Warning” will always display. Disregard

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   i. You created a hiring verification workflow and;
   ii. You received the e-mail from HR that you could proceed with the EPAF.
1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form”
4. Click on the “New EPAF” link.
5. Enter the Banner ID number (M number) of the employee. The M must be capitalized, no spaces.
6. Hit tab or enter button on the keyboard. The employee name will appear.
7. Change query date to the termination date. HR recommends that you use last day in pay period to avoid issues with the time sheet if the termination date is in the current pay period. Otherwise, use the actual last day worked.
8. Click on drop down arrow beside “Approval Category”. Select the EPA - TERMST
9. Click “Go” button.
10. Click “Radio Button” on the right hand side under “select” for the position you are ending.
11. Click “Go” button.
12. Enter approval level 10. **Click on “☐” to select Department head – Required Action = Approve.**
13. Enter approval level 99. **Click on “☐” to select HR Appliers – Required Action = Apply.**
14. Click “Save” button at the top of page. Green check will appear.
15. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You're Done!**

**Errors and Warning Messages:** The “Encumbrance Warning” will always display. **Disregard**

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---

EPAF (Terminate – TAF Student Worker)

(End position)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form”
4. Click on the “New EPAF” link.
5. Enter the Banner ID number (M number) of the employee. The M must be capitalized, no spaces.
6. Hit tab or enter button on the keyboard. The employee name will appear.
7. Change query date to the termination date. HR recommends that you use the last day in pay period to avoid issues with the time sheet if the termination date is in the current pay period. Otherwise, use the actual last day worked.
8. Click on drop down arrow beside “Approval Category” and select the EPAF- TERMTA
9. Click “Go” button.
10. Click “Radio Button” on the right hand side under “select” for the position you are ending.
11. Click “Go” button.
12. Enter approval level 10. **Click on “☐” to select Department head – Required Action = Approve.**
13. Enter approval level 30. **Click on “☐” to select Dean or Vice President – Required Action = Approve.**
14. Enter approval level 35. **Click on “☐” to select TAFINI - TAF Initial Review – Required Action = Approve.**
15. Enter approval level 40. **Click on “☐” to select TAFAPP - TAF Approval – Required Action = Approve.**
16. Enter approval level 99. **Click on “☐” to select HRAPP - HR Appliers – Required Action = Approve.**
17. Click “Save” button at the top of page. Green check will appear.
18. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

**Errors and Warning Messages:** The “Encumbrance Warning” will always display. **Disregard**

<table>
<thead>
<tr>
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</tr>
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EPAF (Rate Change – Student Worker & Work Study)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form”
4. Click on the “New EPAF” link.
5. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
6. Hit tab or enter button on the keyboard. **The employee name will appear.**
7. Change query date. **The date the new rate starts.**
8. Click on drop down arrow beside “Approval Category” - select the EPAF- **RATEST**
9. Click “Go” button.
10. Click “Radio Button” on the right hand side of the position under “select” for the pay rate change.
11. Click “Go” button.
12. Enter the “new” pay rate in the “regular rate” field.
13. Enter the timesheet-orgn. **The “T” must be in front of the number (no spaces) for the employee to get a timesheet.**
14. Enter approval level 10. **Click on “🔍🔍” to select Department head – Required Action = Approve.**
15. Enter approval level 99. **Click on “🔍🔍” to select HR Appliers – Required Action = Apply.**
16. Enter approval level 10. **Click on “🔍🔍” to select Department head – Required Action = Approve.**
17. Click “Save” button at the top of page. **Green check will appear.**
18. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

**Errors and Warning Messages:** The “Encumbrance Warning” will always display. **Disregard**

---

EPAF (Grant Rate Change – Student Worker)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form”
4. Click on the “New EPAF” link.
5. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
6. Hit tab or enter button on the keyboard. **The employee name will appear.**
7. Change query date. **The date the new rate starts.**
8. Click on drop down arrow beside “Approval Category” - select the EPAF- **GRRATE**
9. Click “Go” button.
10. Click “Radio Button” on the right hand side of the position under “select” for the pay rate change.
11. Click “Go” button.
12. Enter the “new” pay rate in the “regular rate” field.
13. Enter approval level 5. **Click on “🔍🔍” to select PI – Principal Investigator – Required Action = Approve.**
14. Enter approval level 20. **Click on “🔍🔍” to select RS – Research Services – Required Action = Approve.**
15. Enter approval level 99. **Click on “🔍🔍” to select HR Appliers – Required Action = Apply.**
16. Enter approval level 99. **Click on “🔍🔍” to select HR Appliers – Required Action = Apply.**
17. Click “Save” button at the top of page. **Green check will appear.**
18. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

**Errors and Warning Messages:** The “Encumbrance Warning” will always display. **Disregard**
1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form”
4. Click on the “New EPAF” link.
5. Enter the Banner ID number (M number) of the employee. The M must be capitalized, no spaces.
6. Hit tab or enter button on the keyboard. The employee name will appear.
7. Change query date. The date the new rate starts.
8. Click on drop down arrow beside “Approval Category” - Select the EPAF- TAFRAT
9. Click “Go” button.
10. Click “Radio Button” on the right hand side of the position under “select” for the pay rate change.
11. Click “Go” button.
12. Enter the “new” pay rate in the “regular rate” field.
13. Enter the timesheet-orgn. The “T" must be in front of the number (no spaces) for the employee to get a timesheet.
14. Enter approval level 10. Click on “🔍🔍” to select Department head – Required Action = Approve.
15. Enter approval level 30. Click on “🔍🔍” to select Dean or Vice President – Required Action = Approve.
16. Enter approval level 35. Click on “🔍🔍” to select TAFINI - TAF Initial Review – Required Action = Approve.
17. Enter approval level 40. Click on “🔍🔍” to select TAFAPP - TAF Approval – Required Action = Approve.
18. Enter approval level 99. Click on “🔍🔍” to select HRAPP - HR Appliers – Required Action = Apply.
19. Click “Save” button at the top of page. Green check will appear.
20. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!

Errors and Warning Messages: The “Encumbrance Warning” will always display. Disregard

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---

EPAF (T-Org Change – Student Worker & Work Study)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form”
4. Click on the “New EPAF” link.
5. Enter the Banner ID number (M number) of the employee. The M must be capitalized, no spaces.
6. Hit tab or enter button on the keyboard. The employee name will appear.
7. Change query date. The date must be the 16th – the first day of the next pay period to avoid issues with the time sheet.
8. Click on drop down arrow beside “Approval Category” - Select the EPAF- TORGST
9. Click “Go” button.
10. Click “Radio Button” on the right hand side of the position under “select”
11. Enter the t-org. The “T” must be in front of the t-org for the employee to get a timesheet.
12. Enter approval level 10. Click on “🔍🔍” to select Department head – Required Action = Approve.
13. Enter approval level 99. Click on “🔍🔍” to select HR Appliers – Required Action = Apply.
14. Click “Save” button at the top of page. Green check will appear.
15. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!

Errors and Warning Messages: The “Encumbrance Warning” will always display. Disregard

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<td>&quot;WARNING&quot; Encumbrance has been set to 0, because method is Value Input.</td>
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</tbody>
</table>
EPAF (Grant T-Org Change – Student Worker)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form”
4. Click on the “New EPAF” link.
5. Enter the Banner ID number (M number) of the employee. The M must be capitalized, no spaces.
6. Hit tab or enter button on the keyboard. The employee name will appear.
7. Change query date. The date must be the 16th – the first day of the next pay period to avoid issues with the time sheet.
8. Click on drop down arrow beside “Approval Category” - Select the EPAF- GRTORG
9. Click “Go” button.
10. Click “Radio Button” on the right hand side of the position under “select”
11. Click “Go” button.
12. Enter the t-org. The “T” must be in front of the t-org for the employee to get a timesheet.
13. Enter approval level 5. Click on “” to select PI – Principal Investigator – Required Action = Approve.
15. Enter approval level 99. Click on “” to select HR Applicrs – Required Action = Apply.
16. Click “Save” button at the top of page. Green check will appear.
17. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!

Errors and Warning Messages: The “Encumbrance Warning” will always display. Disregard

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</table>

---

EPAF (TAF T-Org Change – Student Worker)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form”
4. Click on the “New EPAF” link.
5. Enter the Banner ID number (M number) of the employee. The M must be capitalized, no spaces.
6. Hit tab or enter button on the keyboard. The employee name will appear.
7. Change query date. The date must be the 16th – the first day of the next pay period to avoid issues with the time sheet.
8. Click on drop down arrow beside “Approval Category” - Select the EPAF- TAFTORG
9. Click “Go” button.
10. Click “Radio Button” on the right hand side of the position under “select”
11. Click “Go” button.
12. Enter the t-org. The “T” must be in front of the t-org for the employee to get a timesheet.
13. Enter approval level 10. Click on “” to select Department head – Required Action = Approve
14. Enter approval level 30. Click on “” to select Dean or Vice President – Required Action = Approve.
15. Enter approval level 35. Click on “” to select TAFINI - TAF Initial Review – Required Action = Approve.
16. Enter approval level 40. Click on “” to select TAFAPP - TAF Approval – Required Action = Approve.
17. Enter approval level 99. Click on “” to select HR Applicrs – Required Action = Apply.
18. Click “Save” button at the top of page. Green check will appear.
19. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!

Errors and Warning Messages: The “Encumbrance Warning” will always display. Disregard

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Types of EPAF (Temporary Hourly)

Please note: You must process a hiring verification workflow before you process the temp hourly EPAF. The workflow is used to create the contract that is sent electronically to the individual!

<table>
<thead>
<tr>
<th>Code</th>
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<tbody>
<tr>
<td>HIRETH</td>
<td>Process a NEW temporary hourly hire</td>
</tr>
<tr>
<td>REHITH</td>
<td>Process a REHIRE of a temporary hourly position</td>
</tr>
<tr>
<td>TERMTH</td>
<td>Process a termination of a temporary hourly position</td>
</tr>
<tr>
<td>RATETH</td>
<td>Process a Pay Rate Change for a temporary hourly position</td>
</tr>
<tr>
<td>TORGTH</td>
<td>Process a Timekeeping Location Change for a temp hourly position</td>
</tr>
<tr>
<td>GRHITH</td>
<td>Process a NEW temporary hourly hire into a grant position</td>
</tr>
<tr>
<td>GRRHTH</td>
<td>Process a REHIRE of a temporary hourly into a grant position</td>
</tr>
<tr>
<td>GRRTHH</td>
<td>Process a Pay Rate Change for a temporary hourly grant position</td>
</tr>
</tbody>
</table>
EPAF (Hire – Temporary Hourly)
(Individual has never worked in this position before)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
4. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
5. Hit tab or enter button on the keyboard. **The employee name will appear.**
6. Change query date to the effective date (today’s date will default). **Employee hire date** (00/00/0000 - two digit month & day and four digit year).
7. Click on drop down arrow beside “Approval Category” - Select the EPAF- **HIRETH**
8. Click “Go” or “All Jobs” – All jobs will display any active or terminated positions.
Any positions this employee has had will appear with “All Jobs” selection. This information is needed for Step #12. Make a note!
   a. If a list of the employee job assignments appear and the status is active, the contract type will be Secondary.
   b. If a list of the employee job assignments appear & the status is not active or no active job assignments appear, the contract type will be Primary.
   c. **If the position number you plan to use is listed STOP! You must use a rehire EPAF, not a hire EPAF.**
9. Enter position number. **Basic information should default in once entered; ie, job title, time sheet org, etc.**
10. Enter suffix number **00**
11. Enter the pay rate.
12. Enter the t-org. **The “T” must be in front of the number (no spaces) for the employee to get a timesheet.**
13. Enter approval level 2. **Click on “🔍🔍” to select Approver, NextGen – Required Action = Approve.**
14. Enter approval level 10. **Click on “🔍🔍” to select Department head – Required Action = Approve.**
15. Enter approval level 50. **Click on “🔍🔍” to select Vice Presidents – Required Action = Approve.**
16. Enter approval level 99. **Click on “🔍🔍” to select Applier, HR – Required Action = Apply.**
17. Click “Save” button at the top of page. Green check will appear.
18. Click “Submit” button. **The transaction message “has been successfully submitted” will appear. You’re Done!**

**Errors and Warning Messages:** The “Encumbrance Warning” will always display. **Disregard**

| Hire Temporary Hourly | WARNING | *WARNING* Encumbrance has been set to 0, because method is Value Input. |

- * - indicates a required field.

A. If “ErrorWarnings” appear, the EPAF has not been submitted.
   i. Correct Errors
   ii. Click “Save” button at the top of page. Green check will appear.
   iii. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

B. If the “Errors Warnings” below appear, **click delete button**. You need to verify that:
   i. You created a hiring verification workflow and;
   ii. You received the e-mail from HR that you could proceed with the EPAF.
EPAF (ReHire – Temporary Hourly)

(Individual HAS worked in this position before)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form” – Click on the “New EPAF” link.
4. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
5. Hit tab or enter button on the keyboard. **The employee name will appear.**
6. Change query date to the effective date (today’s date will default). **Employee hire date (00/00/0000 - two digit month & day and four digit year).**
7. Click on drop down arrow beside “Approval Category” - Select the EPAF- REHITH
8. Click “All Jobs” button. All active and terminated positions will be displayed!
9. Click the “Radio Button” on the right hand side on the position to rehire (should be in terminated status).

10. Click “Go” button.
11. Enter the pay rate.
12. Enter the timesheet-orgn. **The “T” must be in front of the number (no spaces) for the employee to get a timesheet.**
13. Enter approval level 2. **Click on “🔍🔍” to select Approver, NextGen – Required Action = Approve.**
14. Enter approval level 10. **Click on “🔍🔍” to select Department head – Required Action = Approve.**
15. Enter approval level 50. **Click on “🔍🔍” to select Vice Presidents – Required Action = Approve.**
16. Enter approval level 99. **Click on “🔍🔍” to select HR Applicants – Required Action = Apply.**
17. Click “Save” button at the top of page. **Green check will appear.**
18. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

**Errors and Warning Messages:** The “Encumbrance Warning” will always display. **Disregard**

| Hire Temporary Hourly | WARNING | *WARNING* Encumbrance has been set to 0, because method is value input. |

- *indicates a required field.

A. If “Error Warnings” appear, the EPAF has not been submitted.
   i. Correct Errors
   ii. Click “Save” button at the top of page. Green check will appear.
   iii. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

B. If the “Errors Warnings” below appear, **click delete button.** You need to verify that:
   i. You created a hiring verification workflow and;
   ii. You received the e-mail from HR that you could proceed with the EPAF.
EPAF (Terminate – Temporary Hourly)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
4. Hit tab or enter button on the keyboard. **The employee name will appear.**
5. Change query date to the termination date. HR recommends that you use last day in pay period to avoid issues with the timesheet if the termination date is in the current pay period. Otherwise, use the actual last day worked.
6. Click on drop down arrow beside “Approval Category” - Select the EPAF- **TERMTH**
7. Click “Go” button.
8. Click “Radio Button” on the right hand side the position to terminate.

9.

| Secondary | 404830 | 60 | Temp-Inform Tech Admin | T4010E, ITD-CS and IT Business Operations | Jul 02, 2018 | Active | ✅ |

10. Enter approval level 10. **Click on “🔍🔍” to select Department head – Required Action = Approve.**
11. Enter approval level 99. **Click on “🔍🔍” to select HR Appliers – Required Action = Apply.**
12. Click “Save” button at the top of page. **Green check will appear.**
13. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

**Errors and Warning Messages:** The “Encumbrance Warning” will always display. **Disregard**

EPAF (Rate Change – Temporary Hourly)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form” - Click on the “New EPAF” link.
4. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
5. Hit tab or enter button on the keyboard. **The employee name will appear.**
6. Change query date. **The date the new rate starts.**
7. Click on drop down arrow beside “Approval Category” - Select the EPAF- **RATETH**
8. Click the “Radio Button” on the right hand side of the position under “select” for the pay rate change.
9. Click “Go” button.
10. Enter the “new” pay rate in the “regular rate” field.
11. Enter the timesheet-orgn. **The “T” must be in front of the number (no spaces) for the employee to get a timesheet.**
12. Enter approval level 2. **Click on “🔍🔍” to select Approver, NextGen – Required Action = Approve.**
13. Enter approval level 10. **Click on “🔍🔍” to select Department head – Required Action = Approve.**
14. Enter approval level 50. **Click on “🔍🔍” to select Vice Presidents – Required Action = Approve.**
15. Enter approval level 99. **Click on “🔍🔍” to select Applier, HR – Required Action = Apply.**
16. Click “Save” button at the top of page. **Green check will appear.**
17. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

**Errors and Warning Messages:** The “Encumbrance Warning” will always display
1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form” - Click on the “New EPAF” link.
4. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
5. Hit tab or enter button on the keyboard. **The employee name will appear.**
6. Change query date. **The date must be the 16th – the first day of the next pay period** to avoid issues with the timesheet.
7. Click on drop down arrow beside “Approval Category” - Select the EPAF- **TORGTH**
8. Click “Go” button.
9. Click “Radio Button” on the right hand side of the position under “select”
10. Click “Go” button.
11. Enter the t-org. **The “T” must be in front of the t-org for the employee to get a timesheet.**
12. Enter approval level 10. **Click on “🔍🔍” to select Department head – Required Action = Approve.**
13. Enter approval level 99. **Click on “🔍🔍” to select HR Appliers – Required Action = Apply.**
14. Click “Save” button at the top of page. **Green check will appear.**
15. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

**Errors and Warning Messages:** The “Encumbrance Warning” will always display. **Disregard**

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* - indicates a required field.
EPAF (Grant Hire – Temporary Hourly)
(Individual has never worked in this position before)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form” - Click on the “New EPAF” link.
4. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
5. Hit tab or enter button on the keyboard. **The employee name will appear.**
6. Change query date to the effective date (today’s date will default). **Employee hire date. (00/00/0000 - two digit month & day and four digit year).**
7. Click on drop down arrow beside “Approval Category” - Select the EPAF- **GRHITH**
8. Click “Go” or “All Jobs” – All jobs will display any active or terminated positions.
   Any positions this employee has had will appear with “All Jobs” selection. This information is needed for Step #12. Make a note!
   a. If a list of the employee job assignments appear and the status is active, the contract type will be Secondary.
   b. If a list of the employee job assignments appear & the status is not active or no active job assignments appear, the contract type will be Primary.
   c. **If the position number you plan to use is listed STOP! You must use a rehire EPAF, not a hire EPAF.**
9. Enter position number. **Basic information should default in once entered; ie, job title, time sheet org, etc.**
10. Enter suffix number **00**
11. Click “Go” button which will take you to the body of the EPAF. Verify your job begin date is correct. You can change it.
12. Verify “Contract Type” which will default to “Secondary.” Only change to primary if the employee has no other active assignment (see number 8 above).
13. Enter the pay rate.
14. Enter the t-org. **The “T” must be in front of the number (no spaces) for the employee to get a timesheet.**
15. Enter approval level 2. **Click on “🔍🔍” to select Approver, NextGen – Required Action = Approve.**
16. Enter approval level 5. **Click on “🔍🔍” to select PI – Principal Investigator – Required Action = Approve.**
17. Enter approval level 20. **Click on “🔍🔍” to select RS – Research Services – Required Action = Approve.**
18. Enter approval level 50. **Click on “🔍🔍” to select Vice Presidents – Required Action = Approve.**
19. Enter approval level 99. **Click on “🔍🔍” to select Applier, HR – Required Action = Apply**
20. Click “Save” button at the top of page. **Green check will appear.**
21. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

**Errors and Warning Messages:** The “Encumbrance Warning” will always display. **Disregard**

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<td>ERROR</td>
</tr>
<tr>
<td>Hire Temporary Hourly</td>
<td>ERROR* Unable to complete initial edit execution (Oracle Error -1001).</td>
</tr>
<tr>
<td>Hire Temporary Hourly</td>
<td>ERROR* invalid Employee Class Code.</td>
</tr>
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</table>

B. If the “Errors Warnings” below appear, **click delete button.** You need to verify that:
   i. You created a hiring verification workflow and;
   ii. You received the e-mail from HR that you could proceed with the EPAF.
EPAF (Grant ReHire – Temporary Hourly)

(Individual HAS worked in this position before)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
4. Hit tab or enter button on the keyboard. **The employee name will appear.**
5. Change query date to the effective date (today's date will default). **Employee hire date (00/00/0000 - two digit month & day and four digit year).**
6. Click on drop down arrow beside “Approval Category” - Select the EPAF- **GRRHTH**
7. Click “All Jobs” button. All active and terminated positions will be displayed!
8. Click “Radio Button” on the right hand side on the position to rehire (should be in terminated status).

9. Enter approval level 20. **Click on 🔍🔍 to select RS – Research Services – Required Action = Approve.**
10. Enter approval level 50. **Click on “Q” to select Vice Presidents – Required Action = Approve.**
11. Enter approval level 99. **Click on “🔍” to select HRAPP - HR Appliers – Required Action = Apply.**
12. Click “Save” button at the top of page. **Green check will appear.**
13. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

**Errors and Warning Messages:** The “Encumbrance Warning” will always display. **Disregard**

- indicates a required field.

A. If “Error Warnings” appear, the EPAF has not been submitted.
   i. Correct Errors
   ii. Click “Save” button at the top of page. Green check will appear.
   iii. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

B. If the “Errors Warnings” below appear, **click delete button.** You need to verify that:
   i. You created a hiring verification workflow and;
   ii. You received the e-mail from HR that you could proceed with the EPAF
EPAF (Grant Rate Change – Temporary Hourly)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Under the “Electronic Personnel Action Form” - Click on the “New EPAF” link.
4. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
5. Hit tab or enter button on the keyboard. **The employee name will appear.**
6. Change query date. **The date the new rate starts.**
7. Click on drop down arrow beside “Approval Category” - Select the EPAF- **GRRTH**
8. Click “Radio Button” on the right hand side of the position under “select” for the pay rate change.
9. Click “Go” button.
10. Enter the “new” pay rate in the “regular rate” field.
11. Enter the timesheet-orgn. **The “T” must be in front of the number (no spaces) for the employee to get a timesheet.**
12. Enter approval level 2. **Click on “🔍🔍” to select Approver, NextGen – Required Action = Approve.**
13. Enter approval level 5. **Click on “🔍🔍” to select PI – Principal Investigator – Required Action = Approve.**
14. Enter approval level 20. **Click on “🔍🔍” to select RS – Research Services – Required Action = Approve.**
15. Enter approval level 50. **Click on “🔍🔍” to select Vice Presidents – Required Action = Approve.**
16. Enter approval level 99. **Click on “🔍🔍” to select Applier, HR – Required Action = Apply.**
17. Click “Save” button at the top of page. **Green check will appear.**
18. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

**Errors and Warning Messages:** The “Encumbrance Warning” will always display. **Disregard**
Types of EPAF (Graduate Assistant)

Before you submit a Graduate Assistant EPAF, you must first submit a hiring verification workflow and then you must complete and submit a Graduate Assistant Summary Form to the Graduate Studies office. GA Summary Forms are located on the Graduate Studies web page. Research/Teaching or Administrative.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GAAS09</td>
<td>Process a NEW Graduate Assistant position – 9 month</td>
</tr>
<tr>
<td>GAAS12</td>
<td>Process a NEW Graduate Assistant position – 12 month</td>
</tr>
<tr>
<td>GAAHDR</td>
<td>Process a NEW Graduate Assistant position – Doctoral</td>
</tr>
<tr>
<td>GGAH09</td>
<td>Process a NEW Graduate Assistant Grant position – 9 month</td>
</tr>
<tr>
<td>GGAS12</td>
<td>Process a NEW Graduate Assistant Grant position – 12 month</td>
</tr>
<tr>
<td>GGAHDR</td>
<td>Process a NEW Graduate Assistant Grant position – Doctoral</td>
</tr>
<tr>
<td>RHGA09</td>
<td>Process a Rehire of a Graduate Assistant position – 9 month</td>
</tr>
<tr>
<td>RHGA12</td>
<td>Process a Rehire of a Graduate Assistant position – 12 month</td>
</tr>
<tr>
<td>RHGADR</td>
<td>Process a Rehire of a Graduate Assistant position – Doctoral</td>
</tr>
<tr>
<td>GGRH09</td>
<td>Process a Rehire of a Graduate Assistant Grant position – 9 month</td>
</tr>
<tr>
<td>GGRH12</td>
<td>Process a Rehire of a Graduate Assistant Grant position – 12 month</td>
</tr>
<tr>
<td>GGRHDR</td>
<td>Process a Rehire of a Graduate Assistant Grant position – Doctoral</td>
</tr>
<tr>
<td>TERMGA</td>
<td>Process a termination of a Graduate Assistant position</td>
</tr>
<tr>
<td>HGAT09</td>
<td>Hire TAF GA position – 9 month</td>
</tr>
<tr>
<td>HGAT12</td>
<td>Hire TAF GA position – 12 month</td>
</tr>
<tr>
<td>HGATDR</td>
<td>Hire TAF GA position – Doctoral</td>
</tr>
<tr>
<td>RGAT09</td>
<td>TAF Rehire GA position – 9 month</td>
</tr>
<tr>
<td>RGAT12</td>
<td>TAF Rehire GA position – 12 month</td>
</tr>
<tr>
<td>RGATDR</td>
<td>TAF Rehire GA Position – Doctoral</td>
</tr>
<tr>
<td>TGATAF</td>
<td>Terminate TAF GA Position</td>
</tr>
</tbody>
</table>
EPAF (Hire – Graduate Assistant)  
**Full-time Assistantship**  
(Individual has never worked in this position before)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
4. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
5. Hit tab or enter button on the keyboard. **The employee name will appear.**
6. Click on drop down arrow beside “Approval Category” - Select the EPAF - GAAXXX (see chart above)
7. Click “Go” or “All Jobs” – All jobs will display any active or terminated positions.
8. Any positions this employee has had will appear with “All Jobs” selection. This information is needed for Step #12. Make a note!
   a. If a list of the employee job assignments appear and the status is active, the contract type will be Secondary.
   b. If a list of the employee job assignments appear & the status is not active or no active job assignments appear, the contract type will be Primary.
   c. If the position number you plan to use is listed STOP! You must use a rehire EPAF, not a hire EPAF.
9. Enter position number. **Basic information should default in once entered; ie, job title, time sheet org, etc.**
10. Enter suffix number **00**

   **Hire Graduate Assistantship - 9 Months, GAA509**

<table>
<thead>
<tr>
<th>Search Type</th>
<th>Position</th>
<th>Suffix</th>
<th>Title</th>
<th>Time Sheet Organization</th>
<th>Start Date</th>
<th>End Date</th>
<th>Last Paid Date</th>
<th>Status</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Job</td>
<td></td>
<td>00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   **There are no active jobs based on the Query Date.** You can change these dates. These dates determine what months the GA will be paid. The “End Grad Assistant Contract” section is your job end date. This date can be changed.

12. Verify "Contract Type" which will default to “Secondary.” Only change to primary if the employee has no other active assignment (see number 8 above).
13. Verify the assign salary. If pay rate is incorrect, STOP! Are you using the correct EPAF? If yes, and the position is less than full-time GA, see instructions below for part-time GA.
14. Enter the t-org. **The “T” must be in front of the number (no spaces).**
15. Enter approval level 2. **Click on “🔍🔍” to select Approver, NextGen – Required Action = Approve.**
16. Enter approval level 10. **Click on “🔍🔍” to select Department head – Required Action = Approve.**
17. Enter approval level 45. **Click on “🔍🔍” to select Graduate School Approval – Required Action = Approve.**
18. Enter approval level 99. **Click on “🔍🔍” to select Applier, HR – Required Action = Apply.**
19. Click “Save” button at the top of page. **Green check will appear.**
20. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

A. If “Error Warnings” appear, the EPAF has not been submitted.
   i. Correct Errors
   ii. Click “Save” button at the top of page. Green check will appear.
   iii. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

B. If the “Errors Warnings” below appear, click delete button. You need to verify that:
   i. You created a hiring verification workflow and;
   ii. You received the e-mail from HR that you could proceed with the EPAF.

**Errors and Warning Messages**

<table>
<thead>
<tr>
<th>Type</th>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hire Graduate Assistant</td>
<td>ERROR</td>
<td><em>ERROR</em> Unable to complete initial edit execution (Oracle Error -1001).</td>
</tr>
<tr>
<td>Graduate Assistantship</td>
<td>ERROR</td>
<td><em>ERROR</em> Invalid Employee Class Code.</td>
</tr>
</tbody>
</table>

* - indicates a required field.
EPAF (Hire – Graduate Assistant)

Part-time Assistantship

(Individual has never worked in this position before)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
4. Enter the Banner ID number (M number) of the employee. The M must be capitalized, no spaces.
5. Hit tab or enter button on the keyboard. The employee name will appear.
6. Click on drop down arrow beside “Approval Category” - Select the EPAF- GAA00X (see chart above)
7. Click “Go” or “All Jobs” – All jobs will display any active or terminated positions.
8. Any positions this employee has had will appear with “All Jobs” selection. This information is needed for Step #12. Make a note!
   a. If a list of the employee job assignments appear and the status is active, the contract type will be Secondary.
   b. If a list of the employee job assignments appear & the status is not active or no active job assignments appear, the contract type will be Primary.
   c. If the position number you plan to use is listed STOP! You must use a rehire EPAF, not a hire EPAF.
9. Enter position number. Basic information should default in once entered; ie, job title, time sheet org, etc.
10. Enter suffix number 00

11. Enter hire Graduate Assistantship - 9 Months, GAA999

12. Verify “Contract Type” which will default to “Secondary.” Only change to primary if the employee has no other active assignment (see number 8 above).

13. Change the salary to reflect the % of full-time assistantship:
   a. Change the “Assign Salary” to the correct rate.
   b. Change the “Annual Salary” to equal the new assign salary x factor.
   c. Change the “Hours per Pay” to reflect rate (ex: 50% time – 80.0 hours x .50 = 40.0 – change to 40).

14. Enter the t-org. The “T” must be in front of the number (no spaces).
15. Enter approval level 2. Click on “🔍🔍” to select Approver, NextGen – Required Action = Approve.
16. Enter approval level 10. Click on “🔍🔍” to select Department head – Required Action = Approve.
17. Enter approval level 45. Click on “🔍🔍” to select Graduate School Approval – Required Action = Approve.
18. Enter approval level 99. Click on “🔍🔍” to select Applier, HR – Required Action = Apply.
19. Click “Save” button at the top of page. Green check will appear.
20. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!

   A. If “Error Warnings” appear, the EPAF has not been submitted.
      i. Correct Errors
      ii. Click “Save” button at the top of page. Green check will appear.
      iii. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!

   B. If the “Errors Warnings” below appear, click delete button. You need to verify that:
      i. You created a hiring verification workflow and; 
      ii. You received the e-mail from HR that you could proceed with the EPAF.
EPAF (ReHire – Graduate Assistant)
Full-time Assistantship
(Individual HAS worked in this position before)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
4. Hit tab or enter button on the keyboard. **The employee name will appear.**
5. Change query date to the effective date (today’s date will default). **Employee hire date** (00/00/0000 - two digit month & day and four digit year).
6. Click on drop down arrow beside “Approval Category” - Select the EPAF- **RHGAXX (see chart above)**
7. Click “All Jobs” button. All active and terminated positions will be displayed!
8. Click the “Radio Button” on the right hand side on the position to rehire (should be in terminated status).

9. **Grad Rehire Graduate Assistantship - 2 months, GGRHRP**

<table>
<thead>
<tr>
<th>Search</th>
<th>Type</th>
<th>Position</th>
<th>Suffix</th>
<th>Title</th>
<th>Time Sheet Organization</th>
<th>Start Date</th>
<th>End Date</th>
<th>Last Paid Date</th>
<th>Status</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>New</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10. Verify the assign salary. If salary is incorrect, **STOP!** Are you using the correct EPAF? If yes, and the position is less than full-time GA, see instructions below.
11. Enter approval level 2. **Click on “🔍🔍” to select Approver, NextGen – Required Action = Approve.**
12. Enter approval level 10. **Click on “🔍🔍” to select Department head – Required Action = Approve.**
13. Enter approval level 45. **Click on “🔍🔍” to select Graduate School Approval – Required Action = Approve.**
14. Enter approval level 99. **Click on “🔍🔍” to select Applier, HR – Required Action = Apply.**
15. Click “Save” button at the top of page. **Green check will appear.**
16. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

**Errors and Warning Messages:**

A. If “Error Warnings” appear, the EPAF has not been submitted.
   i. Correct Errors
   ii. Click “Save” button at the top of page. Green check will appear.
   iii. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

B. If the “Errors Warnings” below appear, **click delete button**. You need to verify;
   i. If a contract has already been processed; or
   ii. Should a terminating EPAF be submitted first; or
   iii. Should HR be contacted to remove a record?
1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the "Employee" tab.
3. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
4. Hit tab or enter button on the keyboard. **The employee name will appear.**
5. Change query date to the effective date (today’s date will default). **Employee hire date (00/00/0000 - two digit month & day and four digit year).**
6. Click on drop down arrow beside “Approval Category” - Select the EPAF- **RHGAXX (see chart above)**
7. Click “All Jobs” button. All active and terminated positions will be displayed!
8. Click the “Radio Button” on the right hand side on the position to rehire (should be in terminated status).

9. **Correct Type you have Grad Assistant Contract**

10. Verify “Contract Type” which will default to “Secondary.” Only change to primary if the employee has no other active assignment (see number 8 above).
11. Change the salary to reflect the % of full-time assistantship:
   a. Change the “Assign Salary” to the correct rate.
   b. Change the “Annual Salary” to equal the assign salary x factor.
   c. Change the “Hours per Pay” to reflect rate (ex: 50% time – 80.0 hours x .50 = 40.0 – change to 40).
12. Enter the t-org. **The “T” must be in front of the number (no spaces).**
13. Enter approval level 2. **Click on “🔍🔍” to select Approver, NextGen – Required Action = Approve.**
14. Enter approval level 10. **Click on “🔍🔍” to select Department head – Required Action = Approve.**
15. Enter approval level 45. **Click on “🔍🔍” to select Graduate School Approval – Required Action = Approve.**
16. Enter approval level 99. **Click on “🔍🔍” to select Applier, HR – Required Action = Apply.**
17. Click “Save” button at the top of page. **Green check will appear.**
18. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

**Errors and Warning Messages:**

A. If “Error Warnings” appear, the EPAF has not been submitted.
   i. Correct Errors
   ii. Click “Save” button at the top of page. Green check will appear.
   iii. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

B. If the “Errors Warnings” below appear, **click delete button.** You need to verify;
   i. If a contract has already been processed; or
   ii. Should a terminating EPAF be submitted first or
   iii. Should HR be contacted to remove a record?
Full-time Assistantship
(Individual has never worked in this position before)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
4. Enter the Banner ID number (M number) of the employee. The M must be capitalized, no spaces.
5. Hit tab or enter button on the keyboard. The employee name will appear.
6. Click on drop down arrow beside “Approval Category” - Select the EPAF- GGAXXX (see chart above)
7. Click “Go” or “All Jobs” – All jobs will display any active or terminated positions.
8. Any positions this employee has had will appear with “All Jobs” selection. This information is needed for Step #12. Make a note!
   a. If a list of the employee job assignments appear and the status is active, the contract type will be Secondary.
   b. If a list of the employee job assignments appear & the status is not active or no active job assignments appear, the contract type will be Primary.
   c. If the position number you plan to use is listed STOP! You must use a rehire EPAF, not a hire EPAF.
9. Enter position number. Basic information should default in once entered; ie, job title, time sheet org, etc.
10. Enter suffix number 00
11. Click the “Go” button which will take you to the body of the EPAF. Verify your job begin and end dates are correct. The “End Grad Assistant Contract” section is your job end date. This date can be changed.
12. Verify “Contract Type” which will default to “Secondary.” Only change to primary if the employee has no other active assignment (see number 8 above).
13. Verify the assign salary. If pay rate is incorrect, STOP! Are you using the correct EPAF? If yes, and the position is less than full-time GA, see instructions below.
14. Enter the t-org. The “T” must be in front of the number (no spaces).
15. Enter approval level 2. Click on “🔍🔍” to select Approver, NextGen – Required Action = Approve.
16. Enter approval level 10. Click on “🔍🔍” to select Department head – Required Action = Approve.
17. Enter approval level 20. Click on “🔍🔍” to select Research Services – Required Action = Approve.
18. Enter approval level 45. Click on “🔍🔍” to select Graduate School Approval – Required Action = Approve.
19. Enter approval level 99. Click on “🔍🔍” to select Applier, HR – Required Action = Apply.
20. Click “Save” button at the top of page. Green check will appear.
21. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!

Errors and Warning Messages:
   A. If “Error Warnings” appear, the EPAF has not been submitted.
      i. Correct Errors
      ii. Click “Save” button at the top of page. Green check will appear.
      iii. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!
   B. If the “Errors Warnings” below appear, click delete button. You need to verify that:
      i. You created a hiring verification workflow and;
      ii. You received the e-mail from HR that you could proceed with the EPAF.

Part-time Assistantship
1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
4. Enter the Banner ID number (M number) of the employee. The M must be capitalized, no spaces.
5. Hit tab or enter button on the keyboard. The employee name will appear.
6. Click on drop down arrow beside “Approval Category” - Select the EPAF- GGAXXX (see chart above)
7. Click “Go” or “All Jobs” – All jobs will display any active or terminated positions.
8. Any positions this employee has had will appear with “All Jobs” selection. This information is needed for Step #12. Make a note!
   a. If a list of the employee job assignments appear and the status is active, the contract type will be Secondary.
   b. If a list of the employee job assignments appear & the status is not active or no active job assignments appear, the contract type will be Primary.
   c. If the position number you plan to use is listed STOP! You must use a rehire EPAF, not a hire EPAF.
9. Enter position number. Basic information should default in once entered; ie, job title, time sheet org, etc.
10. Enter suffix number 00
11. Click the “Go” button which will take you to the body of the EPAF. Verify your job begin and end dates are correct. Graduate Assistant “Job Effective Date” and “Job End Date” will automatically default based on the EPAF type you have selected. You can change these dates. These dates determine what months the GA will be paid. The “End Grad Assistant Contract” section is your job end date. This date can be changed.
12. Verify “Contract Type” which will default to “Secondary.” Only change to primary if the employee has no other active assignment (see number 8 above).
13. Change the salary to reflect the % of full-time assistantship:
   a. Change the “Assign Salary” to the correct rate.
   b. Change the “Annual Salary” to equal the new assign salary x factor.
   c. Change the “Hours per Pay” to reflect rate (ex: 50% time – 80.0 hours x .50 = 40.0 – change to 40).
14. Enter the t-org. The “T” must be in front of the number (no spaces).
15. Enter approval level 2. Click on “🔍🔍” to select Approver, NextGen – Required Action = Approve.
16. Enter approval level 10. Click on “🔍🔍” to select Department head – Required Action = Approve.
17. Enter approval level 20. Click on “🔍🔍” to select Research Services – Required Action = Approve.
18. Enter approval level 45. Click on “🔍🔍” to select Graduate School Approval – Required Action = Approve.
19. Enter approval level 99. Click on “🔍🔍” to select Applier, HR – Required Action = Apply.
20. Click “Save” button at the top of page. Green check will appear.
21. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!

Errors and Warning Messages:
A. If “Error Warnings” appear, the EPAF has not been submitted.
   i. Correct Errors
   ii. Click “Save” button at the top of page. Green check will appear.
   iii. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You’re Done!
B. If the “Errors Warnings” below appear, click delete button. You need to verify that:
   i. You created a hiring verification workflow and;
   ii. You received the e-mail from HR that you could proceed with the EPAF.
1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
4. Hit tab or enter button on the keyboard. **The employee name will appear.**
5. Change query date to the effective date (today’s date will default). **Employee hire date (00/00/0000 - two digit month & day and four digit year).**
6. Click on drop down arrow beside “Approval Category” - Select the EPAF- **RHGAXX (see chart above)**
7. Click “All Jobs” button. All active and terminated positions will be displayed!
8. Click the “Radio Button” on the right hand side on the position to rehire (should be in terminated status).

##Errors and Warning Messages:

###A. If “Error Warnings” appear, the EPAF has not been submitted.
   1. Correct Errors
   2. Click “Save” button at the top of page. Green check will appear.
   3. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You’re Done!**

###B. If the “Errors Warnings” below appear, **click delete button.** You need to verify;
   1. If a contract has already been processed; or
   2. Should a terminating EPAF be submitted first; or
   3. Should HR be contacted to remove a record?
Part-time Assistantship
(Individual HAS worked in this position before)

1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the “Employee” tab.
3. Enter the Banner ID number (M number) of the employee. The M must be capitalized, no spaces.
4. Hit tab or enter button on the keyboard. The employee name will appear.
5. Change query date to the effective date (today’s date will default). Employee hire date (00/00/0000 - two digit month & day and four digit year).
6. Click on drop down arrow beside “Approval Category” - Select the EPAF-RHGAXX (see chart above)
7. Click “All Jobs” button. All active and terminated positions will be displayed!
8. Click the “Radio Button” on the right hand side on the position to rehire (should be in terminated status).

9. Assistant Contract” section is your job end date. This date can be changed.
10. Change the salary to reflect the % of full-time assistantship:
    a. Change the “Assign Salary” to the correct rate.
    b. Change the “Annual Salary” to equal the new rate x the factor.
    c. Change the “Hours per Pay” to reflect rate (ex: 50% time – 80.0 hours x .50 = 40.0 – change to 40).
11. Enter the t-org. The “T” must be in front of the number (no spaces).
12. Enter approval level 2. Click on “🔍🔍” to select Approver, NextGen – Required Action = Approve.
13. Enter approval level 10. Click on “🔍🔍” to select Department head – Required Action = Approve.
14. Enter approval level 20. Click on “🔍🔍” to select Research Services – Required Action = Approve.
15. Enter approval level 45. Click on “🔍🔍” to select Graduate School Approval – Required Action = Approve.
16. Enter approval level 99. Click on “🔍🔍” to select Applier, HR – Required Action = Apply.
17. Click “Save” button at the top of page. Green check will appear.
18. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You're Done!

Errors and Warning Messages:
A. If “Error Warnings” appear, the EPAF has not been submitted.
   i. Correct Errors
   ii. Click “Save” button at the top of page. Green check will appear.
   iii. Click “Submit” button. The transaction message “has been successfully submitted” will appear. You're Done!
B. If the “Errors Warnings” below appear, click delete button. You need to verify;
   i. If a contract has already been processed; or
   ii. Should a terminating EPAF be submitted first; or
   iii. Should HR be contacted to remove a record?

Errors and Warning Messages:

<table>
<thead>
<tr>
<th>Type</th>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Grad Assistant Contract</td>
<td>ERROR</td>
<td><em>ERROR</em> The future dated job record must be deleted before ending job.</td>
</tr>
<tr>
<td>End Grad Assistant Contract</td>
<td>WARNING</td>
<td><em>WARNING</em> Future changes exist - starting on 31-AUG-2019.</td>
</tr>
<tr>
<td>Rehire Graduate Assistantship - 9 months</td>
<td>WARNING</td>
<td><em>WARNING</em> Future changes exist - starting on 31-AUG-2019.</td>
</tr>
</tbody>
</table>
1. Log into Pipeline using your regular Pipeline credentials.
2. Click on the "Employee" tab.
3. Enter the Banner ID number (M number) of the employee. **The M must be capitalized, no spaces.**
4. Hit tab or enter button on the keyboard. **The employee name will appear.**
5. Change query date to the termination date. This is the last paid date. Any date other than the last day of the month will cause the monthly salary to be pro-rated!
6. Click on drop down arrow beside “Approval Category” - Select the EPAF- **TERMGA**
7. Click “Go” button.
8. Click “Radio Button” on the right hand side the position to terminate.

### Errors and Warning Messages:

**A.** If "Error Warnings" appear, the EPAF has not been submitted.
   i. Correct Errors
   ii. Click “Save” button at the top of page. Green check will appear.
   iii. Click “Submit” button. The transaction message “has been successfully submitted” will appear. **You're Done!**

**B.** If the “Errors Warnings” below appear, you need to contact HR to remove the future dated record before your EPAF can be submitted.