ELECTRONIC PERSONNEL ACTION FORMS

EPAF

- EPAF OVERVIEW

The Electronic Personnel Action Form allows paperless processing of personnel actions for **Students, Temp Hourly and Graduate Assistant employees**.

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 temporary hourly workers.
The EPAF is originated in the department by the individual who is authorized to generate payroll transactions. 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.
EPAF Categories - STUDENTS

- HIREST
- HIRESW
- GRHIST
- TAFHIR
- REHIST
- REHISW
- GRRHST
- TAFRAT
- TERMST
- TERMSW
- TERMTA
- RATEST
- GRRATE
- TAFRAT
- TORGST
- TORGST
- TORGSW
- GRTORG
- TAFTOR
EPAF

- EPAF Categories - STUDENTS
  - Hiring Student EPAF Types:
    - HIREST – Used to process student who have never worked in the position before.
    - HIRESW – Used ONLY by Financial Aid to process new work study positions.
    - GRHIST – Used to process student in grant positions who have never worked in that position before.
    - TAFHIR – Used to process individuals in TAF positions.
EPAF Categories - **STUDENTS**

- **Re-Hire Student EPAF Types:**
  - **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

- **Termination EPAF Types:**
  - **TERMST** – Used to end a position for a student worker.
  - **TERMSW** – Used ONLY by Financial Aid to end a work study position.
  - **TERMTA** – Used to terminate a TAF Position
EPAF

- EPAF Categories
  - Other Student EPAF Types: **Student Pay Rate Change**
    - **RATEST** – Used to change a pay rate on a student position.
    - **GRRATE** – Used to change a pay rate on a student in a grant position.
    - **TAFRAT** – Used to change a pay rate on a TAF position.
  
- **Student Timekeeping Org Change** (T-Org)
  - **TORGST** – Used to change a T-Org on a position for a student worker.
  - **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.
EPAF APPROVALS

Approval’s Required for **STUDENTS**

- **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.
EPAF

EPAF Categories – **TEMPORARY HOURLY**

- **HIRETH** – Used to hire temp hourly in a new position.
- **REHITH** – Used to re-hire temp hourly in a previous position.
- **TERMTH** – Used to end a temporary hourly position.
- **RATETH** – Used to change pay rate for TH position.
- **TORGTH** – Used to change T-org for temp hourly.
- **GRHITH** – Grant Hire in a new position.
- **GRRHITH** – Grant Rehire in a previous position.
- **GRRTTH** – Grant pay rate change for Temp Hourly position.
Approval’s Required for **TEMP HOURLY**

- **HR Approve Transaction** – (NEXGEN) – the EPAF will hold here until the employee has electronically signed their contract. Once signed, the NEXGEN approval will process and move the EPAF to the next approver.

- **DEPT HD**

- **VICE PRESIDENT**

- **HR APPLIER** – *(MHRW00001)* allows contract to be applied to Banner and sets up job record.

- **GRANTS** - EPAF’s will require approval from Research Services and PI

- Department Head’s may designate a Proxy Approver for EPAF’s.
Type of GA EPAFS

- **GAAS09** – Hire GA position – 9 month
- **GAAS12** – Hire GA position – 12 month
- **GAASDR** – Hire GA Position – Doctoral
- **RHGA09** – Rehire GA position – 9 month
- **RHGA12** – Rehire GA position – 12 month
- **RHGADR** – Rehire GA Position – Doctoral
- **GGAH09** – Grant Hire – GA position – 9 month
- **GGAH12** – Grant Hire – GA position – 12 month
- **GGAHDR** – Grant Hire – GA position – Doctoral
- **GGRH09** – Grant Rehire – GA position – 9 month
- **GGRH12** – Grant Rehire – GA position – 12 month
- **GGRHDR** – Grant Rehire – GA position – Doctoral
Approval’s Required for **Graduate Assistant**

- **HR Approve Transaction** – (NEXGEN) – the EPAF will hold here until the employee has electronically signed their contract. Once signed, the NEXGEN approval will process and move the EPAF to the next approver.

- **DEPT HD**

- **PI - Research Services (if grant position)**

- **GRADSC – Graduate Studies**

- **HR APPLIER – (MHRW00001)** allows contract to be applied to Banner and sets up job record.

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

Before you create an EPAF:

1. You will need the individual’s Banner ID
2. You will need the position number
3. You will need the T-Org and date of action

NOTE: Be familiar with EPAF types – it makes a difference!
Creating EPAF’s

Log into Pipeline, click on Employee tab and then click on the “New EPAF” link
Creating EPAF’s

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

New EPAF Person Selection

- Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

- indicates a required field.

ID:  

-
Creating EPAF’s

Query Date – this date should be the date of the event. It will default to 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 section related to job information for the individual. If you are using a HIRE EPAF, you will enter data in the “New Job” section. You will enter the position number and suffix “00” for a new position and click “go”

- If the individual has worked in positions before, you will see the positions displayed. If you are using an existing position, you must select a rehire EPAF.
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.

If you are using a hire EPAF and see the position already listed, you must go back and select a rehire EPAF.

You would then click “go”

PLEASE NOTE: YOU WILL BE ABLE TO SEE THE PREVIOUS T-ORG AND PAY RATE USED FOR THIS POSITION AND CAN CHANGE IT IN THE NEXT SCREEN IF NEEDED.
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.
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.

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><strong>Type</strong></td>
</tr>
<tr>
<td>Rehire Student into Same Position</td>
</tr>
</tbody>
</table>

* - indicates a required field.
Tracking EPAF’s

To review the status of an EPAF, the originator can log into Pipeline and under the “EPAF Originator Summary” link they can review EPAF actions:

- EPAF Approver Summary
- EPAF Originator Summary
- New EPAF
- EPAF Proxy Records
- Act as a Proxy

Under “Transaction Status” you can select for review:
- 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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<tbody>
<tr>
<td>Haynes, Alicia A.</td>
<td>M00021525</td>
<td>61739</td>
<td>Hire Student</td>
<td>Sep 18, 2014</td>
<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>Waiting</td>
<td>Comments</td>
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<td>Student-Ind Cost Sponsor Prog, 224880-00</td>
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<tr>
<td>Riehl, Andrew E.</td>
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<td>Rate Change Student</td>
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<tr>
<td>Student-Record Industry Mgmt, 145880-00</td>
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<td>Stratton, Evan M.</td>
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<td>61759</td>
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<td>Student Help-Recycling, 333880-00</td>
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</table>
**GRADUATE ASSISTANT EPAF**

- **How are GA EPAFs Different?**
  - The job begins and the assign salary will populate as will the annual salary and hours per pay based on the EPAF type you select!

### Grant Hire Graduate Assistantship - 12 months, 609945-00 Graduate Assistant - Admin

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
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</thead>
<tbody>
<tr>
<td>Employee Status: (Not Enterable)</td>
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</tr>
<tr>
<td>Employee Class Code: (Not Enterable)</td>
<td>AD, Administrative / Professional</td>
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</tr>
<tr>
<td>I9 Form Indicator: (Not Enterable)</td>
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<tr>
<td>I9 Expiration Date: MM/DD/YYYY (Not Enterable)</td>
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<td></td>
</tr>
<tr>
<td>Job Begin Date: MM/DD/YYYY</td>
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<td>09/01/2018</td>
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<tr>
<td>Contract Type:</td>
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<td>Primary</td>
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<td>Jobs Effective Date: MM/DD/YYYY</td>
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<td>09/01/2018</td>
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<td>Job Change Reason: (Not Enterable)</td>
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<tr>
<td>Assign Salary:</td>
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<td>Annual Salary:</td>
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<td>Hours per Pay:</td>
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<td>12</td>
</tr>
<tr>
<td>Timesheet Orgn:</td>
<td>*</td>
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</tr>
</tbody>
</table>
**Important facts when creating GA EPAFs!**

- If the assistantship is less than full-time, you must manually change the assign salary, the annual salary, and the hours per pay.

- Half-time graduate assistant hours per pay are 40.0 and full-time are 80.0.

- You take the hours per pay times the assign salary for the annual salary amount.
For Temp Hourly and Graduate Assistant employment, the individual must agree to the terms and conditions of the contract.

Temp Hourly and Graduate Assistant EPAFs will create an actual electronic contract that the employee must sign. However, a hiring verification workflow **MUST** be created first or the electronic contract will not process.

Once the EPAF has been successfully submitted, the individual will be sent a link to electronically sign the contract.

HR will verify that the contract has been electronically signed and kick off the EPAF for approvals.

After the EPAF has been approved, it will be applied by HR and the job record will be created.

Temp Hourly assignments are not required to have end dates, but GA assignments will automatically default begin and end dates on the EPAF.
Additional information about EPAFs:

- If an EPAF was initiated, but not submitted, 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.

- An approver can return an EPAF to the originator for corrections before approving.
Electronic contracts are sent to employees via email with a link. They must click on the box to accept the terms and conditions before signing.

New temp hourly employees will have to wait 24 – 48 hours before signing their contracts electronically. The ability to click the link and sign their contract depends on their MTSU email being set up and active. It takes at least 24 hours before ITD can run the process to activate a new MTSU email.

To add an end date for temp hourly workers: You must submit a HIRETH(EPAF) first and then submit a TERMTH(EPAF) after you have received the email stating “Your EPAF is now completed” for the hire EPAF.

There are different mandatory approval levels for different types of EPAFs. You can set up a default routing queues for each EPAF type.
NOTES REGARDING TEMP HOURLY AND GA EPAFS:

✓ If you are the originator of an EPAF, you cannot be the department head approver.

✓ If you are changing a position number for an employee, you should submit the hire EPAF first, and then submit the terminating EPAF. If you submit the terminating EPAF first, HR will assume you are terminating the employee and will change the employee status to terminated. The hire EPAF will not process if the employee is in a terminated status.

✓ Because temp hourly contracts are tied directly to the hiring verification workflow, you must create a hiring verification workflow each time you want to create a new contract. If you want to hire a temp hourly for multiple pay rates, you must create a hiring verification workflow for each pay rate, which would have a different position number.

✓ The temp hourly EPAF must go through the approval process and be applied by HR before the employee will have access to a time sheet.
EPAFS – WHAT ELSE? TROUBLESHOOTING:

✓ Have you done the Hiring Verification in Workflow?
  ➢ If not, you have to do so before creating an EPAF to ensure all employment paperwork is up to date or received by HR. The EPAF will not process if this paperwork has not been submitted.

✓ Is the type of EPAF you selected correct?
  ➢ The type of EPAF you select is critical for payroll processing. Also, EPAF’s contract type defaults to “secondary”, if this person does not have another job change to “primary”.

✓ Has your EPAF been approved?
  ➢ A e-mail is sent to the approver when an EPAF is pending approval. Please approve ASAP. The employee’s pay depends on it!
EPAF PROCESSING

Still having trouble processing your EPAF?
Our EPAF coordinator is

Danielle Archuleta @ x.2382 or Danielle.archuleta@mtsu.edu
EPAF Payroll Processing

Questions?

Thank You For Attending!