EPAF Quick Tips & Instruction Guide

EPAF Contact Person - Alicia Haynes @ 2382 (alicia.haynes@mtsu.edu)

Each time you want to hire or rehire an employee, the HRS Hiring Verification “workflow” has to be done first before the EPAF.

The EPAF cannot be submit until after you have receive an email from HRS that you have permission to hire this person.

The authorization card is acknowledging the employee can start working.

Information need to do an EPAF:
(Employee M#, Position #, Hire or End Date, T-Org & Pay Rate)

Position Number Contact – Susan England @ 5791 Susan.England@mtsu.edu or Jennifer Coppinger Jennifer.Coppinger@mtsu.edu @ 5377 in Budget Office.

The employee has to be enroll in class (either spring, summer or fall) to be hire in a student position (to see if the employee is enroll in class, log in to Banner and go to SFAREGQ). Student position number usually ends in 880, 881, 885.

If the employee is not enroll in class, the employee has to be hire in a temp hourly (hourly) position. Temp hourly position number usually ends in 830 or 850.

The screen to check if an employee position is active, term, T-Org, pay rate, etc. is Banner NBAJOBS. You should have access to this information. If you don’t have access, you will need to request to get access for Banner HR screen:
1. Go to HR web page
2. Select other information (drop down arrow)
3. Click forms
4. Scroll down to Miscellaneous
5. Click Banner HR account Request Form PDF
6. Fill form out
7. Send form thru campus mail to HR
# Types of EPAF

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<tr>
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<tbody>
<tr>
<td>HIRETH</td>
<td>Process a NEW temporary hourly hire</td>
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<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>
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<tr>
<td>TAFHIR</td>
<td>Process a NEW student hire into a TAF position</td>
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<td>TAFRHR</td>
<td>Process a REHIRE of a student into a TAF position</td>
</tr>
<tr>
<td>TERMST</td>
<td>Process a termination of a student worker &amp; student grant positions</td>
</tr>
<tr>
<td>TERMSW</td>
<td>Terminate a Work Study position <em>(Financial Aid Office Only)</em></td>
</tr>
<tr>
<td>TERMTH</td>
<td>Process a termination of a temporary hourly position</td>
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<tr>
<td>TERMTA</td>
<td>Process a termination of a student TAF position</td>
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<tr>
<td>RATEST</td>
<td>Process a Pay Rate Change for a student worker and work study positions</td>
</tr>
<tr>
<td>GRRATE</td>
<td>Process a Pay Rate Change for a student grant position</td>
</tr>
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<td>TAFRAT</td>
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<td>TORGST</td>
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EPAF (Hire – Temporary Hourly)  
(Never work 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 has to be capitalized.**
6. Hit “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”.
9. Select the EPAF. **HIRETH=Temporary Hourly**
10. **This information is for Step #15. 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.
11. Click “Go” button.
12. Enter position number. **Basic information should defaulted in, job title, time sheet organ, etc.**
13. Enter suffix number. **00.**
14. Click “Go” button.
15. “**Only Change contract type**” to **Primary** if the employee has no active job assignments. Refer Step #10.
16. Enter the pay rate. **Minimum wage will default.**
17. Enter the t-org. **The “T” has to be in front of the t-org for the employee to get a timesheet.**
18. Enter approval level 2. **Click on “hour glass” to select Approver, NextGen – Required Action = Approve.**
19. Enter approval level 10. **Click on “hour glass” to select Department head – Required Action = Approve.**
20. Enter approval level 50. **Click on “hour glass” to select Vice Presidents – Required Action = Approve.**
21. Enter approval level 99. **Click on “hour glass” to select Applier, HR – Required Action = Approve.**
22. Click “Save” button at the top of page. **Green check will appear.**
23. Click “Submit” button.
   A. The transaction message has been successfully submit will appear. **FINISH.**

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   1B. Correct Errors.
   2B. Click “Save” button at the top of page. **Green check will appear.**
   3B. Click “Submit” button. **The transaction message has been successfully submit will appear = FINISH.**

C. If the “Errors Warning” appear with the message **BELOW. Click Delete button.**

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FYI
Did you do a Hiring Verification in Workflow? If so, the employee has not turned in paperwork to HR. The EPAF cannot be done until the employee brings the new hire paperwork to HR.
**EPAF (Hire - Student)**

*Never work 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 has to be capitalized.**
6. Hit “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”.
9. Select the EPAF. **HIREST=Student**
10. **This information is for Step #15. 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.
11. Click “Go” button.
12. Enter position number. **Basic information should defaulted in, job title, time sheet organ, etc.**
13. Enter suffix number. **00.**
14. Click “Go” button.
15. **“Only Change contract type”** to **Primary** if the employee has no active job assignments. **Refer Step #10.**
16. Enter the pay rate. **Minimum wage will default.**
17. Enter the t-org. **The “T” has to be in front of the t-org for the employee to get a timesheet.**
18. Enter approval level 10. **Click on “hour glass” to select Department head – Required Action = Approve.**
19. Enter approval level 99. **Click on “hour glass” to select HR Appliers – Required Action = Apply.**
20. Click “Save” button at the top of page. **Green check will appear.**
21. Click “Submit” button. **A.** The transaction message has been successfully submit will appear. **FINISH.**

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**FYI**

Did you do a Hiring Verification in Workflow? If so, the employee has not turned in paperwork to HR. The EPAF cannot be done until the employee brings the new hire paperwork to HR.
EPAF (Grant Hire – Student Worker)

(Never work 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 has to be capitalized.
6. Hit “enter” button on the keyboard. The employee name will appear.
7. Change query date. Employee hire date.
8. Click on drop down arrow beside “Approval Category”.
9. Select the EPAF. GRHIST=Student

10. **This information is for Step #15. 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.

11. Click “Go” button.
12. Enter position number. Basic information should defaulted in, job title, time sheet organ, etc.
13. Enter suffix number. 00.
14. Click “Go” button.
15. **“Only Change contract type** to Primary if the employee has no other positions active. Refer Step #10.
16. Enter the pay rate. Minimum wage will default.
17. Enter the t-org. The “T” has to be in front of the t-org for the employee to get a timesheet.
18. Enter approval level 5. Click on “hour glass” to select PI – Principal Investigator – Required Action = Approve.
20. Enter approval level 10. Click on “hour glass” to select DEPTHD - Department Head–Required Action=Approve.
21. Enter approval level 99. Click on “hour glass” to select HRAPP - HR Appliers – Required Action = Apply.
22. Click “Save” button at the top of page. Green check will appear.
23. Click “Submit” button.

   A. The transaction message has been successfully submit will appear. FINISH.

   The “Encumbrance Warning” will always display. Disregard.

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   1B. Correct Errors.

   2B. Click “Save” button at the top of page. Green check will appear.

   3B. Click “Submit” button. The transaction message has been successfully submit will appear = FINISH.

   C. If the “Errors Warning” appear with the message BELOW. Click Delete button.

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FYI

Did you do a Hiring Verification in Workflow? If so, the employee has not turned in paperwork to HR. The EPAF cannot be done until the employee brings the new hire paperwork to HR.
EPAF (Re Hire – Temporary Hourly)
(Work 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 has to be capitalized.
6. Hit “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”.
9. Select the EPAF. REHITH=Temporary Hourly
10. Click “Go” button.
11. Click “Radio Button” on the right hand side the position to rehire.
12. Click “Go” button.
13. Enter the pay rate. Minimum wage will default.
14. Enter the t-org. The “T” has to be in front of the t-org for the employee to get a timesheet.
15. Enter approval level 2. Click on “hour glass” to select Approver. NextGen – Required Action = Approve.
16. Enter approval level 10. Click on “hour glass” to select Department head – Required Action = Approve.
17. Enter approval level 50. Click on “hour glass” to select Vice Presidents – Required Action = Approve.
18. Enter approval level 99. Click on “hour glass” to select HR Appliers – Required Action = Apply.
19. Click “Save” button at the top of page. Green check will appear.
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EPAF (Re Hire – Student Worker)
(Work in this position before)

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4. Click on the “New EPAF” link.
5. Enter the Banner ID number (M number) of the employee. The M has to be capitalized.
6. Hit “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”.
9. Select the EPAF. REHIST=Student
10. Click “Go” button.
11. Click “Radio Button” on the right hand side the position to rehire.
12. Click “Go” button.
13. Enter the pay rate. Minimum wage will default.
14. Enter the t-org. The “T” has to be in front of the t-org for the employee to get a timesheet.
15. Enter approval level 10. Click on “hour glass” to select Department head – Required Action = Approve.
16. Enter approval level 99. Click on “hour glass” to select HR Appliers – Required Action = Apply.
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5. Enter the Banner ID number (M number) of the employee. The M has to be capitalized.
6. Hit “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”.
9. Select the EPAF. GRRHST=Student
10. Click “Go” button.
11. Click “Radio Button” on the right hand side the position to rehire.
12. Click “Go” button.
13. Enter the pay rate. Minimum wage will default.
14. Enter the t-org. The “T” has to be in front of the t-org for the employee to get a timesheet.
15. Enter approval level 5. Click on “hour glass” to select PI – Principal Investigator – Required Action = Approve.
17. Enter approval level 10. Click on “hour glass” to select DEPTHD - Department Head – Required Action=Approve.
18. Enter approval level 99. Click on “hour glass” to select HRAPP - HR Appli – Required Action = Apply.
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EPAF (Terminate)
(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 has to be capitalized.**
6. Hit “enter” button on the keyboard. **The employee name will appear.**
7. Change query date. **Employee last work date.**
8. Click on drop down arrow beside “Approval Category”.
9. Select the EPAF. **TERMST=Student or TERMTH=Temp Hourly.**
10. Click “Go” button.
11. Click “Radio Button” on the right hand side the position to terminate.
12. Click “Go” button.
13. Enter approval level 10. **Click on “hour glass” to select Department head – Required Action = Approve.**
14. Enter approval level 99. **Click on “hour glass” to select HR Appliers – 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 submit will appear = FINISH.**

The “Encumbrance Warning” will always display. **Disregard.**

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EPAF (T-Org Change)

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 has to be capitalized.**
6. Hit “enter” button on the keyboard. **The employee name will appear.**
7. Change query date. **The date has to be the 16th of the new pay period.**
8. Click on drop down arrow beside “Approval Category”.
9. Select the EPAF. **TORGST=Student or TORGTH=Temp Hourly.**
10. Click “Go” button.
11. Click “Radio Button” on the right hand side the position to change T-Org.
12. Click “Go” button.
13. Enter the t-org. **The “T” has to be in front of the t-org for the employee to get a timesheet.**
14. Enter approval level 10. **Click on “hour glass” to select Department head – Required Action = Approve.**
15. Enter approval level 99. **Click on “hour glass” to select HR Appliers – 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 submit will appear = FINISH.**

The “Encumbrance Warning” will always display. **Disregard.**

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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 has to be capitalized.**
6. Hit “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”.
9. Select the EPAF. **RATEST=Student.**
10. Click “Go” button.
11. Click “Radio Button” on the right hand side the position to change pay rate.
12. Click “Go” button.
13. Enter the “new” pay rate.
14. Enter approval level 10. **Click on “hour glass” to select Department head – Required Action = Approve.**
15. Enter approval level 99. **Click on “hour glass” to select HR Appliers – 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 submit will appear = FINISH.**

The “Encumbrance Warning” will always display. **Disregard.**

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**EPAF (Delete)**

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 “EPAF Original Summary” link.
5. Click on the employee name.
6. Click “delete” button. **The transaction message has been delete will appear = FINISH.**

**EPAF (Re Submitted)**

(EPAF Not Submitted to Approval)

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 “EPAF Original Summary” link.
5. Click on the employee name.
6. Click “Update” button.
7. Click “Save” button at the top of page. **Green check will appear.**
8. Click “Submit” button. **The transaction message has been successfully submit will appear = FINISH.**
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 “EPAF Original Summary” link.
5. Click on the “Default Routing Queue” link.
6. Click on drop down arrow beside “Approval Category”.
7. Select the EPAF
8. Enter all approval levels:
   a. Click on “the drop down arrow” to select Approval Level
   b. Click on “hour glass” to select User Name
   c. Required Action select Approve (except for Approval Level 99 Required Action will always be Apply)
9. Click “Save and Add New Rows” button

**EPAF Status**
(Check status or history of EPAF)

**Approved** – EPAF has been approval by approver and is waiting for HR to apply to job record
(this is an overnight process)

**Completed** – EPAF been load to employee job record. Employee should have time sheet

**Pending** – EPAF waiting for Approver to approval.

**Void** – EPAF have been void.

**Waiting** – EPAF has not been submitted or EPAF has errors.

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 “EPAF Originator Summary” link
5. Once in this link you should see the tab current or history
6. Under the current tab
7. Find the Employee Name
8. Look under transaction status (this will tell you the status of the EPAF)