Electronic Personnel Action Forms
Student and Hourly Payroll Processing

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Electronic Forms Processing

General Overview – What we plan to cover!

- Electronic Personnel Action Forms (EPAF)
- W4 and Social Security Card Requirements
- I9 Requirements
- Questions and Answers

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

EPAF

EPAF Overview

- The Electronic Personnel Action Form allows paperless processing of personnel actions for students. This process enables MTSU to expedite personnel actions through an electronic approval process and provides an audit trail of all approval/disapproval history. The EPAF will replace the existing paper PEF for student processing and temporary hourly terminations.
Electronic Personnel Action Form-EP AF

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

EPAF

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

EPAF

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

- EPAF Categories
  - 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.
  - Timekeeping Org Change
    - 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.
Electronic Personnel Action Form

EPAF

- EPAF Approval
  - For each EPAF, one or more approvals are required. Once created, the EPAF must be routed for approval based on the type of EPAF.
  - You can set default routing approvals for your EPAF’s so that you won’t have to enter the approvals each time.
Electronic Personnel Action Form
EPAF

Approval’s Required

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

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

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

Log into your Pipeline Account, Click on RaiderNet and the Employee Tab.
Creating EPAF’s

- Click on the “Electronic Personnel Action Form” link

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**Employee**

- Time Sheet
- Leave Report
- Electronic Personnel Action Forms
- Benefits and Deductions
  - Insurances
  - ORP and TCRS Benefits
  - 401k, 403b and 457 Plans
  - Miscellaneous Benefits and Charitable Givings
  - Benefit Statements
  - Annual Transfer and Enrollment Period

**Pay Information**

- Direct Deposit Allocation
- Earnings and Deductions History
- Pay Stubs

**Federal Income Tax Information**

- W4 Exemptions and Allowances
- W2 Year End Earnings Statements

**Jobs Summary**

**Leave Balances**

**Microsoft Home Use License**

**Update Preferred First Name**

**RELEASE: 8.10**
Creating EPAF’s

- Click on the “New EPAF” link

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

- Query Date – this date should be the date of the event. It will default today’s date, but it’s best to change it to the event date.

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

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

- You would enter the position number and suffix “00” for a new position and click “go”.
Creating EPAF’s

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

You would then click “go”
Creating EPAF’s

- The EPAF’s have been developed to only require a few fields of entry:
  - The T-Org must be entered or you will not be able to submit.
  - You can change the Job Effective Date and Pay Rate if you choose.

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

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<th>Item</th>
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<th>New Value</th>
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Electronic Personnel Action Form

Creating EPAF’s

- The EPAF’s have been developed to only require a few fields of entry:
  - *The Routing Queue’s must be entered or you will not be able to submit your EPAF.*
Creating EPAF’s

- Once you have entered your approver’s, 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!
Electronic Personnel Action Form (EPAF)

- 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:

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

EPAF

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

<table>
<thead>
<tr>
<th>EPAF Transactions</th>
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<tbody>
<tr>
<td>Name</td>
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<tr>
<td>Haynes, Alicia A.</td>
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<tr>
<td>Jones, Andrew W.</td>
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<td>Riehle, Andrew E.</td>
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<td>Stratton, Evan M.</td>
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Deleting EPAF’s

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

EPAF Approvers

- The department head is generally the EPAF approver and will approve EPAF’s where before they were signing the PEF.
- An approver can designate a “Proxy” approver. The Proxy can log in and approve EPAF’s.
What should accompany the EPAF

- Completed I9
- W4
- Copy of social security card or receipt with name
- TLEA Documentation – Tennessee Lawful Employment Act effective 1/1/12 requires employers to obtain lawful resident/employment verification information.
- Direct Deposit Form
Student/Hourly Payroll Processing

Questions and Answers?

Thank You For Attending!

Contact Information

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