ELECTRONIC PERSONNEL ACTION FORMS EPAF

- EPAF OVERVIEW

  *The Electronic Personnel Action F*orm 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.

Electronic Personnel Action Forms EPAF

- 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 APPROVALS

- Approvals are mandatory for each EPAF type :
  - **PI** – Principal Investigator – only for Grant Related EPAF's.
  - **RS** – Research Services – only for Grant Related EPAF's
  - **GRADIN and GRADSC** – Graduate School Initial Review - only for GA EPAFs
  - **DEPTHD** – Department Head must approve all EPAF's
  - **HRAPP** – Human Resource Services verifies and applies all EPAF's
  - **Deans** – Applicable College Dean – used for Adjunct EPAFs
  - **VP** – Applicable Vice President
  - **HRAPP** – Human Resource Services – all EPAFs
- Department Head's may designate a Proxy Approver for EPAF's.

EPAF

- 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**

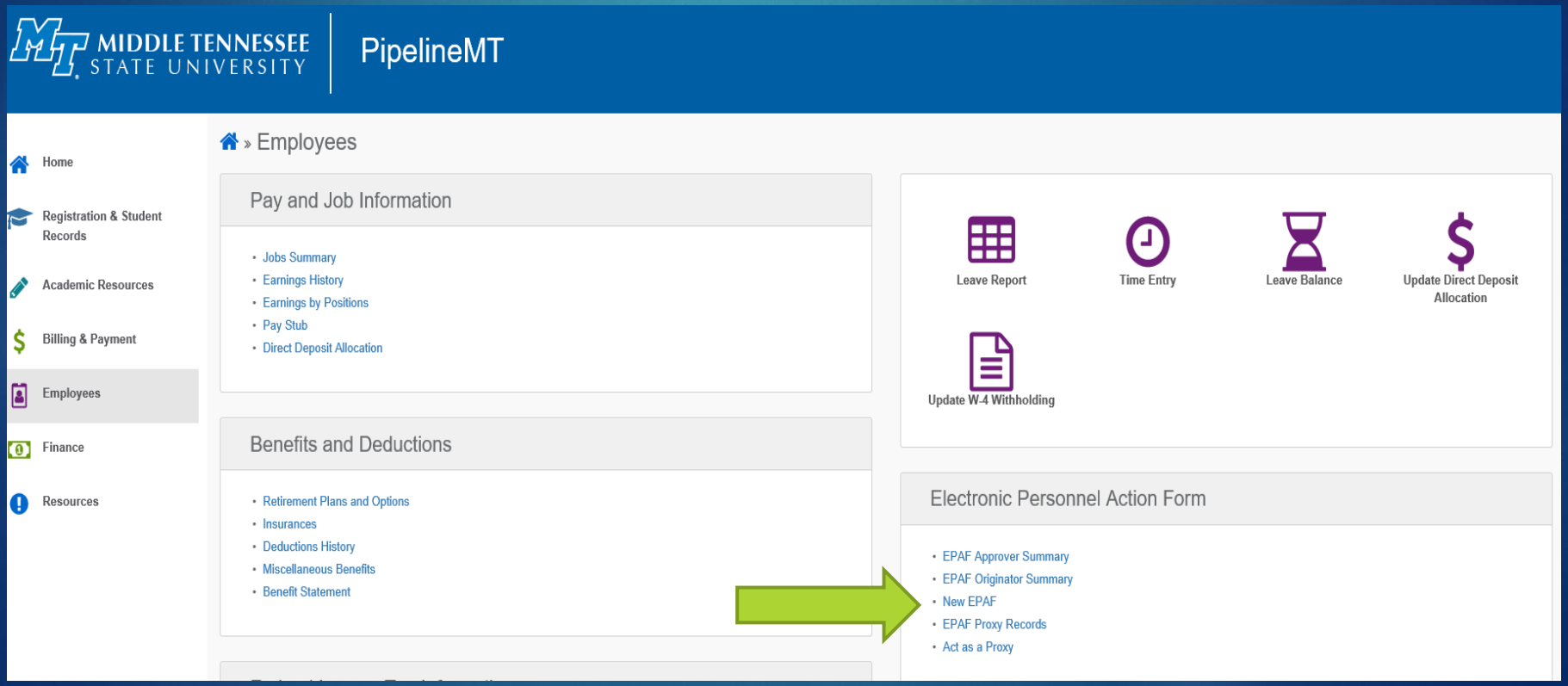
NOTE: Be familiar with EPAF types – it makes a difference!

EPAF CONTRACTS

- EPAFs generated for Temp Hourly, Graduate Assistant, Resident Assistant and Adjunct classifications will have a required contract.
- The hiring verification workflow must be created to initiate the contract type sent to the employee.
- The individual must agree to the terms and conditions of employment and electronically sign their contract.
  - **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.**

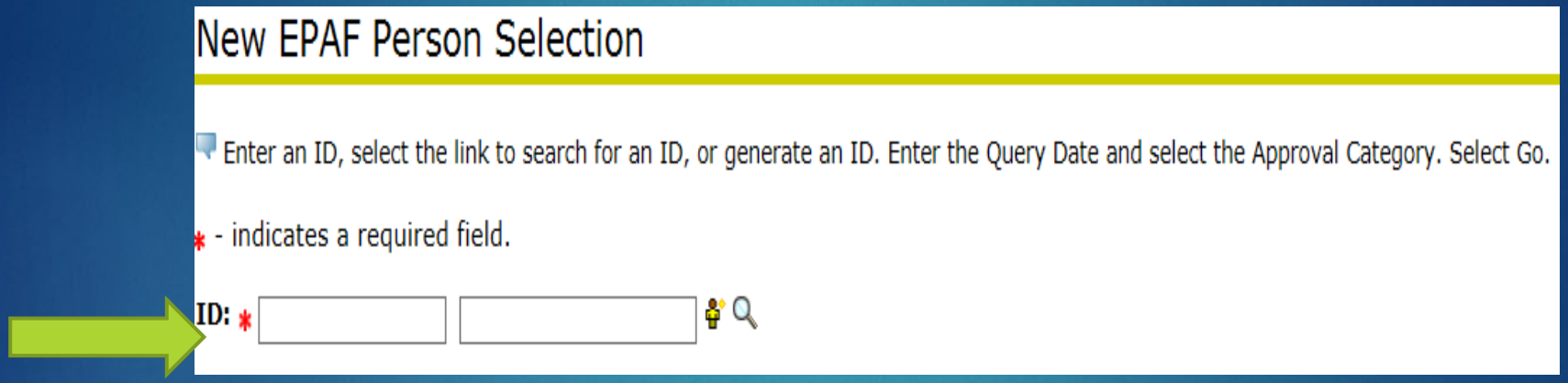
EPAF

- Creating EPAF's
  - Log into Pipeline, click on Employee tab and then click on the "New EPAF" link



EPAF

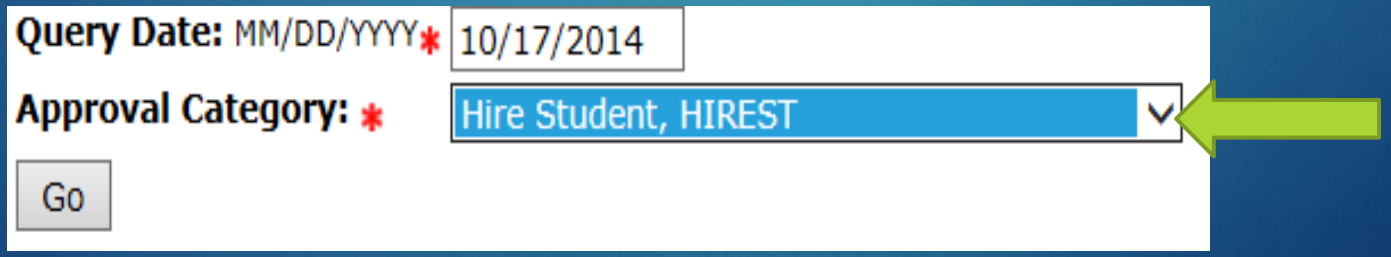
- Creating EPAF's
  - Enter the Banner ID (M number), hit tab and verify you have the correct name.



EPAF

- 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"



EPAF

- Creating EPAF's
  - 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"

Student Hire, HIREST

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									

There are no active jobs based on the Query Date.

All Jobs

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..

Rehire Student into Same Position, REHIST

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									
	Primary	620880	00	Student Help-Develop Office	T30500, Development Office	Jul 02, 2018		Mar 15, 2023	Active	
	Secondary	620945	00	Graduate Assistant - Admin	T30500, Development Office	Jan 01, 2022	Aug 31, 2023	Apr 30, 2023	Active	
	Secondary	GAA945	00	Graduate Assistant - Admin	T18000, V Provost Res and Dean of Grad	Sep 01, 2022	Aug 31, 2023	Apr 30, 2023	Active	
	Secondary	J64865	00	Adjunct Professor - Flat Rate	T13300, Computer Science	Apr 01, 2023	Apr 30, 2023	Apr 30, 2023	Active	
	Secondary	J64880	00	ST Help - Retention Female ST	T13300, Computer Science	Jan 13, 2023		Mar 15, 2023	Active	

All Jobs

Go

EPAF

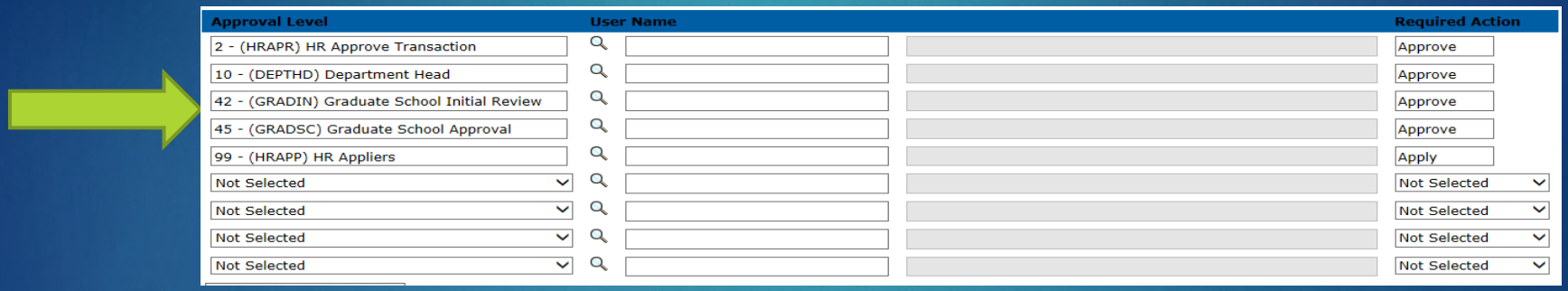
- Creating EPAF's
  - ***The T-Org must be entered or you will not be able to submit. PLEASE NOTE: IF "T" IS NOT ENTERED A TIME SHEET WILL NOT BE GENERATED***
  - ***The search icon is not active for T-org's***
  - **You can change the Job Effective Date and Pay Rate if you choose.**

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

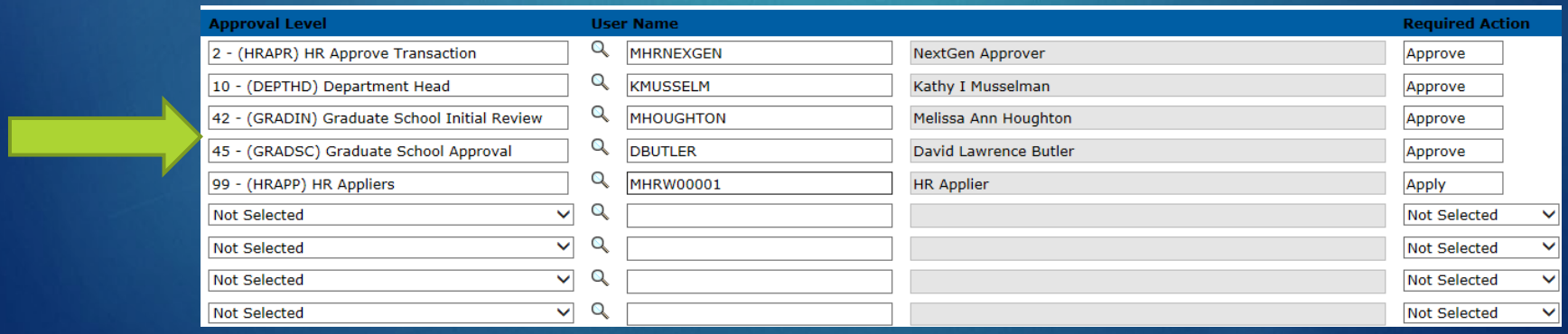
Item	Current Value	New Value
Employee Status: (Not Enterable)	Active	
Employee Class Code: (Not Enterable)	SW, College Work Study	
I9 Form Indicator: (Not Enterable)	Temporary	
I9 Expiration Date: MM/DD/YYYY(Not Enterable)	01/23/2017	
Job Status: (Not Enterable)	Terminated	A
Step: (Not Enterable)	0	0
Jobs Effective Date: MM/DD/YYYY	05/14/2014	10/17/2014
Job Change Reason: (Not Enterable)	TERM	REHI
Time Entry Method: (Not Enterable)	Employee Time Entry via Web	W
Time Entry Type: (Not Enterable)	Pay Period Time Sheet	T
Time In/Out Ind: (Not Enterable)	Yes	Y
Regular Rate:	7.25	7.25
Timesheet Orgn: *	T16450	

EPAF

- Routing Queue (Approvals)
  - ***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.***



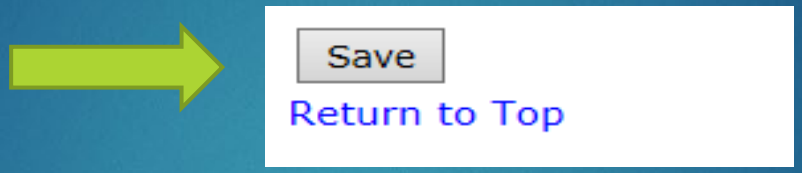
Approval Level	User Name		Required Action
2 - (HRAPR) HR Approve Transaction			Approve
10 - (DEPTHD) Department Head			Approve
42 - (GRADIN) Graduate School Initial Review			Approve
45 - (GRADSC) Graduate School Approval			Approve
99 - (HRAPP) HR Appliers			Apply
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected



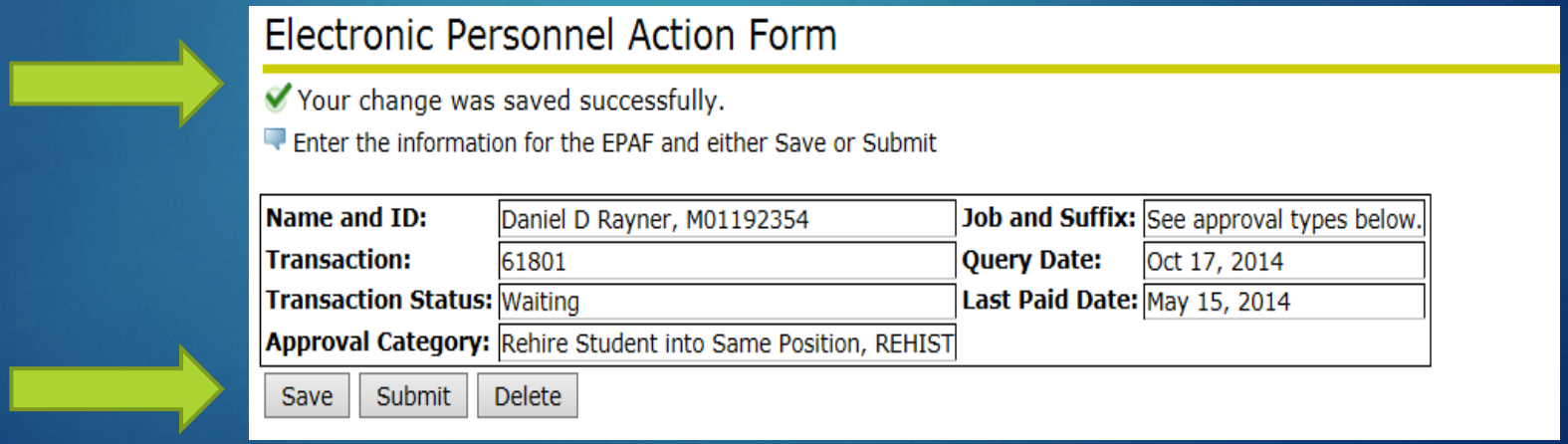
Approval Level	User Name		Required Action
2 - (HRAPR) HR Approve Transaction	MHRNEXGEN	NextGen Approver	Approve
10 - (DEPTHD) Department Head	KMUSSELM	Kathy I Musselman	Approve
42 - (GRADIN) Graduate School Initial Review	MHOUGHTON	Melissa Ann Houghton	Approve
45 - (GRADSC) Graduate School Approval	DBUTLER	David Lawrence Butler	Approve
99 - (HRAPP) HR Appliers	MHRW00001	HR Applier	Apply
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected

EPAF

- Creating EPAF's
  - Once you have entered your approvers, you will click on the "save" button at the bottom.

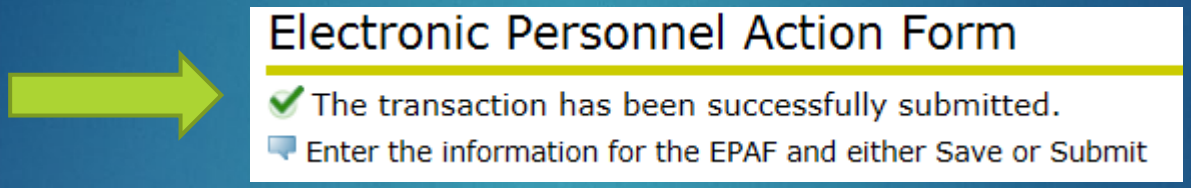


  - At the top of the page, you will see a green check if your EPAF was saved successfully. If so, then click "Submit" to submit the EPAF for approval.



EPAF

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



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

Errors and Warning Messages

Type	Message Type	Description
Rehire Student into Same Position	WARNING	*WARNING* Encumbrance Method is Value Input and salary has changed.

* - indicates a required field.

EPAF ERRORS

- 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

Timesheet Orgn must be filled in for Approval Type, GAAS09.

Enter the information for the EPAF and either Save or Submit

Transaction was not submitted. Please review errors.

Enter the information for the EPAF and either Save or Submit

Name and ID:	Meagan Nicole Batey, M00453828
Transaction:	142697
Transaction Status:	Waiting
Approval Category:	Hire Temporary Hourly, HIRETH

Query Date: Aug 01, 2019

Save | Submit | Delete

Approval Types | Errors | Routing Queue | Comments | Transaction Histo
New EPAF | EPAF Originator Summary
Return to EPAF Menu

Jump to Bottom

Errors and Warning Messages

Type	Message Type	Description
Hire Temporary Hourly	ERROR	*ERROR* Unable to complete initial edit execution (Oracle Error -1001).
Hire Temporary Hourly	ERROR	*ERROR* Invalid Employee Class Code.

* - indicates a required field.

EPAF – GRADUATE ASSISTANT

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

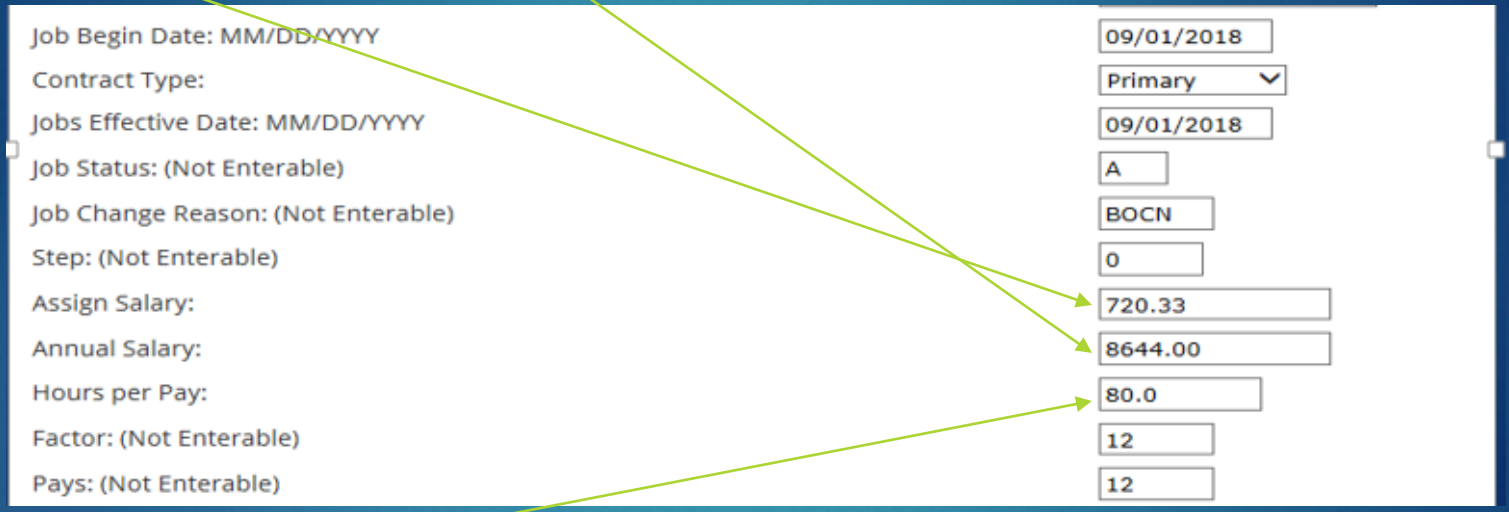
Grant Hire Graduate Assistantship - 12 months, 609945-00 Graduate Assistant - Admin

Item	Current Value	New Value
Employee Status: (Not Enterable)	Active	
Employee Class Code: (Not Enterable)	AD, Administrative / Professional	
I9 Form Indicator: (Not Enterable)		
I9 Expiration Date: MM/DD/YYYY(Not Enterable)		
Job Begin Date: MM/DD/YYYY		09/01/2018
Contract Type:		Primary
Jobs Effective Date: MM/DD/YYYY		09/01/2018
Job Status: (Not Enterable)		A
Job Change Reason: (Not Enterable)		BOCN
Step: (Not Enterable)		0
Assign Salary:		720.33
Annual Salary:		8644.00
Hours per Pay:		80.0
Factor: (Not Enterable)		12
Pays: (Not Enterable)		12
Timesheet Orgn: *		

Graduate Assistant EPAF

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.

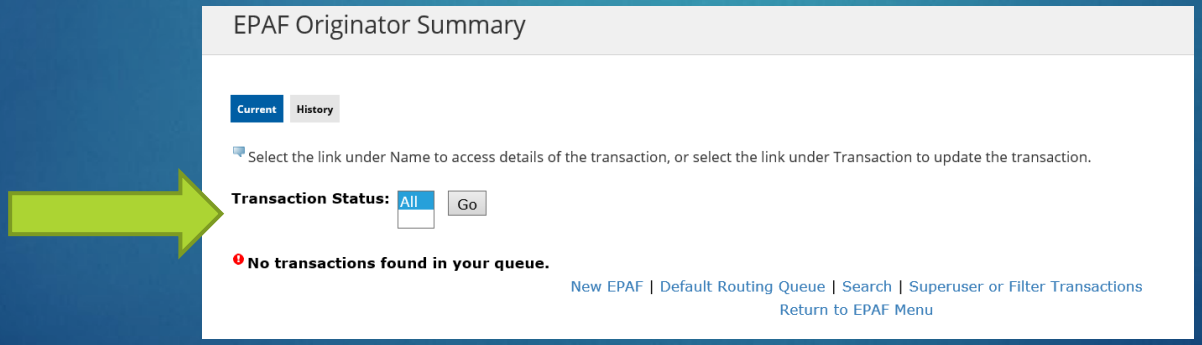


- Half-time graduate assistant hours per pay are 40.0 and full-time are 80.0.
- You take the hours per pay times the assign salary for the annual salary amount.

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:



EPAF

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

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Abed, Muhammad J. Graduate Assistant - Teaching, 050950-00	M01209610	124621	TAF Hire Graduate Assistantship - 9 Months	Aug 17, 2018	Sep 01, 2018	Completed	
Dent, Roger A. Temp Help Bus Driver, 718830-00	M01464052	118329	Hire Temporary Hourly	Jun 28, 2018	Jun 18, 2018	Completed	Warnings
Hays, Hillary S. Graduate Assistant - Teaching, 115950-00	M01245609	115883	Rehire Graduate Assistantship - 12 Months	May 18, 2018	May 01, 2018	Completed	

  - Click on the EPAF for additional information:

Routing Queue

Approval Level	Name	Required Action	Queue Status	Action Date
HR Approve Transaction, 2	NextGen Approver (Awaiting Employee Electronic Sign), MHRNEXGEN	Approve	Approved	Aug 17, 2018 02:16:12 PM
Department Head, 10	Medha S Sarkar, MSARKAR	Approve	Approved	Aug 17, 2018 02:40:10 PM
Deans/Vice Presidents TAF Appr, 30	Robert Urban Fischer, BFISCHER	Approve	Approved	Aug 18, 2018 08:47:21 AM
TAF Initial Review, 35	Maria Castelli Knox, MKNOX	Approve	Approved	Aug 21, 2018 08:34:52 AM
TAF Approval, 40	David Jeffrey Edgar, DJEDGAR	Approve	Approved	Aug 21, 2018 08:38:28 AM
Graduate School Approval, 45	Kimberly Lynn Douglass, KDOUGLASS	Approve	Approved	Aug 23, 2018 09:34:23 AM
HR Appliers, 99	HR Applier, MHRW00001	Apply	Applied	Aug 24, 2018 01:40:25 PM

NOTES REGARDING EPAFS:

- 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 employees who do not have credentials 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 activate a MTSU email.
- Only Graduate Assistant and Adjunct EPAFs has begin and end dates for contacts. To end an assignment, you must create a separate terminating EPAF after you have received the email stating "Your EPAF is now completed" for the hire EPAF.
- Adjunct EPAFs will be either teaching or non-teaching. You must know which EPAF type to use.
- If you are the originator of an EPAF, you cannot be the department head approver.

NOTES REGARDING EPAFS:

- 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.

Notes Regarding EPAFs:

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.

EPAF 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 - STUDENTS

EPAF Categories –**STUDENTS**

- **Hiring**
  - **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 - 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 Student 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 - STUDENTS

- **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 – TEMP HOURLY

- **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
  - **GRRHTH–**Grant Rehire in a previous position
  - **GRRTTH–**Grant pay rate change for Temp Hourly position.

EPAF – Graduate Assistant

- **EPAF Categories – Graduate Assistant**
  - **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

EPAF PROCESSING

Questions??

Still having trouble processing your EPAF?

Our EPAF coordinator is

LaCresha Longwell, ext 5235 or lacresha.longwell@mtsu.edu