Electronic Personnel Action Forms - EPAF
The Electronic Personnel Action Form allows paperless processing of personnel actions for students and temp hourly. 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 Form- EPAF

- 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 electronic approval routing queue. Each EPAF has mandatory approval levels developed by the Human Resource Services office.
Electronic Personnel Action Form EPAF

- EPAF Categories - **STUDENTS**
  - **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.
    - **TAFHIR** - Used to process individuals in TAF positions.
Electronic Personnel Action Form

EPAF

- EPAF Categories - **STUDENTS**
  - **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.
    - **TAFRAT** - Used to re-hire an individual into a TAF position
  - **Terminations**
    - **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
Electronic Personnel Action Form
EPAF

- **EPAF Categories**
  - **Pay Rate Change**
    - **RA** - Used to change a pay rate on a student position.
    - **GR** - Used to change a pay rate on a student in a grant position.
    - **TA** - Used to change a pay rate on a TAF position.

- **Timekeeping Org Change**
  - **TG** - Used to change a T-Org on a position for a student worker.
  - **TGR** - Used ONLY by Financial Aid to change a T-Org on a work study position.
  - **GR** - Used to change a T-Org on a grant funded student position.
  - **TAF** - Used to change a T-Org on a TAF position.
Electronic Personnel Action Form EPAF

- **EPAF Categories - TEMP 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.
Electronic Personnel Action Form (EPAF)

- 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.
Approval’s Required for TEMP HOURLY

HR Approve Transaction - (NEXGEN)

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.
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.
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: [input fields]
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 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”.

You will see the job information for the individual.
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:

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.
Electronic Personnel Action Form (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**

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Status: (Not Enterable)</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Employee Class Code: (Not Enterable)</td>
<td>SW, College Work Study</td>
<td></td>
</tr>
<tr>
<td>I-9 Form Indicator: (Not Enterable)</td>
<td>Temporary</td>
<td></td>
</tr>
<tr>
<td>I-9 Expiration Date: MM/DD/YYYY (Not Enterable)</td>
<td>01/23/2017</td>
<td></td>
</tr>
<tr>
<td>Job Status: (Not Enterable)</td>
<td>Terminated</td>
<td>A</td>
</tr>
<tr>
<td>Step: (Not Enterable)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Jobs Effective Date: MM/DD/YYYY</td>
<td>05/14/2014</td>
<td>10/17/2014</td>
</tr>
<tr>
<td>Job Change Reason: (Not Enterable)</td>
<td>TERM</td>
<td>REHI</td>
</tr>
<tr>
<td>Time Entry Method: (Not Enterable)</td>
<td>Employee Time Entry via Web</td>
<td>W</td>
</tr>
<tr>
<td>Time Entry Type: (Not Enterable)</td>
<td>Pay Period Time Sheet</td>
<td>T</td>
</tr>
<tr>
<td>Time In/Out Ind: (Not Enterable)</td>
<td>Yes</td>
<td>Y</td>
</tr>
<tr>
<td>Regular Rate:</td>
<td>7.25</td>
<td>7.25</td>
</tr>
<tr>
<td>Timesheet Orgn:</td>
<td>T16450</td>
<td></td>
</tr>
</tbody>
</table>
Electronic Personnel Action Form (EPAF)

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.

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Electronic Personnel Action Form

The transaction has been successfully submitted.
Enter the information for the EPAF and either Save or Submit
```

- 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>Type</th>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rehire Student into Same Position</td>
<td>WARNING</td>
<td><em>WARNING</em> Encumbrance Method is Value Input and salary has changed.</td>
</tr>
</tbody>
</table>

* - indicates a required field.
Electronic Personnel Action Form

- 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.

### EPAF Transactions

<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>
</tr>
</thead>
<tbody>
<tr>
<td>Haynes, Alicia A.</td>
<td>M00021525</td>
<td>61739</td>
<td>Hire Student</td>
<td>Sep 18, 2014</td>
<td></td>
<td>Waiting</td>
<td>Comments</td>
</tr>
<tr>
<td>Pub Safety Student Holiday Pay, 912880-00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jones, Andrew W.</td>
<td>M01103650</td>
<td>61738</td>
<td>Hire Student</td>
<td>Sep 17, 2014</td>
<td></td>
<td>Waiting</td>
<td>Comments</td>
</tr>
<tr>
<td>Student-Ind Cost Sponsor Prog, 224880-00</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Riehl, Andrew E.</td>
<td>M01206442</td>
<td>61737</td>
<td>Rate Change Student</td>
<td>Sep 16, 2014</td>
<td></td>
<td>Waiting</td>
<td>Comments</td>
</tr>
<tr>
<td>Student-Record Industry Mgmt, 145880-00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stratton, Evan M.</td>
<td>M01220038</td>
<td>61759</td>
<td>Hire Student</td>
<td>Sep 12, 2014</td>
<td></td>
<td>Waiting</td>
<td>Comments, Errors</td>
</tr>
<tr>
<td>Student Help-Recycling, 333880-00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Additional information:

- 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.

- An approver can return an EPAF to the originator for corrections before approving.
NOTES REGARDING TEMP HOURLY CONTRACTS:

- Contracts are sent to employees via email and they are able to sign them electronically. 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. This process depends on their MTSU email being active and it takes at least 24 hours before ITD can run the process to activate.

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

- There are additional mandatory approval levels and you can set up a default routing que.
Have you done the Hiring Verification in Workflow? If not, you have to do so before attempting an EPAF to make sure whether or not the employee has to do employment paperwork. The EPAF system will not process if this paperwork has not been submitted.

Is the type of EPAF you selected correct?

EPAF’s contract type defaults to “secondary”, if this person does not have another job change to “primary”.

Check for proper approval levels.
EPAF Payroll Processing

Still having trouble processing your EPAF?

Our EPAF coordinator is Alicia Haynes @ x.2382. If no answer, Lisa Batey @ x.5712.
EP AF Payroll Processing

Questions?

Thank You For Attending!