

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. Adjunct Faculty and Summer School pay have now been added to the EPAF system.***

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.

EPAF Instructions

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mtsu.edu/hrs
1. Other
Information
2. Training

Training Modules, Various On-Campus Training/Seminars and Training Materials

Banner

- [BANNER HR Cheat Sheet](#)
- [BANNER Navigation and Forms Training Module](#)
- [HRS Forms Quick Reference Guide](#)
- [HRS Forms Training Module](#)

Electronic Personnel Action (EPAF)

- [Electronic Personnel Action Forms Training Module](#)
- [EPAF Training Module – Adjunct Faculty](#)
- [EPAF Training Module – Summer School](#)
- [EPAF Instruction Guide](#)



Employee Relations

- [Performance Evaluation Training](#)
- [Student Supervisor Training Registration](#)
- [Supervising Students](#)

PageUp

- [PageUp Instruction Manual](#)

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

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- ▶ 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.

► 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.**

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► Creating EPAF's

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

The screenshot displays the PipelineMT web application interface. At the top, the Middle Tennessee State University logo and the text "PipelineMT" are visible. A left-hand navigation menu includes links for Home, Registration & Student Records, Academic Resources, Billing & Payment, Employees (highlighted), Finance, and Resources. The main content area is titled "Employees" and is divided into three sections: "Pay and Job Information" (containing links for Jobs Summary, Earnings History, Earnings by Positions, Pay Stub, and Direct Deposit Allocation), "Benefits and Deductions" (containing links for Retirement Plans and Options, Insurances, Deductions History, Miscellaneous Benefits, and Benefit Statement), and "Electronic Personnel Action Form" (containing links for EPAF Approver Summary, EPAF Originator Summary, New EPAF, EPAF Proxy Records, and Act as a Proxy). A large green arrow points from the "Benefits and Deductions" section towards the "New EPAF" link in the "Electronic Personnel Action Form" section.

MIDDLE TENNESSEE STATE UNIVERSITY | PipelineMT

Home » Employees

Pay and Job Information

- Jobs Summary
- Earnings History
- Earnings by Positions
- Pay Stub
- Direct Deposit Allocation

Benefits and Deductions

- Retirement Plans and Options
- Insurances
- Deductions History
- Miscellaneous Benefits
- Benefit Statement

Electronic Personnel Action Form

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

Other available actions (indicated by icons):

- Leave Report
- Time Entry
- Leave Balance
- Update Direct Deposit Allocation
- Update W-4 Withholding

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► 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: *  

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► 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.**



Query Date: MM/DD/YYYY* 10/17/2014

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

Query Date: MM/DD/YYYY* 10/17/2014

Approval Category: * Hire Student, HIREST

Go




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► 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, HIRES

Search	Type	Position	Suffix	Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/>

⚠ There are no active jobs based on the Query Date.

- 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
<input type="text"/>	New Job	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/>
	Primary	620880	00	Student Help-Develop Office		T30500, Development Office	Jul 02, 2018		Mar 15, 2023	Active	<input type="radio"/>
	Secondary	620945	00	Graduate Assistant - Admin		T30500, Development Office	Jan 01, 2022	Aug 31, 2023	Apr 30, 2023	Active	<input type="radio"/>
	Secondary	GAA945	00	Graduate Assistant - Admin		T18000, V Provost Res and Dean of Grad	Sep 01, 2022	Aug 31, 2023	Apr 30, 2023	Active	<input type="radio"/>
	Secondary	J64865	00	Adjunct Professor - Flat Rate		T13300, Computer Science	Apr 01, 2023	Apr 30, 2023	Apr 30, 2023	Active	<input type="radio"/>
	Secondary	J64880	00	ST Help - Retention Female ST		T13300, Computer Science	Jan 13, 2023		Mar 15, 2023	Active	<input type="radio"/>


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



► 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.*

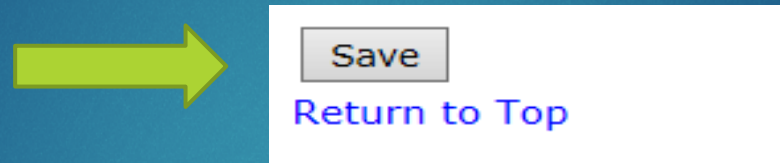
Approval Level	User Name	Required Action
2 - (HRAPR) HR Approve Transaction		<input type="text"/>
10 - (DEPTHD) Department Head		<input type="text"/>
42 - (GRADIN) Graduate School Initial Review		<input type="text"/>
45 - (GRADSC) Graduate School Approval		<input type="text"/>
99 - (HRAPP) HR Appliers		<input type="text"/>
Not Selected 		<input type="text"/>
Not Selected 		<input type="text"/>
Not Selected 		<input type="text"/>
Not Selected 		<input type="text"/>

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

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- ▶ 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.



Electronic Personnel Action Form

✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

Name and ID:	Daniel D Rayner, M01192354	Job and Suffix:	See approval types below.
Transaction:	61801	Query Date:	Oct 17, 2014
Transaction Status:	Waiting	Last Paid Date:	May 15, 2014
Approval Category:	Rehire Student into Same Position, REHIST		

Save Submit Delete



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► Creating EPAF's

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



Electronic Personnel Action Form

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

- 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


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- ▶ 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:

[Approval Types](#) | [Errors](#) | [Routing Queue](#) | [Comments](#) | [Transaction History](#)
[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

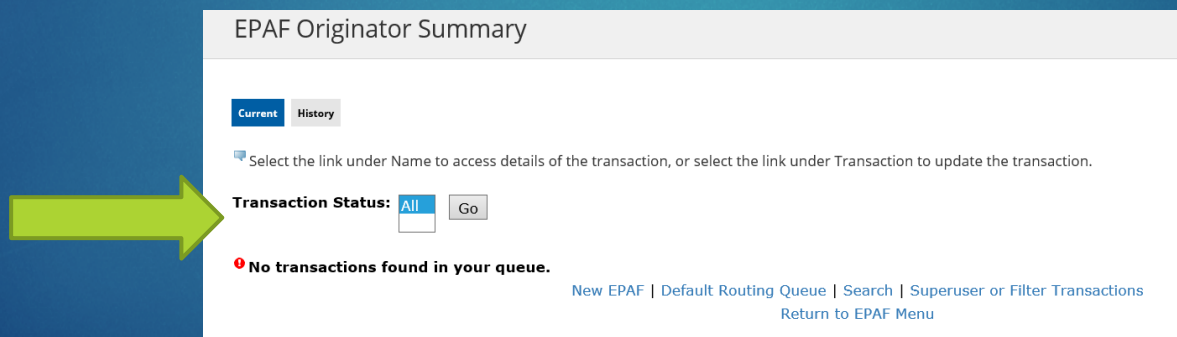
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► Tracking EPAF's

- 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:



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► 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:

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- ✓ 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 have begin and end dates for contracts. 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:

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- ▶ 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.
- ▶ An approver can return an EPAF to the originator for corrections before approving.

EPAF

Troubleshooting:

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- ✓ Have you done the Hiring Verification in Workflow?
 - If not, you must 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, you will need to change to "primary".
- ✓ Has your EPAF been approved?
 - An 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

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EPAF Categories –**STUDENTS**

▶ **Hiring**

- ▶ **HIRES**–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

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► **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

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► 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

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▶ 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
- ▶ **GRRTH**—Grant pay rate change for Temp Hourly position.

EPAF – Graduate Assistant

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▶ 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

Electronic Personnel Action Forms (EPAF)

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➤ ADJUNCT FACULTY EPAF

✓ Teaching

❖ A Teaching EPAF will have credit hours attached!

1. **HIREAF** – used when the individual has NEVER worked in the position number.
2. **REHIAF** – used when the individual HAS worked in the position number.
3. **GRHIAF** – used for grant position numbers and individual has never worked in the position number before.
4. **GRRHAF** – used for grant position numbers and individual has previously worked in the position number.
5. **TERMAF** – used to terminate a position number.

Electronic Personnel Action Form (EPAF) Adjunct Faculty Continued

- ❖ Non-Teaching EPAF will have clock hours associated with payment.
- 1. **AFHINT** – used for an individual who has NEVER worked in position number before.
- 2. **AFRHNT** – used for an individual who HAS worked in position number.
- 3. **AFGHNT** – used for a grant position when the individual has never worked in position before.
- 4. **AFGRNT** – used for a grant position when the individual has worked in position before.
- 5. **TERMAF** – used to terminate an adjunct position.

Electronic Personnel Action Forms (EPAF) Summer School

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- ✓ ONLY TO BE USED FOR FULL-TIME FACULTY TEACHING DURING THE SUMMER SCHEDULE!
 - ✓ NO HIRING VERIFICATION WORKFLOW IS NEEDED FOR SUMMER SCHOOL EPAFS!
 - ✓ ONLY USED FOR FULL-TIME FACULTY TEACHING SUMMER. POSITIONS WILL END IN 810.
-
1. **HIRESS** – used when the individual has NEVER worked in the position number.
 2. **REHISS** – used when the individual HAS worked in the position number.
 3. **GRHISS** – used for grant position numbers and individual has never worked in the position number before.
 4. **GRRHSS** – used for grant position numbers and individual has previously worked in the position number.
 5. **TERMSS** – used to terminate a position number.

EPAF APPROVALS – Summer School











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- ▶ Approval's Required for **Summer School – Mandatory**
 - ▶ **DEPTHD** – Chair/Director, etc.
 - ▶ **DEANS** – Applicable College Dean.
 - ▶ **UNIVCO** – University College
 - ▶ **VP** – Applicable Vice President
 - ▶ **RS** – Research Services – only for Grant Related EPAF's
 - ▶ **HRAPP** – Human Resource Services applies all EPAFs.
- ❖ Any approver may designate a Proxy Approver for EPAF's.

► Routing Queue (Dual Enrollment)

- *If you are submitting a contract for a Dual Enrollment payment, you must manually add the approver.*
- *You will need to use the “Not Selected” dropdown and click on UNIVCO, which will be for the University College Approver.*

Routing Queue

Approval Level		User Name
2 - (HRAPR) HR Approve Transaction		<input type="text"/>
10 - (DEPTHD) Department Head		<input type="text"/>
30 - (DEANS) Deans		<input type="text"/>
42 - (ACADRE) Academic Affairs Review		<input type="text"/>
50 - (VP) Vice Presidents		<input type="text"/>
99 - (HRAPP) HR Appliers		<input type="text"/>
Not Selected ▼		<input type="text"/>
Not Selected ▼		<input type="text"/>
Not Selected ▼		<input type="text"/>
Not Selected ▼		<input type="text"/>

Save and Add New Rows

EPAF Continued

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- ▶ Creating Summer School EPAF's
 1. You will need the individual's Banner ID
 2. You will need the position number – Summer School position numbers end in 810!
 3. You will need the T-Org

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

EPAF Processing Questions??

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- ▶ Still having trouble processing your EPAF?
- ▶ Our EPAF coordinator is
- ▶ ***LaCresha Longwell, ext 5235 or lacresha.longwell@mtsu.edu***