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Overview and Purpose

The Personnel Action Form (PAF) is a document used by Human Resources to facilitate any changes related to a student employee’s job. This includes actions such as hiring, termination, pay increases, additional pay, and promotions, just to name a few. The online Personnel Action Form now allows users to update their regular faculty & staff, temporary and student employees Report To information. Its intent is to be comprehensive, and as such, requires training for first time users.

In order to ease potential unfamiliarity with the requirements and jargon of the document, and also to simplify the process as a whole, we have implemented an electronic version of the PAF for student employees. By shifting to this medium, a number of benefits become available:

- Security
- Pre-populated fields
- Tracking
- Consolidation
Creating an ePAF

The ePAF Landing Page is the starting point for the electronic PAF system. From here, you will be able to create and review ePAFs, grant access to others, and see a student employee’s active jobs.

**NAVIGATION:**

Log on to [https://my.tcu.edu](https://my.tcu.edu) and click on the “Department / Budget Manager” tile and then the “ePAF” tile.
Types of ePAFs
The following is a brief description of each option displayed on this page; for more detailed instructions on each item, please see the applicable section(s) found in this document. It should also be noted that the availability of items on this page is limited by your security level. All items will not be visible to all users.

- **Review ePAF**
- **Hire Student-Employee**
- **Manage WorkStudy**
- **Jobcode Change**
- **Pay Rate Change**
- **Term Employee**
- **Reports To Change**
- **Account Code Change**
- **Career Center Student Check**
- **View Current Jobs**
- **Delegation/Authorization**
- **Department Approval**

**Use this type when hiring an undergraduate or graduate student**

**Use this type to change a student employee to/from Work Study funds**

**Use this type to change a student employee jobcode**

**Use this type to change the pay rate for a student employee**

**Use this type to terminate a student employee’s job**

**Use this type to update regular, temporary & student employees’ current supervisor**

**Use this type to update the budget information for a student employee**

This page shows what information the Career Center has for the student

This page shows all active jobs for any student

Use this page to control ePAF access for your departments

Use this page to approve / deny ePAFs in your queue

One important step to note – with the exception of the “Hire Student - Employee” ePAF type, after inputting the student’s ID# you will need to select the job record you wish to take action on from the “Current Jobs” table (located at the bottom of each page). This list will only populate after the student ID# has been entered; simply click the “Select Employee” button corresponding to the job you want to change.
1) **Employee ID**: begin by either typing in the student employee’s TCU ID# or clicking the magnifying glass next to the “Employee ID” field and selecting the desired entry (See Appendix A for help with this option). Tab out of field.

   **TIP**: after the ID# has been entered, the “Current Jobs” section at the bottom will populate, letting you see at a glance what other commitments the student employee already has.

2) **Job Code**: enter job code or click the magnifying glass next to the “Job Code” field and selecting the desired entry. The list of available job codes is determined by the student’s undergraduate or graduate status.

3) **Workstudy Award**: if the student is an undergraduate and has been awarded federal workstudy money for the current academic year, the amount will be display.

4) **Hiring as Workstudy**: if the student is an undergraduate and has been awarded federal workstudy money for the current academic year this field will be available. If you wish to hire your student as workstudy, click the slide button to change from No to Yes.

5) **Hire Date**: this date must correspond to the beginning of a pay period. Acceptable dates can be selected by clicking on the magnifying glass. (Note: actual hours for which an hourly student employee will be paid are dependent on the submitted timesheet.)

6) **Department**: either type in the department number or use the magnifying glass to search for it (note, you will only be able to select departments for which you have been granted access).

7) **Reports To**: the supervisor must be a regular employee in the same business unit as the hiring department (note, this field will only become accessible after the Department field has been populated). Either type in the supervisor’s position number or use the magnifying glass to search for it.

8) **Estimated Weekly Hours**: enter the number of hours per week this job will require. This number is an estimate only, and will not impact the student employee’s paycheck.
9) **Hourly Rate**: enter the hourly pay rate for the student employee (must be at least $7.25). Send any questions to Rachelle Blackwell (r.blackwell@tcu.edu) in HR Compensation.

10) **Frog Job Posting #:** each student employee’s job on campus must have a corresponding FrogJobs posting. Send any questions to Laura Chaney (l.j.chaney@tcu.edu) in the Career Center.

11) **Budget Information**: the Department, Account, Fund Code, and Project fields will be pre-populated based on your other selections; however, they will remain editable if you need to change them.

Once these fields have been filled in, proceed by clicking the “Submit” button at the bottom of the page. If you wish to start over, the “Clear Page” button will remove any content you have typed.
Hire Graduate Student

1) **Employee ID**: begin by either typing in the student employee’s TCU ID# or clicking the magnifying glass next to the “Employee ID” field and selecting the desired entry (See Appendix A for help with this option).

   *TIP*: after the ID# has been entered, the “Current Jobs” section at the bottom will populate, letting you see at a glance what other commitments the student employee already has.

2) **Job Code**: select the option corresponding to the duties this student employee will perform.

3) **Hire Date**: this date must correspond to the beginning of a pay period. Acceptable dates can be selected by clicking on the magnifying glass. (Note: actual hours for which the student employee will be paid for an hourly job are dependent on the on the submitted timesheet.)

4) **Term Date**: this date must correspond to the beginning of a pay period. Acceptable dates can be selected by clicking on the magnifying glass. (Note: Term date not required for hourly graduate student jobs.)

5) **Department**: either type in the department number or use the magnifying glass to search for it (note, you will only be able to select departments for which you have been granted access).

6) **Reports To**: the supervisor must be a regular employee in the same business unit as the hiring department (note, this field will only become accessible after the Department field has been populated). Either type in the supervisor’s Position Number or use the magnifying glass to search for it.

7) **Hourly Rate / Total Award**: if “Hourly Student” was selected as the type, enter the hourly pay rate here (must be at least $7.25). Otherwise, enter the total amount to be paid to the student employee. Any
questions regarding graduate student pay may be sent to Tim Barth (t.barth@tcu.edu) in Graduate Financial Aid.

8) **Standard Hours**: enter the number of hours per week this job will require. This field is only provided for assistantships. This number will be recorded on each paycheck as their hours worked per week.

9) **Estimated Weekly Hours**: For Hourly type jobs, this number is an estimate only, and will not impact the student employee’s paycheck. This field is only provided for hourly graduate student jobs.

10) **Frog Job Posting #**: each student employee’s job on campus must have a corresponding FrogJobs posting. Send any questions to Laura Chaney (l.j.chaney@tcu.edu) in the Career Center. This field is only provided for hourly graduate student jobs.

11) **Budget Information**: the Department, Account, Fund Code, and Project fields will be pre-populated based on your other selections; however, they will remain editable if you need to change them.

Once these fields have been filled in, proceed by clicking the “Submit” button at the bottom of the page. If you wish to start over, the “Clear Page” button will remove any content you have typed.
1) **Employee ID**: begin by either typing in the student employee’s TCU ID# or clicking the magnifying glass next to the “Employee ID” field and selecting the desired entry (See Appendix A for help with this option).

2) **Select Employee**: once the student employee’s ID# has been entered, the “Current Jobs” table will be populated. From this table, select the job record you wish to take action upon.

3) **Effective Date**: this date must correspond to the beginning of a pay period. Acceptable dates can be selected by clicking on the magnifying glass.

4) **Activate/Inactivate Work Study**: the appropriate action will be automatically selected based upon the student employee’s current classification.

5) **Select Earnings Code**: this field is related to the Activate/Inactivate Work Study checkboxes, and will be automatically selected for you. When the “Activate WorkStudy” button is checked, the “Change to Federal Work Study” option will be selected. When the “Inactivate WorkStudy” button is checked, the “Change to Regular Pay” option will be selected.
6) **New Accounting Information**: these values (Department, Fund Code, Account, and Project) will be pre-populated with the same values from the respective “Old Accounting Information” section. However, these values can be changed if necessary.

7) **Old Accounting Information**: the current accounting information will be displayed here, broken down by Department, Fund Code, Account, and Project.

8) **New Supervisor ID**: the supervisor must be a regular employee in the same business unit as the student employee’s current department. Either type in the supervisor’s position number or use the magnifying glass to search for it.

9) **Former Supervisor ID**: this field displays the student employee’s current supervisor ID and name.

Once these fields have been filled in, proceed by clicking the “Submit” button at the bottom of the page. If you wish to start over, the “Clear Page” button will remove any content you have typed.
JobCode Change

1) **Employee ID:** begin by either typing in the student employee’s TCU ID# or clicking the magnifying glass next to the “Employee ID” field and selecting the desired entry (See Appendix A for help with this option).

2) **Select Employee:** once the student employee’s ID# has been entered, the “Current Jobs” table will be populated. From this table, select the job record you wish to take action upon.

3) **Effective Date:** this date must correspond to the beginning of a pay period. Acceptable dates can be selected by clicking on the magnifying glass.

4) **Select New Job Code:** Click the magnifying glass for a list of student employee job codes. Available job codes are dependent on the student’s undergraduate or graduate classification. Select the job code that most closely describes the job duties your student employee will be performing for your department.

Once these fields have been filled in, proceed by clicking the “Submit” button at the bottom of the page. If you wish to start over, the “Clear Page” button will remove any content you have typed.
Pay Rate Change

1) **Employee ID**: begin by either typing in the student employee’s TCU ID# or clicking the magnifying glass next to the “Employee ID” field and selecting the desired entry (See Appendix A for help with this option).

2) **Select Employee**: once the student employee’s ID# has been entered, the “Current Jobs” table will be populated. From this table, select the job record you wish to take action upon.

3) **Effective Date**: this date must correspond to the beginning of a pay period. Acceptable dates can be selected by clicking on the magnifying glass.

4) **Former Supervisor ID**: this field displays the student employee’s current supervisor ID and name.

1) **Current Hourly Rate**: this field displays the employee’s current hourly rate.

2) **New Hourly Rate**: enter the student employee’s new hourly rate.

3) **Reports To**: the supervisor must be a regular employee in the same business unit as the student employee’s current department. Either type in the supervisor’s position number or use the magnifying glass to search for it.

Once these fields have been filled in, proceed by clicking the “Submit” button at the bottom of the page. If you wish to start over, the “Clear Page” button will remove any content you have typed.
Term Employee

1) **Employee ID:** begin by either typing in the student employee’s TCU ID# or clicking the magnifying glass next to the “Employee ID” field and selecting the desired entry (See Appendix A for help with this option).

2) **Select Employee:** once the student employee’s ID# has been entered, the “Current Jobs” table will be populated. From this table, select the job record you wish to take action upon.

3) **Termination Date:** this date must correspond to the beginning of a pay period. Acceptable dates can be selected by clicking on the magnifying glass.

4) **Reason for Termination:** click the magnifying glass and select the desired entry

Once these fields have been filled in, proceed by clicking the “Submit” button at the bottom of the page. If you wish to start over, the “Clear Page” button will remove any content you have typed. To cancel the PAF, click the “Return” button.
Reports To Change

1) **Employee ID**: begin by either typing in the employee’s TCU ID# or clicking the magnifying glass next to the “Employee ID” field and selecting the desired entry (See Appendix A for help with this option).

2) **Select Employee**: once the employee’s ID# has been entered, the “Current Jobs” table will be populated. From this table, select the job record you wish to take action upon.

3) **Effective Date**: this date must correspond to the beginning of a pay period. Acceptable dates can be selected by clicking on the magnifying glass.

4) **Former Reports To**: this field displays the employee’s current supervisor ID and name.

5) **New Reports To**: the supervisor must be a regular employee in the same business unit as the employee’s current department. Either type in the supervisor’s position number # or use the magnifying glass to search for it.

6) **Estimated Worked Hours**: if necessary, you can also update the employee’s estimated weekly hours for student employees only.

Once these fields have been filled in, proceed by clicking the “Submit” button at the bottom of the page. If you wish to start over, the “Clear Page” button will remove any content you have typed.

*Note: Reports To field will be used to route leave reporting for regular staff, and Frog Time for student and temporary employees.*
Account Code Change

1) **Employee ID**: begin by either typing in the student employee’s TCU ID # or clicking the magnifying glass next to the “Employee ID” field and selecting the desired entry (See Appendix A for help with this option).

2) **Select Employee**: once the student employee’s ID # has been entered, the “Current Jobs” table will be populated. From this table, select the job record you wish to take action upon.

3) **Effective Date**: this date must correspond to the beginning of a pay period. Acceptable dates can be selected by clicking on the magnifying glass.

4) **New Accounting Information**: input the new budget information into the Department, Fund Code, Account, and Project fields.

5) **Old Accounting Information**: displays the current budget information for the employee’s job.

Once these fields have been filled in, proceed by clicking the “Submit” button at the bottom of the page. If you wish to start over, the “Clear Page” button will remove any content you have typed. To cancel the PAF, click the “Return” button.
Other ePAF tools

Review ePAF
Clicking on this link will reveal new options designed to show the PAFs you have created through the electronic PAF system.

Instructions
By selecting the various options, you can limit the number of results that will be displayed. For example, to see every Pay Rate Change ePAF you have created within the last month, you would click “Pay Rate Change,” enter the appropriate dates in the “From Date” and “To Date” fields, and click the “Search” button.

In order to see every PAF you have created, simply click the “See All Types” checkbox (with all other fields empty) and then click the “Search” button.

TIP: PeopleSoft automatically limits the number of results displayed at one time, so if you do not see what you are looking for, check the top right of the table and verify all of the records are being displayed!
Career Center Student Check
This page allows you to verify a student has completed all necessary paperwork at the Career Center. For questions on this requirement, please contact Cheri Massey (c.massey@tcu.edu).

Instructions
1) Type in the student’s TCU ID# and click the “Search” button.
   a. Please note, if after clicking “Search” you receive a message that no matching results were found, the student has not yet been to the Career Center.

2) After the page loads, the various checkboxes displayed signify what information the student has provided to the Career Center.
   a. For all students, the “SSN Verified” and “I-9 Verified” checkboxes must be checked.
   b. For international students, “Entered in Glacier” must also be checked.

3) Until the appropriate paperwork has been completed (and corresponding checkboxes selected), no ePAF can created for that student ID#.
View Current Jobs
This page allows you to view all of the active jobs for an employee.

Instructions
1) Type in the student employee’s TCU ID# and click the “Search” button. Alternatively, click the magnifying glass next to the “Empl ID” field and select the desired entry (See Appendix A for help with this option).

2) The table will populate with each of the student employee’s active jobs occupying a row.

3) If you wish to search for another student employee, the “Clear Page” button will remove any content you have typed. The “Return” button will take you back to the “Department HPAF Homepage.”
Delegation / Authorization

This section is used to manage access to the electronic PAF system. Security access to this system is managed on a departmental level. Department managers are automatically granted access, and using this page, they have the ability to grant additional users the ability to access the electronic PAF system.

After clicking on this link, you will be presented with a search page. If you know the department’s number, type it into the “Department” field, or use the magnifying glass to search for it.

After clicking on this link, you will be presented with a search page. If you know the department’s number, type it into the “Department” field, or use the magnifying glass to search for it.

**TIP:** Leaving the “Department” field blank and clicking on the “Search” button will display every department you have access to.

### Granting Access

Having selected the department, you will now be shown the users that have access to the electronic PAF system for that department. To switch between users, use the arrows along the top right of the Proxy/Supervisor Access window.

To grant access to another person, first click the “Add” link in the top right, then select the desired options that follow.

1) **Proxy/Supervisor:** Either type in the employee’s TCU ID# or use the magnifying glass to search for it.
2) **Effective Date:** defaults to the current date, but it can be changed if desired.

3) **Effective Sequence:** should only be changed from “0” for subsequent entries with the same effective date.

4) **Is Proxy/Supervisor active as of this date?:** once a user has been added to this page (and Saved), they cannot be removed. However, unclicking this checkbox will remove the proxy’s access for that department.

5) **Should Proxy have access to this page?:** when checked, it grants the proxy the ability to create other proxies.

6) **Is Proxy a Department Approver?:** when checked, grants the proxy the status of Department Approver (for more information, see section on “Department Approvers”).

7) **PAF created by employee needs department approval:** when checked, PAFs created by this proxy must first be approved by a Department Approver before entering the workflow.

8) **Send email once PAF is completed:** when checked, upon successful processing of a PAF an email will be delivered to this proxy.

9) **Access of Proxy to paygroup:** these checkboxes determine what type of employees this proxy can create PAFs for. (Note: at this time, the only actions that can be taken for Biweekly/Monthly Temporary and Monthly and Biweekly employees is Report To changes.)
Departmental Approval

In the initial setup of the electronic PAF system, each department has a single proxy. That is, only one employee per department has the capability of creating an ePAF.

However, depending on the reporting structure of your department and its number of employees, you may designate one or more additional employees as proxies. This has the benefit of spreading the workload, but can also add complexity in tracking what work has been done.

The Department Approver is an additional layer of scrutiny for the electronic PAF system. When setting up a proxy, there are two options for this role:

1) **Is Proxy a Department Approver?**: allows the proxy to approve PAFs submitted by other proxies of the same department.

2) **PAF created by employee needs department approval**: when this is checked, the proxy is allowed to create PAFs; however, it will not be processed until a Department Approver has approved it.

For example, a department manager may want an administrative assistant to create PAFs, but would like to review them before they are officially submitted. Picture a paper document sitting on the manager’s desk: this document must have the manager’s signature before it can be processed by HR, so until it is signed, it will stay on the manager’s desk. To utilize this functionality, select the “PAF created by employee needs department approval” option.

Any proxy user that has the “Is Proxy a Department Approver” option checked will have the ability to approve (‘sign’) ePAFs for that department.
Appendix A: Using the “Magnifying Glass”

While using PeopleSoft, you may come across a text field which has a magnifying glass next to it:

![Image of Empl ID field with magnifying glass]

This is a feature of PeopleSoft which serves as an alternative form of entry to typing in the text field. In some cases, it also serves as a selection tool of pre-approved items for fields that have restricted what are considered acceptable entries. If you are unsure of what entries are acceptable for the given text box, simply click on this icon and a new pop-up window will appear with additional parameters designed to aid you.

Example

The text box in the picture above is from the “Review Current Jobs” page and is prompting you to enter an employee’s TCU ID#. If you know the ID#, proceed by typing it in; however, if you are unsure, clicking on the magnifying glass will present you with additional options. In this case, the pop-up window looks like this (a list of employee ID#'s and names are also shown in the window, but have been removed from the picture for security reasons):

![Image of pop-up window with search options]

At first glance, this may not look to be any more helpful, since the only text box available is asking for the same ID#. However, the “Search by” field is a dropdown list, and different items such as “Name” can be selected in place of ID#. Alternatively, clicking on the “Advanced Lookup” link will yield additional search options:

![Image of advanced lookup screen]

Using the “Advanced Lookup” page will allow you to narrow your search results further by utilizing multiple criteria at the same time, instead of only a single criterion as above.

After entering your search criteria, clicking the “Look Up” button will display all of the results matching your parameters. Since each result is listed as a clickable hyperlink, once you have located your desired result (in this case, the employee’s TCU ID#), clicking it will close the pop-up window and populate the “Empl ID” text box with that entry.
Appendix B: New Student Employee Hire Flowchart

1. Department posts job description, receives ProJobs.

2. Department selects student to hire.

3. Is Student Employee International?
   - Yes: Student EE goes to International Student Services.
   - No: Student returns to Career Center, I-9 and SSN are verified, ePAF system updated.

4. Student EE goes to Career Center, I-9 and SSN are verified, ePAF system updated.

5. Student returns to Supervisor; Department can now create ePAF.

6. Is Student Employee paid by Work Study?
   - Yes: ePAF routed to Financial Aid for approval.
   - No: Is Student Employee paid by Grant funds?
     - Yes: ePAF routed to Research Accounting for approval.
     - No: ePAF is checked for errors by HR Data Control, then processed.

7. REMEMBER, the Student Employee will only be paid for hours submitted on their timesheets!