ePAF Guide

Updated April 2021

Contents

Overview and Purpose

The **ePAF** (electronic Personnel Action Form) system is used to facilitate any changes related to a student employee's job. This includes actions such as hiring, termination, pay increases and additional pay, just to name a few.

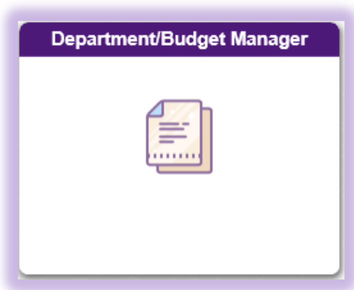
In addition, the ePAF allows you to update **Reports To** information for faculty, staff, temporary employees, as well as student employees.

Create an ePAF

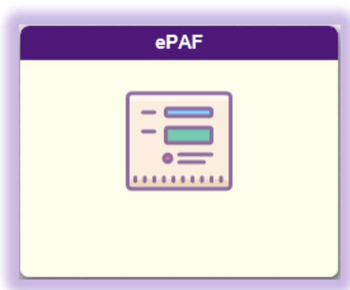
The **ePAF Landing Page** is the starting point.

Navigation:

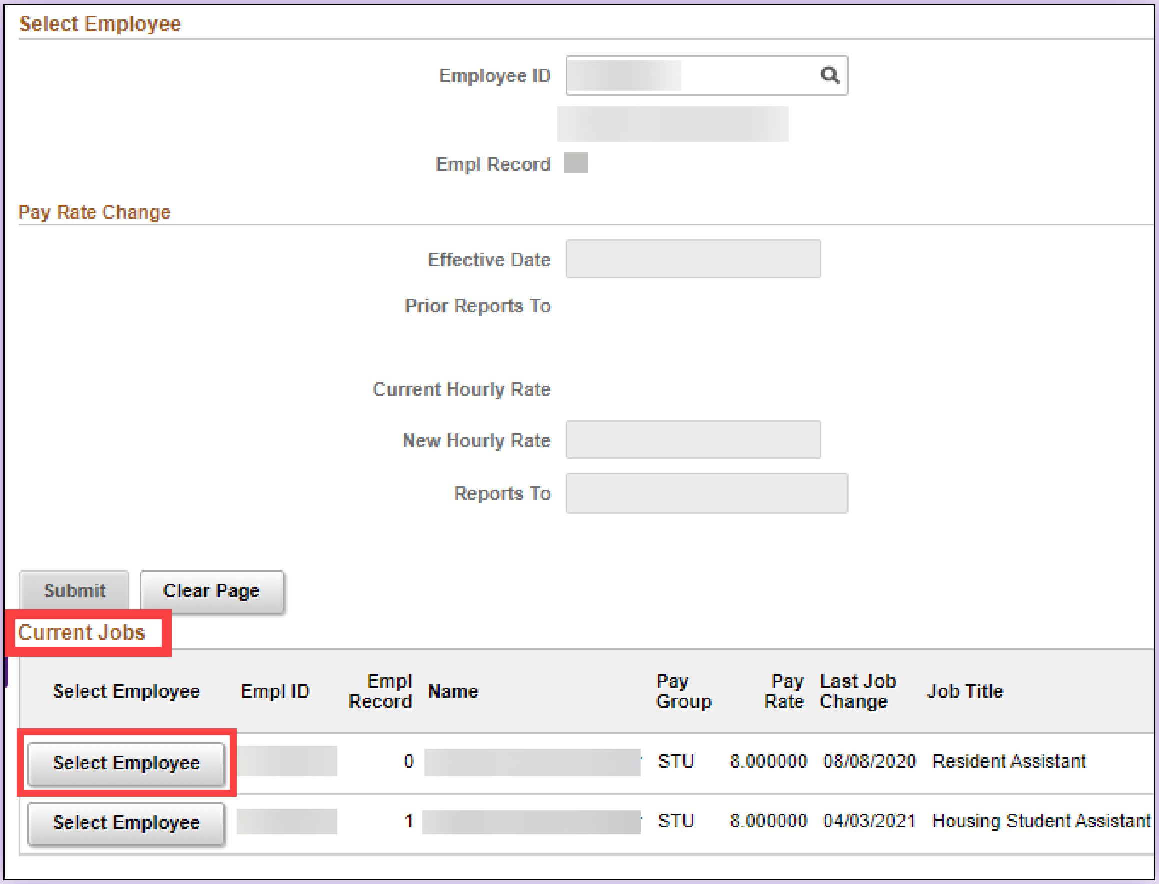
- Log on to https://my.tcu.edu
- Click on the **Department / Budget Manager** tile



- Select the **ePAF** tile

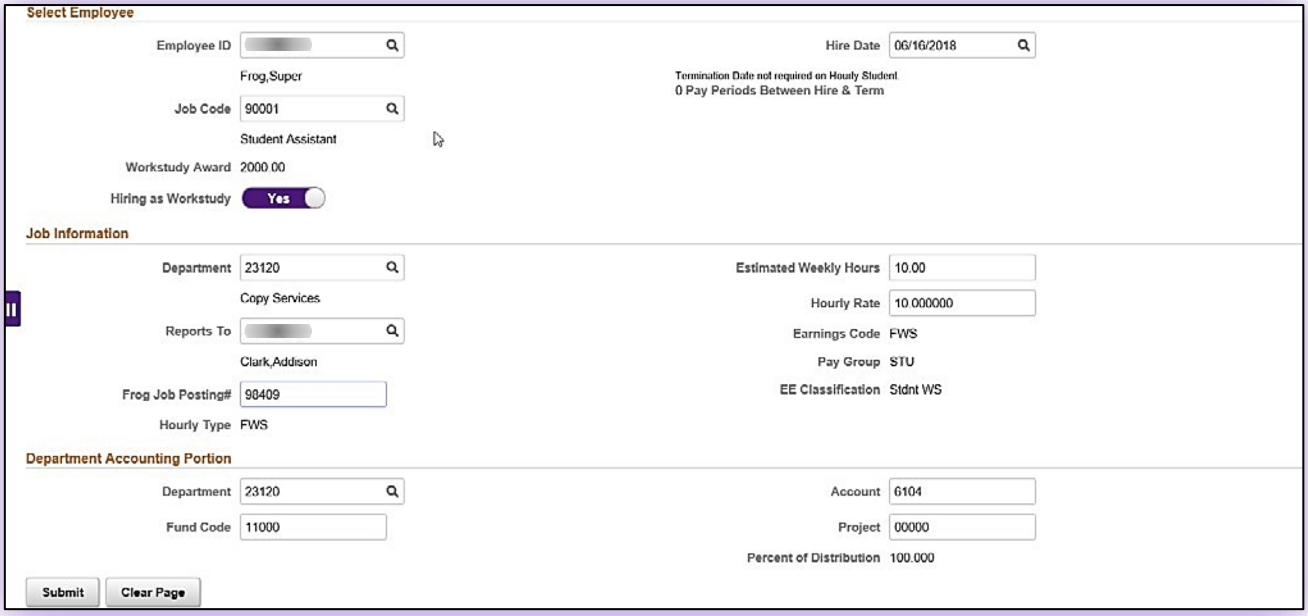


One important note: With the exception of the **Hire Student - Employee** ePAF type, once the student employee's ID# has been entered, a list of **Current Jobs** populates and shows at the bottom of each page. From the list, click the **Select Employee** button to open the job record you wish to change.



Select Employee	Empl ID	Empl Record	Name	Pay Group	Pay Rate	Last Job Change	Job Title
Select Employee		0		STU	8.000000	08/08/2020	Resident Assistant
Select Employee		1		STU	8.000000	04/03/2021	Housing Student Assistant

Hire Student



1) <u>Employee ID</u>: Enter the student employee's TCU ID# or click the magnifying glass next to the **Employee ID** field and select the desired entry. (See Appendix A for help with this option.) Note: After the ID# has been entered, hit the tab key. The **Current Jobs** section at the bottom of the screen will populate, letting you see at a glance what other commitments the student employee already has.

2) <u>Job Code</u>: Enter job code or click the magnifying glass next to the **Job Code** field and select the desired entry. The list of available job codes is determined by the student's undergraduate or graduate status.

3) <u>Workstudy Award</u>: If the student is an undergraduate and has been awarded federal workstudy money for the current academic year, the amount will be display.

4) <u>Hiring as Workstudy</u>: 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) <u>Hire Date</u>: This date must correspond to the beginning of a pay period. Click on the magnifying glass to select a date. Note: Actual hours for which an hourly student employee will be paid are determined by timeclock shifts recorded or timesheets submitted.

6) <u>Department</u>: 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) <u>Reports To</u>: Either type in the supervisor's position number or use the magnifying glass to search for it. 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.

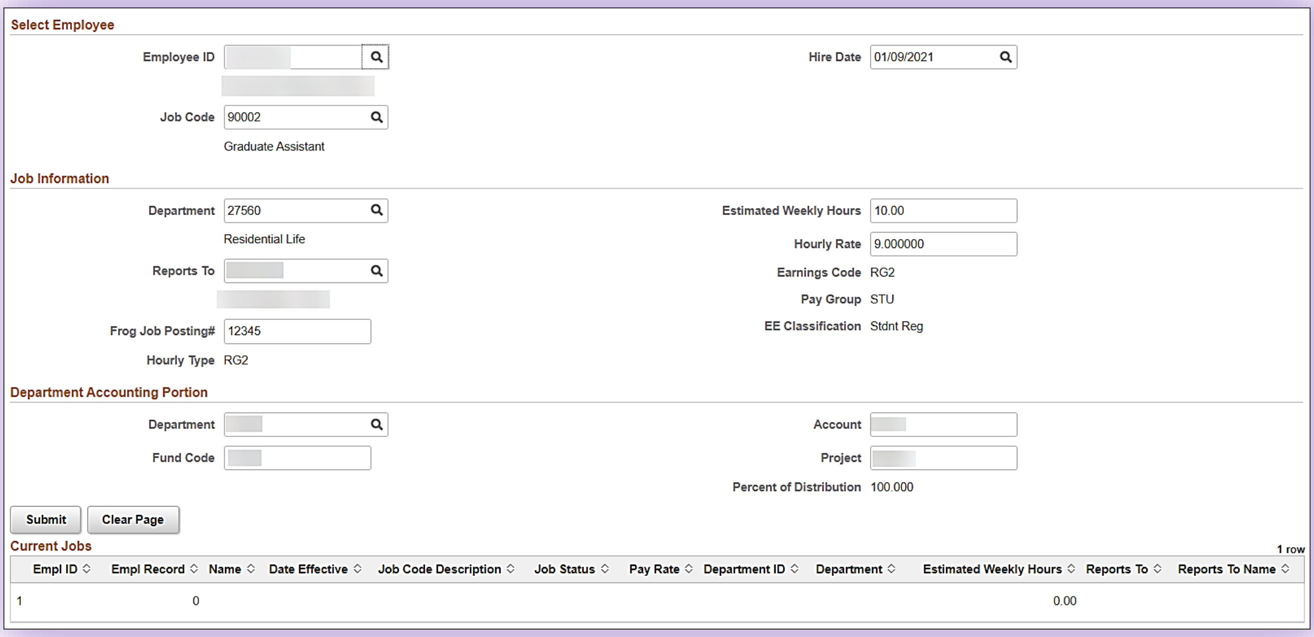
8) <u>Estimated Weekly Hours</u>: Enter the number of hours per week this job will require. This

number is an estimate only, and will not impact the student employee's paycheck. It lets you see at a glance what other commitments the student employee already has.

9) Hourly Rate: Enter the hourly pay rate for the student employee. The rate must be at least $7.25. Send any questions about pay rate to the HR Compensation Team at HRCompensation@tcu.edu.
10) Frog Job Posting #: Each student employee's job on campus must have a corresponding FrogJobs posting. Send any questions to the Assistant Director Employee Development (Celeste Lindell c.lindell@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. You may change the info if needed.

Once these fields have been filled in, click the **Submit** button at the bottom of the page. If you wish to start over, click the **Clear Page** button to remove any content you have typed.

Hire Graduate Student



1) Employee ID: Enter the student employee's TCU ID# or click the magnifying glass next to the **Employee ID** field and select the desired entry. (See Appendix A for help with this option.) Note: After the ID# has been entered, hit the tab key. The **Current Jobs** section at the bottom of the screen will populate, letting you see at a glance what other commitments the student employee already has.

2) Job Code: Select the job code that best reflects the duties this student employee will perform. For graduate student hiring, only job codes corresponding to graduate students will be shown.

3) Hire Date: This date must correspond to the beginning of a pay period. Click on the magnifying glass to select a date. Note: Actual hours for which an hourly student employee will be paid are determined by timeclock shifts recorded or timesheets submitted.

4) Term Date: This date must correspond to the beginning of a pay period. Click on the magnifying glass to select an appropriate date. Note: Term date is 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: Enter the supervisor's position number or use the magnifying glass to search for it. 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.

7) Hourly Rate / Total Award: If **Hourly Student** was selected as the type, enter the hourly pay rate. The minimum rate must be at least $7.25. If the student is not paid hourly, enter the total amount to be paid to the student employee. Any questions regarding graduate student pay may be sent to the Graduate Financial Aid office at FinancialAid@tcu.edu.

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.

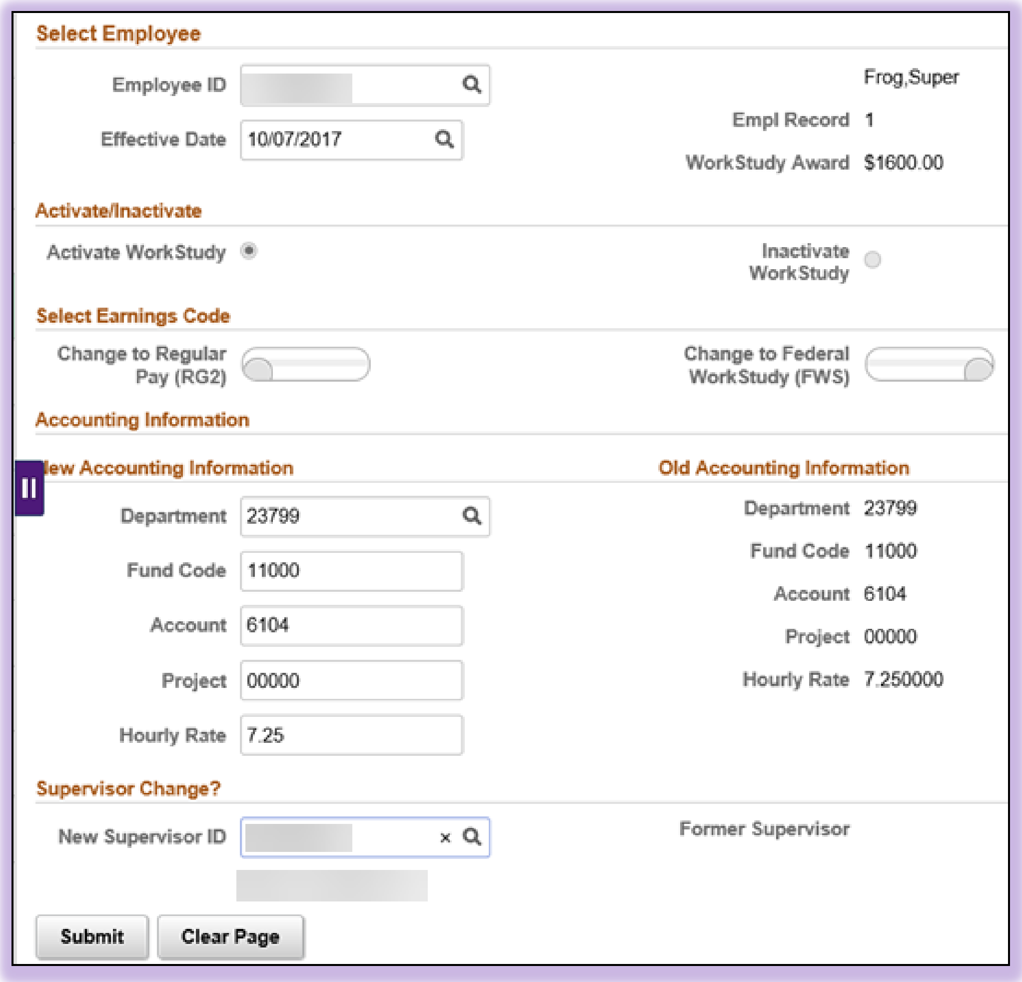
9) Estimated Weekly Hours: This is an estimate only and will not impact the student employee's paycheck. It allows you see, at a glance, what other commitments the student employee already has.

10) Frog Job Posting #: Each student employee's job on campus must have a corresponding FrogJobs posting. Send any questions to the Assistant Director Employee Development (Celeste Lindell c.lindell@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. You may change the info if needed.

Once these fields have been filled in, click the **Submit** button at the bottom of the page. If you wish to start over, click the **Clear Page** button to remove any content you have typed.

Manage WorkStudy



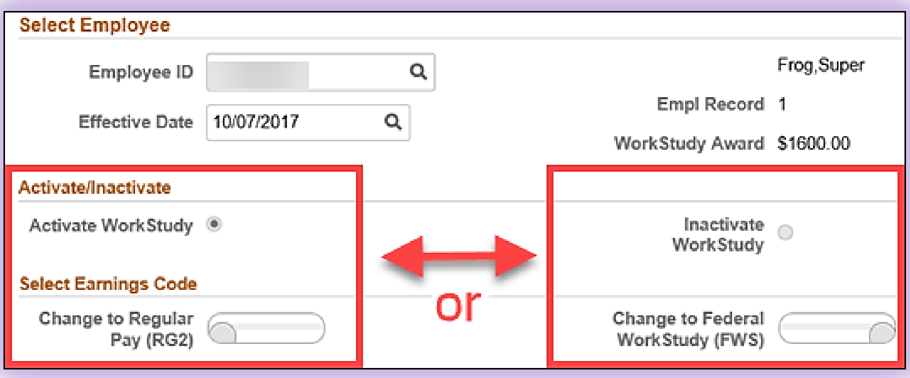
1) Employee ID: Enter the student employee's TCU ID# or click the magnifying glass next to the **Employee ID** field and select the desired entry. (See Appendix A for help with this option.)

2) Select Employee: Once the student employee's ID# has been entered, a list of **Current Jobs** populates and shows at the bottom of each page. From the list, click the **Select Employee** button to open the job record you wish to change.

3) Effective Date: This date must correspond to the beginning of a pay period. Click on the magnifying glass to select a date.

4) Activate/Inactivate Work Study: The appropriate action is shown by default and is based upon the student employee's current classification.

5) Select Earnings Code: The value is automatically selected for you based on the Activate/Inactivate Work Study selection made in the field located above. When you select the **Activate WorkStudy** button above, the **Change to Federal Work Study** option will be selected. When you select the **Inactivate WorkStudy** button, the **Change to Regular Pay** option will be selected.



6) New Accounting Information: Department, Fund Code, Account, and Project values will pre-populate with the same values from the respective **Old Accounting Information** section. You may change the values, as needed.

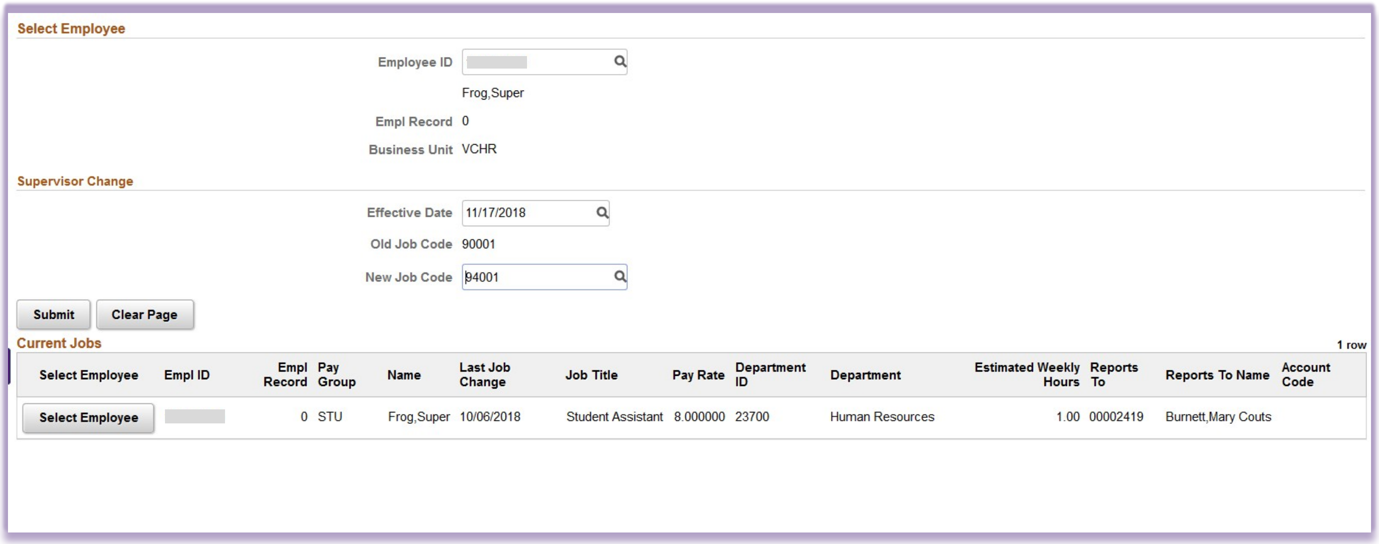
7) Old Accounting Information: The current accounting information is displayed, broken down by Department, Fund Code, Account, and Project.

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, click the **Submit** button at the bottom of the page. If you wish to start over, click the **Clear Page** button to remove any content you have typed.

Change Job Code



Select Employee

Employee ID

Frog,Super

Empl Record 0

Business Unit VCHR

Supervisor Change

Effective Date 11/17/2018

Old Job Code 90001

New Job Code 94001

Submit | Clear Page

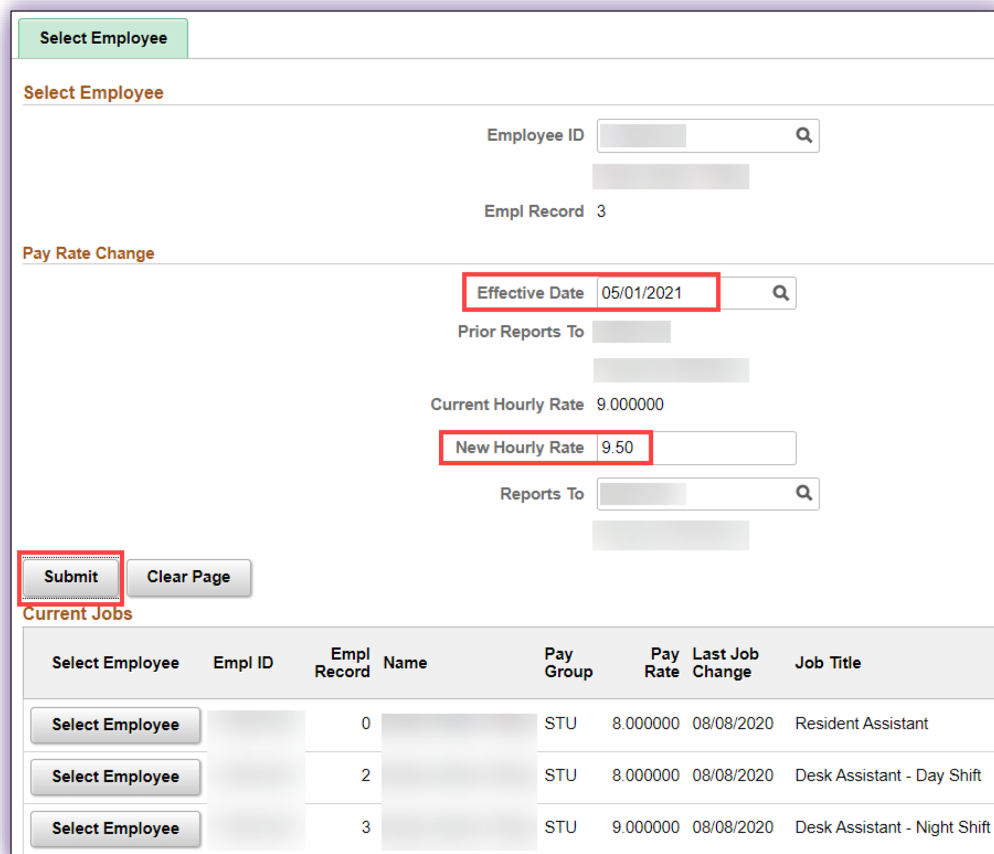
Current Jobs 1 row

Select Employee	Empl ID	Empl Record	Pay Group	Name	Last Job Change	Job Title	Pay Rate	Department ID	Department	Estimated Weekly Hours	Reports To	Reports To Name	Account Code
Select Employee		0	STU	Frog,Super	10/06/2018	Student Assistant	8.000000	23700	Human Resources	1.00	00002419	Burnett,Mary Couts	

1) Employee ID: Enter the student employee's TCU ID# or click the magnifying glass next to the **Employee ID** field and select the desired entry. (See Appendix A for help with this option.)
2) Select Employee: Once the student employee's ID# has been entered, a list of **Current Jobs** populates and shows at the bottom of each page. From the list, click the **Select Employee** button to open the job record you wish to change.
3) Effective Date: The effective date must correspond to the beginning of a pay period. Click on the magnifying glass to select a date.
4) Select New Job Code: Click the magnifying glass for a list of student employee job codes. Available job codes listed are dependent 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, click the **Submit** button at the bottom of the page. If you wish to start over, click the **Clear Page** button to remove any content you have typed.

Change Pay Rate



1) Employee ID: Enter the student employee's TCU ID# or click the magnifying glass next to the **Employee ID** field and select the desired entry. (See Appendix A for help with this option.)

2) Select Employee: Once the student employee's ID# has been entered, a list of **Current Jobs** populates and shows at the bottom of each page. From the list, click the **Select Employee** button to open the job record you wish to change.

3) Effective Date: This date must correspond to the beginning of a pay period. Click the magnifying glass to select a date.

4) Former Supervisor ID: This field displays the student employee's current supervisor ID and name.

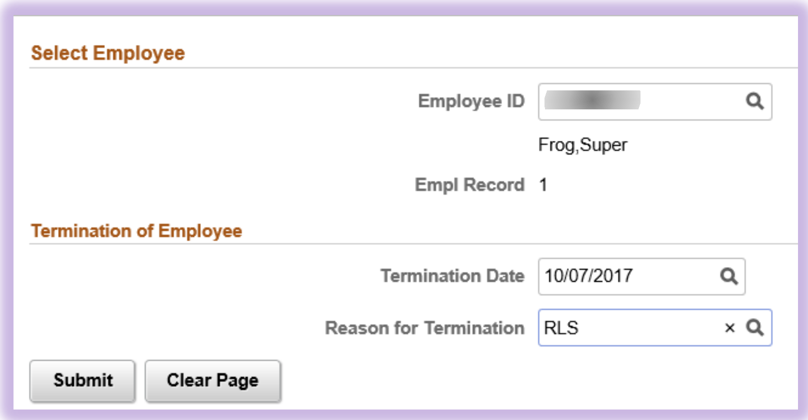
5) Current Hourly Rate: This field displays the employee's current hourly rate.

6) New Hourly Rate: Enter the student employee's new hourly rate.

7) 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, click the **Submit** button at the bottom of the page. If you wish to start over, click the **Clear Page** button to remove any content you have typed.

Term Employee

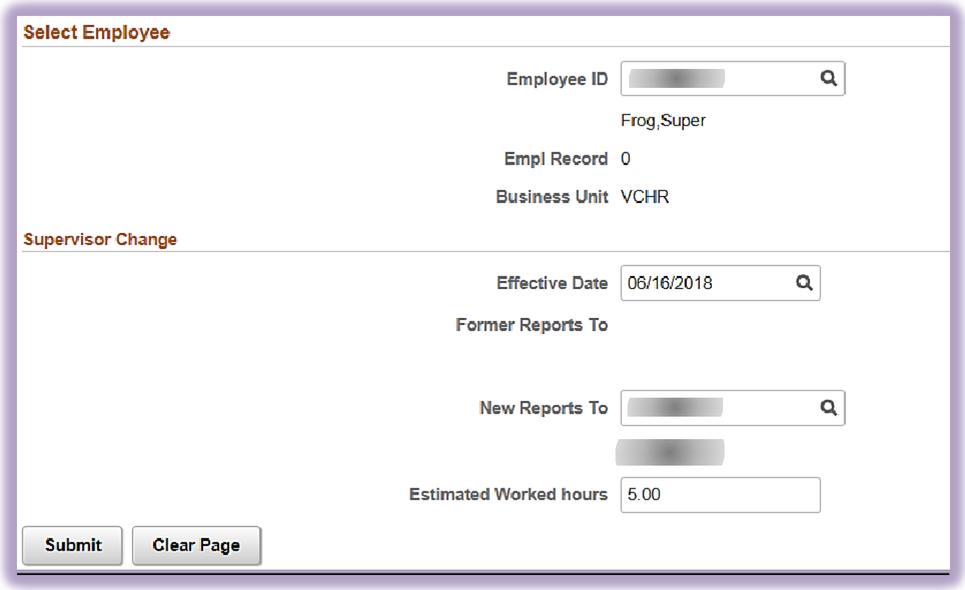


1) Employee ID: Enter the student employee's TCU ID# or click the magnifying glass next to the **Employee ID** field and select the desired entry. (See Appendix A for help with this option.)
2) Select Employee: Once the student employee's ID# has been entered, a list of **Current Jobs** populates and shows at the bottom of each page. From the list, click the **Select Employee** button to open the job record you wish to change.
3) Termination Date: This date must correspond to the beginning of a pay period. Click on the magnifying glass to select a date.
4) Reason for Termination: Click the magnifying glass and select a reason from the list.

Once these fields have been filled in, click the **Submit** button at the bottom of the page. If you wish to start over, click the **Clear Page** button to remove any content you have typed.

Change Reports To

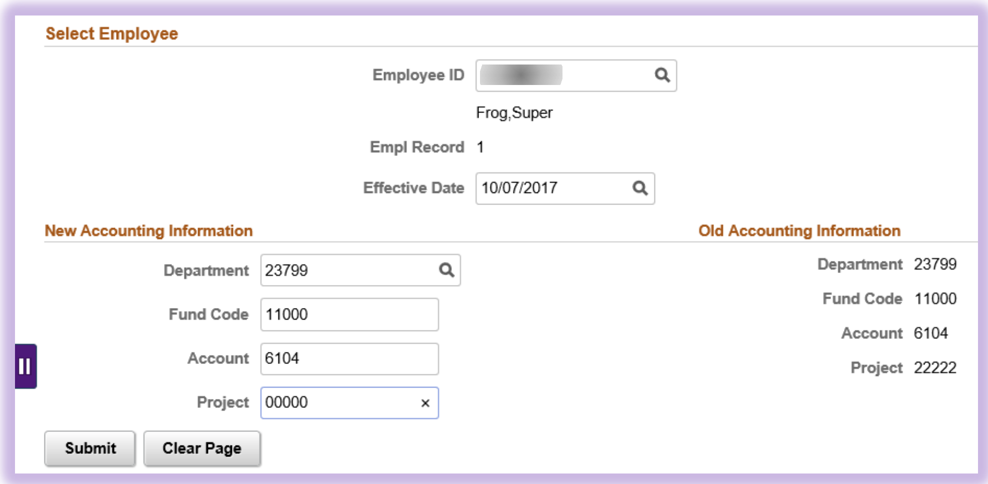
It is important to keep the **Reports To** field up-to-date. The **Reports To** field is used in Frog Time for approval of student (and temporary employees) time shifts. For regular staff, **Reports To** is used to route leave reporting. **Change Reports To** is the only option available in the ePAF system to make changes to regular faculty and staff jobs, as well as student jobs.



1) Employee ID: Enter the employee's TCU ID# or click the magnifying glass next to the **Employee ID** field and select the desired entry. (See Appendix A for help with this option.)
2) Select Employee: Once the student employee's ID# has been entered, a list of **Current Jobs** populates and shows at the bottom of each page. From the list, click the **Select Employee** button to open the job record you wish to change.
3) Effective Date: This date must correspond to the beginning of a pay period. Click on the magnifying glass to select a date.
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 work hours.

Once these fields have been filled in, click the **Submit** button at the bottom of the page. If you wish to start over, click the **Clear Page** button to remove any content you have typed.

Change Account Code



1) <u>Employee ID</u>: Enter the student employee's TCU ID # or click the magnifying glass next to the **Employee ID** field and select the desired entry. (See Appendix A for help with this option.)

2) <u>Select Employee</u>: Once the student employee's ID# has been entered, a list of **Current Jobs** populates and shows at the bottom of each page. From the list, click the **Select Employee** button to open the job record you wish to change.

3) <u>Effective Date</u>: This date must correspond to the beginning of a pay period. Click on the magnifying glass to select a date.

4) <u>New Accounting Information:</u> Input the new budget information into the Department, Fund Code, Account, and Project fields.

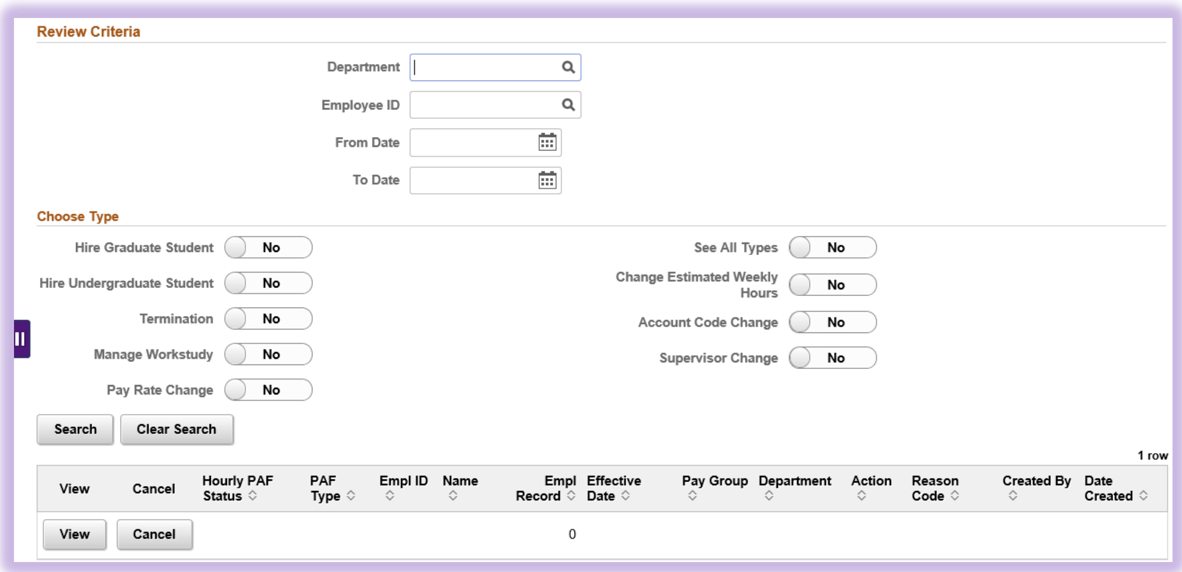
5) <u>Old Accounting Information:</u> Displays the current budget information for the employee's job.

Once these fields have been filled in, click the **Submit** button at the bottom of the page. If you wish to start over, click the **Clear Page** button to remove any content you have typed.

Other ePAF tools

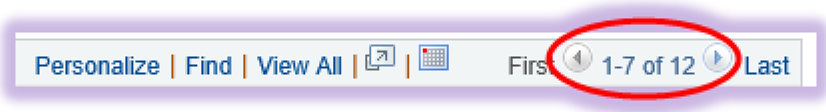
Review ePAF

Click the **Review ePAF** link to view the PAFs you have created in the system. Use the different criteria available to refine your search.



Utilize the various options to 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, click the **Pay Rate Change** button to change it to **Yes**. Then enter the appropriate dates in the **From Date** and **To Date** fields and click the **Search** button.

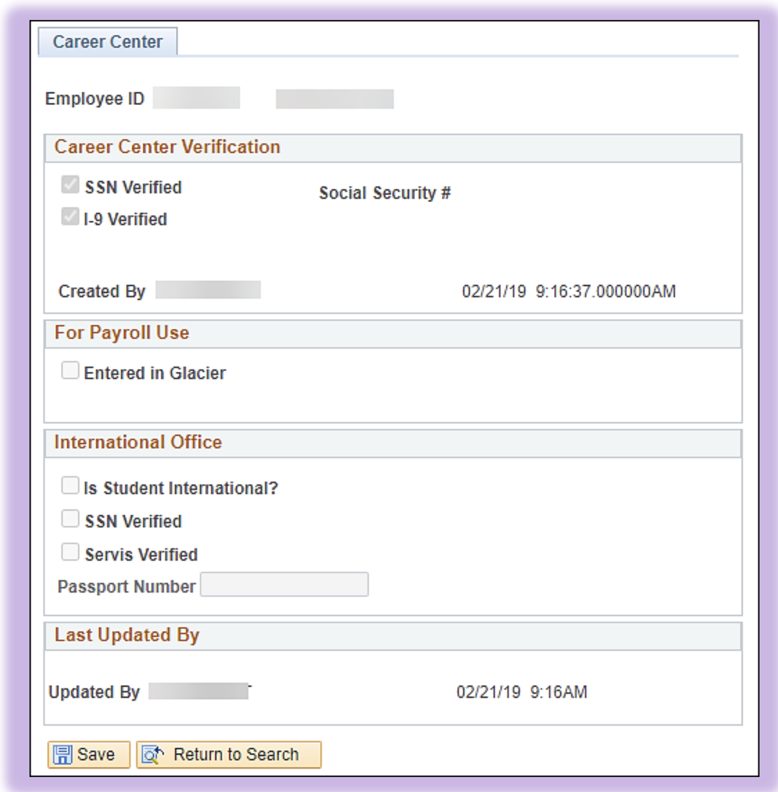
In order to see every PAF you have created, simply click the **See All Types** button (with all other fields empty) and then click the **Search** button.



***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

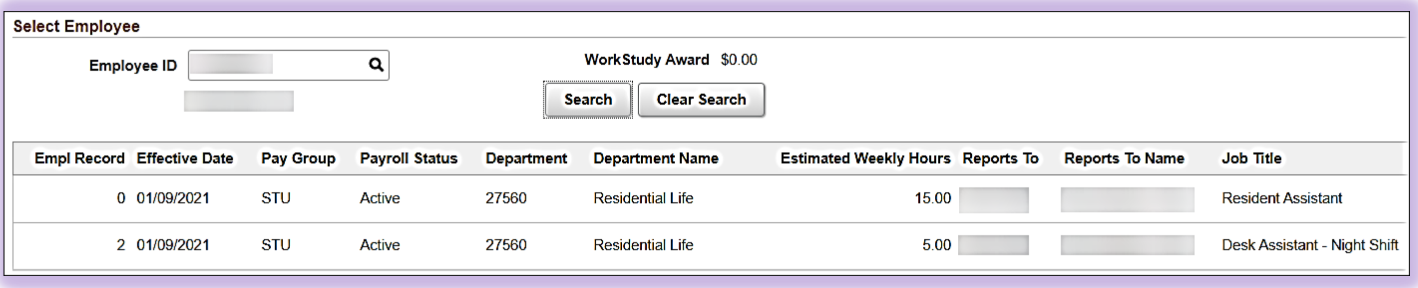
This page allows you to verify a student has completed all necessary paperwork at the Career Center. For questions on this requirement, please contact the Program Administrative Assistant (Chrysteen Gabbert c.l.gabbert@tcu.edu).



1) Type in the student's TCU ID# and click the **Search** button. If 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.


Select Employee

Employee ID

WorkStudy Award $0.00

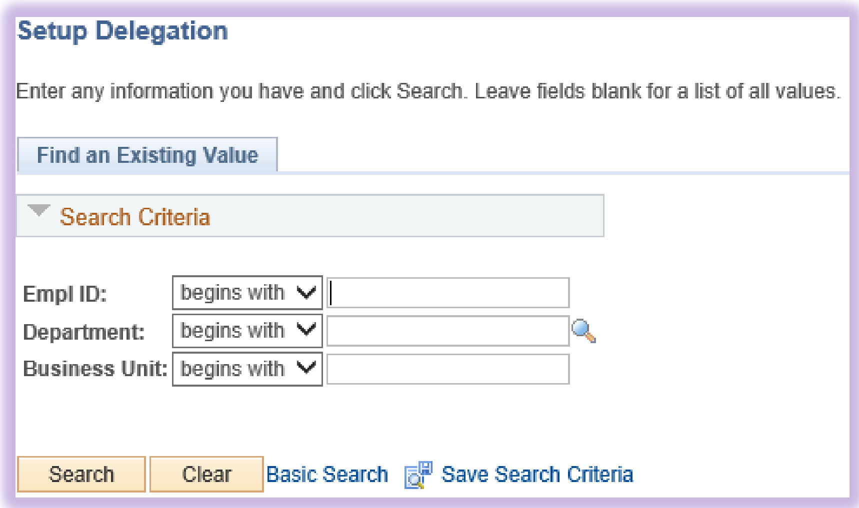
Search | Clear Search

Empl Record	Effective Date	Pay Group	Payroll Status	Department	Department Name	Estimated Weekly Hours	Reports To	Reports To Name	Job Title
0	01/09/2021	STU	Active	27560	Residential Life	15.00			Resident Assistant
2	01/09/2021	STU	Active	27560	Residential Life	5.00			Desk Assistant - Night Shift

1) Employee ID: Enter the student employee's TCU ID # or click the magnifying glass next to the **Employee 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 Search** button will remove any content you have typed.

Delegation/Authorization

Use the Delegation/Authorization page to manage access to the ePAF system. By default, department managers are automatically granted access. In turn, the department managers can use this page to grant additional users access to the ePAF system. Security access to this system is granted on a departmental level and users can be given access to more than one department.

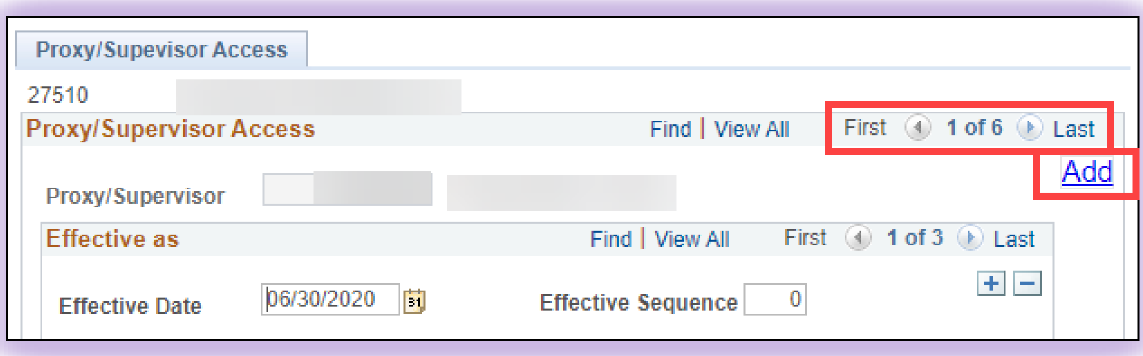


Grant Access

To begin, enter the department number or use the magnifying glass to search for it.

***TIP**: To display every department you have access to, leave the **Department** field blank and click on the **Search** button.*

All the users that have access for that department will be listed. To switch between users, use the arrows along the top right of the Proxy/Supervisor Access window.



To grant access to a person **not already listed**, click the **Add** link in the top right of the screen. 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: The date defaults to the current date. You may change the date as needed.

3) Effective Sequence: The 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.

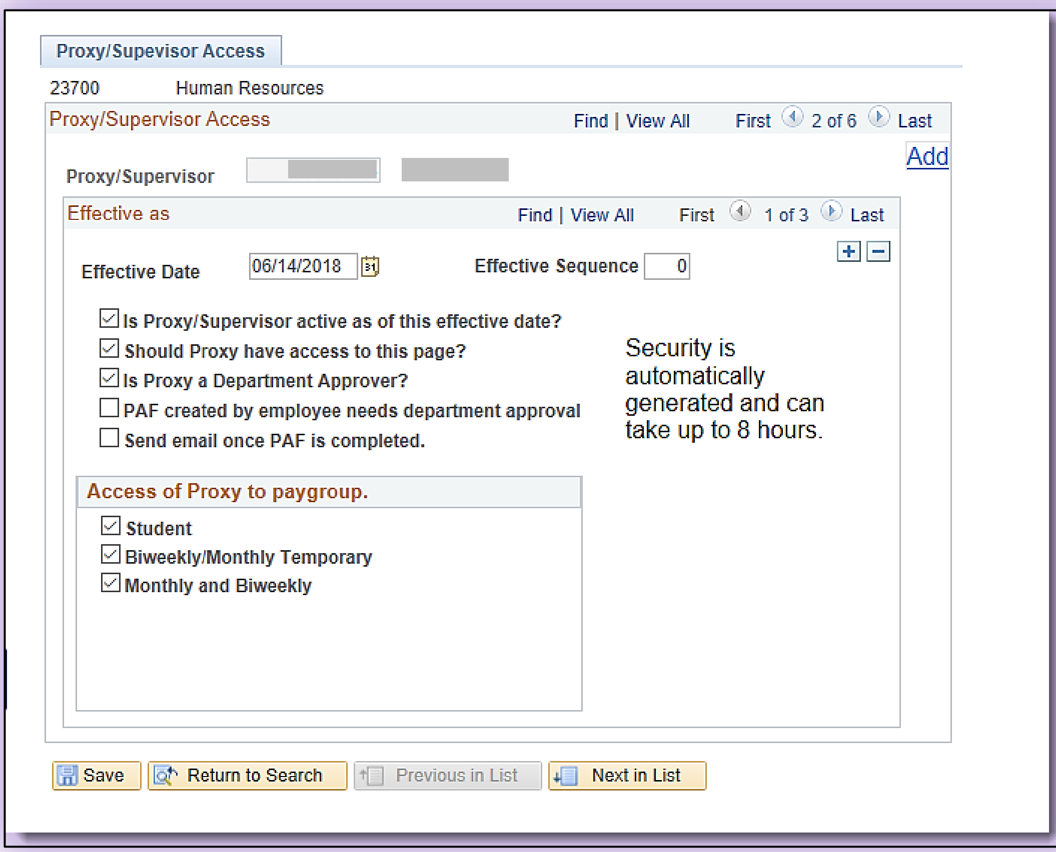
5) Should Proxy have access to this page?: When checked, it grants the proxy the ability to create other proxies.

6) Is Proxy a Department Approver?: When checked, the proxy is granted 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

Initially, each department manager is given access as the proxy. However, depending on the reporting structure of the department and the number of employees, the department manager 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 ePAF system. When setting up a proxy, there are two options for this role:

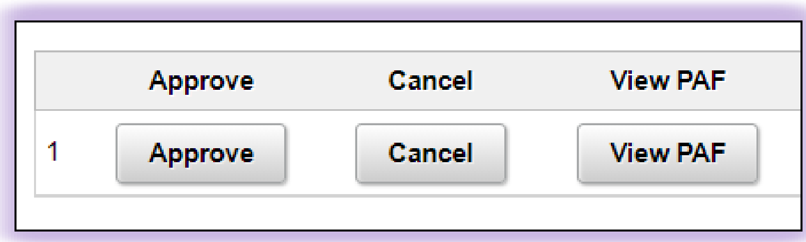
1) <u>Is Proxy a Department Approver?</u>: Allows the proxy to approve PAFs submitted by other proxies of the same department.
2) <u>PAF created by employee needs department approval</u>: When this is checked, the proxy can create a PAF; however, a PAF will not be processed until a Department Approver 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. 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 ePAFs for that department.

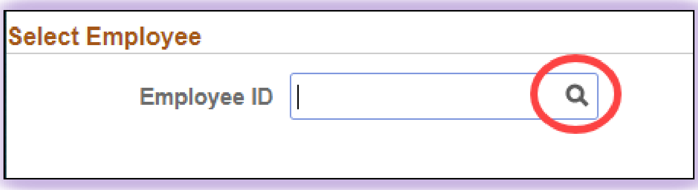
Making the Approval

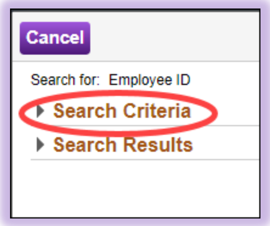
Login to my.tcu.edu and navigate to the ePAF system. Select the **Department Approval** option from the left navigation list. Any outstanding PAFs will be listed. Find the PAF row and use the buttons to **Approve** or **Cancel** or **View the PAF**.



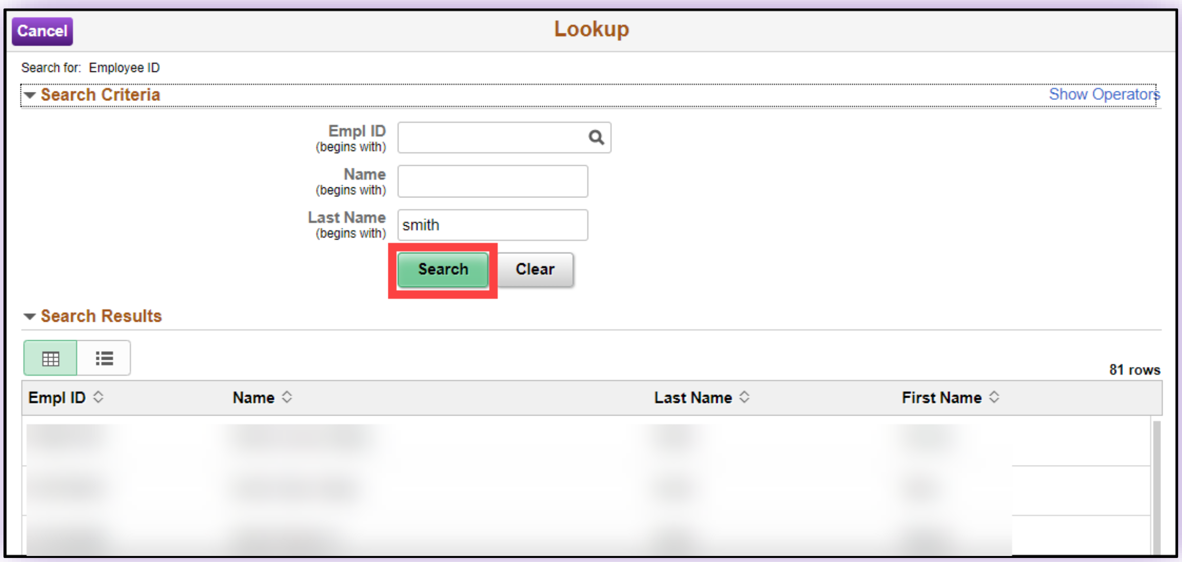
Appendix A: Using the Magnifying Glass

In PeopleSoft, you will often see a **magnifying glass icon** next to text fields. This is a feature of PeopleSoft that allows you to search instead of entering the text. In some cases, it also serves as a selection tool of pre-approved items for fields.

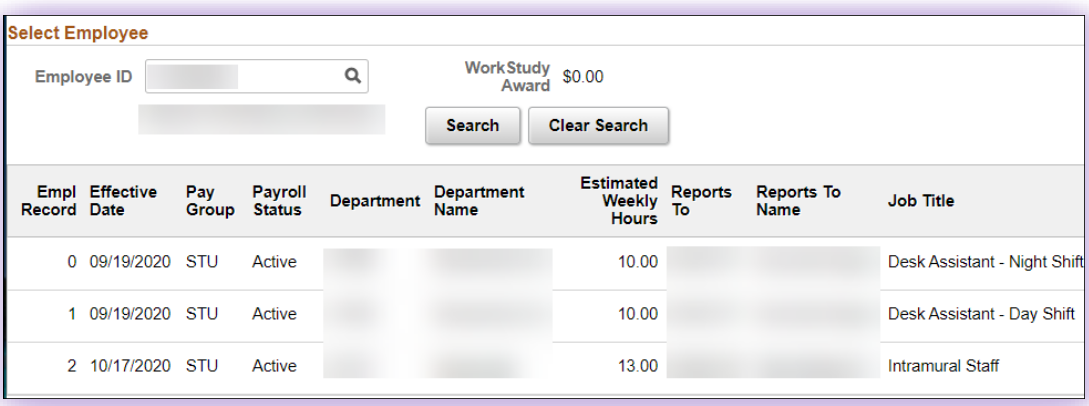




The text box in the picture above prompts you to enter an employee's TCU ID#. If you know the ID#, type it in and click the **Search button**. However, if you are unsure, click on the magnifying glass to see additional search options. A pop-up window lists employee ID#'s and names that can be selected. To narrow your search results even more, click on **Search Criteria.** Enter text into one of the **Search Criteria** fields for ID, Name, or Last Name and click the **Search button**. From the results list, locate the person and click on the row to select them.



All the job records for that employee will be listed.



Empl Record	Effective Date	Pay Group	Payroll Status	Department	Department Name	Estimated Weekly Hours	Reports To	Reports To Name	Job Title
0	09/19/2020	STU	Active			10.00			Desk Assistant - Night Shift
1	09/19/2020	STU	Active			10.00			Desk Assistant - Day Shift
2	10/17/2020	STU	Active			13.00			Intramural Staff

Appendix B: New Student Employee Hire Flowchart