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Check Your Background with Little Known Facts

Which ePAF: Exempt? Nonexempt? Faculty?

Pay Change – Increases the RATE OF PAY
- Hourly Rate for Nonexempt
- Annual Salary for Exempt or Faculty

FTE Change – Increases the WORKLOAD
- Hours per week for Nonexempt or Exempt
- Course Load for Faculty
- Exempt & Faculty: Adjust Both FTE & Annual Salary
  - 1.0 FTE = $24,000 (2 entries on the ePAF)
  - 0.3 FTE = $12,000 (2 entries on the ePAF)

Multi-Action ePAFs

ONLY used when the Employee has ONLY one Job

NO cell phone, NO secondary, NO overload
Create or Change Default Earnings

If it populates from a prior job with a Special Rate

- Add Secondary Position (SSR, ADC, etc)
- Primary Job Recurring Pay (SSR, ADC, CPA, etc)

Contact HR for assistance; the Employee Record needs adjusting!

You Can! (HR Can’t)
Division Routing

Verify Your Chain of Command Routing

- In Your Department
- Next Levels: Deans, AVPs, Provost, SVP

HR / Budget May Not Know the Inner Processes

Questions??
Start an ePAF to Avoid Errors and Corruption

1. **Employee ID** – R# Misunderstandings and Duplicate IDs
   - False – Asking new employees if they have worked at Texas Tech is the best way to discover if they had an R#.
   - False - All new hires should be assigned a new R#, even if they previously had a job at TT.
   - False - A name search is the best method to determine someone’s R#.
   - False - When starting a New Hire ePAF, you can put the Social Security No in the ID field select the employee or find the R#.
   - False – The employee should know if they worked at Texas Tech and have an R#.
   - True – An Originator should use the 3-method ePAF Search to verify whether a new employee has an R#:
     - The best search is the social security number, **SSN/SIN/TIN**
     - An employee-provided R# should be verified with the employee ID: search
     - A **Last Name / First Name** search *might* verify the employee, if the employee has not changed names.
   - True – New employees may not know they were assigned an R#
     - From enrolling as a student (but not attending)
     - By being recruited as a student (but not attending)
     - From a vendor relationship
   - True – Once a person is assigned a Texas Tech R#, it is a permanent identification that should be used forever.

2. **Choose the Query Date** according to the Employee Job Assignment on the Person Selection Screen and THE DATE guidelines on the template. Contact AFISM 2KNOW for questions or assistance. Replace the ‘today’s date’ that is displayed in the Query Date field.
   - Enter the R#
   - Choose the Approval Category (ePAF) from the menu
   - When the Employee Job Assignment appears, review for date conflicts and choose a Query Date according to THE DATE guidelines on the Template.
3. **On the Job Selection screen**, be sure to select the radio button for the appropriate position and click the [Next Approval Type] button, or enter a new position, select the radio button and click the [Next Approval Type] button for each Approval Type on the ePAF.
   - Building the ePAF incorrectly can cause a corrupt ePAF and must be started over.
   - If the employee is being re-appointed to a previously held position, be sure to click the [All Jobs] button and select the position instead of using the entry box to re-enter the position.
   - For a multi-action ePAF, be sure to follow the Instruction Guide that describes the order of the Approval Types, deciding whether a different position (T#) is to be used for different Approval Types, and which Approval Types use the Query Date versus entering a manual date.

4. The **Scroll Down Double-check**, looking for Position-Suffix-Title integrity. An ePAF that opens in a corrupt state might be identified by missing or jumbled data in the Position-Suffix-Title of each Approval Type. If the data is missing or jumbled, restart the ePAF.

5. **The Create or Change Default Earnings**.
   - A successful save of your final entries on this Approval Type means some causes of corrupt ePAFs have been avoided.
   - Make the Default Earning entries according to the template and click the [Save and Add New Rows] button to save your work. If the ePAF errors out of the form, it is better NOT to use the browser back button to continue; it is better to restart the ePAF. Using the browser back button may cause the ePAF to become corrupt, and may duplicate copies of the ePAF in your Originator Summary.
   - Each Earning Code row must have the Query Date in the Effective Date column; if there is no date the ePAF might error or become corrupt. For some ePAFs, the previous date was inserted and must be replaced. Enter or Copy/Paste the Query Date in the Effective Date field for each Earning Code row.
   - If the pop-up list does not open to select an earning code, the ePAF is corrupt and must be restarted.
   - If the ePAF populates previous Earn Codes that are incorrect:
     - For Add Secondary Positions or Primary Job Recurring Pay (overloads, ADC, SSR), contact HR for assistance
     - For primary jobs or Add Secondary Job (FTE jobs with RGS, HLD, HLN), do not overtype entries on a row. Click the [Save and Add New Rows] button and a Remove check-box will appear at the end of the row. Check to remove the incorrect rows, add the correct rows (don’t forget to put the Query Date in the Effective Date field for each Earn Code row) and click the [Save and Add New Rows] button to save your work.
   - CAUTION – Since each ePAF template has specific instructions, it is apparent when the originator is not following the template.
     - There is an unusual number of incorrect FTE-based primary and secondary jobs with RGS or HLD or HLN errors!!
6. The Create or Change Labor Distribution FOAPAL.
   - The FOAPs are inserted from the Position. If the FOAPs are correct, click the [Save and Add New Rows] button to save your work. A successful save of your final entries may mean some causes of corrupt ePAFs have been avoided.
   - If the FOAP(s) are correct, the percent can be changed, and a new row can be added. Don’t forget to click the [Save and Add New Rows] button to save your work.
   - If the FOAPs are incorrect, do not overtype entries on a row. Overtyping FOAP codes can cause errors and may lead to a corrupt ePAF. A FOAP row must have a Percent of .00 to be removed. A Remove check-box is at the end of the row, created during the previous save of Default Earnings. Set the Percent to .00 and check to remove the incorrect FOAP row(s), then add the correct FOAP row(s) and click the [Save and Add New Rows] button to save your work.

7. The Routing Queue.
   - If the Approval Level pop-up list or the User Name (for approvers) pop-up list fails to open, the ePAF is corrupt and must be restarted.
   - If the ePAF is populated from the Default Routing Queue (find the link in the Originator Summary), several steps have been avoided. A mandatory level cannot be removed and a remove box will not appear; an optional level can be removed. An approver name can be replaced.
   - Click the [Save and Add New Rows] button to save your work. A successful save of your final entries may mean some causes of corrupt ePAFs have been avoided.
   - Verify that your routing levels comply with your department and next level specifications.
     - There are a surprising number of ePAFs that are not routed per chain-of-command

8. Other Common Errors. Return to the top of the form to begin ePAF entries, paying particular attention to the template to avoid errors in:
   - Work Address line 1 (mailstop)
   - Time Entry Method
   - Hours per Day
   - Hours per Pay
Overview: Graduate Student Tuition Benefits

Tuition Benefits: Definitions and Procedures

Tuition Benefits include waivers, exemptions, and the PhD Scholarship that may be applied to tuition and fee accounts of certain, but not all, graduate students. Tuition Benefits are not to be confused with employment benefits such as health insurance. The following definitions apply to Tuition Benefits:

- **Full Time Graduate Students** with a .5 FTE job are eligible according to the following position titles:
  - GPTI – Graduate Part-time Instructors are eligible
  - TA – Teaching Assistants are eligible
  - RA – Research Assistants are eligible
  - GA – Graduate Assistants are not eligible
  - GRHA – Graduate Resident Hall Assistants are not eligible
- **Waivers** are Tuition Benefits for non-resident tuition.
- **Exemptions** are Tuition Benefits for any other mandatory tuition and fees.
- **PhD Scholarship** is an additional scholarship for PhD students, if eligible
- The Tuition Benefits are applied to the Graduate Student’s Tuition and Fee account automatically once the Graduate Student has registered for classes and an ePAF has been approved through Level 75.
- Tuition Benefits are not intended to reduce the student account balance to $0. Graduate Students have a personal financial responsibility to pay the balance due by the payment due date and will be subject to cancellation regardless of whether Tuition Benefits have been applied.
- **Student Business Services (SBS) offers payment plans for students who cannot pay the total due by the payment due date. A payment plan may help avoid cancellation if Tuition Benefits are not applied to the student account by the payment due date.**
Date Definitions

Academic Calendar for Tuition Payments and Benefits Eligibility

The following dates are estimated from the 2013 – 2014 Academic Calendar.

- **Student Payment Due or Approval for a Payment Plan**, approximately seven days before the first class day, and cancellation procedures are initiated when the balance is not paid:
  - If the student will not receive the benefit by the payment due date, then the student should pay the full amount due or enroll in a payment plan to avoid cancellation.
  - Fall 2013: 8/19/13
  - Spring 2014: 1/08/14

- **Student Job Start Date** (1st day of work) for the Semester must be on or before the 12th day of class for fall/spring or the 4th day of class in a summer term (approximate dates):
  - Fall 2013: 9/11/13
  - Spring 2014: 1/31/14

- **ePAF Approval Deadline** means ePAF Level 75 is approved no later than the 20th class day in fall/spring or 15th class day in summer terms (approximate dates):
  - Fall 2013: 9/23/13
  - Spring 2014: 2/12/14

Employment Calendar for Employee Pay

The following dates are based on the fiscal year calendar, fiscal semesters, and payroll processing.

- **Employment Job Start Date** (1st day of work) for the Semester must be on or after the following dates:
  - Fall 2013: 9/11/13
  - Spring 2014: 1/16/14

- **ePAF Payroll Due Date** means ePAF Level 75 is approved no later than the 18th day of the month:
  - Fall 2013: 9/18/13, 10/18/2013, etc.
  - Spring 2014: 1/18/2014, 2/18/14, etc.

- **Employee Paychecks** for GPTI/TA/RA (exempt, monthly salary) is the first working day of the month following the completed work month.
**Student Procedures**

To receive a benefit before the payment due date, the GPTI/TA/RA must be:

1. Registered/enrolled in Graduate School full time for the semester. It is imperative that students register as early as possible so that Tuition Benefits are applied prior to any payment due dates. Since students must have the required enrollment in order for the ePAF to be approved by the Level 33-Graduate School, they should be encouraged to enroll even prior to their ePAF being submitted.

2. Appointed as a .5 FTE employee for that semester with an appropriate Student Job Start Date, see Date Definitions, **and** the ePAF is approved by the ePAF Approval Deadline, see Date Definitions (approved by Level 75-Compensation TTU after being approved by Level 33-Graduate School).

When items 1 and 2 above are met, the benefit is posted to the student account within 24 hours.

- If the student has not received the benefit by the payment due date (see Date Definitions), then the student should pay the full amount due or enroll in a payment plan to avoid cancellation.
- If the student pays the bill, and then the benefit is posted later, any overpayment by the student will be refunded to the student.
- Students who receive emails or calls from SBS indicating they are subject to cancellation should review their student account and contact SBS for assistance or they will be cancelled.

The additional PhD Scholarship is applied during the semester:

- In the fall and spring semesters, the additional PhD scholarship of $304 may not be applied until after the 12th class day.
- PhD students should pay the outstanding balance in full (less the PhD scholarship portion, if eligible) or enroll in a payment plan prior to the payment due date to avoid cancellation.
- Student Business Services will account for the value of that scholarship in determining whether a student is subject to cancellation.
Department Procedures

Students must have active jobs in the system to receive Tuition Benefits.

- Ending a GPTI/TA/RA job will prevent Tuition Benefits until the student has a new job assignment. If you have questions on funding issues, please contact the Budget Office.
- If at all possible, do not end a GPTI/TA/RA job if the student will continue employment with the same title in a near-future term.
- If a student will no longer be employed in that title, the job should be ended with a Job Change End or a Terminate Employee ePAF. A future date (end of the term in which they will be working) can be used and it will not impact the student’s services and activities until that future end date is reached.

When entering the ePAF appointment:

- The Graduate Student must have an appropriate Student Job Start Date, see Date Definitions.
- The ePAF must meet the ePAF Approval Deadline according (see Date Definitions) for the Graduate Student to receive Tuition Benefits.
- On the ePAF Approval Deadline (20th/15th class day), the Graduate Student appointment and Job Labor Distribution are recorded. Departments are charged the Tuition Benefits expense according to the Labor Distribution.
- After the ePAF Approval Deadline (20th/15th class day), no Tuition Benefits can be provided to the Graduate Student except through the use of a scholarship.
- On the day following the ePAF Approval Deadline (20th/15th class day), the department can review the expenses to the FOPs, with detail that includes the Graduate Student R# ID.

The Tuition Expense to the department will appear on FI026 after the (20th/15th class day) with the Student R# (no capital “R”) in the Document Reference Number column:

<table>
<thead>
<tr>
<th>DOCUMENT ID</th>
<th>TRANSACTION AMOUNT</th>
<th>TRANSACTION DESCRIPTION</th>
<th>DOCUMENT REFERENCE NUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>TW000523</td>
<td>2,307.63</td>
<td>201357 TA/RA exemption</td>
<td>R#</td>
</tr>
</tbody>
</table>
Semester Considerations for ePAFs

Fall Semesters:

- **Appointment Dates in the Fall Semester.**
  - ePAFs for students with a **Student Job Start Date** of September 1 paid from a FOP that will be active on September 1 can be submitted early (May-August).
  - If the **Student Job Start Date** will be on September 2 or after, the ePAF cannot be submitted until the new fiscal year budget is opened for ePAF processing, usually in late August.
  - Funding Changes (Future Change and/or Redistribution) can be submitted at a later date to change the funding for the student.

- **Sponsored Project funding expires / renews.** Research FOPs that expire on or before August 31 cannot be used to fund the student for the next fiscal year. If a new or renewed research FOP will start on or after September 1, use the temporary FOP to submit the ePAF and use a funding change (Future Change and/or Redistribution) to switch to the research FOP when funding becomes available.

- If Funding Changes cannot be processed prior to the **ePAF Approval Deadline** defined above, the expense of the Tuition Benefits will be charged to the temporary FOPs, and then a Cost Transfer will also be required to move the expenses from the original/temporary FOP to the desired FOP. For questions about Cost Transfers, please contact the FST or SPAR accountant for assistance.

- Questions or concerns about funding changes or budget issues related to fiscal year end/begin; contact the Budget Office for assistance.

Summer Appointments:

- Students on summer leave without an active job, will not receive Tuition Benefits.
- Students must be enrolled and working an active job to receive Tuition Benefits.
Graduate Student Tuition Benefit, Eligibility At-a-Glance**

The student must enroll as a full time student in the Graduate School to qualify for a GPTI/TA/RA job and subsequent eligibility for tuition benefits. The job is submitted by the department on an ePAF form that must be approved by the Graduate School and Human Resources before the tuition benefits are placed on the student’s account, according to the criteria below. The student is responsible to pay any balance due on the payment due date, even if the job and tuition benefits are pending approval. This chart represents the guidelines and dates for the full time graduate student to secure a job and qualify for tuition benefits.

** SAMPLE: Academic Dates are estimates based on the 2013 – 2014 Academic Calendar.

<table>
<thead>
<tr>
<th>Academic Semester: Student and Tuition Benefits Eligibility</th>
<th>Fiscal Semester: Employee Job and Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Payment Due Date or Payment Plan Approval</strong></td>
<td><strong>Employment Semester: First – Last</strong></td>
</tr>
<tr>
<td><strong>Academic Semester: First Class - Last Final</strong></td>
<td><strong>Employment Appointment Start Date</strong></td>
</tr>
<tr>
<td><strong>Tuition Benefit: Criteria for Job Start Date</strong></td>
<td><strong>ePAF Due for 1st Paycheck</strong></td>
</tr>
<tr>
<td><strong>Tuition Benefit: Criteria for ePAF Approval Date</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Sample</strong></td>
<td></td>
</tr>
</tbody>
</table>

- **Payment is due (or a payment plan must be arranged) approximately seven days before the first class day; after this date, if the balance is unpaid and no payment plan exists, cancellation steps are initiated.**
- **The first day of classes and the last day of finals for the academic semester is listed as:**
- **To qualify for Tuition Benefit, the 1st day of work must be on or before the 12th day of class for fall/spring or the 4th day of class in a summer term (approximate dates):**

<table>
<thead>
<tr>
<th>Academic Semester</th>
<th>Tuition Benefit Criteria</th>
<th>Employment Semester</th>
<th>Employment Appointment Start Date</th>
<th>ePAF Due for 1st Paycheck</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2013: Aug 19</td>
<td>Fall 2013: Aug 26 – Dec 11</td>
<td>Fall 2013: Sept 11 2013</td>
<td>Fall 2013: Sep 23 2013</td>
<td>Fall 2013: Sept 1 – Jan 15 (4.5 months)</td>
</tr>
</tbody>
</table>

- **To receive the Tuition Benefit, the ePAF must be approved by Level 75 on or before the 20th class day in fall/spring or 15th class day in summer terms:** Tuition Benefits are expensed to the departments (approximate dates).
- **For fiscal year funding, semesters are defined as follows for employee pay on a monthly basis (fixed dates):**
- **The appointment start date for the semester, if funding is available or a department plan (short term funding followed by funding changes and or cost transfers) has been determined:**

<table>
<thead>
<tr>
<th>Employment Semester</th>
<th>Employment Appointment Start Date</th>
<th>ePAF Due for 1st Paycheck</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2013: Aug 19</td>
<td>Fall 2013: Aug 26 – Dec 11</td>
<td>Fall 2013: Sept 1 – Jan 15 (4.5 months)</td>
</tr>
<tr>
<td>Spring 2014: Jan 8</td>
<td>Spring 2014: Jan 15 – May 13</td>
<td>Spring 2014: Jan 16 – May 31 (4.5 months)</td>
</tr>
</tbody>
</table>

2013 07 15 ePAF Refresher for the New FY.docx 12 of 13
AFISM Class Evaluation

Class: ePAF Refresher for Next FY
Presenter(s): Byron Anderson

Please indicate your evaluation of each statement.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Neutral</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The presentation was easy to follow.</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>2. The Presenter’s knowledge was sufficient for the topics.</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>3. The Presenter’s delivery helped me learn.</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>4. The class included opportunities for questions and discussion.</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>5. I know more than before I came to class.</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>6. Class materials will be helpful back on the job.</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>7. I will recommend this class to others.</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>8. I will recommend this presenter to others.</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>9. My evaluation of the overall class is:</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
</tbody>
</table>

The best part of this course:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

The least useful part of this course:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Suggestions or other comments:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

If you wish to be contacted, please complete the following:

Name: ___________________________________________
Department: ______________________________________
Phone: __________________________________________
Email: __________________________________________

When completed, return the form before you leave the session, or mail to: AFISM | MS 5064