Quick Reference Guide to HR and ePAF

Links to Job Aids refer to: RaiderLink > A&F Work Tools tab > Human Resources channel

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AFISM Resource Center:

- Phone Assistance (Help Desk): 2-KNOW (742-5669)
- Outlook Address (Help Desk): AFISM 2KNOW
- Registration System for AFISM Classes
- Training Materials, Job Aids, Video Tutorials
- Knowledge Base (Q&A, FAQ)
Personnel Actions

An **employment relationship** begins on the first day of work and ends on the last day of work:

- Employee Class (ecls) designates categories such as faculty, staff, etc. for each position title.
- Benefit Category (bcat) designates the type(s) of benefits available for the position title.
- Leave Category (lcat) designates the type(s) if leaves available for the position.

A **Personnel Action** is an employment decision, such as hiring, promoting, or terminating an employee. The **Personnel Date** on an ePAF is the “first (start)” or “final (end)” day of the Personnel Action.

An ePAF **Approval Category** is an electronic form that collects information about a personnel action, and is comprised of one or more sections referred to as **Approval Types**.

Definitions of Employees, Positions, and Jobs

Matching Exercise: Can you match the correct definition to each term:

- **Employee?**
  - A. A work description, identified by a Title and T#.
- **Position?**
  - B. An R# appointed to a T# and a suffix of 00.
- **Job?**
  - C. A person identified by a Social Security Name and R#.

FTE (Full Time Equivalency): Full-time, Part-time and Percent for Regular Work

*Job Aids* > ePAF Selection and Entry > Convert Hours to, from FTE

A 40-hour week is considered 1.0 FTE (full time). The formula is **work hours ÷ 40 = FTE**

Half-time (20 hours) is considered ____ FTE. 3 days a week is considered ____ FTE.

The student will work 7 hours in the lab ______ and 13 hours with the professor______.

Variations are:

- **Faculty**: each academic department determines FTE based on course load.
- **Students**: Students are considered fulltime as students and half-time or less as an employee.
- **Task workers (exempt)**: usually are zero FTE and paid ‘additional compensation’ for the work performed.
- **Temporary workers (nonexempt)**: 2 appointments - either (a) have an FTE paid semi-monthly by timesheet for several months, or (b) be 0.01 FTE paid ‘lump sum’ for work performed.
- **Non-Tech employees** have zero FTE, zero pay.
- **Retired Workers** have multiple considerations for FTE; contact HR Compensation Operations for guidance.

Pay Plan: Texas Tech’s List of Job Titles, Pay Ranges, and Exempt/Nonexempt Status

*Pay Plan*: RaiderLink > A&F Work Tools, HR Home > SHORTCUTS, Pay Plan > Classified Pay Plan

- Position Class (Title) Codes begin with (E)xecutive, (F)aculty, (S)taff, (U) Student, and (P)art-time
- Click the Title to find Texas Tech’s institutional job description and Employee Class code.
- Based on the FLSA (Fair Labor Standards Act), Texas Tech has three methods of employment:
  - **Exempt**: Exempt from completing timesheets, and is paid an Annual Salary over 12 (twelve!) months *(Monthly, MN)*.
  - **Faculty/TA/GPTI**: Exempt, and paid an Annual Salary over 9 (nine!) months *(Monthly, MN)*.
  - **Nonexempt**: Submit a timesheet twice monthly *(Semi-monthly, SM)*, and is paid by an hourly rate.

**CAUTION**: An employee cannot perform both Exempt and Nonexempt jobs simultaneously.
Faculty and Student Titles

Faculty Titles (Exempt 9 Mo): Professor, Instructor
Research Titles (Exempt 12 Mo): Principal Investigator, Co-Investigator, Sr. Research Associate, Research Associate, Research Assistant, usually paid from Sponsored Project Funds (starting with 21, 22, 23, 25B or the 11B State Research Fund managed by VP Research); also FOP Program Code 200.

Student Titles, Exempt and Nonexempt (Graduates must be fulltime students to qualify for the Job title)

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Non – Ex - Fac</th>
</tr>
</thead>
<tbody>
<tr>
<td>SA</td>
<td>Student Assistant Undergraduate, admin or clerical duties</td>
<td></td>
</tr>
<tr>
<td>GA</td>
<td>Graduate Assistant FT Graduate Student, admin or clerical</td>
<td></td>
</tr>
<tr>
<td>TA</td>
<td>Teaching Assistant FT Graduate Student, &lt;18 hrs in discipline</td>
<td></td>
</tr>
<tr>
<td>GPTI</td>
<td>Grad Part Time Instructor FT Graduate Student, &gt;18 hrs in discipline</td>
<td></td>
</tr>
<tr>
<td>RA</td>
<td>Research Assistant FT Graduate Student, doing research</td>
<td></td>
</tr>
</tbody>
</table>

Additional Characteristics of Nonexempt, Exempt, and Faculty/TA/GPTI employment methods:

<table>
<thead>
<tr>
<th>FLSA Classification</th>
<th>Rate of Pay (Payroll ID)</th>
<th>“Factors” Pay Periods</th>
<th>“Pays” Paychecks</th>
<th>Hours Per Day</th>
<th>Hours Per Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exempt</td>
<td>12 month Annual Salary (MN)</td>
<td></td>
<td></td>
<td>1.0 FTE: _____</td>
<td>1.0 FTE: _____</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.5 FTE: _____</td>
<td>0.5 FTE: _____</td>
</tr>
<tr>
<td>Faculty / TA / GPTI</td>
<td>9 month Annual Salary (MN)</td>
<td></td>
<td></td>
<td>1.0 FTE: _____</td>
<td>1.0 FTE: _____</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.5 FTE: _____</td>
<td>0.5 FTE: _____</td>
</tr>
<tr>
<td>Nonexempt</td>
<td>Hourly, twice monthly (SM)</td>
<td></td>
<td></td>
<td>1.0 FTE: _____</td>
<td>1.0 FTE: _____</td>
</tr>
</tbody>
</table>

Calculate Hours Per Day and Hours Per Pay

Job Aids > ePAF Selection and Entry > ePAF Calculator > Choose Exempt or Nonexempt “Hours per Day and Hours per Pay” from the drop-down list

1) **HOURS PER DAY** means average work hours per work day, adjusted by FTE for part-time.
2) **HOURS PER PAY** means average work hours per pay period, adjusted by FTE for part-time
   For a .3 FTE: **Exempt** Hrs/Day _____ Hrs/Pay _____ **Nonexempt** Hrs/Day_____ Hrs/Pay _____
3) For a low FTE, the minimum “Hours per Day” is never less than one hour.
4) The formula for encumbrance calculation is hourly rate x hours per pay x remaining pay periods to the end of the fiscal year unless a job end date occurs first. (also recognizes leave status)
5) Encumbrances are not computed for nonexempt students (SA/GA).
6) Recasting is the nightly process to re-compute encumbrances.

Convert Hours to, from Annual Salary

Job Aids > ePAF Selection and Entry > Convert from “Annual Salary and FTE” to Hourly Rate
Convert from Hourly Rate to “FTE and Annual Salary”

Convert a .5 FTE teaching assistant ($8750 annual) to nonexempt hourly ______________.
Convert a .5 FTE research assistant ($11,600 annual) to nonexempt hourly ______________.
A $12.50 hourly rate converts to Exempt Annual Salary __________ or Faculty Annual Salary __________.
12 ePAF Approval Categories for Employee Jobs

Job Aids > ePAF Selection and Entry > “Guide for Choosing an ePAF”
Job Aids > ePAF Selection and Entry > “Forms of Employee Pay (color)"

A Primary Job is the first or base “work for pay” job indicated by FTE (workload: hours or courses taught).

1. New Hire for an employee coming to Texas Tech from another employer, or unemployment.
2. Transfer Gaining for an employee coming from another department.
3. Job Change Begin to re-start an employee’s primary job following a job end (promotion, demotion)

Ending Job ePAFs end the appointment of the employee.

4. Termination ends the primary job and the employee relationship with Texas Tech.
5. Transfer Losing ends the primary job when transferring to a new department.
6. End Job ends the primary job and keeps the employee assigned to the department.

Second Job ePAFs are labeled as:

7. Add Secondary Job is another “work for pay” job with FTE.
8. Add Secondary Position is “additional pay” above normal FTE (interim duties endowed professor).
9. Primary Job Recurring Pay is an “allowance” above normal FTE (phone or housing allowance).
10. Retiree Returning to Work is for a retired employee to work while retaining retirement status.

Modifying ePAFs (that do not start or end a job)

11. Pay Change to increase or decrease the rate of pay (hourly rate or annual salary)
12. FTE Change to increase/decrease workload or work hours, affecting full time and part time status.

Outside Texas Tech

Within Texas Tech: T, H, S, E

Within My Department
•
•
# # # # # # # # #
•
•
•
# # # # # # # # #
•
•

Multiple Action ePAFs
+++++++ END / BEGIN ++++++++  
1. 
2. 
+++++++ START / END ++++++++  
3. 
4. 
++++ END PRIMARY & SECONDARY ++++  
5. 
6. 
# Single Action ePAF Exercise

<table>
<thead>
<tr>
<th>Employment Decision</th>
<th>Approval Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>___ 1. Assigned to a second job title with FTE</td>
<td>A. New Hire</td>
</tr>
<tr>
<td>___ 2. Hire a new employee who is an internal candidate</td>
<td>B. Transfer Gaining</td>
</tr>
<tr>
<td>___ 3. Increase a student’s wage from 7.50 to 7.75</td>
<td>C. Job Change Begin</td>
</tr>
<tr>
<td>___ 4. Provide a cell phone allowance</td>
<td>D. Add Secondary Job</td>
</tr>
<tr>
<td>___ 5. Fire an employee</td>
<td>E. Add Secondary Position</td>
</tr>
<tr>
<td>___ 6. End an employee’s job</td>
<td>F. Primary Job Recurring Pay</td>
</tr>
<tr>
<td>___ 7. Recognize a distinguished professor with additional pay</td>
<td>G. Pay Change</td>
</tr>
<tr>
<td>___ 8. Restart the primary job of an employee in your department</td>
<td>H. Retiree Return to Work</td>
</tr>
<tr>
<td>___ 9. One of your employees quits to work in another department</td>
<td>I. FTE Change</td>
</tr>
<tr>
<td>___ 10. Increase a student worker from 12 to 20 hours per week</td>
<td>J. Terminate Employee</td>
</tr>
<tr>
<td>___ 11. Hire a new employee from United Supermarkets</td>
<td>K. Transfer Losing</td>
</tr>
<tr>
<td>___ 12. A retired employee returns on a part-time basis</td>
<td>L. Job Change End</td>
</tr>
</tbody>
</table>

13. The Multiple Action Approval Categories allow a department to submit two actions on one ePAF.

14. In the chart below, how many ePAFs have a Personnel Date of “Final Day”? (circle the ePAFs)

15. These “Final Day” ePAFs belong to the _______________________ group on the previous page.

### What is the “Official” Personnel Date for an ePAF?

A Personnel Action **EITHER (starts or changes) a job status** - **OR- ends the job. It is the first or the final day!**

*It is entered in the “official” Personnel Date field of each ePAF and is referred to as THE DATE of the ePAF!*

<table>
<thead>
<tr>
<th>For this Personnel Action</th>
<th>THE DATE (Personnel Date) is –</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Hire</td>
<td>Actual date the employee starts the Job (and Employee Relationship)</td>
</tr>
<tr>
<td>Transfer Gaining</td>
<td>Employee’s first day of the new job</td>
</tr>
<tr>
<td>Job Change Begin</td>
<td>Employee’s first day of the new job</td>
</tr>
<tr>
<td>Add Secondary Job</td>
<td>Employee’s first day of the new job</td>
</tr>
<tr>
<td>Retiree Return to Work</td>
<td>Employee’s first day of the new job</td>
</tr>
<tr>
<td>Add Secondary Position</td>
<td>Start date of pay to the employee</td>
</tr>
<tr>
<td>Primary Job Recurring Pay</td>
<td>Start date of pay to the employee</td>
</tr>
<tr>
<td>Termination</td>
<td>Final day of the job, ends the Employee Relationship</td>
</tr>
<tr>
<td>Transfer Losing</td>
<td>Final day of the job</td>
</tr>
<tr>
<td>Job Change End</td>
<td>Final day of the job</td>
</tr>
<tr>
<td>Pay Change</td>
<td>Start date of the revised pay rate (hourly wage, annual salary)</td>
</tr>
<tr>
<td>Change FTE</td>
<td>Start date of the revised FTE (workload: hours per week)</td>
</tr>
</tbody>
</table>

### ePAF Templates: Entry by Entry Hints for Completing an ePAF

*Job Aids > ePAF Selection and Entry > ePAF Templates*

A guide for each ePAF, listed in the Groups for Primary Jobs, Second Jobs, Ending Jobs, Modifying Jobs, and Multiple Action ePAFs!
Employee Pay and Leaves Are Identified by Earning Codes

Job Aids > ePAF Selection and Entry > “Forms of Employee Pay (color)"
Job Aids > ePAF Selection and Entry > “Earning Codes for Employee Pay”

**Earn Codes for Primary and Secondary ePAFs That Start Employee Pay:**

**Primary Job** (FTE job entered on a New Hire, Transfer Gaining, or Job Change Begin):
- RGS (regular salary) or RGH (regular hourly) Earn Codes with Hours Per Pay, and no Special Rate.
- **Longevity Eligibility (Full Time Staff only)** where HLD = Yes and HLN = N; Unit of 1 and no Special Rate.

**Secondary Job** (FTE) has RGS or RGH Earn Codes with Hours Per Pay (no longevity); no Special Rate.

**Secondary Position** (additional pay) **Earn Codes are on the Forms of Employee Pay and the ePAF Template, with Unit of 1.**

**Primary Job Recurring Pay** (allowance) **Earn Codes are on the Forms of Employee Pay and the ePAF Template, Unit of 1.**

Class Exercise: List Employee Jobs and ePAFs (above) for this employee:

Find (underline in the scenario) and list the 4 jobs that will comprise this employee’s pay; add the Primary or Secondary ePAF (from above) for each job. Together, the class will complete the final three columns.

A professor is recruited by Texas Tech. She will teach half-time and research half-time. She will be designated an endowed professor with additional pay, and be provided a cell phone allowance.

<table>
<thead>
<tr>
<th>Employee Job: (to be paid for)</th>
<th>ePAF to Complete: (see above)</th>
<th>Earn Code for ePAF</th>
<th>Hours or Units</th>
<th>Special Rate? Y/N</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>a)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Primary Job ePAFs always have 2 codes!</strong></td>
<td>b)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
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<tr>
<td>4.</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**Employee One-time Payment System (EOPS)**

Forms: RaiderLink > A&F Work Tools > Human Resources > “EOPS, Employee One-time Payment System”

Payments for tasks or short projects performed outside the employee’s normal job duties are submitted on an EOPS online form (not an ePAF) and electronically routed for approval. Payment to the employee will be included on the employee’s pay check (or direct deposit) once all approvals are completed.
Date Definitions: Typical Dates You Should Know

Pay Schedule: Dates for Payroll Processing
A&F Work Tools tab > Human Resources, Payroll Forms > Manager Resources > Pay Schedule
– or – (below Human Resources) Month at a Glance, Calendar > Select Year and Month

TTU Employee tab > Month at a Glance, Payroll Pay Schedule
– or – Month at a Glance, Department End User Calendars

Nonexempt semi-monthly (SM) time reporting periods are 1st thru the 15th to be paid on the 25th and the 16th thru the end to be paid on the 10th.

Exempt monthly (MN) salary reporting periods are 1st thru the end, to be paid on the 1st work day of the following month.

Dates for Official Employee Records
The Original Hire Date occurs upon the first employment of a person, and the Current Hire Date refers to a rehire after a break in service.
The Termination Date is the last day of work or leave before a break in service, while the Last Day of Work refers to the last day of work and might be followed by a leave before Termination (leave cannot extend employment into the next pay period).

Academic Semesters Enter the standard begin and end dates, and length of fiscal year semesters:

<table>
<thead>
<tr>
<th>Fall Months</th>
<th>Spring Months</th>
<th>Summer I Months</th>
<th>Summer II Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>to</td>
<td>to</td>
<td>to</td>
<td>to</td>
</tr>
</tbody>
</table>

Academic Instruction Appointments during the Fiscal Year
1. During the 9 month academic year, Faculty/GPTI/TA appointments end on May 31.
2. All 9 month Faculty/GPTI/TAs are electronically placed on leave for June 1, returning August 31. (Some departments end GPTI/TA jobs) All other appointments continue uninterrupted.
3. While the primary job remains on summer leave, departments submit Summer ePAFs (Add Secondary FTE Job and End).

YOUR CHALLENGE: Academic departments ‘manage’ their salary budgets on a ______________ basis and think in terms of ________ for employees (semester salary budget). However, an ePAF for exempt teaching faculty requires ______________________________ .

Exempt Employee Annual Salary for Semester Pay
Job Aids > ePAF Selection and Entry > ePAF Calculator > “Multipurpose Exempt Salary”

1) Tom, a TA will be paid $5000 to teach the Fall Semester: Ann Sal ________ Mon Sal ________ FTE ______

2) If he receives a $4400 Work Study Award: T-Dept ePAF: Ann Sal ________ Mon Sal ________ FTE ______

W-Award: Ann Sal ________ Mon Sal ________ FTE ______

3) Sue is a TA who will assume Dr. Jones class on March 1 to complete the semester for $3450.

Ann Sal ________ Mon Sal ________ FTE ______
New Position Request / Reclassification


A **New Position Request** is an application to add a new position (T#) to the department.

A **Reclassification** is an application to modify an existing position by changing the title, etc.

Changing **ONLY** the Labor Distribution

When the labor expense is to be changed to a different budget, and there are no changes to title, pay, or FTE:

- The “**Current & Future Labor Change, TLABOR ePAF**” changes the labor distribution from now forward
- The “**Labor Redistribution Form**” changes pay in a previous (closed) pay period, retroactively

**Forms**: RaiderLink > A&F Work Tools > Budget > Forms >

**COMMENTS** are for Explanations -- **NOT** for Instructions to HR or Payroll

A description of the employee action will assist the approvers when they review the ePAF. However, the Comments box is not the appropriate method for assigning timesheet approvers or other data access responsibilities!

Routing and Approving ePAFs, Tracking and eMail Notices

**Job Aids** > ePAF Selection and Entry > "ePAF Approval Matrix"

A **Mandatory** level is an approval level assigned to an ePAF, such as Department Head.

An **Optional** level refers to an approval level that can be added by the department when needed, such as Financial Aid for Work Study approval or Graduate School for GPTI/TA/RA/GA approval.

There are **3 methods** available for routing ePAFs within your department:

- **A**. The department can add levels **5-FYI** and **10-PI**. Email HR with names of approvers for those levels.
- **B**. The department can **duplicate** any level (REMEMBER: Mandatory levels cannot be removed!).
- **C**. Approver levels above 20 often have one approver who assigns colleagues as proxies.

**eMail reminders** are sent at 10am and 3pm for ePAFs in process (waiting completion or approval).

Monitor the **progress of an ePAF** by viewing the Approval Routing for action, date and time.
Occasional Personnel Actions

Job Aids > Department Operations > Occasional Personnel Actions > (see list)

Fringe Projection Application, a calculator that estimates the cost of fringes (matching retirement, social security, etc.) for an employee.

Appointing a Non-Tech Employee, for an individual who works on campus but is paid by another employer.

Full Time Exempt Non-Faculty Employees Teaching Classes, for the full time staff (such as the Chancellor, President, etc) who teaches an academic class.

College Work Study Awards
The “award” is the maximum student earnings where financial aid will pay 75% of the earnings and the department will pay 25% of the earnings, using a Financial Aid W# position. If the student will earn more than the award, then the department will pay 100% of the additional earnings, using department T# position. Financial Aid provides an Award authorization that includes the Award amount, the earnings period (semester), the work study FOAP, and the W# for paying the award.

Manual Checks for Missed Pay Periods

Job Aids > Department Operations > Occasional Personnel Actions > “Manual Check Procedures”
Forms: RaiderLink > A&F Work Tools > Human Resources > Payroll Forms > Banner Forms > choose: “Manual Check Request – Exempt Forms” or “Manual Check Request – Non-Exempt Forms” (Instructions are available).

A manual check request is submitted when an employee misses a pay check. The employee must have an active job or the form will be returned. Only one pay period may be submitted on a Manual Check Request.

Manual Check Requests received by Friday will be paid on the following Friday with a paper check to be picked up in the Payroll Office.

Summer Appointment Instructions contains information about appointing 9 month faculty who have been placed on summer leave but will teach summer classes or conduct research.

Assigning Roles: ePAF and HR Cognos Permission and Access

Job Aids > ePAF Selection and Entry > “Managing Your Originator Summary”
Job Aids > ePAF Selection and Entry > "Managing Your Approver Summary"
Job Aids > ePAF Selection and Entry > "Proxy Navigation"

- A “role” is created by granting permission to access online date for an organization.
  1. ePAF Originator role is granted upon completion of the All About HR and ePAF training.
  2. ePAF Approver role is granted by organization managers, using TEAM App.
  3. HR Cognos role is granted by organization managers, using TEAM App. Takes an overnight update to be active.
  4. WTEWLR Approver role is granted by organization managers, using TEAM App.
  5. WTEWLR Proxy role is granted by organization managers to assign WTEWLR approvers, using TEAM App.
- TEAM App is the application used by organization managers (dept head; finance mgr) to assign roles.
- New ePAF Originators cannot view the ePAFs prepared by their predecessors or colleagues. However, an approver can grant proxy privileges to the originator to view previous ePAFs.
  - ePAF Approvers can assign Proxies may from the ePAF menu, not using TEAM App.
    - The Proxy must have an Approver role or an Originator role
  - Viewing HR Cognos Reports is restricted because of confidential and personal information. The organization manager makes a separate decision of who will be allowed to view private information.
- Operating Policy OP 70.40 describes guidelines and consequences regarding employee confidentiality.
ePAF Attachments: I-9 New Employee Packet and Other Employee Documents

Forms: RaiderLink > A&F Work Tools, HR Home > New Employees > Before Your First Day, New Employee Packet
Job Aids > ePAF Selection and Entry > "ePAF Attachment Instructions"

The preferred file format is pdf.
A chart that shows what attachments should be on an ePAF is found on page 15.
Attachments can be added to an ePAF after submission without returning it for correction.
If the ePAF reaches HR without attachments, it will be returned to the Originator.
The I9 New Employee Packet (NEP) must be attached as one file; Document Type is I9 New Employee Packet.
All other documents must be attached in one file; Document Type is Other ePAF Attachments.

1. Leave Import to start the attachment procedure.

2. Use the Arrows or Page List to choose which page is “visible” for attaching to the ePAF.

3. Choose a DOCUMENT TYPE and SAVE; the visible page will be the 1st page of the attachment.

4. Do not enter Tech ID, First/Last Names or Eff Date.

5. Attach the visible page (a single page is attached), or Attach all pages in the In-box (in the order of the In-box).
How to Select the Query Date (plus, other date definitions)

*Job Aids > ePAF Selection and Entry > “The HR/ePAF Date Glossary” & “Date Reminders for ePAF Groups”*

**End Date** – The Query Date
- For **starting** a new job or FTE/Pay Change must be **after** the end date.
- For **ending** an appointment can be **on or after** the end date.

**Last Paid Date** – The Query Date  (NOT Payday, when the employee receives the pay check)
- For **starting** a new job or FTE/Pay Change must be **after** the Last Paid Date
- For **ending** a job can be **on or after** the Last Paid Date

**Due Date** – The cut-off date for Payroll processing; must be approved at level 75-Compensation to be included.
- FTE/Pay Change ePAFs must be approved on the Due Date or be returned to be dated for the next period
- All other ePAFs will update **after** the ePAF Due Date (are not returned for date changes) as a **late** ePAFs

**Future Dated Records** – After an ePAF applies with a future date, a new ePAF cannot be inserted before the future date. HR Compensation Operations can remove future dated records (including upcoming End Dates).

**Personnel Date** – For the employee record (found in the body of the ePAF), is either the first day of a new job or status, or the final day of a job (pg 5). **It does not change for End Date, Last Paid Date, or Due Date!!!**

**Query Date** – is chosen for the pay period that an employee’s job will start/change/stop. It must respect a previous End Date, the Last Paid Date and the Due Date. **CAUTION:** Found on the first ePAF entry screen, it is pre-populated with the current date which must be overtyped. It defaults (pre-fills) other fields on the ePAF. If it incorrect, the defaulted entry fields will be incorrect also! Once the ePAF has opened for entry, the only way to correct the Query Date is to start over or overtype each field that has defaulted.

***If the ePAF will apply in the current or a future pay period, the Personnel Date can be entered in the Query Date field!!! (Verify whether the Query Date should be changed for an End Date or Last Paid Date, see above)***

**Manual Steps to Correct Pay** – when the ePAF is late, and employee pay is incorrect:
- For **ending** jobs, an **exempt** person might be **overpaid** – Contact HR Compensation Operations for assistance.
- For **starting** jobs, any employee may be **underpaid** – A Manual Check Request (MCR) must be prepared for each pay period back to the Personnel Date, **after** the ePAF updates the system.
Tips and Procedures for Starting an ePAF

Job Aids > ePAF Selection and Entry > “Procedures to Start a New ePAF”
Job Aids > ePAF Selection and Entry > “The Condensed Guide of ePAF Tips and Tricks”

1. What icon symbolizes search or list? __________________________________________
2. What icon will generate a new R#? _____________________________________________
3. What button shows an employee’s history of jobs held? ___________________________
4. What 2 screens must be completed before an ePAF will open for entry? _________
   and ___________________________________________
5. An ePAF is built by clicking the ___________________ button for each Approval Type?
6. Before clicking the button, what 2 items should you visually verify? _________
   and ___________________________________________
7. When the ePAF opens for entry, how can you visually verify if it built correctly?
   ______________________________________________________________
8. *ERROR* means _____________________________________________________________
9. *WARNING* means __________________________________________________________
10. A different error list is created when you click ______ versus ____________
11. What do these buttons do: VOID____________________________________________
    DELETE____________________________________________
12. Where do you find field-by-field hints for opening and completing an ePAF? _______
13. When will the Address Selection screen appear? _________________________________
14. What should you enter on the Address Selection screen? __________________________
15. In the Originator Summary, the “Default Routing Queue” link will allow you to ______
    _________________________________________________________________________

Reminder: Multiple-action ePAFs Are MORE Complex!!

• Two Actions, and each has a Personnel Action Date!!
• Two Actions may mean two T-positions!! Building the ePAF using the [Next Approval Type] key must match the T-position with the correct Approval Type!!
• Sometimes, the Query Date relates to one action, sometimes to both!!
• To simplify these issues, each Multi-Action Template has an additional “Instruction Guide”

Resources for Your Success:

Phone: 2-KNOW (5669)
Email: AFISM 2KNOW
AFISM’s Knowledge Base (FAQs)
# AFISM Class Evaluation

**Class:** All About HR and ePAF  
**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>3</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>2. The Presenter’s knowledge was sufficient for the topics.</td>
<td>3</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>3. The Presenter’s delivery helped me learn.</td>
<td>3</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>4. The class included opportunities for questions and discussion.</td>
<td>3</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>5. I know more than before I came to class.</td>
<td>3</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>6. Class materials will be helpful back on the job.</td>
<td>3</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>7. I will recommend this class to others.</td>
<td>3</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>8. I will recommend this presenter to others.</td>
<td>3</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>9. My evaluation of the overall class is:</td>
<td>3</td>
<td>4</td>
<td>2</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: ___________________________
TEXAS TECH UNIVERSITY
CONFIDENTIALITY STATEMENT

I agree to hold as strictly confidential all Texas Tech University System information regarding personnel and/or student records, communications, and activities and all other information made confidential by TTU policy or law (including, but not limited to, the Family Educational Rights and Privacy Act of 1974 and the Gramm-Leach-Bliley Act of 1999) to which I have access or obtain as faculty, employee, student, agent, representative or affiliate of TTU.

I agree that I will not read or otherwise gain access to such confidential information except as required to perform my duties and responsibilities at TTU. Further, unless disclosure is authorized or required by law, I agree that I will not disclose any such confidential information now or at any time in the future, either directly or indirectly, except as required to perform my duties and responsibilities at TTU and, then, only to the extent disclosure is consistent with the authorized purpose for which the information was obtained.

I agree to handle all confidential information, whether written, computerized, oral or in some other form, in such a way that it shall not be inadvertently revealed or disclosed to any other person. Except as authorized by my responsibilities and duties, I agree that I will not maintain for my files any permanent record that contains confidential information and will provide for the complete destruction of any rough drafts or unofficial copies of confidential information.

I acknowledge and agree that any breach of the Confidentiality Agreement by me may result in disciplinary action, consistent with Texas Tech University policy, up to and including termination of employment; further, I understand that such a breach may result in legal action.

The terms of this Confidentiality Agreement are effective immediately and apply to all confidential information I have attained in the past as well as future information. I understand that this document will become a part of my permanent personnel and/or student record.

________________________________________  __________________________
Signature of Faculty, Employee, Student, or Affiliate  Date

________________________________________
Printed Name, R#

Witness
HR/ePAF Class