TTRFGE, TTU Transfer Gaining Exempt

Purpose of this ePAF Approval Category:
For a Texas Tech employee who is changing from a different department to your department. That department’s Transfer Losing ePAF must apply to the system before your ePAF will submit (you can complete your ePAF and save it to submit after their ePAF applies).

For details and comparison with other ePAFs, please review the Guide for Choosing an ePAF document on the HR Job Aids webpage.

The DATE Reminders - Transfer Gaining

The Personnel Date is the first day of the new job, regardless of whether whether it occurred in the past or is an upcoming date.

The Query Date is pre-populated with today’s date and should be over-typed with a date that is after both the previous Job End Date and the Last Paid Date. The ePAF will apply even after the Due Date.
If the employee has missed a paycheck, a Manual Check Request must be submitted for each pay period missed.

ePAF Template

<table>
<thead>
<tr>
<th>Hint: Do not use the browser BACK button</th>
<th>Hint: Save often</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hint: Use Job Aid ePAF Attachment Instructions</td>
<td>Hint: Follow the example for dates input.</td>
</tr>
<tr>
<td>Hint: No dashes or spaces in numbers</td>
<td></td>
</tr>
</tbody>
</table>

NEW ePAF PERSON SELECTION Screen: This is the first ePAF entry screen

ID
Enter R#, OR Search for R#. DO NOT Generate a new R#.

Query Date
Hint: Enter THE DATE (if it is not today’s date)

Approval Category
TTU Transfer Gaining Exempt

ADDRESS and TELEPHONE SELECTION Screen: This screen only appears if the person already has a TTU work address stored with their R#.

In the “Type” Column
HINT: Always choose the line with ‘Texas Tech Work’ and click the round radial in the “Select” column, then click GO. IF the person worked previously in your department, click ALL JOBS and select the line with your department. NEVER choose the "New Record" line!

NEW ePAF JOB SELECTION Screen: This is the screen where you enter or select the T# position.

HINT: If the person was previously appointed to this T#, click ALL JOBS to get a list of previous appointments and select the appointment by clicking the round radial in the Select column.
HINT: Be sure to click the NEXT APPROVAL TYPE button until the GO button remains.

Enter Position Number
Hint: Enter Position # for the new job, and TAB to the Suffix.

Suffix
00
00 is the standard entry for Transfer Gaining (primary job)
**WORK ADDRESS UPDATE**

The following Address and Phone are the Home Department where the employee receives campus mail (NOT employee's home). This address and phone will be published in the campus directory.

- **Address From Date:** MM/DD/YYYY
- **Address Type:** WK (Default for department work address; not overrideable.)
- **Address Sequence No:** Leave Blank
- **Address Line 1:**
- **Address Line 2:**
- **Address Line 3:**
- **City:**
- **State:** Pick From List (TX)
- **Zip or Postal Code:** 79409
- **County:** Pick From List (48303, Lubbock)
- **Nation:** Pick From List
- **Telephone Type:** WK
- **Telephone Sequence No:** Leave Blank
- **Area Code:**
- **Telephone (No spaces or dashes):** 7 digits such as 7421234
- **Phone Extension:**

**Employee Status**

- **Employee Status:** A
- **Employee Class Code:**
- **Leave Category:** Pick From List
- **Benefit Category:** Pick From List
- **FT/PT:** Pick From List
- **Home COAS:** Chart of Account, T or S
- **Home Organization:** Home Organization code such as C11000
- **Distribution COAS:** Chart of Account, T or S (repeat of above)
- **Distribution Organization:** Home Organization code such as C11000 (repeat of above)
- **Location Code:** Pick From List

**Employee Record Gaining**

- **Employee Status:** A
- **Employee Class Code:**
- **Leave Category:** Pick From List
- **Benefit Category:** Pick From List
- **FT/PT:** Pick From List
- **Home COAS:** Chart of Account, T or S
- **Home Organization:** Home Organization code such as C11000
- **Distribution COAS:** Chart of Account, T or S (repeat of above)
- **Distribution Organization:** Home Organization code such as C11000 (repeat of above)
- **Location Code:** Pick From List

**Hints:**

- Verify the T#, suffix and title appear correctly above each Approval Type.
- If this is a reappointment to a T#, copy the Job Begin Date from the Current Value to the New Value column.
- The Effective Date is not defaulted to Default Earnings; each Earn code row must have the Query Date.
### NEW JOB EXEMPT

**Job Begin Date (MM/DD/YYYY)**

- **Hint:** Use the Query Date as the Job Begin Date.

**Job Effective Date (MM/DD/YYYY)**

- **Exception:** If this is a reappointment and the employee was previously appointed to this # position, use the original Job Begin Date displayed in the Current Value Column of the ePAF.

**Jobs Effective Date (MM/DD/YYYY)**

- **Hint:** Use the Query Date as the Jobs Effective Date.

**Personnel Date (MM/DD/YYYY)**

- **Hint:** Follow THE DATE Reminders above.

**Step**

- Default. Not overridable.

**Annual Salary**

- Use the ePAF Calculator job aid. This ePAF is for 12 mon staff whose annual salary is paid over 12 months. This is not salary for a semester or salary for a month.

**Job Status**

- Default. Not overridable.

**Position Title**

- Entry not allowed. Defaults from Position # AFTER ePAF applies.

**FTE**

- 1.0 is FT; 3 decimals, i.e., .5 (20 hrs); .25 (10 hrs); .375 (15 hrs)

**Job Change Reason Code**

- Pick From List

- TRFDE-Demotion; FACRS-Faculty/Research Admin Assign;

- TRFLT-Lateral Job Transfer; TRFPR-Promotion;

- TMRPG-Temp-Student-Fac-Staff change.

**Timesheet COA**

- Chart of Account, T or S

**Timesheet Orgn**

- Home Organization code such as C11000

**Premium Pay Code**

- Pick From List

- LONG-Longevity Pay if Full Time Staff Only, else Not Selected

**Supervisor ID**

- R# ID of the job supervisor, who must have an active job.

### COMPENSATION Exempt - Factor & Pays

**Effective Date MM/DD/YYYY**

- **Hint:** Use the Query Date

**Hours per Day**

- Use the ePAF Calculator job aid.

**Hours per Pay**

- Use the ePAF Calculator job aid.

**Factor**

- Use the Exempt, Faculty, and Nonexempt Employee Classes job aid to find the Factor.

**Pays**

- Copy from Factor above.

### CREATE OR CHANGE DEFAULT EARNINGS

**New Value**

<table>
<thead>
<tr>
<th>Effective Date (MM/DD/YYYY)</th>
<th>Earnings</th>
<th>Hrs or Units per Pay</th>
<th>Deemed Hours</th>
<th>Special Rate</th>
<th>Shift</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pick From List</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use Query Date</td>
<td>HLD or HLN</td>
<td>1</td>
<td>Lv Blank</td>
<td>Lv Blank</td>
<td>1</td>
<td>Lv Blank</td>
</tr>
<tr>
<td>Use Query Date</td>
<td>RGS</td>
<td>(Hours)</td>
<td>Lv Blank</td>
<td>Lv Blank</td>
<td>1</td>
<td>Lv Blank</td>
</tr>
</tbody>
</table>

**Hint:** Only make entries in three columns - Effective Date, Earnings Code, and Hrs or Units (Shift is pre-loaded; Lv Blank - leave column blank - column is not used).

**Effective Date:** Use the Query Date. Must be in the format MM/DD/YYYY. Required with each Earnings Code.

**HLN (Not Eligible) or HLD (Eligible)** is for Longevity (or Hazardous Duty): Choose either HLN or HLD. Only Full Time Staff are eligible = HLD; all others are HLN. Insert 1 (Unit) in the Hrs or Units column.

**RGS** for Exempt Regular Salary: Type RGS in the Earnings column. Hours or Units per Pay is the same as Hours per Pay entered above.

**CAUTION:** Do not 'edit' an Earnings Code that defaults into Default Earnings. If a code is unwanted, click to remove the line and enter the desired Earnings Code on a new line.

*Be sure to click “SAVE and Add New Rows” if you make changes in Default Earnings.*
**CREATE OR CHANGE LABOR DISTRIBUTION, FOAPAL**

Effective Date (MM/DD/YYYY)    Hint: Date defaults to the Query Date

<table>
<thead>
<tr>
<th>COA</th>
<th>Fund</th>
<th>Org</th>
<th>Acct</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>T or S</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Hint: Effective Date should be query date.  Hint: Percent column should total to 100.

**CAUTION:** FOAPAL defaults from the Position and only the Percent can be edited. To remove a FOAP, set the percent to 0 and click to remove the line. Add new FOAPs on new line(s) with appropriate percents. Be sure to click “SAVE and Add New Rows” if you make changes to the FOAPs.

**ROUTING QUEUE**

| 20 - Department | Approve | HINT: Click the magnifying glass and choose a name for each level. |
| 75 - Compensation | Approve | HINT: Find the “Default Routing” link in your Originator Summary and save the names of the approvers for each ePAF Approval Category. |
| 80 - Budget | Approve | |
| 95 - HR TTU Approval | Approve | |
| 99 - HR TTU Apply - Upload | Apply | |

**HINT:** The minimum approvals for most ePAF’s are preloaded in the Routing Queue. If additional approvals are required for a particular employee type such as faculty or students (Grad School, Provost, etc), or if additional approvals are required by your department management or if the transaction is an exception to university policy select the required approvers from the Approval Level pull down list.