TTRLGE, TTU Transfer-Losing AND Transfer-Gaining Exempt

Purpose of this ePAF Approval Category:
To Transfer-Lose a non-Faculty employee(exempt or nonexempt) and Transfer-Gain an exempt employee within one entity (T/S or H). Must end second jobs first.

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

The DATE Reminders - Transfer Lose/Gain

The END Job:	The <u>Personnel Dat</u>e is the last day of the appointment regardless whether it occurred in the past or is an upcoming date, and can be entered in the Job Effective and End date fields. But, when submitting a late ePAF, the Job Effective and End date fields must be on or after the Last Paid Date.
The BEGIN Job:	The <u>Personnel Dat</u>e is the first day of the new job, regardless of whether it occurred in the past or is an upcoming date. The <u>Query Date</u> (Begin Job) is pre-populated with today's date and should be over-typed. The Query Date must be after both the previous Job End Date and the Last Paid Date.
NOTE:	The ePAF will apply even after the Due Date. If the employee will be paid incorrectly, contact HR Comp Ops to discuss options.

ePAF Template

Hint: Do not use the browser BACK 🔄 button

Hint: Use Job Aid ePAF Attachment Instructions

Hint: Save often
Hint: Follow the example for dates input.
Hint: No dashes or spaces in numbers

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	Trans-Losing AND Transfer-Gaining Exempt TTRLGE

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: Refer to the TTRLGE Instruction Guide.

The ePAF entry form opens: Be sure to follow these hints before starting your entry:

HINT: Verify the T#, suffix and title appear correctly above each Approval Type.

HINT: If this is a reappointment to a T#, copy the Job Begin Date from the Current Value to the New Value column.

HINT: The Effective Date is not defaulted to Default Earnings; each Earn code row must have the Query Date.

Work Address Update - New Job

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		Hint: Use the Query Date for the Address From Date.
Address Type	WK	Default for department work address; not overrideable.
		(NOTE: Personal Biographic form collects home address, etc.)
Address Sequence No	Leave Blank	
Address Line 1		Enter Mail Stop with no spaces. Ex: MS1093
Address Line 2		Optional Department Work Address
Address Line 3		Optional Department Work Address
City		Enter City (required)
State	Pick From List	(TX)
Zip or Postal Code	79409	Enter Zip or search list (79409 is TTU Zip)
County	Pick From List	(48303, Lubbock)
Nation	Pick From List	
Telephone Type	WK	Default for employee work phone; not overrideable.
Telephone Sequence No	Leave Blank	
Area Code		
Telephone (No spaces or dashes)		7 digits such as 7421234
Phone Extension		

END JOB

Jobs Effective Date (MM/DD/YYYY)		Hint: Follow THE DATE Reminders above.
Personnel Date (MM/DD/YYYY)		Hint: Follow THE DATE Reminders above.
Job Status	T	Default. Not overrideable.
Job Change Reason Code	Pick from List	Hint: Choose either **TRFLD-**Tranfer Losing between Depts or
		TRFLI-Transfer Losing between agencies, HSC-TTU-SYS).
Job End Date		Hint: Follow THE DATE Reminders above.

Employee Record Gaining

Field	Value	Description
Employee Status	A	Default. Not overrideable.
Employee Class Code		From the approved New Position Request form, or from HR Cognos Report RPT_EMPL_007 - Empl List by Home ORGN
Leave Category	Pick From List	From the approved New Position Request form, or from HR Cognos Report RPT_EMPL_007 - Empl List by Home ORGN
Benefit Category	Pick From List	From the approved New Position Request form, or from HR Cognos Report RPT_EMPL_007 - Empl List by Home ORGN
FT/PT	Pick From List	Indicates the status of the Employee (not the Job)
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	Code of the Building

NEW JOB EXEMPT

Field	Value	Description
Job Begin Date (MM/DD/YYYY)		**Hint:** Use the Query Date as the Job Begin Date.
		Exception: If this is a reappointment and the employee was previously appointed to this T# position, use the original Job Begin Date displayed in the Current Value Column of the ePAF.
Job Type	P	Default. Not overrideable.
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	0	Default. Not overrideable.
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	A	Default. Not overrideable.
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; TMPRG-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

Field	Value	Description
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

Effective Date (MM/DD/YYYY)	Earnings	Hrs or Units per Pay	Deemed Hours	Special Rate	Shift	End Date
	Pick From List					
Use Query Date	HLD or HLN	1	Lv Blank	Lv Blank	1	Lv Blank
Use Query Date	RGS	(Hours)	Lv Blank	Lv Blank	1	Lv Blank
					1	

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					
COA	Fund	Org	Acct	Program	Activity	Location	Percent
T or S							

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:** Choose Approver for the Transfer-<u>LOSING</u> Department
20 - Department	Approve	**Hint:** Choose Approver for the Transfer-<u>GAINING</u> Department
75 - Compensation	Approve	**HINT:** Click the magnifying glass 🔍 and choose
80 - Budget	Approve	a name for each level.
95 - HR TTU Approval	Approve	**HINT:** The "Default Routing" link in your Originator Summary
99 - HR TTU Apply - Upload	Apply	lets you save your approvers for each ePAF Approval Category.

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.