

The Condensed Guide of ePAF Tips and Tricks

Resources/Reminders for Getting Started:

- Cognos HR Report HR121 is for someone who works in your organization
- Cognos HR Report HR035 is for someone who works in a different organization
- Cognos HR Report RPT_PBUD_002 lists T#s with position budgets and assigned employees
- Cognos HR Report RPT_EMPL_007 lists employees with ECLS, BCAT, and LCAT
- Look for future dated records, job end date, last paid date to avoid possible date conflicts; contact HR Comp Ops to remove future dated records that will keep the ePAF from submitting
- Review Pay Schedule for the Due Date of the intended pay period
- Use the HR Job Aid “The Guide for Choosing an ePAF” to choose an ePAF Approval Category
- Locate the Template for the ePAF and have it available for reference.
- Verify you have the correct R#, Social Security ID and name

If the person is new to your organization

- A [New Hire](#) is an employee coming from outside Texas Tech to start employment at Texas Tech
- A [Transfer Gaining](#) employee is already employed at Texas Tech and is transferring to your organization
- [Job Change Begin](#) to reappoint a student/employee whose job ended in your organization. If the student/employee’s job ended in another organization, use the [Transfer Gaining](#) to appoint in your organization (assigns to you as home organization with your work address and phone.
- [Add a Secondary Job](#) if the new-to-you person is remaining in another organization and starting a job in your organization, and don’t forget that total employee FTE cannot exceed 1.0!
- Use Cognos HR035 report to review employees for Transfer Gaining or Add Secondary Job
- For a new employee, collect the Social Security Number, and use the New ePAF ‘Search’ feature to see whether the employee has an R#, or needs to be assigned an R#

Remember the general definitions:

- **Personnel Date** – the official 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 last day of a job.
- **Query Date** (entered only on the first Person Selection screen) is used to navigate the system guidelines (Last Paid Date, ePAF Due Date) and coordinate the effective date changes in the database. The Query Date for an ePAF that will
 - ***Be*** approved by the desired Due Date is the same as the Personnel Date.
 - ***Not be*** approved by the desired Due Date, should be selected according to the “Query Date Guidelines for Submitting ePAFs” below, and review whether that employee might be overpaid or underpaid.
- Some **Effective Dates** on the ePAF are pre-populated (defaulted) from the Query Date, and all Effective Dates should be the same as the Query Date.

Query Date Guidelines for Submitting ePAFs.

- *If the ePAF will apply in the current or a future pay period, without encountering the following constraints, the Personnel Date can also be entered in the Query Date field. EXCEPTIONS:*
- If there is a previous **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.
- If there is a **LAST PAID DATE**, the Query Date
 - 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
- For the **ePAF DUE DATE**,
 - **FTE/Pay Change ePAFs** must be approved on the Due Date or be returned; change the Query Date to the next period
 - **All other ePAFs** will update **after** the ePAF Due Date (are not returned for date changes) as a **late** ePAFs causing employee **underpayments** or **overpayments**. **You must take manual steps to correct the pay, as described below!!**

New ePAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

* - indicates a required field.

1. Enter R# ID: R00902742 Byron Manning Anderson

2. Choose ePAF Approval Category: TTU Pay Change Exempt, TPACHE

3. Examine End Date & Last Paid

4. Query Date: Replace Today's Date: 07/08/2013

Go

Employee Job Assignments				Start Date	End Date	Last Paid Date	Status
Type	Position	Suffix	Title				
Primary	T95572	00	Administrative Support and Finance HR Systems Dept	Sep 01, 2008		May 31, 2013	Active

All Jobs

Late ePAFs and Employee Pay Errors – when the ePAF is late, and employee pay is incorrect:

- If the job is **ending**, an **exempt** employee might be **overpaid** – Contact HR Compensation Operations for assistance; several possibilities need to be considered.
- If a new job is **starting**, an 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 for Opening a New ePAF for Entry:

1. Person Selection screen –
 - a. Enter the R# or search for an existing employee before generating a new R#
 - b. The Query Date should be overtyped using the definitions and guidelines above
 - c. Select the desired Approval Category and review the employee's current jobs.
 - d. Use the ALL JOBS button to reveal previous jobs when re-appointing; note the Start Date that will appear as the Job Begin Date current value when the ePAF opens.
 - e. Look at End Date and Last Paid Date to adjust the Query Date if needed.
2. (Optional, only with Transfer Gaining and rehires) Address Selection screen – select the Texas Tech Work address and click GO. Never select a new address!
3. New ePAF Job Selection screen –
 - a. For reappointments or rehires to the same T position and suffix, click the ALL JOBS button to locate the previous job; the Start Date will be the Job Begin Date.
 - b. For new primary or secondary jobs, enter the T position and suffix
 - c. For job changes (FTE, Pay) or job ends, select the current job
 - d. Review the Approval Type title on the top of the job chart, verify/click the desired job (re-click ALL JOBS if necessary), and click the Next Approval Type button – repeat these steps until the Job Labor Distribution FOAPAL and GO button are the final choice.
 - e. When the ePAF opens for entry, scroll Down, verifying that the T position, suffix and title on the Approval Types are correct: if incorrect, return to the ePAF menu and start over.

Tips for Starting ePAF Entries – Bottom Up to Decrease Errors!

1. Default Earnings –
 - a. On reappointment or FTE/PAY Change ePAFs, where the current Earn Codes are defaulted as new values, replace the old date with the Query Date for each Earn Code.
 - b. To remove an Earn Code, it is better to remove the incorrect rows and add new rows. Click Save and Add New Rows which will cause a Remove box to appear for each Earn Code row (it also causes the Remove boxes for the Labor Distribution FOAPAL to appear below). Check the boxes of the code(s) to remove and click save again.
 - c. Follow the Template instructions; enter a Query Date with each Earn Code selected.
 - d. Before leaving Default Earnings, be sure to Save and Add New Rows.
2. Labor Distribution, FOAPAL –
 - a. To remove a FOAP row, it is better to remove the incorrect rows and add new rows.
 - b. First, set the percent to .00 for each FOAP to remove and click Save and Add New Rows. This will cause a Remove box to appear for each FOAP row (this also causes the Remove boxes for the Default Earnings to appear above).
 - c. Enter any new Chart and FOAP on a new row; edit the percent column to equal 100.
 - d. Check the Remove boxes for the code(s) to remove; and Save and Add New Rows again.

3. Routing Queue –

- a. If optional approval levels are desired, select from the drop-down list and select an a Required Action, until the desired levels are added, then Save and Add New Rows.
 - b. TIP: Start on the lowest level (99-Apply) and select the approver. The Routing Queue will position on the bottom of the screen with all rows visible. ***You do not need to scroll down to position the Queue in the middle of your screen!*** Assign the approver to the next-lowest level and continue upward to the lowest level (20-Department?). ***This tip eliminates scrolling down between each approver selection!!***
 - c. Default Routing Queue. The link is found in your Originator Summary. You can save the levels and approvers to default to the ePAF each time it opens.
 - **NOTE:** When revising levels in the Queue, **sometimes** it gets confused and will not let you delete a level. When this happens, remove all levels, re-select the ePAF and click GO to re-create the Queue from the beginning.
4. Check whether the Job Begin Date (below) current value should be copied to the new value.
 5. Return to the top of the ePAF to complete the remaining entries.

A **Job Begin Date** error occurs with rehires and reappointments to the same T-number and suffix of a previous appointment (such as a TA being reappointed as a TA):

- Use the 'All Jobs' button to view past appointments, and select the prior appointment, if found
- The correct entry for the 'Job Begin Date' (the original date appointed to the T-number and suffix) is displayed in the Current Value column and can be re-typed (or, copy and paste) to the New Value entry field

Multi-Action ePAFs combine two actions on one ePAF and require special attention:

- Before starting, review the special Instruction Guide found with the template
- Since there are two actions and two T-number and Suffix positions, be sure to enter each T position and suffix correctly.
- Since there are two actions and possibly two Personnel Dates: Be sure to enter the Personnel Date(s) correctly.
- Verify the Title of the Approval Type as you select the correct T position and suffix, before clicking the 'Next Approval Type' button.