Training Manual

For

New ePAF in ADP

Created for Georgia State University
Changes from the 2/18 Manual

1. The ePAF will not be used for Summer Faculty- (See Chapter 1)

2. PAF Status- When an Epaf is automatically updated and no more changes need to occur it will go to complete; whereas if more changes need to occur it will go to EV5 Updated (See Chapter 1)

3. When adding an additional job choose the action of Hire and complete the ePAF as needed. Insert the Employee ID# in the comment field on the PAF Authorization Tab. (See Chapter 5)

4. When completing an ePAF using the Miscellaneous tab select Action of Pay rate Change and Reason of Other (except when hiring a Fee Based Employee use Hire). When completing Fee based Epaf select appointment classification of Staff Occasional and leave PAF Data 2 blank.

5. New feature- Print for more then one department at a time by entering the first and last department in the range (See chapter 9)

6. The Action Reason Code Table has expanded (See Appendix D)

Changes from the 4/29/2010 Manual

1. When hiring or making any changes to Student Leaders leave PAF Data 2 blank and enter information into PAF Miscellaneous Tab (See Chapter 4)

2. For Panther Works students select the Appointment Classification of Panther Works. Panther Works is similar to Works Study Students and the ePAF will need to be approved by Financial Aid.

3. Action Reason Code Table has expanded (See Appendix D)

4. List of Common Issues and Frequently used Job Codes has been added (See Appendix A)

Changes from 8/17/2011 Manual

1. URL has changed to https://enterprisehr.us.adp.com/bv2p/v5bv2p.html (See Chapter 2)

2. Digital Certificates have been eliminated (Removal of Appendix E)
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Chapter 1

Introduction to New ePAF and Contact Information

The Personnel Action Form is used as documentation for an employee’s payroll changes. The electronic Personnel Action Form (ePAF) was originally created by Georgia State University to help improve the efficiency and tracking of the PAF. The new ePAF was built in ADP and modeled after the previous system.

- **The ePAF is used for:**
  - Hires
  - Rehires
  - Terminations
  - Job Code Changes
  - Account Code Changes
  - Retirement
  - Educational Leave of Absence
  - Sabbatical
  - Miscellaneous Personal
  - Data Changes
  - Pay rate/Salary Changes
  - Stipend
  - Fee Based
  - Extra Compensation
  - Industry Supplement
  - Foundation Supplement
  - Prior Period Adjustment

- **This form is not used for:**
  - Graduate Assistants
  - Part Time Instructors
  - Medical Leave of Absence (FMLA)
  - Military
  - Government
  - Organ and Marrow Donation
  - Summer Faculty

**Required Documentation:** Initiators should send any additional documentation needed, which substantiates an action or change directly to HR via fax# (404) 413-3308.

**Some things to keep in mind:**
- Termination/Resignation Letters must be faxed to HR (404) 413-3008
- New Hire packets need to be completed by employees
- All position changes need to be approved by Class & Comp before submitting the ePAF for processing
  
  Please see the Class & Comp position review form at http://www.gsu.edu/hr/30439.html
- If changing the position the action start date of the ePAF must equal the effective date on the Position Review form from Class & Comp
- Speed type creation date needs to be same as or prior to action date on the ePAF

**HR Contact Information for ePAF:**

HR Help Desk: (404) 413-3360 – for questions or issues with how to complete ePAF

HR Fax Number: (404) 413-3308- for documentation needed to support ePAF

General Help Desk (404) 413-4357- for questions or issues with security and accessing ePAF
Changes with the New ePAF In ADP

Some of the significant differences with the new ePAF:

1. **ePAF can be used by other USG schools**
   - Employees using the ePAF will not be able to view personal information for employees at other institutions.
   - Employees cannot see ePAF created for employees at other institutions.
   - Job Information for other schools will be available for selection, but will create an error when saving (except for Job Code). For more information on Job Codes please see HR website at [http://www.gsu.edu/hr/index.html](http://www.gsu.edu/hr/index.html)

2. **Navigation**
   - ePAF functions slightly different (Please see Appendix A)
   - New tabs provide more flexibility- PAF Work and PAF Misc

3. **In many cases the ePAF can update Payroll after HRIS approval without manual entry by HR.** (see Appendix B)
   - This will create new PAF Statuses of Pending EV5 update, Updated by EV5 and Unsuccessful Update

4. **An employee cannot create or save an ePAF for himself**
   - This is a University System of Georgia Rule

5. **HR Position # needed for Staff and Faculty employees on New Hire and when Position is changing**
   - With the ePAF being able to do automatic updates HR Position # is needed to sync up position and job

6. **New Terminology** (see Appendix A)
Policies and Rules

When to complete ePAF
· Complete an ePAF for any data or pay rate changes for all employees except those paid through PPGRA.
· Complete an ePAF for any Sponsored Project that previously had an end date and has been renewed.

General Rules:
· One employee per ePAF
· Legal name on file with Social Security Administration must be used for all ePAF
· Minimum of 2 signatures (1 Initator and at least 1 different approver) from employees with first-hand knowledge.
· The employee named on the ePAF cannot be one of the two authorizing signatures
· Minimum of 1 “Final Approver” signature required before submitting for processing.
· An ePAF should be submitted to HR ten business days before the next effective pay date for the changes to be reflected in that pay date’s run. Please see Payroll calendar at http://managers.hr.gsu.edu/payroll-hris/tools/payroll-schedule/
· More than 10 transactions of the same type, including work schedule changes, may be submitted to HR in an excel spreadsheet with the appropriate approval signatures as defined above. Email routing may be used.

Before Submitting to HR: Appropriate Signatures
· If the employee named on the ePAF is being paid through Work Study, then the ePAF must be approved by Financial Aid before submitting it to Payroll for processing.
· Justification by the PI to URSA and approval by URSA is needed on any ePAF for a retroactive cost transfer (RCT). RCTs are defined as cost transfers on Sponsored Projects completed after an effort certification period* has closed.
· *Please refer to University Research Services and Administration (URSA) Cost Transfer Policy and Procedures for specifics including acceptable justifications and certification dates. http://www.gsu.edu/research/25271.html

Required Fields for all New Hire ePAFs except Faculty:
· All fields are required except:
  · Badge #
  · Employee ID
  · Employee Record number
  · Action End Date
  · Budget Position #
  · HR Position # (only needed for Staff and Faculty)
  · PAF Work Tab
  · PAF Misc Tab

Since Faculty New Hire information is entered into Job Panel in MFE the required fields are:
· Employee ID #
· Action and Reason
· Effective Date
· Appointment Classification
· Department
· Any other information required for new hires on ePAF not entered into Job Panel in MFE (see above)

Required Fields for all ePAFs Except New Hire:
· Employee ID #
· Employee Record
· Appointment Classification
· Department
· Action Code
· Reason Code and completing corresponding data fields
· Effective Date is required for every Action Code.
· Action End Date is required for Leave of Absence Action Code.
· Any Full Time Earning (FTE) change must include matching Compensation Frequency and Base Salary
Roles for Authorizing ePAF and Overview of the ePAF Process

Roles for Authorizing ePAF
- **Initiator:** Creates the ePAF and can be one of the required approvers for the ePAF
- **Reviewer:** Assess the ePAF for Accuracy with respect to their area of responsibility and can approve an ePAF
- **Final Approver:** Has authority to approve the ePAF for a division and has the ability to submit it for processing
- **Administrator:** After ePAF is Submitted, an Administrator can review and take action on an ePAF.
- **HRIS:** Reviews ePAF for accuracy and has the ability to have the ePAF automatically update EV5 (Payroll System) or complete it manually by entering the data into EV5

General ePAF Process

**Step 1.** Initiate an ePAF for a new or existing employee.

**Step 2.** ePAF is approved by at least two people (one of which must have security of final approver). The document cannot be changed after the first approval unless recycled. Once ePAF has been recycled the approval requirements start over.

**Step 3.** Once the ePAF has received all needed approvals the final approver can submit the ePAF and choose where to route it. The system will automatically route:
- **HR**
- **Financial Aid (for Work Study Students)**

**Final Approver can select:**
- **Budget and Planning**- Prior Period Adjustments
- **Research Financial Services**- Change to a PERs that has been certified
- **Departmental Adjustment**- Prior Period Adjustments that do not continue into the future that are processed and completed in the college. If Departmental Adjustment is chosen it will complete the ePAF, but will not automatically update EV5 or financial system.

**Step 4.** After the Final Approver has approved, routed and submitted the ePAF the status will change from Pending Approval to Submitted for Processing.

A. If ePAF is routed to Research Financial Services or Financial Aid they will review the document and either recycle or approve. If approved they will route ePAF to next Administrator.

B. Budget and Planning will review the ePAF and approve or recycle. If approved, Budget and Planning will process ePAF for Prior Period Adjustments and has the ability to complete the ePAF or route to administrators as needed.

C. If HR receives the ePAF, the PAF status will change to In Process by HR and it will be routed through HR areas for processing.

D. When HRIS receives the ePAF they can choose to have the ePAF automatically update EV5 (Payroll System) or complete it manually by entering the data into EV5. If HRIS chooses to have the ePAF automatically update the ePAF Status will be:
- **Pending EV5**- update when waiting for automatic update
- **Completed**- If the automatic update is successful and no other changes need to occur.
- **EV5 Updated**- If the automatic update is successful, but other actions need to be taken.
- **Unsuccessful EV5 Update**- If there is some issues with automatic update and needs to be manually completed by HRIS.

**Step 5. Completed**- The ePAF process is done and the information is in ADP or a journal has been submitted for an adjustment
Chapter 2

Accessing the ePAF

Note: If you have a digital certificate you can access the ePAF using the ADP Portal Administrator Login. (Please see Appendix E for more information)

Step 1: In the web browser type: [https://enterprisehr.us.adp.com/bv2p/v5bv2p.html](https://enterprisehr.us.adp.com/bv2p/v5bv2p.html)

Step 2: A warning message may appear if so select Run.

Step 3: Enter User Name and Password – If it is your first time to enter the ePAF you may need to reset your password.

  Note: User Name is generally USG followed by the first letter of your first name and the first four of your last name then underscore and BV2P. For example Melinda Jones would be (USGMJONE_BV2P)

  Note: Passwords will be emailed to the employee after training. If you have any issues with passwords please contact the help desk at 3-4357

Step 4: Select USG Personnel Action Form > Personnel Action Form (ePAF)

Step 5: A. For Initiating a new ePAF select ADD then select OK

  * Note it is very important to leave the Personal Action Form ID blank

  B. For an existing ePAF select Personnel Action Form (ePAF) next to ADD
Chapter 3
Initiating a New Hire ePAF for All Employees except Faculty, Student Leaders and Fee Based

Step 1. Access system and select ADD next to Personnel Action Form (ePAF)

Step 2. When the Personal Action Form ID box appears leave it blank and select OK
*Note it is very important to leave the Personal Action Form ID blank

Step 3. PAF Data Tab 1

New Hire or Rehire Employees who have not worked at the University System of Georgia Since December 2008:
- Enter full legal name of employee including middle name if applicable

Rehiring employees that have worked in the University System of Georgia Since January 2009
- Enter Employee’s Previous Employee ID Number

Required Fields for all New Hire and Retiree employees:
- Action- Select Hire or Rehire
- Reason- Select a Reason Code that describes what is happening with the ePAF. More explanation can be entered in the comment field on PAF Data Tab 2.
- EffDt (Effective Date)- Enter the date the action will start (i.e. enter date employee will start work)
- PAF Appt C (Appointment Classification)- Select employee type. Appointment classification could populate FTE, Comp Frequency, grey out Annual rate and may require distribution to be entered. (See Appendix C)
- Department ID- Search or enter for the home department for employee.
  Note: all Georgia State University Departments start with G
- Job Code- Search or enter job code. See affirmative action list on HR website for correct job code
  Note: all Georgia State University Job Codes start with 09
• **FTE** - (Full Time Equivalency):
  - Faculty and Staff = Number of hours worked per week divided by 40 hours
  - Work Study default = .48
  - Temporary default = .03
  - Student Assistant default = .03

• **HR Position Number** - This field is needed for staff and faculty and will populate Department and Job Code. If there are any changes to a staff employee’s Department, FTE, and Job Code please contact Class & Comp before submitting an ePAF.

• **Building, Room, Mail Drop** - Enter information for employee. If unknown enter supervisor information and send updated ePAF when more information is known.
  
  Note: Select the magnify glass to search for the number associated with the building.

• **Reports To** - Enter or Search for the Employee ID for the Business Manager or HRAC manager for the employee. If the HRAC or Business Manager information is not available please contact HR at 3-3360.

• **Etime Supervisor ID** - Enter or Search for the Employee ID for the supervisor responsible for approving Etime for employee (i.e. time worked or vacation/sick)

**Optional fields for New Hire:**

• Badge# (Panther Card# at Georgia State University) - Helpful when hiring students
• End Date - This information will not be entered into Payroll and another ePAF will need to be completed when the action ends.

• **Budget Position Number**

**Step 4. PAF Data Tab 2** - For more information on Annual Rate, Comp Frequency and Comp Rate see Appendix C

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<th>PAF Date: 01/26/0010</th>
<th>PAF Status:</th>
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<table>
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<td>Action</td>
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<td>Annual Rate</td>
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<td>Comp Rate</td>
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</tr>
<tr>
<td>Annual Rate</td>
<td>Comp Freq</td>
<td>Comp Rate</td>
<td></td>
</tr>
</tbody>
</table>

PAF Remarks:

**Required Fields:**

• Annual Rate - For employees paid monthly, enter the yearly or contract salary. Depending on appointment classification this field may be grayed out.

• Comp Frequency - This is a require field and depending on Appointment Classification may be pre-populated. If not populated select if the employee will be paid for number of hours worked (H) or a monthly (M) set rate.

• Comp Rate - This is a required field. For employees paid biweekly enter the hourly compensation rate. For employees paid on salary this will automatically calculate from the annual rate and FTE.

**Optional Fields:** PAF Remarks - A free form field that allows users to enter more information about the transaction. Note this comment box can be erased before ePAF is completed.
Step 5. PAF Distribution Tab

Required Fields:

- **Distribution type**: Select amount or percent to distribute salary.  
  **Note**: Hourly employees can only be distributed by percent.

- **Speedtype Codes**: Enter or search using the magnify glass for correct speedtype to charge employee's salary.  
  **Note**: All Georgia State University Speedtype Codes begin with 09 followed by 10 characters (12 total). Asterisks are used for blank spaces. For example 09SPEC*****

- Enter either % of salary or amount to charge to each speedtype code. The total has to equal 100% or amount entered in the Compensation Rate on PAF Data Tab 2. Any amount or percent remaining will be shown above in the Total Salary/Effort Remaining.

- If more then one speedtype code is needed add a row by selecting the current row and pressing the green arrow at top right side of the page. See picture below.

- If a row needs to be deleted select the row to be deleted and press the red arrow at top. See picture below.

Step 6. PAF Work Tab- Optional and only used for Biweekly Benefit Eligible Staff

This is an optional tab to provide information to Payroll about the Non Exempt Staff’s work schedule. This only needs to be completed if the schedule will be different from the default: **Monday – Friday 8:30A-5:15P 45 min meal deduction**

Payroll will enter this information into eTime schedule. Employee will still record daily information into eTime.
Step 7. PAF Misc Tab- This will not currently be used when hiring a new employee except when hiring a Fee Based or Student Leader.

Step 8. PAF Authorization Tab

- **Enter comment**: Optional type a note in the Official Comments for Archive History- This is recorded in the history
- **Select an Action**: Select the magnify glass next to the Action Status box and choose the desired action.

- Actions that can be taken:
  - **Approve**: Selecting approve means that the completed information is correct and you authorize further action. The ePAF will be grayed out after the first approval and cannot be changed without recycling.
  - **Recycle**: Selecting Recycle will open the ePAF for changes and start the approval process over. The Initiator should be notified to correct any mistakes. Recycle will open ePAF for changes to everything except name and employee ID.
  - **On Hold**: Selecting On Hold will place the form in temporary state of inactivity. This will create email reminders to the initiator and will be canceled by the system if left 20 days on hold. To take an ePAF off On Hold select another action.
  - **Cancel**: Once the action of canceled is selected and the ePAF is saved the form will be grayed out and no more actions can be taken.

Note: If an ePAF sits without activity it will be placed automatically On Hold on the 10th day and the initiator will receive a reminder email. If no activity occurs for 21 more days the ePAF will automatically be canceled on the 31st day.

- **Save**: To record the action select save (disk at top of page). Every time the information is saved a note about who took the action will appear in the history record under “This Space Reserved For HR Use”. Use the scroll bars to read the entire history record and comments.

Step 9. Notifying the Approver-

Once the initiator has completed the ePAF the next approver/s need to be notified. One way to notify the next approver/s is to use the email function on the ePAF. For more information about the email please see page 22
Chapter 4

Initiating a New Hire ePAF for a Student Leader and Fee Based Employee

Information: A New Hire ePAF for Student Leaders and Fee Based Employees will follow the same procedures as other new hire ePAF except that PAF Data 2 will be left blank and the PAF Misc tab will be completed. For more information on completing a new hire ePAF please see Chapter 3.

Step 1. Access system and select ADD next to Personnel Action Form (ePAF)

Step 2. When the Personal Action Form ID box appears leave it blank and select OK

*Note it is very important to leave the Personal Action Form ID blank

Step 3. PAF Data Tab 1 – Please see Chapter 3 on how to complete PAF Data Tab 1 for New Hires.

Student Leader PAF Appointment Classification = SLR Student Leader
Student Leader Job Code = 094X02
Fee Based PAF Appointment Classification = STO Staff Occasional
Fee Based Job Code = 097X10

Step 4. PAF Data Tab 2- For Student Leaders and Fee Based Employees leave PAF Data 2 blank
Step 5. PAF Distribution Tab - This tab can be completed for Student Leader and Fee Based employees or the information can be entered on the PAF Misc tab. See Chapter 3 for more information.

Step 6. PAF Work Tab - This tab will not be completed for Student Leaders or Fee Based Employees.

Step 7A. Student Leaders PAF Misc Tab
A. Select the Magnify Glass next to MISC and choose Stipend
B. In the comment box include information about the begin and end dates of the stipend, the monthly salary, and the speed type code.

Step 7B. Fee Based PAF Misc Tab
A. Select the Magnify Glass next to MISC and choose Fee Based
B. In the comment box include a description of the task performed, the amount that should be paid to the employee, and speed type code. Note these employees can be paid an hourly or monthly salary but their pay frequency will be monthly.

Step 8. PAF Authorization Tab - Please Refer to Chapter 3 on how to approve and save the Epaf.
Chapter 5
Initiating a New Hire ePAF for a Faculty Employee

**Information**: A faculty member is placed into a non-paying paygroup with MFE. The information entered into the Job Panel in MFE will carry over to the ePAF. Completing an ePAF will notify Payroll about the start of employment.

**Step 1.** Access system and select **ADD** next to Personnel Action Form (ePAF)

**Step 2.** When the Personal Action Form ID box appears leave it blank and select **OK**

*Note it is very important to leave the Personal Action Form ID blank*

**Step 3.** PAF Data Tab 1

- Once an employee ID is entered information previously recorded into MFE will populate in the Change From side. Complete any missing fields on the Change From Side by entering information into the Change To Side.
  - **Employee ID**- This is a required field. Enter the employee’s ID or search using the magnify glass.
  - **Action**- This is a required field. Select Magnify Glass and choose Hire
  - **Reason**- Select a Reason Code that describes what is happening with the ePAF. More explanation can be entered in the comment field on PAF Data Tab 2.
  - **EffDt (Effective Date)** This is a required field. Enter date when the employee will begin work or contract starts
  - **End Date**- No end date is required and will not be entered into Payroll. To end an action another ePAF will need to be completed.
  - **PAF Appt C (Appointment Classification)**- This is a required field. Select the employee type. This will populate compensation frequency to be monthly for faculty employees. (See Appendix C)
  - **Department ID**- This is a required field. Search or enter for the home department for employee.
    - **Note**: all Georgia State University Departments start with G
  - **Job Code**- Search or enter job code. See affirmative action list on HR website for correct job code
    - **Note**: all Georgia State University Job Codes start with 09
- **FTE** - (Full Time Equivalency):
  Faculty and Staff = Number of hours worked per week divided by 40 hours

- **HR Position #** - This will populate Department ID and Job Code

- **Building, Room, Mail Drop** - Enter information for employee. If unknown enter supervisor information and send updated ePAF when more information is known.
  *Note: Select the magnify glass to search for the number associated with the building.*

- **Reports To** - Enter or Search for the Employee ID for the Business Manager or HRAC manager for the employee. If the HRAC OR Business Manager information is not available contact HR at 3-3360

- **Etime Supervisor ID** - Enter or Search for the Employee ID for the supervisor responsible for approving etime for employee (i.e. time worked or vacation/sick)

### Step 4. PAF Data Tab 2: For more information on Annual Rate, Comp Frequency and Comp Rate see Appendix C

<table>
<thead>
<tr>
<th>PAF Data 1</th>
<th>PAF Data 2</th>
<th>PAF Distribution</th>
<th>PAF Work</th>
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- **Last Name:** Johnson  
- **First Name:** Cedric  
- **Middle:**

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- **PAF Remarks:** A free form field that allows users to enter more information about the transaction. Note this comment box can be erased before ePAF is completed.

- **Annual Rate** - Enter the contract salary if different then what is populated in the Change From Side

- **Comp Frequency** - This field will default to monthly for all faculty employees

- **Comp Rate** - For employees paid on salary this will automatically calculate from the annual rate and FTE.
Step 5 PAF Distribution Tab- Information from MFE should be pre-populated in Change From Side. Complete any missing fields or make any changes necessary

<table>
<thead>
<tr>
<th>PAF Data 1</th>
<th>PAF Data 2</th>
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<td>First Name: Cedric</td>
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<th>% of total Salary/Effort</th>
<th>Change to each Speedtype per Pay Period</th>
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<th>By Amount</th>
<th>Total Salary/Effort Remaining</th>
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<table>
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<th>Change To</th>
<th>Speedtype Code(s):</th>
<th>% of total Salary/Effort</th>
<th>Change to each Speedtype per Pay Period</th>
<th></th>
</tr>
</thead>
</table>

- Distribution type- Select amount or percent to distribute salary.

- Speedtype Codes- Enter or search using the magnify glass for correct speedtype to charge employee’s salary.
  
  **Note:** All Georgia State University Speedtype Codes begin with 09 followed by 10 characters (12 total). Asterisk maybe used for blank spaces. For example 09SPEC******

- Enter either % of salary or amount to charge to each speedtype code. The total has to equal 100% or amount entered in the Compensation Rate on PAF Data Tab 2. If it does not equal the remaining amount or percent will be shown above in the Total Salary/Effort Remaining.

- If more then one speedtype code is needed add a row by selecting the current row and pressing the green arrow at top right side of the page. See picture below

- If a row needs to be deleted select the row to be deleted and press the red arrow at top. See picture below.

Step 6 Skip PAF Work Tab and PAF Misc Tab- These tabs will not be used in hiring a new faculty member
Step 7. PAF Authorization Tab

- **Enter comment**: Optional type a note in the Official Comments for Archive History- This is recorded in the history
- **Select an Action**: Select the magnify glass next to the Action Status box and choose the desired action.

- Actions that can be taken:
  - **Approve**: Selecting approve means that the completed information is correct and you authorize further action. The ePAF will be grayed out after the first approval and cannot be changed without recycling.
  - **Recycle**: Selecting Recycle will open the ePAF for changes and start the approval process over. The Initiator should be notified to correct any mistakes. Recycle will open ePAF for changes to everything except name and employee ID.
  - **On Hold**: Selecting On Hold will place the form in temporary state of inactivity. This will create email reminders to the initiator and will be canceled by the system if left 20 days on hold. To take an ePAF off On Hold select another action.
  - **Cancel**: Once the action of canceled is selected and the ePAF is saved the form will be grayed out and no more actions can be taken.

Note: If an ePAF sits without activity it will be placed automatically On Hold on the 10th day and the initiator will receive a reminder email. If no activity occurs for 21 more days the ePAF will automatically be canceled on the 31st day.

- **Save**: To record the action select save (disk at top of page). Every time the information is saved a note about who took the action will appear in the history record under “This Space Reserved For HR Use”. Use the scroll bars to read the entire history record and comments.

Step 8. Notifying the Approver:

Once the initiator has completed the ePAF the next approver/s need to be notified. One way to notify the next approver/s is to use the email function on the ePAF. For more information about the email please see page 22.
Chapter 6
Initiating an ePAF for all actions besides New Hire

Step 1. Access system and select ADD next to Personnel Action Form (ePAF)

Step 2. When the Personal Action Form ID box appears leave it blank and select OK
*Note it is very important to leave the Personal Action Form ID blank

Step 3. PAF Data Tab 1

**Required Fields:**
- **Employee ID** - This will populate employee’s name and fill in the Change From Side with information that is currently in EV5 (Payroll System).

- **Employee Record #** - The employee record number can be chosen by clicking the magnify glass next to the Empl Rcd#. **It is very important for Students that could have multiple jobs, AY Faculty with a Summer Job, and employees that may have worked at another USG school to select the right Employee Record # to change.** If the wrong record is selected it may change information in another job or department causing employee to possibly be paid wrong.

Hint - If the information is incorrect in the Change From side it could be because the wrong Employee Record# has been selected.

* For adding an additional job select the action Hire and fill out all required information. In the comment section on the PAF Authorization tab please enter the employee’s ID#.
• **Action**: Select the Magnify Glass and choose the action that describes what is happening. If both a pay rate change and a data change is happening select Pay Rate change.

• **Reason**: Select a Reason Code that describes what is happening with the ePAF. To help HR understand the action type more information PAF Data Tab 2 comment field.

• **EffDt**: Effective Date of when the action will begin. System can do future dated events but it is not recommended for more then one month in advance.
  
  **Note**: For termination select the day the action starts not the last day of work. For Retirement select the 1st of the month.

• **End Date**: This field is only required for Leave of Absence. For all other actions end date will not be entered into Payroll and another ePAF will need to be completed.

• **PAF Appt C (Appointment Classification)**: Select employee type. Appointment classification could populate FTE, Comp Frequency, grey out Annual rate and may require distribution to be entered. (See Appendix C)

• **Department ID**: Search or enter for the home department for employee.
  
  **Note**: all Georgia State University Departments start with G

• **HR Position Number**: This field is needed for staff and faculty and will populate Department and Job Code. If there are any changes to an employee’s department, FTE or Job Code please contact Class & Comp before submitting an ePAF. The Position Review form can be found: http://www.gsu.edu/hr/30439.html

**Optional Fields** - Make all other needed changes. Information will carry over from the Change From Side if nothing is entered into the Change To side.

• **Job Code**: Search or enter job code. See affirmative action list on HR website for correct job code
  
  **Note**: all Georgia State University Job Codes start with 09

• **FTE** (Full Time Equivalency):
  
  - Faculty and Staff = Number of hours worked per week divided by 40 hours
  - Work Study default=.48
  - Temporary default=.03
  - Student Assistant default=.03

• **Building, Room, Mail Drop**: Enter information for employee. If unknown enter supervisor information and send updated ePAF when more information is known.
  
  **Note**: Select the magnify glass to search for the number associated with the building.

• **Reports To**: Enter or Search for the Employee ID for the Business Manager or HRAC manager for the employee.
  
  If the HRAC or Business Manager information is not available please contact HR at 3-3360.

• **Etime Supervisor ID**: Enter or Search for the Employee ID for the supervisor responsible for approving Etime for employee (i.e. time worked or vacation/sick)
Step 4 PAF Data Tab 2- For more information on Annual Rate, Comp Frequency and Comp Rate see Appendix C

Note: This only needs to be completed if there is a change to the information.

- **Annual Rate**: For employees paid monthly enter the yearly or contract salary. Depending on appointment classification this field may be grayed out.

- **Comp Frequency**: This is a require field and depending on Appointment Classification may be pre-populated. If not populated select if the employee will be paid for number of hours worked (H) or a monthly (M) set rate.

- **Comp Rate**: This is a required field. For employees paid biweekly enter the hourly compensation rate. For employees paid on salary this will automatically calculate from the annual rate and FTE.

- **PAF Remarks**: A free form field that allows users to enter more information about the transaction. Note this comment box can be erased before ePAF is completed.

Step 5. PAF Distribution Tab

Note: This only needs to be completed if there is a change to the information

- **Distribution type**: Select amount or percent to distribute salary.

  Note: Employees paid hourly can only be distributed by percent.

- **Speedtype Codes**: Enter or search using the magnify glass for correct speedtype to charge employee’s salary.

  Note: All Georgia State University Speedtype Codes begin with 09 followed by 10 characters (12 total). Asterisk maybe used for blank spaces. For example 09SPEC*****
• Enter either % of salary or amount to charge to each speedtype code. The total has to equal 100% or amount entered in the Compensation Rate on PAF Data Tab 2. If it does not equal the remaining amount or percent will be shown above in the Total Salary/Effort Remaining.

• If more then one speedtype code is needed add a row by selecting the current row and pressing the green arrow at top right side of the page. See picture below.

• If a row needs to be deleted select the row to be deleted and press the red arrow at top. See picture below.

Step 6. PAF Work Tab- Optional and only used for Non Exempt Biweekly Staff
More than 10 work schedule changes may be submitted to HR in an excel spreadsheet with the appropriate approval signatures as defined above. Email routing may be used.

Step 7 PAF Misc Tab- This tab can be use in place of the paper forms to notify Payroll and Budget & Planning about Stipend, Fee Based, Extra Compensation, Industry Supplement, Foundation Supplement, and Prior Period Adjustments.

All Except Fee Based:
- Select Action Code of Payrate Change and Reason Other. Select the miscellaneous code and enter information in the comment field. Information must include but is not limited to: Start and Stop dates, amount, frequency of payment, where the payment should be charged (i.e. which speedtype to charge) and explanation of why this happen.

Fee Based Already Employed at Georgia State University:
- Select Payrate Change and Reason Other. Select Appointment Classification of Staff Occasional and fill out Epaf as needed but leave PAF Data 2 Tab blank.

Fee Based New Hire:
- If the employee is new to the University select Action of Hire and Appointment Classification of Staff Occasional. Complete the Epaf including the PAF Misc Tab see above.
Step 8. PAF Authorization Tab

**Enter comment:** Optional type a note in the Official Comments for Archive History. This is recorded in the history.

**Select an Action:** Select the magnify glass next to the Action Status box and choose the desired action.

- **Approve:** Selecting approve means that the completed information is correct and you authorize further action. The ePAF will be grayed out after the first approval and cannot be changed without recycling.

- **Recycle:** Selecting Recycle will open the ePAF for changes and start the approval process over. The Initiator should be notified to correct any mistakes. Recycle will open ePAF for changes to everything except name and employee ID.

- **On Hold:** Selecting On Hold will place the form in temporary state of inactivity. This will create email reminders to the initiator and will be canceled by the system if left 20 days on hold. To take an ePAF off On Hold select another action.

- **Cancel:** Once the action of canceled is selected and the ePAF is saved the form will be grayed out and no more actions can be taken.

**Note:** If an ePAF sits without activity it will be placed automatically On Hold on the 10th day and the initiator will receive a reminder email. If no activity occurs for 21 more days the ePAF will automatically be canceled on the 31st day.

- **Save:** To record the action select save (disk at top of page). Every time the information is saved a note about who took the action will appear in the history record under “This Space Reserved For HR Use”. Use the scroll bars to read the entire history record and comments.

Step 9. Notifying the Approver

Once the initiator has completed the ePAF the next approver/s need to be notified. One way to notify the next approver/s is to use the email function on the ePAF. For more information about the email please see page 22.
Chapter 7

Notifying next approver with email

**Information:** The next step in the ePAF process is to obtain the need approvals. The system has been made flexible to allow the users to choose who should approve the ePAF. The minimum requirements are that at least two people must approve and at least one approver must be a final approver. The approvers will need to be notified about the ePAF they need to approve. One way to notify the approvers is to use the email notification built into the ePAF.

**Step 1.** From inside the ePAF click the **PAF Authorization** tab

**Step 2.** Select the button **Go to Email Panel** next to the Action Status. This will bring up a separate email page.

**Step 3:** Enter email address:
- **A.** Type in employee email address in the box under Email Address
- **B.** Search for the employee’s email address by entering employee ID or select the magnify glass to find employee by name. This will populate the employee’s campus email address.

**Step 4:** Enter email body: Type a short message or select the magnify glass for a standard email

**Step 5:** To send an email to more then one person at a time select the green arrow on top of page. If green arrow does not appear click on the email address box. Repeat Steps 3 and 4

**Step 6:** Select **Send Email**
Chapter 8
Approval and Routing

Information- After an ePAF has been created it requires at least two approvers, one of which must be a final approver, before it can be submitted to administrators for processing. This section describes how to find an ePAF that has already been created, take action and submit it for processing.

Step 1. Access the system (see page 8)

Step 2. Click USG Personnel Action Form> Personnel Action Form (ePAF)> Personnel Action Form (Epaf) (next to ADD)

This will bring up a search screen that will allow you search for existing ePAF

Step 3 Search for ePAF: by typing in search criteria or searching using the magnify glass.

Few things to know about searching:

- By entering entire ePAF # in Personnel Action Form ID will bring up a specific ePAF
- By selecting OK with out anything in the search criteria will bring up the first 300 ePAF for Georgia State University in ADP
- Entering search criteria will limit the number returned
- A partial search is possible by only entering the beginning of a word or number.
  For example by entering ST in the last name field will bring up ePAF for all GSU employees with last name starting with ST. Similarly if the entire department number is not known the beginning can be entered.
- ADP does not have a Boolean search criteria, meaning that no wild cards (* or % etc) can be used to stand in for missing information.

Depending on the search criteria used, either the specific ePAF will come up, or a list of ePAFs matching the search criteria will appear below the search screen. From the list select the ePAF you wish to review. (see picture above)

Step 4 Review each tab inside the ePAF carefully to make sure information is correct. The Change From is the information currently in Payroll and the Change To is the information that needs to be changed. If nothing is in the Change To fields the information will carry over from the Change From. For more information please see Chapter 3
- PAF Data Tab 1 and PAF Data Tab 2- Information about employee’s job record
- PAF Distribution Tab- How the employee’s salary will be distributed among speedtype
- PAF Work Tab- Used to tell Payroll the work schedule of non-exempt biweekly staff employees
- PAF Misc Tab- Used to tell Payroll about additional payments (stipends, fee based, foundation supplement, industry supplement, Extra Compensation) and Prior Period Adjustments
Step 5. PAF Authorization Tab

- **Enter comment**: Optional type a note in the Official Comments for Archive History. This is recorded in the history.

- **Select an Action**: Select the magnify glass next to the Action Status box and choose the desired action.

  - **Actions that can be taken**:
    - **Approve**: Selecting approve means that the completed information is correct and you authorize further action. The ePAF will be grayed out after the first approval and cannot be changed without recycling.
    - **Recycle**: Selecting Recycle will open the ePAF for changes and start the approval process over. The Initiator should be notified to correct any mistakes. Recycle will open ePAF for changes to everything except name and employee ID.
    - **On Hold**: Selecting On Hold will place the form in temporary state of inactivity. This will create email reminders to the initiator and will be canceled by the system if left 20 days on hold. To take an ePAF off On Hold select another action.
    - **Cancel**: Once the action of canceled is selected and the ePAF is saved the form will be grayed out and no more actions can be taken.

  **Note**: If an ePAF sits without activity it will be placed automatically On Hold on the 10th day and the initiator will receive a reminder email. If no activity occurs for 21 more days the ePAF will automatically be canceled on the 31st day.

- **Save**: To record the action select save (disk at top of page). Every time the information is saved a note about who took the action will appear in the history record under “This Space Reserved For HR Use”. Use the scroll bars to read the entire history record and comments.

**Step 6. Notifying the Approver**

If other approvers are needed, one way to notify them is to use the email function on the ePAF. For more information about the email please see page 22
Chapter 9
Final Approver

When the minimum approval requirements have been met, including the final approver has approved and saved, the routing and submit box on the PAF Authorization Tab will open for Final Approvers.

**Note:** Routing and Submit should only be selected once the ePAF has been fully approved (not just met minimum requirements) and it is ready to be processed by an administrator.

- **Final Approver**- Approves ePAF and Saves (see Chapter 7 Approval and Routing)
- **Select a routing status** by clicking on the magnify glass next to Routing Status Box or let routing default to HR or Financial Aid.
- **Select Submit** – Above the history record
- **Select Save**- Disk button at top right side of the page.

Optional Routing for Final Approvers-

- **HR**- ePAF routing will default to HR except for Work Study Students which will first route to Financial Aid. EPAF should be submitted to HR when it will affect a current or future pay period.

- **Financial Aid**- ePAF for Work Study students will automatically route to Financial Aid for approval when submitted. Financial Aid will review ePAF and recycle or approve. If ePAF is approved it will be routed to HR for processing

- **Research**- Route the ePAF to Research Financial Services if it is for an adjustment on a grant that is over 90 days old or affects a PERs that has already been certified. Please see URSA for more details.

- **Budget and Planning**- Route ePAF to Budget and Planning when ePAF is for an adjustment. If the adjustment will affect a current or future payroll route to HR first, but make a note using box on PAF Misc tab to notify HR that it is a prior period adjustment and it will be routed to Budget and Planning

- **Departmental Adjustments**- Departmental adjustments are used when ePAF is only affecting a prior period adjustment and has been processed by the college and does not need to go to Budget and Planning (At current time no department is using departmental adjustments). After selecting departmental adjustments and submit the ePAF will be completed and no more changes can be made.
Chapter 10
Printing the ePAF

Step 1. Access the System (See Chapter 2)

Step 2. Select USG Personnel Action Form > USG Custom ePAF Processes > ePAF Report (EPRH038)

A search page will appear on the right side of the page

Step 3. Enter search criteria and select Run Report on the bottom of the page
   - To print a single ePAF enter the Personnel Action Form Id (i.e. Epaf #)
   - To print a range of ePAF select the desired criteria by entering information in the search fields or selecting the
     magnify glasses.
   - When entering first or last name it must be the entire name
   - Print for more then one department at a time by entering the range of department numbers
   - Match Date By has three options:
     A. Complete Date- Date Epaf was completed on
     B. Effective Date- Date the action will start
     C. PAF Date- Date ePAF was created

Step 4. The following message will appear. Select OK. This will cause the screen to look like it disappeared

Step 5. At the top right side of the screen select the hour glass

Step 6. A status screen will appear (shown below). The status button needs to say “Success.” Keep hitting Reset List
   until “Success” appears.
Step 7. At top of the screen select the magnify glass next to the hour glass. This will bring up a Reports Output screen that will allow you to select the format of the report and view it.

Step 8. Optional step - The print format will default to .LIS. To print in .PDF select the drop down box next to file extension and select PDF.

Step 9. Select the magnify glass on the top left of the Reports Output screen. This will bring up the document to print. It will print each ePAF on two pages and on the last page of the print out will be a status of all the reports printed.
Information: After ePAF is submitted for processing it will be routed to an administrator to review and process.

Step 1. Access the system (see page 8)
Step 2. Click USG Personnel Action Form > Personnel Action Form (ePAF) > Personnel Action Form (ePAF) (next to ADD)

This will bring up a search screen that will allow you search for existing ePAF

Step 3 Administrators can search for an ePAF waiting for processing by using Routing Status and PAF Status.

Select the magnify glass next to status to select the status and select OK

- **Routing Status**: Select the processing department (i.e. Research Financial Services, Financial Aid, etc.)
- **PAF Status**: Submitted for Processing - Financial Aid, Research, Budget and Planning
  In Process by HR - Payroll Specialist, Benefits, HRIS, Class & Comp, Budget & Planning

Few things to know about searching:
- By entering entire ePAF # at top will bring up the specific ePAF
- By selecting OK with out anything in the search criteria will bring up the first 300 ePAF for Georgia State University in ADP
- Entering search criteria will limit the number returned
- A partial search is possible by only entering the beginning of a word or number. For example by entering ST in the last name field it will bring up all the ePAF for all GSU employees with last name starting with ST. Similarly if the entire department number is not known the beginning can be entered.
- ADP does not have a Boolean search criteria, meaning that no wild cards (* or % etc) can be used to stand in for missing information.

Step 4 Depending on the search criteria used, either the specific ePAF will come up, or a list of ePAFs matching the search criteria will appear below the search screen. From the list select the ePAF you wish to review. (see picture above).

Step 5 Review each tab inside ePAF carefully to make sure information is correct. The Change From side is what is currently in Payroll and the Change To is the information that is changing.

- **PAF Data Tab 1 and PAF Data Tab 2**: Information about employee’s job record (see page 9-10)
- **PAF Distribution Tab**: How the employee’s salary will be distributed among speedtype (see page 11)
- **PAF Work Tab**: Used to tell Payroll the work schedule of non-exempt biweekly staff employees (see page 11)
- **PAF Misc Tab**: Used to tell Payroll about one time payments (stipends, fee based, extra compensation) and Prior Period Adjustments (see page 20)
Step 6. Select PAF Authorization tab

A. Select action to be taken on ePAF

- **Approve**: Selecting approve means that the completed information is correct and you authorize further action.
- **Recycle**: Selecting Recycle will start the approval process over. The Initiator should be notified to correct any mistakes. It will change the status to Pending Approval. Recycle will open ePAF for changes to everything except name and employee ID.
- **On Hold**: Selecting On Hold will place the form in temporary state of inactivity. This will create email reminders to the initiator and will be canceled by the system if left 20 days on hold. To take an ePAF off On Hold select another action.
- **Cancel**: Once the action of canceled is selected and the ePAF is saved the form will be grayed out and no more actions can be taken

B. Route ePAF to next Administrator

Select Magnify Glass next to Routing Status if ePAF needs to go to another administrator

C. Save

To record the action select save (disk at top of page). Every time the information is saved a note about who took the action will appear in the history record under “This Space Reserved For HR Use”. Use the scroll bars to read the entire history record and comments.
Once the ePAF has been fully approved and is ready to be completed, HRIS and Budget and Planning can complete an ePAF manually or HRIS can have the system update EV5 for certain records.

1. **Update** - HRIS can choose to have the system automatically update EV5 for some ePAFs if it is not a new hire or there is no future dated records by selecting the **PAF Ready for Update Program** box. During the update the ePAF status can change to:
   - **Pending EV5 update** - Waiting for the ePAF to update EV5 (Position and Job)
   - **Update by EV5** - ePAF successfully updated to EV5. If there are no other changes that need to be made the system can automatically complete ePAF as well.
   - **Unsuccessful Update** - ePAF unable to update EV5 automatically. HRIS will investigate error and may enter information in manually.

2. **Complete** - HRIS and Budget and Planning can complete an ePAF manually when it has been fully processed by selecting the **PAF Status** and choosing **Complete**.
Appendix A
Glossary of Terms and Helpful Tips

Glossary

**Badge ID** - Is the same as Panther ID at Georgia State University.

**Company** - Each school in the University System has a number to identify their information. 090 is GSU company code.

**Digital Certificate** - ADP uses digital certificates for extra security for products with sensitive information.

**Effective Date** - Date the action is schedule to begin.

**Employee Record # (Empl Rcd#)** - Student employees that may have worked more than one job / account or Summer Faculty there maybe more than one record. It is important to select the correct record to change because this system can automatically update information. (read more about this on page 17)

**Enterprise/ EV5** - Is the payroll system for ADP.

**Etime Supervisor** - This is the supervisor responsible for approving etime for employee (time worked or vacation/sick).

**Mail Drop** - PO Box for the employee.

**Meal Deduction** - How long is the standard meal break for the employee named on the ePAF.

**PAF Appt C** - PAF Appointment Classification.

**Reports To** - This is the Business Manager or HRAC person for this employee.

Helpful Tips

- **Effective Date for Termination** - The effective date is the day after last day worked.

- **Starts with 09**: Job Code, HR Position#, and Speedtype.

- **Starts with G**: Departments.

- **All speedtype codes** are 12 characters long. They start with 09 and can have * after the speedtype code for example 09SPEC*****

- **Frequently Used Job Codes**:
  - Student Assistant - 094X01
  - Student Leader - 094X02
  - Work Study - 094X04
  - Panther Works Assistant - 094X12
  - Temporary Staff - 097X12
  - Fee Based - 097X10

- **Adding an Additional Job** - When adding an additional Job select action of New Hire and complete the ePAF. Enter the employee ID# in the comment field on the PAF Authorization Tab.

- **Few things to know about searching**:
  1. By selecting OK with out anything in the search criteria will bring up the first 300 ePAF for Georgia State University in ADP.
  2. Entering search criteria will limit the number returned but will return information for other schools. The system will create an error message when information from other schools is selected except for Job Code.
  3. A partial search is possible by only entering the beginning of a word or number. For example by entering ST in the last name field will bring up ePAFs for all GSU employees with last name starting with ST. Similarly if the entire department number is not known the beginning can be entered.
  4. ADP does not have a Boolean search criteria, meaning that no wild cards (* or % etc) can be used to stand in for missing information.
Appendix B

PAF Status

Pending Approval- While the ePAF is being processed by the colleges and departments before being submitted for administrator processing.

Submitted for Processing- ePAF is submitted to administrators for processing. ePAF will stay in Submitted for processing until marked in process by HR or completed by Budget and Planning. If recycled the ePAF status will return to Pending approval.

In Process by HR- Once ePAF has been reviewed by the HR front desk the ePAF status will change to In Process by HR.

Pending EV5 update- Waiting for the ePAF to update EV5 (Position and Job).

Update by EV5- ePAF successfully updated to EV5 automatically. If there are no other changes that need to be made the system can automatically status the ePAF as complete.

Error EV5 Update- ePAF unable to update EV5 automatically. HRIS will investigate error and may enter information in manually.

Completed- ePAF has been finished and no future action can be taken on the ePAF. The information has been entered into ADP or a journal has been submitted for adjustments. To make changes a new ePAF needs to be started.

On Hold- The user can place an ePAF On Hold if more information is needed. If the ePAF has had no action taken for a while, on the 10th day the system will place it On Hold. After the ePAF has been On Hold for 20 days with no action the ePAF will be canceled.

Canceled- If Epaf is cancelled it can no longer have any actions taken and for any changes to take affect a new ePAF must be started.
# Appendix C
## Appointment Classification

<table>
<thead>
<tr>
<th>Appointment Classifications</th>
<th>Paygroup</th>
<th>Comp Freq</th>
<th>Annual Salary</th>
<th>Comp Rate</th>
<th>Default FTE</th>
<th>Distribution Type</th>
<th>Position Number Required</th>
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<td>Enter</td>
<td>Auto calculate</td>
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<td>percent or amount</td>
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<td>Enter</td>
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<td>A</td>
<td>Monthly</td>
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<td>Staff, Limited Term w/Benefits</td>
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## Appendix D
### Action Reason Codes

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