Federal Work Study New Hire

**Use this process for any student who this is their first Federal Work Study position.**

**Step One:** Electronic Personnel Action Form Screen

1. Select New EPAF

![Electronic Personnel Action Form Screen]

**Step Two:** New EPAF Person Selection

1. Enter Rocket ID of student and Tab. Name will populate if valid ID and active student
   
   a. Magnifying glass icon can be used to search for student if ID not available

   ![Magnifying Glass Icon]

2. Leave Query Date to populate current date
3. Select the Approval Category for the EPAF From the drop down menu (Federal Work Study New Hire to FWS, FWSNEW)
4. Select Go
**Step Three: Enter Position Information**

1. Click All Jobs to confirm that student does not have another position on campus
   a. **If student has a current position or previously terminated position on campus** DO NOT USE New Hire EPAF. See instructions for FWS Additional Jobs or FWS Rehire
2. Enter PCN and press Tab (Position Control Number i.e P60011). Student Employee Title will populate.
3. Enter in Suffix. Press Tab **Note:** Suffix number will be 00 at the first work assignment for the year for FWS, the first instance of a new PCN and continuation of the same job from Summer to Fall/Spring. The Suffix number will change to 01, 02 etc. if a different FWS job is added within the aid year.
4. **Entering the Suffix number is critical to actually Submit the EPAF as explained further below.**
5. Select Go (Do Not Select Next Approval Type. If you do, click on New EPAF and start again)
Note Instructions at the beginning of EPAF Form:

Enter the information for the EPAF and either Save or Submit. After submitting EPAF, please send state tax forms, OPERS enrollment/exemption forms, and SSA form to Payroll Office MS 459. I-9 Documentation, DMA, and Personal Information Form (PIF) should be sent to Career Services Office MS 112. Federal W4 elections and Direct Deposit account information can be completed through the myUT portal. Completed FWS contracts should be sent to the Office of Student Financial Aid by mail (MS314) or email Julia.rippke@utoledo.edu.

Step Four: New Student Employee

1. Enter Birth Date, Citizenship, Ethnicity and Gender
   a. Values should already be there listed under Current Value. Re-enter what is shown under New Value.

New Student Employee

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birth Date:</td>
<td>MM/DD/YYYY 06/14/1990</td>
<td>06/14/1990</td>
</tr>
<tr>
<td>Citizenship:</td>
<td>Y, Citizen</td>
<td>Y, Citizen</td>
</tr>
<tr>
<td>Ethnicity:</td>
<td>C, Caucasian or White</td>
<td>C, Caucasian or White</td>
</tr>
<tr>
<td>Sex:</td>
<td>Female</td>
<td>Female</td>
</tr>
</tbody>
</table>
**Step Five:** Create an Employee Record

*Note* at the top of this section that the full PCN and suffix is complete. If you see neither or only the PCN with no suffix number, then go to bottom of screen and click New EPAF and start over. This is an indication there was a problem with entering the PCN and suffix number on the previous screen.

1. Enter Current Hire Date – this is the date that the student will begin working
2. Employee Class Code (Magnifying Glass can be clicked to show available choices for student class codes).
3. Home Organization – Department that the student will be working in. This is **NOT** the index but generally is the index number without the “A” in front and add ”0” at the end (i.e. A10625 = 106250)
4. Location Code can be selected from the drop down menu. **DO NOT** USE MC (do not use) as an option.
   a. MC AC, Main Campus Academic applies to students working in the colleges
   b. MC SA, Main Campus Student Affairs applies to departments falling under the VP of Student Affairs
   c. MC AD, Main Campus Administration applies any other departments on the Main Campus
   d. HSC C, College applies to departments in the medical college
   e. HSC H, Hospital applies to departments in the hospital
   f. HSC S, Support applies to all other health science departments not in college or hospital
5. Home COAS - defaults in, not able to be changed
6. Employee Status- defaults in, not able to be changed

![Create an Employee Record, P60011-00 FWS Exempt Student UndergradMC](image)

**Step Six:** Create an Employee Assignment

1. Personnel Date – 1\textsuperscript{st} date of employment or start date. **MUST** equal Current Hire Date from Create Employee Record section above
2. Jobs Effective Date - 1st day of employment when EPAF is completed before the actual start date OR 1st day of the current pay period in which EPAF is being completed
3. Job Begin Date - Must be the same as Job Effective Date
4. Contract Type – New Hire will ALWAYS be Primary
5. Regular Rate – The rate of pay for Federal Work Study will default in. This cannot be changed.
6. Timesheet Org - Employee's department, can be searched.
7. Step - Defaults in, not able to be changed.
8. FTE - Defaults in, not able to be changed.

**Create an Employee Assignment, P60011-00 FWS Exempt Student UndergradMC**

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Date: MM/DD/YYYY*</td>
<td></td>
<td>05/12/212</td>
</tr>
<tr>
<td>Jobs Effective Date: MM/DD/YYYY*</td>
<td></td>
<td>05/12/2012</td>
</tr>
<tr>
<td>Job Begin Date: MM/DD/YYYY*</td>
<td></td>
<td>05/2012</td>
</tr>
<tr>
<td>Contract Type:</td>
<td>Primary</td>
<td></td>
</tr>
<tr>
<td>Regular Rate: *(Not Enterable)</td>
<td></td>
<td>7.70</td>
</tr>
<tr>
<td>Timesheet Orgn: *</td>
<td>00000</td>
<td></td>
</tr>
<tr>
<td>Step: *(Not Enterable)</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>FTE: *(Not Enterable)</td>
<td>.1</td>
<td></td>
</tr>
</tbody>
</table>

**Step Seven: Ending Jobs**

1. This is the end of the semester or academic year in which the student will be working
   a. Generally students are hired from Fall thru the end of Spring semester (i.e. August – May)
   b. A separate EPAF will need to be done for students working thru the Summer semester
2. Personnel Date, Job Effective Date and Job End Date will all be the same future date
3. Jobs Status - defaults in, not able to be changed
4. Job Change Reason – defaults in, not able to be changed
5. If student position ends prior to the end date originally entered, a separate Terminate Student Employee or End Job EPAF needs to be submitted
Step Eight: Routing Queue

1. Designate appropriate approvers
   a. MGMT – should be Manager that signed on SEPA
   b. EXEC – should be Executive that signed on SEPA
   c. FINAID – should be JRIPPKE – Julia Rippke
   d. CSRV – should be SANDERS – Sheila Anderson
   e. PAYROL – should be PWILLARD/MCARDENAS – Paula Willard/Magdalena Cardenas
   f. PAYAPP – should be KGULDEN – Kelley Guldenpfennig
      i. Last approval level must be set to APPLY

Please note that the originator, MGMT, and EXEC cannot be one in the same person. There must be a minimum of two different people before it routes to Career Services. The originator can be the MGMT or the MGMT and EXEC can be the same.

Also, all Approval Levels MUST be completed before submission. Otherwise it will cause the EPAF to error upon submitting. If you do not see the person within the MGMT or EXEC level, please contact HR for further assistance.

2. You MUST Save and Add New Rows before you submit your EPAF
Step Nine: Save and Submit EPAF

1. Save and Submit EPAF. By choosing to Save first, you can see and fix many errors before submitting.
2. You will see message that your changes were saved/submitted successfully.

Electronic Personnel Action Form

![Image of EPAF form]

Note, to avoid overspending in the FWS budgeted indexes, please complete two EPAF’s when hiring a FWS. The second Epaf would be using the department’s PCN that they would use when hiring a student worker- this uses their account information that we would charge back to in case they go over their FWS award. This information used to be collected on the paper SEPA’s as a second distribution number. Supervisors please send scanned copies to the following email address: FinancialAidFWS@utoledo.edu