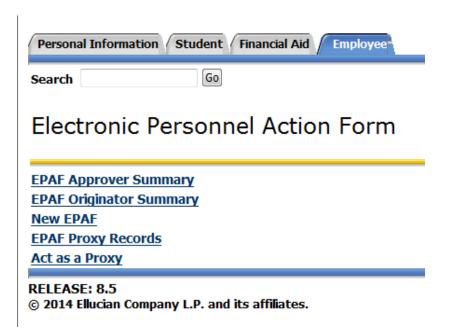# New Hire for Students

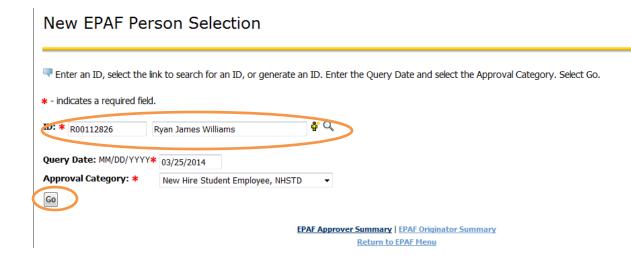**Step One:** Electronic Personal Action Form Screen



**\*\*Please Note:** At the beginning of the EPAF it states after Submitting the EPAF to please send state tax forms, OPERS enrollment/exemption forms, and SSA form to Payroll Office MS 459. I9 documentation and Personal Information Form (PIF) should be sent to HR-AS1000, and DMA should be sent to Career Services Office MS 112. Federal W4 elections and Direct Deposit account information can be completed through the MYUT portal.

**Step Two:** New EPAF Person Selection

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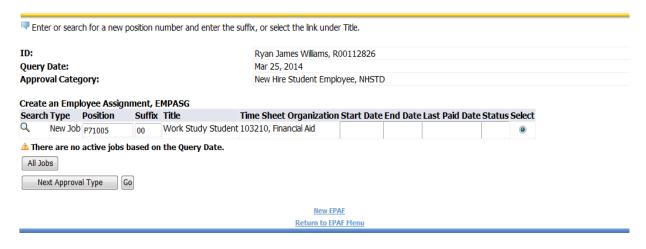   a. Magnifying glass icon can be used to search for student if ID is not available



2. Leave Query Date to populate current date
3. Select the approval Category for the EPAF from the drop down menu (New Hire Student Employee NHSTD)
4. Select Go

## 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.

ID: ✱ [R00112826]  [Ryan James Williams]  👤 🔍

Query Date: MM/DD/YYYY ✱ [03/25/2014]

Approval Category: ✱ [New Hire Student Employee, NHSTD ▾]

[Go]

EPAF Approver Summary | EPAF Originator Summary
Return to EPAF Menu

**Step Three:** Enter Position Information

1. Click All Jobs to confirm that the student does not have another position on campus
   a. **If the student has a current position or previously terminated position on campus DO NOT USE New Hire EPAF.** See instructions for Additional Jobs or Rehire)

2. Enter PCN and press Tab (Postion Control Number i.e P71001). Student Employee Title will populate. If you do not know what your position number is for student positions, you can view available position numbers for your department under the Departmental Pooled Position report in Human Resources General Inquiry folder in the Web Report Library (https://reports.utoledo.edu/). If you do not have access to this report please contact your Business Manager to gain access.

3. Enter in Suffix. Press Tab. (Suffix number should always be 00 for brand new position)

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 onto New EPAF and start again)**

## New EPAF Job Selection

💬 Enter or search for a new position number and enter the suffix, or select the link under Title.

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| **ID:** | | | | Ryan James Williams, R00112826 | | | | | |
| **Query Date:** | | | | Mar 25, 2014 | | | | | |
| **Approval Category:** | | | | New Hire Student Employee, NHSTD | | | | | |

**Create an Employee Assignment, EMPASG**

| Search Type | Position | Suffix | Title | Time Sheet Organization | Start Date | End Date | Last Paid Date | Status | Select |
|---|---|---|---|---|---|---|---|---|---|
| 🔍 New Job | P71005 | 00 | Work Study Student | 103210, Financial Aid | | | | | ⦿ |

⚠ There are no active jobs based on the Query Date.

[ All Jobs ]
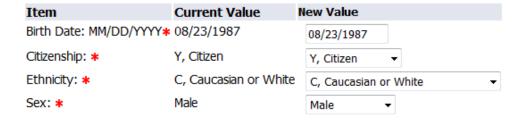
[ Next Approval Type ] [Go]

**Step Four:** New Student Employee

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

| Item | Current Value | New Value |
|---|---|---|
| Birth Date: MM/DD/YYYY* | 08/23/1987 | 08/23/1987 |
| Citizenship: * | Y, Citizen | Y, Citizen ▾ |
| Ethnicity: * | C, Caucasian or White | C, Caucasian or White ▾ |
| Sex: * | Male | Male ▾ |

**Step Five**: Create an Employee Record

1. Note at the top of this next section that the full PCN and suffix is complete. If you do not see either the PCN or 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**.**

## Create an Employee Record, P71005-00 Work Study Student

| Item | Current Value | New Value |
|---|---|---|
| Current Hire Date: MM/DD/YYYY* | | 05/02/2014 |
| Employee Class Code: * | 🔍 | S2 |
| Home Organization: * | 🔍 | 105760 |
| Location Code: | | MC AC, Main Campus Academic ▼ |
| Home COAS: (Not Enterable) | | T |
| Employee Status: *(Not Enterable) | | A |

## Create an Employee Assignment, P71005-00 Work Study Student

| Item | Current Value | New Value |
|---|---|---|
| Personnel Date: MM/DD/YYYY* | | 05/02/2014 |
| Jobs Effective Date: MM/DD/YYYY* | | 05/02/2014 |
| Job Begin Date: MM/DD/YYYY* | | 05/02/2014 |
| Contract Type: * | | Primary ▼ |
| Regular Rate: * | | 9.00 |
| Timesheet Orgn: * | 🔍 | 105760 |
| Step: (Not Enterable) | | 0 |
| FTE: (Not Enterable) | | .1 |

2. Enter Current Hire Date – this is the date that the student will begin working
3. Enter Employee Class Code (Click the Magnifying Glass to show available choices for student class codes). Typically S1 for Student Exempt and S3 for Non Exempt Student.
4. 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)
5. 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
6. Home COAS - defaults in, not able to be changed

7. Employee Status- some records will default in, please be sure Home Organizations always have 6 digits

### Create an Employee Record, P71005-00 Work Study Student

| Item | Current Value | New Value |
|---|---|---|
| Current Hire Date: MM/DD/YYYY* | | 05/02/2014 |
| Employee Class Code: * | | S2 |
| Home Organization: * | | 105760 |
| Location Code: | | MC AC, Main Campus Academic |
| Home COAS: (Not Enterable) | | T |
| Employee Status: *(Not Enterable) | | A |

**Step Six:** Create an Employee Assignment

1. Personnel Date – 1st 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 - Rate of pay is entered as dollars and cents with no dollar sign.
6. Timesheet Org - Employee's department, can be searched. Please be sure this is a 6 digit number (zero on the end example A10879 = 108790)
7. Step - Defaults in, not able to be changed.
8. FTE - Defaults in, not able to be changed.

## Create an Employee Assignment, P71005-00 Work Study Student

| Item | Current Value | New Value |
|---|---|---|
| Personnel Date: MM/DD/YYYY＊ | | 05/02/2014 |
| Jobs Effective Date: MM/DD/YYYY＊ | | 05/02/2014 |
| Job Begin Date: MM/DD/YYYY＊ | | 05/02/2014 |
| Contract Type: ＊ | | Primary ▾ |
| Regular Rate: ＊ | | 9.00 |
| Timesheet Orgn: ＊ | | 🔍 108790 |
| Step: (Not Enterable) | | 0 |
| FTE: (Not Enterable) | | .1 |

**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 due to the different academic credits requirements
2. Personnel Date, Job Effective Date and Job End Date will all be the same future date of when the position is to end.
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

# Ending Jobs, P71005-00 Work Study Student

| Item | Current Value | New Value |
|---|---|---|
| Personnel Date: MM/DD/YYYY* | | 08/10/2014 |
| Jobs Effective Date: MM/DD/YYYY* | | 08/10/2014 |
| Job End Date: MM/DD/YYYY* | | 08/10/2014 |
| Job Status: *(Not Enterable) | | T |
| Job Change Reason: *(Not Enterable) | | 100 |

**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. CSRV – should be SANDERS – Sheila Anderson
    d. PAYROL – should be PWILLARD/MCARDENAS – Paula Willard/Magdalena Cardenas
    e. PAYAPP – should be Payroll Apply—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 Payroll for further assistance.

## Routing Queue

| Approval Level | User Name | | Required Action |
|---|---|---|---|
| 10 - (MGMT) Management | CWALLAC | Cecillia C. Wallace | Approve |
| 20 - (EXEC) Executive | DRAIDER | Diana Sue Raider | Approve |
| 30 - (CSRV) Career Services | SANDERS | Sheila L. Anderson | Approve |
| 65 - (PAYROL) Payroll Approval | PWILARD | | Approve |
| 95 - (PAYAPP) Payroll Apply | KGULDEN | Kelley Ann Guldenpfennig | Apply |
| Not Selected | | | Not Selected |
| Not Selected | | | Not Selected |
| Not Selected | | | Not Selected |
| Not Selected | | | Not Selected |

Save and Add New Rows

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

✔ The transaction has been successfully submitted.
💬 Enter the information for the EPAF and either Save or Submit

| Name and ID: | Ryan James Williams, R00112826 | | |
|---|---|---|---|
| **Transaction:** | 42507 | **Query Date:** | Mar 25, 2014 |
| **Transaction Status:** | Pending | | |
| **Approval Category:** | New Hire Student Employee, NHSTD | | |