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Chapter 1: Paper and Electronic Forms

What is a Personnel Action Form (PAF)?
The PAF is a paper form available to managers and administrators to initiate different types of Human Resources (HR) transactions that are essential for employment and accurate payroll processing.

When to use a PAF?
A completed paper PAF must be submitted for the following HR transactions:
I. New Hire - professorial, instructional, and temporary professional
II. Continuation of appointment
III. Secondary job appointment
IV. One-time/supplemental/bonus payments
V. Salary/Grade/Title Changes

What is a Personnel Change Form (PCF)?
TC employs a significant number of employees for a set time period (by semester or gift/grant duration); these appointments are called “Term Appointments”. The PCF is a paper form available to managers and administrators to inform HR of a change in Job End Date for an employee who is on a Term Appointment.

When to use a PCF?
A completed paper PCF must be submitted to HR to process a change to the Job End Date (including job transfer) for an employee who is on a Term Appointment.

What is an Electronic Personnel Action Form (EPAF)?
The EPAF is an electronic tool available to managers and administrators to initiate 2 types of transactions:
I. Termination of Job
II. Transfers

When to use an EPAF?
I. Termination of Job
Submit a “Termination of Job” EPAF when an employee who is on an open ended appointment is leaving the job that s/he holds in your department.

II. Transfers
Submit a “Transfer” EPAF when an employee who is on an open ended appointment is leaving the job that s/he holds in your department to assume another job within the College.
Chapter 2: Step-by-Step Directions on Termination of Job - EPAF

1. Access the TC Portal with the following URL: https://my.tc.edu.

2. Log into the portal by entering your UNI and Password and clicking the Log in button.

   For assistance with UNI and Password, please contact Academic Computing at Ext. 3302 or acs@tc.edu.

3. Once you have logged into the portal click on the TC Services tab.

4. Click on the EPAFs (Electronic Personnel Action Form) link found in the Self Service channel under Payroll & Human Resources subtitle. This will take you to the EPAFs (Electronic Personnel Action Form) page.

5. Enter the TC ID of the employee whose job you are terminating in the ID field.

   If you do not know the employee’s TC ID click on the magnifying glass icon to go to the Person Search page.

   a. Click on the Employee radio button. This will limit your search to employee records in Banner.

   b. Enter the employee’s last name in the Last Name field.

   c. Enter the employee’s first name in the First Name field.

   d. Click the Go button. This will take you to the Person Search Results Page.

   e. Click on the ID to select the person.

6. Press the Tab key on your keyboard to scroll to the Effective Date field.

7. Enter the date you wish to terminate the employee’s job in the Effective Date field.

   Note: The date format (MM/DD/YYYY) is required.

8. Press the Tab key on your keyboard to scroll to the Transaction Type field.

9. Click the dropdown arrow in this field to access the Transaction Types available.

10. Click on Termination of Job, TERMJB.

11. Click on the GO button to navigate to the New EPAF Job Selection Page.
12. Select the appropriate job you wish to terminate under the **Existing Jobs** heading. This will take you to the **Electric Personnel Action Form** page.

   *Note: Employees hold multiple jobs; make sure to select the correct job*

13. Reenter the effective date of this transaction into the **Effective Date** field under the **New Value** column.

   *Note: The date format (MM/DD/YYYY) is required.*

   This date should reflect the last day the employee worked and must be greater than or equal to the employee’s **Last Paid Date** which can be found in the top block of the page. If the employee’s **Last Paid Date** is greater than the last day worked, use the **Last Paid Date** on the **Effective Date** field. Employee’s last day worked **must** be entered in the **Comment** field.

14. Define the **Routing Queue** for this EPAF by selecting the Human Resources Associate and HRIS **Approval Levels**.

   *Note: You can establish Default Routing Queues to avoid steps 17-20. Please see chapter 4.*

15. Click on the magnifying glass next to the Human Resources Associate **Approval Level**.

16. Click on the name of the Human Resources Associate assigned to your department and click **Select**.

17. Click on the magnifying glass next to the HRIS **Approval Level**.

18. Click on Ahmed, Easmatara and click **Select**.

19. Type the Reason for Job Termination in the **Comment** field. A list of acceptable Job Termination Reasons can be accessed by clicking on the **HELP** menu at the top of this page.

20. Click on the **Save and Add New Rows** button.

21. When you get confirmation that your change was saved successfully scroll to the bottom of the page and click the **Submit** button.
Chapter 3: Step-by-Step Directions on Transfer - EPAF

1. Access the TC Portal with the following URL: https://my.tc.edu.

2. Log into the portal by entering your UNI and Password and clicking the Log in button. 

   For assistance with UNI and Password, please contact Academic Computing at Ext. 3302 or acs@tc.edu.

3. Once you have logged into the portal click on the TC Services tab.

4. Click on the EPAFs (Electronic Personnel Action Form) link found in the Self Service channel under Payroll & Human Resources subtitle. This will take you to the EPAFs (Electronic Personnel Action Form) page.

5. Enter the TC ID of the employee whose job you are terminating in the ID field.

   If you do not know the employee’s TC ID click on the magnifying glass icon to go to the Person Search page.

   a. Click on the Employee radio button. This will limit your search to employee records in Banner.

   b. Enter the employee’s last name in the Last Name field.

   c. Enter the employee’s first name in the First Name field.

   d. Click the Go button. This will take you to the Person Search Results Page.

   e. Click on the ID to select the person.

6. Press the Tab key on your keyboard to scroll to the Effective Date field.

7. Enter the date you wish to transfer the employee’s job in the Effective Date field.

   Note: The date format (MM/DD/YYYY) is required.

   This date should reflect the last day the employee worked in the current job (1 calendar day prior to the begin date of the new job) and must be greater than or equal to the employee’s Last Paid Date which can be found in the top block of the page. If the employee’s Last Paid Date is greater than the last day worked, use the Last Paid Date on the Effective Date field. Employee’s last day worked must be entered in the Comment field.
8. Press the Tab key on your keyboard to scroll to the Transaction Type field.
9. Click the dropdown arrow in this field to access the Transaction Types available.
10. Click on Transfer, TRANS.
11. Click on the GO button to navigate to the New EPAF Job Selection Page.
12. Select the appropriate job you wish to transfer under the Existing Jobs heading.
   This will take you to the Electric Personnel Action Form page.
   Note: Employees hold multiple jobs; make sure to select the correct job
13. Reenter the effective date of this transaction into the Effective Date field under the New Value column.
   Note: The date format (MM/DD/YYYY) is required.
   This date should reflect the last day the employee worked and must be greater than or equal to the employee’s Last Paid Date which can be found in the top block of this page.
14. Define the Routing Queue for this EPAF by selecting the Human Resources Associate and HRIS Approval Levels.
   Note: You can establish Default Routing Queues to avoid steps 17-20. Please see chapter 4.
15. Click on the magnifying glass next to the Human Resources Associate Approval Level.
16. Click on the name of the Human Resources Associate assigned to your department and click Select.
17. Click on the magnifying glass next to the HRIS Approval Level.
18. Click on Ahmed, Easmatara and click Select.
19. Type “Transfer” in the Comment field.
20. Click on the Save and Add New Rows button.
21. When you get confirmation that your change was saved successfully scroll to the bottom of the page and click the Submit button.
Chapter 4: Directions to Establish Default Routing Queues for EPAFs

1. Access the TC Portal with the following URL: https://my.tc.edu.

2. Log into the portal by entering your UNI and Password and clicking the Log in button.
   
   For assistance with UNI and Password, please contact Academic Computing at Ext. 3302 or acs@tc.edu.

3. Once you have logged into the portal click on the TC Services tab.

4. Click on the EPAFs (Electronic Personnel Action Form) link found in the Self Service channel under Payroll & Human Resources subtitle. This will take you to the EPAFs (Electronic Personnel Action Form) page.

5. Click on the EPAF Originator Summary link.

6. Click on the Default Routing Queue link at the bottom of the page.

7. Click on the dropdown arrow in the Approval Category field to select the type of transaction and click GO.

8. Click on the magnifying glass icon next to the Human Resources Associate Approval Level.

9. Click on the name of the Human Resources Associate assigned to your department. Click Select.

   Click on the link to find the HR Associate for your department.

10. Click on the magnifying glass next to the HRIS Approval Level.

11. Click on Ahmed, Easmatara. Click Select.

12. Click on the Save and Add New Rows button.

13. You will get confirmation that your change was saved successfully at the top of the page.

14. Click on the EPAF Originator Summary link at the bottom of the page and repeat steps 6 through 12 for other types of transactions.