

**STAY ENGAGED. STAY SAFE.**

**#RallyTheValley** 

# ePAF System

The Office of Human Resources  
Rev. April 24, 2020

# Common Definitions

- ▶ **ePAF** - Electronic Personnel Action Form. To be used for a new candidate that has been hired, or current employee who will be working in another department. Used only for WS, STU, CLN, & RES.
- ▶ **CPAF** - Change of Personnel Action Form, also referred as Change of PAF. It is used to make changes to an employee's job data such as *funding source, hiring dates or hours, job position, and/or rate of pay, change in department, and transfers.*
- ▶ **Stipend** - Used to provide an additional job to an employee outside their normal job duties for a specific amount of time. Stipends do **NOT** apply to student employees or non-exempt staff.
- ▶ **Location/Supervisor (CPOS)** - Used to change an employee's campus location and/or update Reports To of an employee.
- ▶ **Creator** - The person creating the ePAF, CPAF or Stipend.

# Common Definitions cont...

- ▶ **Approver** - Person or department who needs to review and approve an ePAF/cPAF for it to move forward to the next person or department in the workflow.
- ▶ **Cost Center Manager** - The authority in charge of a project number.
- ▶ **Workflow** - An approval process initiated by the creator of the ePAF/cPAF and ending with the processing of the Office of Human Resources. The number of approvers required in a workflow varies depending on different factors such as classification and additional verifications.
- ▶ **Cost Center** - The account where the employee will be paid out of.
- ▶ **PeopleAdmin** - An applicant tracking system that UTRGV uses to recruit and hire candidates
- ▶ **Hiring Proposal** - A form that is used in PeopleAdmin that is created when an applicant has been identified to be hired
- ▶ **Manage Hire** - Internal page in PeopleSoft that displays a list of applicants that have gone through the recruiting process and are ready to be hired

# PeopleAdmin

- ▶ For any employees that are being processed through PeopleAdmin a hiring proposal must be created. Below are the following employee types that need to be processed:
  - ▶ Full Time Faculty
  - ▶ Part Time Faculty
  - ▶ Full Time Staff (new or transfer)
  - ▶ Graduate Assistant

An ePAF or cPAF will NOT be required for hires processed through PeopleAdmin. The information that is provided in PeopleAdmin will be transferred into PeopleSoft. cPAFs that may include changes that do not have to go through PeopleAdmin such as position changes/ change in assignment dates, funding changes or salary changes.

# How to access the ePAF Portal

The screenshot shows the UTRGV website interface. At the top right, the navigation bar includes 'Directory' and 'myUTRGV', with a red arrow pointing to the 'myUTRGV' link. Below this is a search bar. A secondary navigation bar contains links for 'About', 'Academics', 'New & Current Students', 'Student Experience', 'Research', 'School of Medicine', 'Athletics', and 'Give'. The main content area is titled 'Applications' and displays a grid of icons for various services. A red arrow points to the 'ePAF' icon in the second row, first column of the grid.

Icon	Label
	ASSIST
	Office 365
	Blackboard
	V Link
	Engagement Zone
	vPrint
	Handshake
	iTravel
	FPT
	PeopleSoft
	Oracle 24/7
	vSoftware
	ePAF
	E-Learn
	Housing
	Major Explorer
	Course Evals
	EAB Campus
	People Admin
	ServiceNow

- [www.UTRGV.edu](http://www.UTRGV.edu)
- myUTRGV
- Type in full UTRGV credentials to log in

# Before submitting an ePAF for new hires:

- ▶ **Reminder for summer funding request, departments need to submit the [Student Employment Request Form](#).**
- ▶ **Completed all On-Boarding Forms**
  - ▶ [Biographical Data Form](#)
  - ▶ [Certification of State or Public-School Employment](#)
  - ▶ [Selective Service Registration Form](#)
  - ▶ [Voluntary Self-Identification of Disability](#)
  - ▶ [Prior State Service Form](#)
- ▶ **[I-9 Employment Eligibility Verification](#)**
  - ▶ Form I-9 Online (this applies only for new employees or employees that have not worked for UTRGV for two years or more).- I-9 form is a two-step process
- ▶ <https://www.utrgv.edu/hr/organizational-development-training/on-boarding/index.htm>
  - ▶ You can contact Human Resources if you would like to present documentation in person, or due to COVID-19, employees can present I-9 documentation via Zoom or SKYPE. (Please notify [HR@utrgv.edu](mailto:HR@utrgv.edu) to schedule an appointment via zoom/skype).
- ▶ **Criminal Background Check (CBC)**
- ▶ **Note:** For employee's who do not have a Social Security Number, but have applied for one, they will need to provide copy of the letter stamped by Social Security Administration office to Human Resources. Once provided to Human Resources, PAF will be approved. This is something HR will communicate with employee and supervisor when it applies.

# Before submitting an ePAF or cPAF - Identifying the Employee's ID Number

## SEARCH FOR EPAF, CPAF, STIPEND OR SEPARATION

### Search box

Type keyword to search. Results will match keyword similar to form (ePAF, CPAF, Stipend) number, employee name, employee ID or position number (position numbers entered for **Fiscal Year 2019**.) Tip: Entering employee ID will provide faster results.

FY: All Search

- ▶ Currently if a person has had a PAF in the system any time from 2015 to now, the supervisor/creator can do a search by clicking create an ePAF or cPAF
- ▶ Search: by first or last name or employee ID, (it won't search with both first and last name), and it will show them a list of all existing PAFs in the system for people with the same name
- ▶ Important Note: There may be multiple employees with the same name, you would need to validate the first name, last name, birthdate on the PAF that you selected. You can contact our office if you are not sure if you selected the correct employee

# Electronic Personnel Action Form (ePAF)

UTRGV The University of Texas Rio Grande Valley

HR Portal: ePAF System Hello, Rolando LOG OUT

Home ePAF CPAF Stipend Location/Supervisor Employee Separation Search Reports Resources Portals

**EPAF SYSTEM**

Welcome to the Human Resources electronic Personnel Action Form (ePAF) System. Your Employee ID: 6001133198

**PLEASE SELECT AN ACTION FROM THE LIST BELOW:**

- View any forms that are pending your approval. From here you can also view the status of forms that you created or that have been assigned to you.
- Create an electronic Personnel Action Form once a candidate has been selected for a job position.
- Create a Change of Personnel Action Form.
- Use this form in lieu of CPAF if the only change will be to the location or supervisor of an employee.
- Create a Stipend for a full-time employee.
- Create a Separation Form for an employee leaving the institution.
- Search for an existing form. \* Note: You must have the rights to view the form.

- ▶ The ePAF is used for a new employee that has been hired. (Employee classifications: STU, WS, RES, CLN)
- ▶ It is recommended to complete this form at least **two weeks** prior to hire date to allow enough time between approvers and the Office of Human Resources to process the information.
- ▶ Do not create an ePAF if the employee is transferring to another department or division.
- ▶ Please be advise that any ePAF, cPAF and Stipend must be at HR by the Payroll Calendar Deadline for the employee to get paid on time.
- ▶ [Payroll deadline calendar](#)
- ▶ If a second assignment is being added to a current employee record, then an ePAF should be created with the new position number.



# How to fill out the ePAF form

**Employee Information**

Salutation:  Full Name: First:  Middle:  Last:

UTRGV ID#:  Banner ID#:  \* Banner ID required for faculty and student-employees.

Email:

Birth day: Month  Day  (Optional. To be used for verification purposes for multiple employees with same first and last name)

---

**Current Position Number Information**

Update Position Information?

Position #:

Job Code/Title:  Business Unit:

Department:

Employee Classification:

Hours per week:  FTE:

---

**Proposed Position Number Information**

Update Position Information?

Position #:

Job Code/Title:  Business Unit:

Department:

Employee Classification:

Hours per week:  FTE:

## ▶ Employee Info.

- ▶ Salutation
- ▶ First/Middle/Last
- ▶ Employee ID number
  - ▶ Get with employee to see if they have an employee ID
  - ▶ If not, please leave UTRGV ID blank
- ▶ Banner ID (faculty and student)
- ▶ Email - personal email address (to send UTRGV email set-up)
- ▶ Birthday month and day (to be used as a second identifier)

# How to fill out the ePAF form cont...

**Proposed Position Number Information**

*This section is pre-populated based on the position number selected.*

Press the 'Search Position Number' button to automatically populate the job code and department information below.

Position #: \_\_\_\_\_

Job Code/Title: \_\_\_\_\_

Division: \_\_\_\_\_

Division/College: \_\_\_\_\_

Department: \_\_\_\_\_

Employee Classification: \_\_\_\_\_

Hours per week:  FTE:

**Reports to/Supervisor Information**

*This section is pre-populated based on the position number selected.*

Update Reports to/Supervisor?

Reports to Position#: \_\_\_\_\_

Title: \_\_\_\_\_

Supervisor Name: \_\_\_\_\_

Supervisor Employee ID: \_\_\_\_\_

Email: \_\_\_\_\_

**Campus Location for the Position Number**

Campus City: \_\_\_\_\_

Campus Location: \_\_\_\_\_

Office/Room #:

Department Phone:  [ 999-999-9999 ]

Desk Phone:  [ 999-999-9999 ] (optional)

The position number will prepopulate: Job Title, Job Code, Division, Department, FTE, Supervisor and Campus.

If there is a change in position, search for a position number that fits the required job description. If one is not listed, please request one with **Position Control**. Note that each employee must have its own position number assigned to them.

# How to fill out the ePAF form cont...

### Job Information

Will prospective employee be hired in another department/college concurrently during the period of this assignment?  
 Yes  No

Is employee going to be working from out-of-state?  Yes  No

If out-of-state, select state:

If out-of-country, enter name of country:

Campus City:

Campus Location:

Office/Room #:

Department Phone:  [ 999-999-9999 ]

Desk Phone:  [ 999-999-9999 ] (optional)

Proposed Start Date:

*⚠ Proposed Start Date must be greater than today. Proposed Start Date does not mean the employee may start working on that day. Clearance from HR must first be received before employee may begin to work.*

Proposed End Date:

Note: End date cannot be greater than the fiscal year of start date. For full-time employees, end date is typically August 31<sup>st</sup>.

## Complete Job Information

- Answer the following questions of the employee's status. (a drop-down box of all the states is listed or type in name of country)
  - Room#
  - Dept. Phone
  - Desk Phone
- Start Date cannot back date as of the current date.
- End date for Full Time staff should be to the end of the fiscal year. For Part Time employees end date will vary.

# How to fill out the ePAF form cont...

**Proposed Cost Center**

Enter the cost center number(s) of the corresponding source(s) of funding.

Ln	Cost Center	Name	% Fund. Source	Annual Assign. Amount	Proposed Encumbrance
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>


Click checkbox to view Encumbrance calculator

The Cost Center number will need to be selected when you search

- Funding Information
  - a. % of funding must = 100%
  - b. Annualized Assignment Amount approved
  - c. Proposed Encumbrance amount – amount owed from Start date to End date (8/31)


Note: Work Study assignment, the department can indicate 30% of funding and 70% with 99900001 Placeholder for Financial Aid.

# How to fill out the ePAF form cont...

 **International Information:**

Yes  No Is the prospective employee going to work with a Visa?  
If Yes, please specify type of visa:

Yes  No If you answered 'No' to the question above, is the prospective employee a US Citizen/Permanent Resident or hold a valid Employment Authorization Document (OPT/EAD card)?

 **Contact Information**

Name:  ID:

Email:

Phone #:  [999-999-9999]

View HR Entry

- Additional Verifications  
-Visa Type
- Contact Information is the person who HR staff will contact if any questions arise.

**Important:** Please review the information that is being submitted to make sure that there is no delay in PAF approval, due to incorrect information (ex. Dates, supervisor, FTE, hours, etc.)

# Workflow

Student and Staff Workflow		Reviewer	Manager	International Admission <sup>^</sup>	Financial Aid	Grants & Contracts <sup>^^</sup>	Career Center	Vice President <sup>~</sup>	Position Control	Human Resources
AP	<b>Administrative &amp; Professional Staff</b>	-	✓	-	-	-		✓	✓	✓
APN	10999: Special Assignment A&P	-	✓	-	-	-			✓	✓
CL	<b>Classified Staff</b>	-	✓	-	-	-			✓	✓
CLN	10995: Special Assignment Classified Staff	-	✓	-	-	-			✓	✓
	10998: Temp Staff Assignment *	-	✓	-	-	-			✓	✓
	10061: Part-Time Non-Student (Academic Affairs)**	-	✓	-	-	-	✓			✓
	10061: Part-Time Non-Student **	-	✓	-	-	-	✓	✓		✓
STU	<b>10065: Student Employment Initiative***</b>	-	✓	-	-	-	✓		-	✓
	<b>10094: AmeriCorps***</b>	-	✓	-	✓	-	-		-	✓
	<b>Other***</b>	-	✓	-	-	-	✓		-	✓
WS	<b>College Work-Study***</b>	-	✓	-	✓	-	✓		-	✓

<sup>^</sup>International Admission and Student Services, International Program & Partnerships, Graduate Medical Education, Immigration Services Manager – For international or VISA employees.

<sup>^^</sup>Grants and Contracts Office – when budget from a grant or cost share is used.

\* Up to 4 ½ months with 20 – 40 hours per week.

\*\* Up to 19 hours per week.

\*\*\* Position Control will be included in workflow if there is a change to the position.

~ Excludes VP Academic Affairs

# Workflow cont...

- ▶ An approval process is initiated by the creator of the ePAF, cPAF or Stipend notifying the next approver in the workflow
- ▶ The approvers in a workflow varies depending on different factors such as job codes and additional verifications
- ▶ Part-time non-Students requests will need to include a higher authority approval (VP approval in order to be processed).

Faculty and Graduate Assistantship Workflow													
		Hiring Official	Reviewer	Manager	International ^	Graduate College	Grants & Contracts^^	Financial Aid	Assistant Dean	Vice President	Academic Affairs™	Position Control	Human Resources
FA1	Academic Affairs		-		-		-		✓		✓	✓	✓
	Health Affairs	✓	-	✓	-		-		✓			✓	✓
	School of Medicine	✓	-	✓	-		-			✓*		✓	✓
FA2	Academic Affairs		-		-		-		✓		✓	✓	✓
	Health Affairs	✓	-	✓	-		-		✓			✓	✓
	School of Medicine	✓	-	✓	-		-			✓*		✓	✓
FA3	Academic Affairs		-		-		-		✓		✓	✓	✓
	Health Affairs	✓	-	✓	-		-		✓			✓	✓
	School of Medicine	✓	-	✓	-		-			✓*		✓	✓
FA4	School of Medicine	✓	-	✓	-		-			✓*	✓	✓	✓
APN	10997: Special Assignment Faculty	✓	-	✓	-		-		✓		✓	✓	✓
RES	School of Medicine	✓	-	✓	-		-			✓*		✓	✓
GRA	10081: Research Assistant WS					✓		✓	✓				✓
	10082: Graduate Assistant WS					✓		✓	✓				✓
	10095: Res. Assist, 10096: Grad. Assist.		-		-	✓	-		✓				✓
	10064: Assistant Instructor***		-		-	✓	-		✓		✓		✓
GTA	10080: Teaching Assistant WS					✓		✓	✓				✓
	10047: Graduate Teaching Assistant		-		-	✓	-		✓				✓

\*VP for School of Medicine. ~Previously role for Provost

# Rejected ePAF / cPAFs / Stipend or if an edit is needed:

- ▶ If an ePAF, cPAF or Stipend is rejected by Human Resources, an email notification will be sent to the approvers in the workflow informing them of the rejection with the reason.
- ▶ Creators, managers, deans, and reviewers can edit any part of the PAF as long as it has not reached Position Control or HR .
- ▶ Other departments in the workflow (financial aid, grants, etc. ) can only edit certain fields.
- ▶ Please note that the Creator, Managers, Asst Dean, and Reviewer will have access to update ePAF/CPAF/Stipends information such as (Name, position information, Salary Information, Funding source, Contact Information). The only item that only HR can help update for departments is changes to the workflow. Changes cannot be done by departments when it has reached either Position Control or Human Resources approval



# Change of Personnel Action Form (cPAF)

UTRGV The University of Texas Rio Grande Valley

HR Portal: ePAF System Hello, Rolando LOG OUT

Home ePAF CPAF Stipend Separation Search Reports Resources Portals

### CREATE CPAF: STEP 1 OF 5

**About this form:** Change of Personnel Action Form (CPAF) is used when a current employee is moving from one department to another (within UTRGV), when there is a change in funding information, hiring date range, funding source, change in rate, or job title.

- If your department is hiring an existing UTRGV employee, please refer to the [CPAF form](#) instead.

All fields are required, unless otherwise noted.

#### SEARCH EMPLOYEE TO UPDATE CPAF

Enter employee ID:

[Site Policies](#) | [Contact Us](#) | [UT System](#) | [Fraud Reporting](#) | [Careers](#)

[Clery Crime Reports](#) | [Texas Homeland Security](#) | [State of Texas](#) | [Texas Veterans](#) | [Where the Money Goes](#)

- ▶ Change of Personnel Action Form is for multiple changes to an employee job information. Such as employee is moving from one department/division to another, change in funding information, hiring date range, change in pay rate, change in supervisor, change in location or job title, etc.
- ▶ A cPAF is not used for:
  - ▶ New employees
  - ▶ Employees leaving the university
  - ▶ Students employees terminating and not coming back to the university
- Please be advise that any ePAF, cPAF and Stipend must be at HR by the 20<sup>th</sup> of the month for the employee to get paid on time.

• **Important** - if your student employee meets their contract dates and will not return, then a **separation form** must be submitted, even if contract dates were met based on CPAF. The separation process will prevent overpayments and unauthorized access.

# How to fill out the cPAF form

HR Portal: ePAF System Hello, Rolando [LOG OUT](#)

[Home](#) | [ePAF](#) | [CPAF](#) | [Stipend](#) | [Location/Supervisor](#) | [Employee Separation](#) | [Search](#) | [Reports](#) | [Resources](#) ▼ | [Portals](#) ▼

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### CREATE CPAF: STEP 1 OF 5

**About this form:** Change of Personnel Action Form (CPAF) is used when a current employee is moving from one department to another (within UTRGV), when there is a change in funding information, hiring date range, funding source, change in rate, or job title.

All fields are required, unless otherwise noted.

#### SEARCH EMPLOYEE TO UPDATE CPAF

Enter employee ID:

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[Site Policies](#) | [Contact Us](#) | [UT System](#) | [Fraud Reporting](#) | [Careers](#)

[Clery Crime Reports](#) | [Texas Homeland Security](#) | [State of Texas](#) | [Texas Veterans](#) | [Where the Money Goes](#)

HR Portal: ePAF System Hello, Rolando [LOG OUT](#)

[Home](#) | [ePAF](#) | [CPAF](#) | [Stipend](#) | [Location/Supervisor](#) | [Employee Separation](#) | [Search](#) | [Reports](#) | [Resources](#) ▼ | [Portals](#) ▼

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### CPAF SEARCH RESULTS: STEP 2 OF 5

Results are based on keyword ". To search again, [click here](#).

Blank CPAF.

Invalid entry. No results found.


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[Site Policies](#) | [Contact Us](#) | [UT System](#) | [Fraud Reporting](#) | [Careers](#)

[Clery Crime Reports](#) | [Texas Homeland Security](#) | [State of Texas](#) | [Texas Veterans](#) | [Where the Money Goes](#)

- Search by the employee ID to locate, if an employee's assignment was submitted by PeopleAdmin then a blank cPAF would need to be created.
- To create a blank cPAF, please click on the "Continue" and then select the blank CPAF. This will populate a blank cPAF and fill out the proposed side of the form (right).

# How to fill out the cPAF form cont...

 **Proposed Position Number Information**

Update Position Information?

Position #:

Job Code/Title:

Update Division/Department Information?

Business Unit:

Department:

Employee Classification:

Hours per week:  FTE:

- The position number will prepopulate: Job Title, Job Code, Division, Department, FTE, Empl Class, Supervisor and Campus.
- Search for a position number that has been provided by Position Control. If it is not listed, please contact [Planning and Analysis](#). Note that each employee must have its own position number assigned to them.

# How to fill out the cPAF form cont...

<b>Reports to/Supervisor Information</b> <input type="checkbox"/> Update Reports to/Supervisor? Reports to Position#: _____ Title: _____ Supervisor Name: _____ Supervisor Employee ID: _____ Email: _____	<b>Reports to/Supervisor Information</b> <input type="checkbox"/> Update Reports to/Supervisor? Reports to Position#: _____ Title: _____ Supervisor Name: _____ Supervisor Employee ID: _____ Email: _____
<b>Brief Description</b> Please provide a list of courses or duties for this assignment and justification for this CPAF: (limit to 600 characters). <div style="border: 1px solid #add8e6; height: 80px;"></div>	<b>Brief Description</b> Please provide a list of courses or duties for this assignment and justification for this CPAF: (limit to 600 characters). <div style="border: 1px solid #add8e6; height: 80px;"></div>

<b>Campus Location for the Position Number</b> <input type="text" value="Search Location"/> Campus City: _____ Campus Location: _____ Office/Room #: <input type="text"/> Department Phone: <input type="text"/> [ 999-999-9999 ] Desk Phone: <input type="text"/> [ 999-999-9999 ] (optional)	<b>Campus Location for the Position Number</b> <input type="text" value="Search Location"/> Campus City: _____ Campus Location: _____ Office/Room #: <input type="text"/> Department Phone: <input type="text"/> [ 999-999-9999 ] Desk Phone: <input type="text"/> [ 999-999-9999 ] (optional)
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## Change in Supervisor

- Note if you are only trying update the Supervisor and/or Location for an employee, please route a CPOS (Location/Supervisor)

## Brief Description

- Briefly describe justification for change and/or list of courses.
  - Ex. *“This cPAF is to create a second assignment with the Biology Department”*
  - Ex. *“This cPAF is just for a change in cost centers”*
- This will help HR understand the type of change that is being requested, please provide as much detail as possible.

## Campus Location

- The city and location will prepopulate with the position number, room number and dept. number will need to be filled.

# How to fill out the cPAF form cont...

### Job Information

Will prospective employee be hired in another department/college concurrently during the period of this assignment?  
 Yes  No

Is employee going to be working from out-of-state?  Yes  No

If out-of-state, select state:

If out-of-country, enter name of country:

Proposed Start Date:

Proposed End Date:

Note: End date cannot be greater than the fiscal year of start date. For full-time employees, end date is typically August 31<sup>st</sup>.

### Job Information

Will prospective employee be hired in another department/college concurrently during the period of this assignment?  
 Yes  No

View Employee ePAF History with ID #600114 (beginning 09/01/2018)

Ref.	POS #	Job Title	Department	Start / End Date	Hrs	PAF Status
N/A	70089324	10052: Part Time Lecturer	Art	09/01/2018	N/A	N/A

PAF Status: P = Pending, A = Approved, R = Rejected, N/A = Not Applicable

Is employee going to be working from out-of-state?  Yes  No

If out-of-state, select state:

If out-of-country, enter name of country:

Proposed Start Date:

Proposed End Date:

Note: End date cannot be greater than the fiscal year of start date. For full-time employees, end date is typically August 31<sup>st</sup>.

## ▶ Job Information

- ▶ Answer the following questions on employment status.
- ▶ View employee ePAF History, view what ePAF/cPAF that have been routed for the employee.
- ▶ If the employee is an out-of-state employee, please indicate the state.
- ▶ If the employee is out-of-state, please indicate the name of country.
- ▶ Start date of change of assignment.
- ▶ End date can be to the end of the fiscal year.

# How to fill out the cPAF form cont...

**Proposed Cost Center**

Enter the cost center number(s) of the corresponding source(s) of funding.


Ln	Cost Center	Name	% Fund. Source	Annual Assign. Amount	Proposed Encumbrance
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
				<input type="text"/>	<input type="text"/>

Click checkbox to view Encumbrance calculator

## ▶ Funding Information


- ▶ Search for Cost Center number
- ▶ Indicate % of funding
- ▶ Approved annualized amount
- ▶ Encumbrance amount - amount owed from Start date to End date (8/31)

# How to fill out the cPAF form cont...

 **International Information:**

Yes  No [Is the prospective employee going to work with a Visa?](#)  
If Yes, please specify type of visa:

Yes  No [If you answered 'No' to the question above, is the prospective employee a US Citizen/Permanent Resident or hold a valid Employment Authorization Document \(OPT/EAD card\)?](#)

 **Contact Information**

Name:  ID:

Email:

Phone #:  [999-999-9999]

## Additional Verifications

- Visa Type

## Contact Information

- Please enter the employee that can be contacted if HR has a questions on the cPAF.

**Important:** Please review the information that is being submitted to make sure that there is no delay in PAF approval, due to incorrect information (ex. Dates, supervisor, FTE, hours, etc.)

# Stipends

The screenshot shows the UTRGV HR Portal ePAF System interface. At the top, the UTRGV logo and the text 'The University of Texas Rio Grande Valley' are displayed. Below this is a navigation bar with links for Home, ePAF, CPAF, Stipend, Separation, Search, Reports, Resources, and Portals. The user is logged in as 'Hello, Rolando' with a 'LOG OUT' button. The main content area is titled 'EPAF SYSTEM' and includes a welcome message and the user's Employee ID (6001133198). A yellow banner contains a note about Tuition Assistance. Below this, a section titled 'PLEASE SELECT AN ACTION FROM THE LIST BELOW:' lists several options: 'View Pending Approvals', 'Create an ePAF', 'Create a Change of PAF', 'Create a Stipend', 'Create a Separation', and 'Search'. A red arrow points to the 'Create a Stipend' button. At the bottom, there are links for Site Policies, Contact Us, UT System, Fraud Reporting, Careers, Clery Crime Reports, Texas Homeland Security, State of Texas, Texas Veterans, and Where the Money Goes.

- ▶ Stipends are used for Exempt Employees to allow them to work temporary assignments outside their normal job duties for a specific period
- ▶ Stipends **DO NOT** apply to student employees or non-exempt staff.
- ▶ The amount to be paid on a stipend should not be more than 10% of the annual salary of the difference on the temporary position
  - a. Consult the compensation area if you have questions regarding how much you can pay on a stipend



# How to fill out the Stipend form

### Employee Information

Salutation:  Full Name: First:  Middle:  Last:

UTRGV ID#:  Banner ID#:  \* Banner ID required for faculty and student-employees.

Email:

Birth day: Month  Day  (Optional. To be used for verification purposes for multiple employees with same first and last name)

### Current Position Number Information

Update Position Information?

Position #:

Job Code/Title:  Business Unit:

Department:

Employee Classification:

Hours per week:  FTE:

### Proposed Position Number Information

Update Position Information?

Position #:

Job Code/Title:  Business Unit:

Department:

Employee Classification:

Hours per week:  FTE:

## ▶ Position Number Information

- ▶ Stipend will be entered as additional pay and not as an assignment.
- ▶ If you are planning to pay a current full-time employee who does not work for your department, and this is related to a stipend work, a new position number will have to be requested.

# How to fill out the Stipend form cont...

Reports to/Supervisor Information	Reports to/Supervisor Information
<input type="checkbox"/> Update Reports to/Supervisor? Reports to Position#: _____ Title: _____ Supervisor Name: _____ Supervisor Employee ID: _____ Email: _____	<input type="checkbox"/> Update Reports to/Supervisor? Reports to Position#: _____ Title: _____ Supervisor Name: _____ Supervisor Employee ID: _____ Email: _____
<b>Brief Description</b> Please provide a list of courses or duties for this assignment and justification for this CPAF: (limit to 600 characters). <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>	<b>Brief Description</b> Please provide a list of courses or duties for this assignment and justification for this CPAF: (limit to 600 characters). <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>
<b>Campus Location for the Position Number</b> <input type="text" value="Search Location"/> Campus City: _____ Campus Location: _____ Office/Room #: _____ Department Phone: _____ [ 999-999-9999 ] Desk Phone: _____ [ 999-999-9999 ] (optional)	<b>Campus Location for the Position Number</b> <input type="text" value="Search Location"/> Campus City: _____ Campus Location: _____ Office/Room #: _____ Department Phone: _____ [ 999-999-9999 ] Desk Phone: _____ [ 999-999-9999 ] (optional)

## Select the Supervisor

### Brief Description

- This should always be filled in. Indicate the total amount employee will receive for the entire stipend. This will help HR understand the type of change that is being requested, please provide as much detail as possible.
- If the stipend is for a Faculty employee, please indicate what type of stipend they will be receiving (Overload, Special Assignment, Dept Chair)

### Campus Location

- The city and location will prepopulate with the position number, room number and dept. number will need to be filled.

# How to fill out the Stipend form cont...

### Job Information

Will prospective employee be hired in another department/college concurrently during the period of this assignment?  
 Yes  No

Is employee going to be working from out-of-state?  Yes  No

If out-of-state, select state:

If out-of-country, enter name of country:

Proposed Start Date:

Proposed End Date:

Note: End date cannot be greater than the fiscal year of start date. For full-time employees, end date is typically August 31<sup>st</sup>.

### Job Information

Will prospective employee be hired in another department/college concurrently during the period of this assignment?  
 Yes  No

Is employee going to be working from out-of-state?  Yes  No

If out-of-state, select state:

If out-of-country, enter name of country:

Proposed Start Date:

Proposed End Date:

Note: End date cannot be greater than the fiscal year of start date. For full-time employees, end date is typically August 31<sup>st</sup>.

## New Proposed Information for Employee

- Start Date of stipend
- End date for stipend should not go pass the fiscal year.
- Number of hours per week – The amount to be paid on a stipend should not be more than 10% of the annual salary of the difference on the temporary position.

# How to fill out the Stipend form cont...

**Proposed Cost Center**

Enter the cost center number(s) of the corresponding source(s) of funding.

Ln	Cost Center	Name	% Fund. Source	Annual Assign. Amount	Proposed Encumbrance
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Click checkbox to view Encumbrance calculator

## Funding Information

- Search for cost center number
- % of funding
- Annualized amount – should be the total amount employee will receive divided by the number of months employee will receive stipend

# How to fill out the Stipend form cont...

**International Information:**

Yes  No [Is the prospective employee going to work with a Visa?](#)  
If Yes, please specify type of visa:

Yes  No [If you answered 'No' to the question above, is the prospective employee a US Citizen/Permanent Resident or hold a valid Employment Authorization Document \(OPT/EAD card\)?](#)

**Contact Information**

Name:  ID:

Email:

Phone #:  [999-999-9999]

View HR Entry

## International Information

- Additional Verifications
  - a. Visa Type

## Contact Information

- Please enter the employee's information where she/he can be contacted if HR has questions about the form.

**Important:** Please review the information that is being submitted to make sure that there is no delay in PAF approval, due to incorrect information (ex. Dates, supervisor, FTE, hours, etc.)

**Employee Information**Employee Name: 

Select prospective employee from the list to auto-populate their data. If it does not exist, leave as 'Select Employee' and fill in the employee information.

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

UTRGV ID#: \_\_\_\_\_

Email: \_\_\_\_\_

Division/College:  Department: Supervisor: Department/Project Manager: Was this employee working with a UTRGV sponsorship VISA?  Yes  NoIs this a grant funded position?  Yes  No**Employee classification / Job Code**

Select the classification and job code for employee:

Classification/Job Code Description: Job Code/Title: **Employee Separation Information**Last physical work date: [?]    Separation date: [?]   

Reason for Employee Separation:

*Note: For voluntary separation (v), supervisor will need to submit a scanned copy of the letter of resignation to the Office of Human Resources at [HR@utrgv.edu](mailto:HR@utrgv.edu).*

**Contact Person for this form**Contact person:  Phone number: \_\_\_\_\_

# Employee Separation

- ▶ Supervisor must submit employee separation form when they become aware that employee is completely separating from the University.
- ▶ Unlike the ePAF, there will be NO workflow involved
- ▶ The system will automatically send email notifications to corresponding departments
- ▶ For voluntary separation, supervisor will need to submit a scanned copy of the letter of resignation to HR at [HR@utrgv.edu](mailto:HR@utrgv.edu). Please include the contact person and phone number
- ▶ If a student has worked to the end of their assignment end date and is not returning to the department an employee separation will be needed.
- ▶ If employee is leaving for less than 3 months, the cPAF should be used instead
- ▶ If employee is leaving the department but not the university (cPAF should be processed)

# Supervisor Checklist for Employee Separations

Yes	N/A	
<input type="radio"/>	<input type="radio"/>	Inform employee to submit <b>final timecard</b> through Time Entry function in Oracle.
<input type="radio"/>	<input type="radio"/>	Collect <b>university equipment</b> such as iPad, secure USB flash drive, laptop, and/or any other equipment that belongs to the institution, and keep inventory.
<input type="radio"/>	<input type="radio"/>	Collect <b>procurement card</b> and/or <b>travel cards</b> , if any, and supervisor will forward them to the Purchasing Office.
<input type="radio"/>	<input type="radio"/>	Inform employee to submit <b>keys</b> to the Facilities Operations Department (this includes vehicles keys or keys to any other facility or equipment).
<input type="radio"/>	<input type="radio"/>	Collect employee <b>id badge (access card)</b> and submit to Campus Card Services.
<input type="radio"/>	<input type="radio"/>	Inform the employee to contact Parking and Transportation for any pending <b>parking fines fees</b> .
<input type="radio"/>	<input type="radio"/>	Inform the employee to contact the <b>Office of Human Resources</b> to facilitate separation.
<input type="radio"/>	<input type="radio"/>	Inform the employee to contact the <b>University Library</b> for any pending fees/checked out items.
<input type="radio"/>	<input type="radio"/>	As a reminder, if employee is a project manager, submit a <a href="#">UTRGV Project Key Member Update Form</a> with the name of the new employee responsible for the project numbers.

- ▶ As a supervisor it is your responsibility to properly exit an employee
- ▶ This checklist will act as a guide to ensure pending items are completed or returned prior to the issuance of the employee's final check



# Workflow

- ▶ The following emails are automatically sent to the departments as soon as the form is submitted

General		
Access	<a href="mailto:AccessAdmin@utrgv.edu">AccessAdmin@utrgv.edu</a>	
Asset Management	<a href="mailto:Gloria.Rios@utrgv.edu">Gloria.Rios@utrgv.edu</a>	<a href="mailto:Ana.Salinas@utrgv.edu">Ana.Salinas@utrgv.edu</a>
Business Information Systems	<a href="mailto:Miguel.Trevino@utrgv.edu">Miguel.Trevino@utrgv.edu</a> <a href="mailto:Boon.Ong@utrgv.edu">Boon.Ong@utrgv.edu</a>	<a href="mailto:Josie.Lopez@utrgv.edu">Josie.Lopez@utrgv.edu</a> <a href="mailto:Karina.Esparza@utrgv.edu">Karina.Esparza@utrgv.edu</a>
Campus Card Services	<a href="mailto:Homer.Villalobos@utrgv.edu">Homer.Villalobos@utrgv.edu</a>	
Creator of the form	(email address of creator)	
External Servers	<a href="mailto:Robert.Jackson@utrgv.edu">Robert.Jackson@utrgv.edu</a>	
Human Resources	<a href="mailto:HR@utrgv.edu">HR@utrgv.edu</a>	
IT Service Desk	<a href="mailto:ITServiceDesk@utrgv.edu">ITServiceDesk@utrgv.edu</a>	
Labor Distribution	<a href="mailto:Commitment_Accounting@utrgv.edu">Commitment_Accounting@utrgv.edu</a>	
Library	<a href="mailto:Circulation@utrgv.edu">Circulation@utrgv.edu</a>	<a href="mailto:ill@utrgv.edu">ill@utrgv.edu</a>
Locksmiths	<a href="mailto:Michael.DeLaCruz@utrgv.edu">Michael.DeLaCruz@utrgv.edu</a> <a href="mailto:Guadalupe.Manzano@utrgv.edu">Guadalupe.Manzano@utrgv.edu</a> <a href="mailto:Abraham.Hernandez@utrgv.edu">Abraham.Hernandez@utrgv.edu</a>	<a href="mailto:Fernando.Salinas@utrgv.edu">Fernando.Salinas@utrgv.edu</a> <a href="mailto:Melissa.Pena1@utrgv.edu">Melissa.Pena1@utrgv.edu</a>
Office of Res. Compliance	<a href="mailto:EffortCert@utrgv.edu">EffortCert@utrgv.edu</a>	
Parking & Transportation	<a href="mailto:Parking@utrgv.edu">Parking@utrgv.edu</a>	
Payroll	<a href="mailto:Payroll@utrgv.edu">Payroll@utrgv.edu</a>	
Procurement Office	<a href="mailto:Maggie.Rangel@utrgv.edu">Maggie.Rangel@utrgv.edu</a> <a href="mailto:Isabel.Castro@utrgv.edu">Isabel.Castro@utrgv.edu</a> <a href="mailto:Iris.Bezanilla@utrgv.edu">Iris.Bezanilla@utrgv.edu</a>	<a href="mailto:Amanda.Lawrence@utrgv.edu">Amanda.Lawrence@utrgv.edu</a> <a href="mailto:Gricelda.Saavedra@utrgv.edu">Gricelda.Saavedra@utrgv.edu</a> <a href="mailto:Lilli.Cameron@utrgv.edu">Lilli.Cameron@utrgv.edu</a>
If Work-Study: Financial Aid, Student Employment.	<a href="mailto:FinAid@utrgv.edu">FinAid@utrgv.edu</a> , <a href="mailto:StudentEmployment@utrgv.edu">StudentEmployment@utrgv.edu</a>	
If Direct Wage: Student Employment	<a href="mailto:StudentEmployment@utrgv.edu">StudentEmployment@utrgv.edu</a>	
If Student Employee Initiative (SEI): Student Employment	<a href="mailto:Ana.Perez@utrgv.edu">Ana.Perez@utrgv.edu</a>	
If not Work-study, Direct Wage nor SEI: Planning and Analysis	<a href="mailto:PositionControl@utrgv.edu">PositionControl@utrgv.edu</a>	
If Graduate Assistant:	<a href="mailto:Maria.RamosDelAngel@utrgv.edu">Maria.RamosDelAngel@utrgv.edu</a>	
If student on a UTRGV Sponsorship VISA: International Admissions	<a href="mailto:Samantha.Lopez@utrgv.edu">Samantha.Lopez@utrgv.edu</a>	
If non-student on a UTRGV Sponsorship VISA: International Admissions	<a href="mailto:Alberto.Castillo@utrgv.edu">Alberto.Castillo@utrgv.edu</a>	
If on a Grant: Grants & Contr., Res. Comp.	<a href="mailto:GrantsAndContracts@utrgv.edu">GrantsAndContracts@utrgv.edu</a> <a href="mailto:EffortCert@utrgv.edu">EffortCert@utrgv.edu</a>	
If faculty full-time: Provost Office Supervisor	<a href="mailto:Provost@utrgv.edu">Provost@utrgv.edu</a> Based on the name selected on form.	



For question on submitting ePAFs/cPAFs or Stipends, please feel free to call or email us at:

- ▶ Edinburg – 956-665-2451
- ▶ Brownsville – 956-882-8205
- ▶ [hr@utrgv.edu](mailto:hr@utrgv.edu)

Thank you,

**The University of Texas**  
**Rio Grande Valley™**  
.....  
**Office of Human Resources**