LEHMAN COLLEGE

ePAF User Guide

Hourly PSC Titles:

Non-Teaching Adjuncts

Adjunct College Lab Tech

Continuing Education Teachers

Property of the Office of Human Resources

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Introduction

User guide for the Electronic Personnel Action Form (ePAF) System

This document has been designed to assist Lehman Administration Staff with the ePAF system for the following processes:

- New Hire/Initial Appointments.
- Making revisions to an ePAF
- Terminating an employee
- Reappointing an aemployee

The system requires a multi-step electronic approval process by user roles – Department Secretary (creator), Department Chairperson, Executive Assistant, Dean, Human Resources, Budget, and Payroll respectively.

This aid along with the accompanying screen shots will assist each Administrative Department in performing tasks associated with the specific user role. Access to information about the ePAF and the ability to change data on a form is dependent on the assigned role.

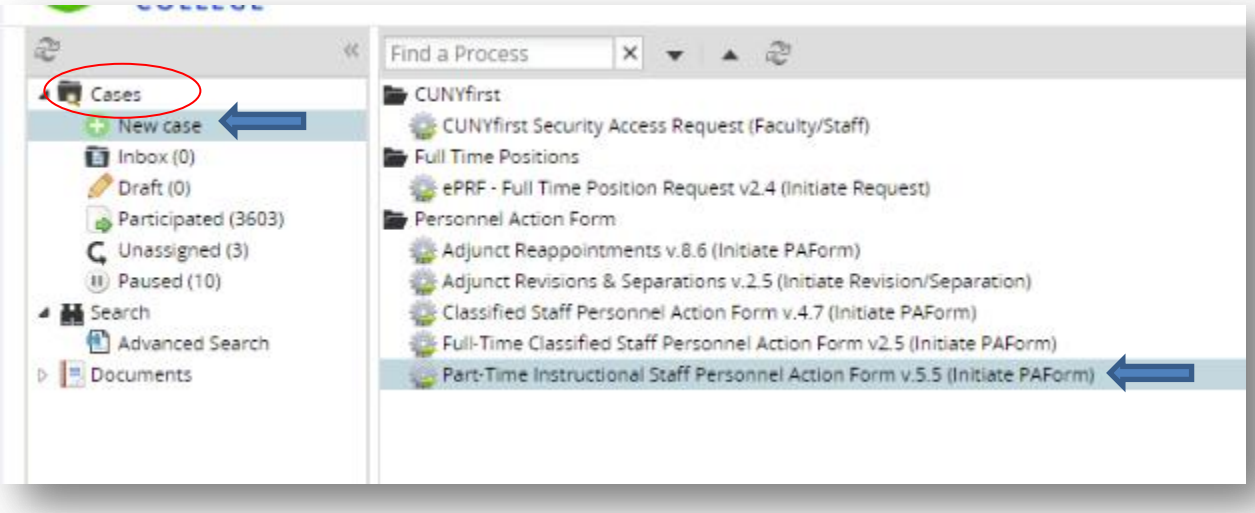
As we utilize this system, it is important that we continue to follow the Lehman College/CUNY policies and procedures. This will ensure that appointments are processed faster, take proactive control over expenses, and ultimately more employees being paid on-time.

Initial Appointments

The following are a series of screen shots outlining the process you must follow to create the ePAF after logging in.

Step 1: Getting to the right ePAF

To begin creating the ePAF double-click “New case” from the menu on the left, then double-click “Part-Time Instructional Staff Personnel Form” (Initiate PAForm).

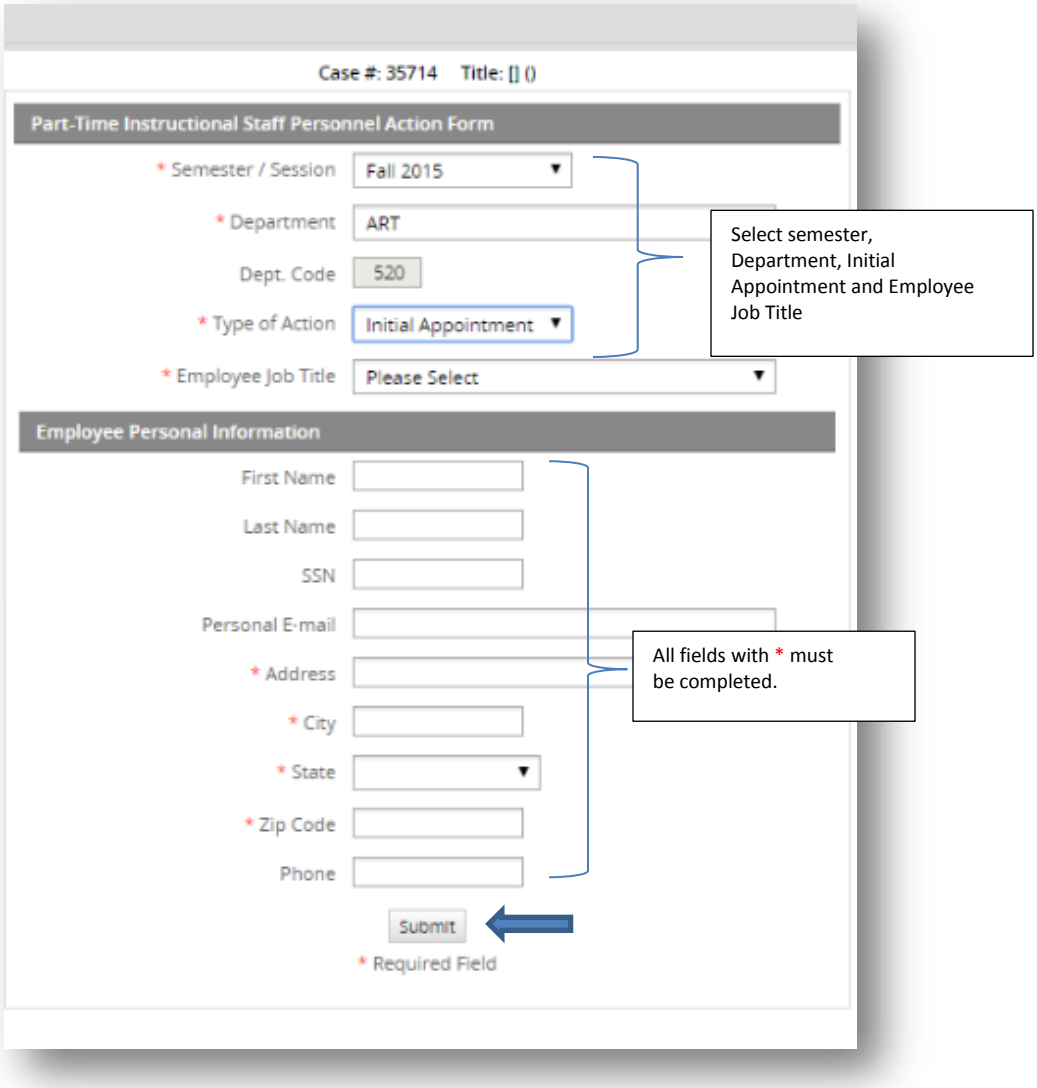


Please note that moving forward each ePAF will be identified by a “Case #”. The only time the Secretary will have anything in the “Inbox” is if the Executive Assistant or Chairperson has pushed back the ePAF. From here, you will begin the creation of the ePAF.

Step 2: Entering employee personnel data

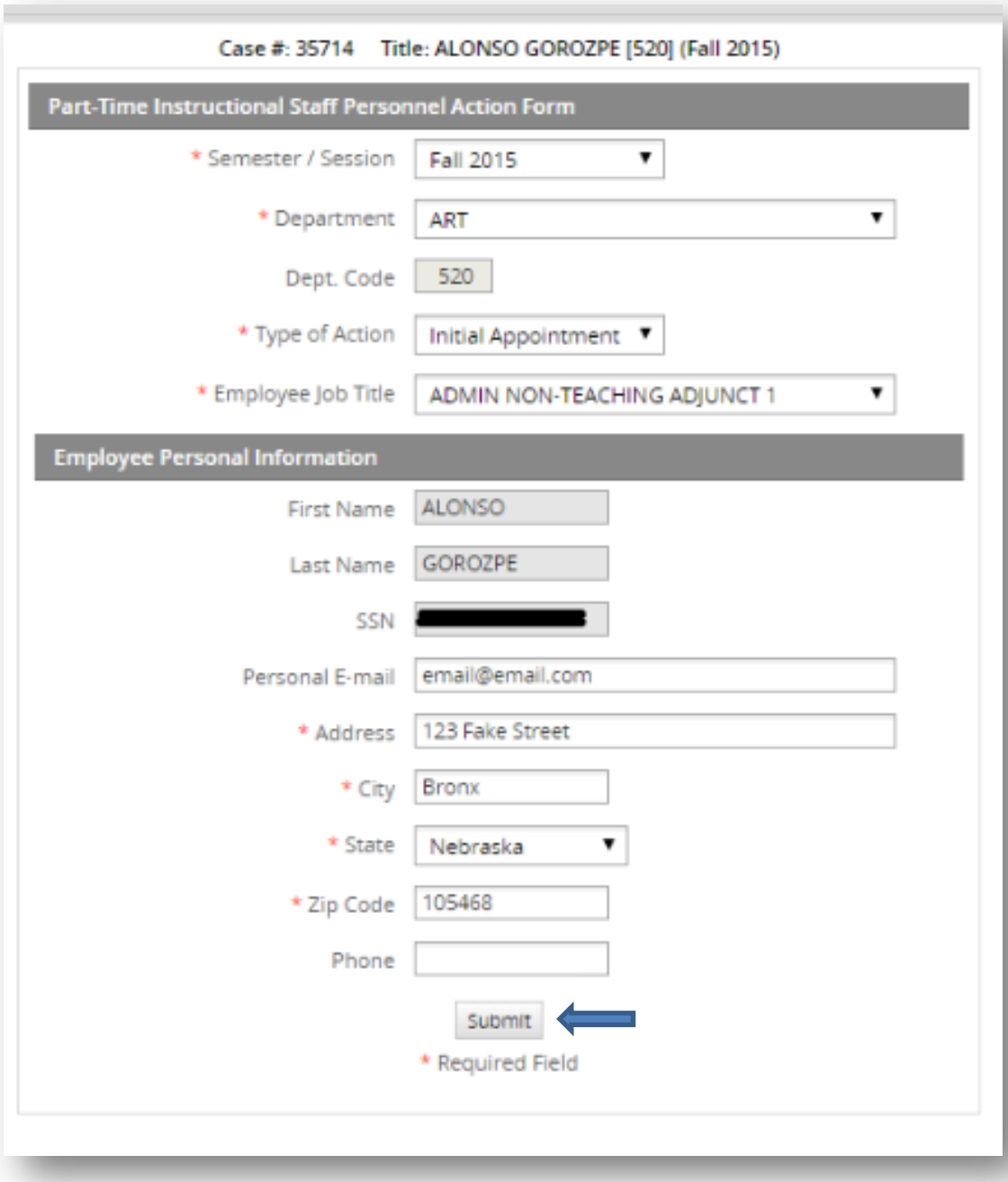
- After opening up the ePAF, immediately on the next screen, a message will pop up about new hire paperwork. Click “ok” to proceed (see screenshot below).
- Under the “Part-Time Instructional Staff Personnel Form” section, select the appropriate Department.
- Select type of action as “Initial Appointment”.
- Select Employee Job Title.

- Under “Employee Personal Information” section, fill out entire employee’s information.
- This process will be the same for new Non-Teaching Adjuncts (NTA), Adjunct College Lab Techs (Adjunct CLT) and Continuing Education Teachers (CET).
- Screenshot for these steps are below.



- Click “Submit” to move forward.

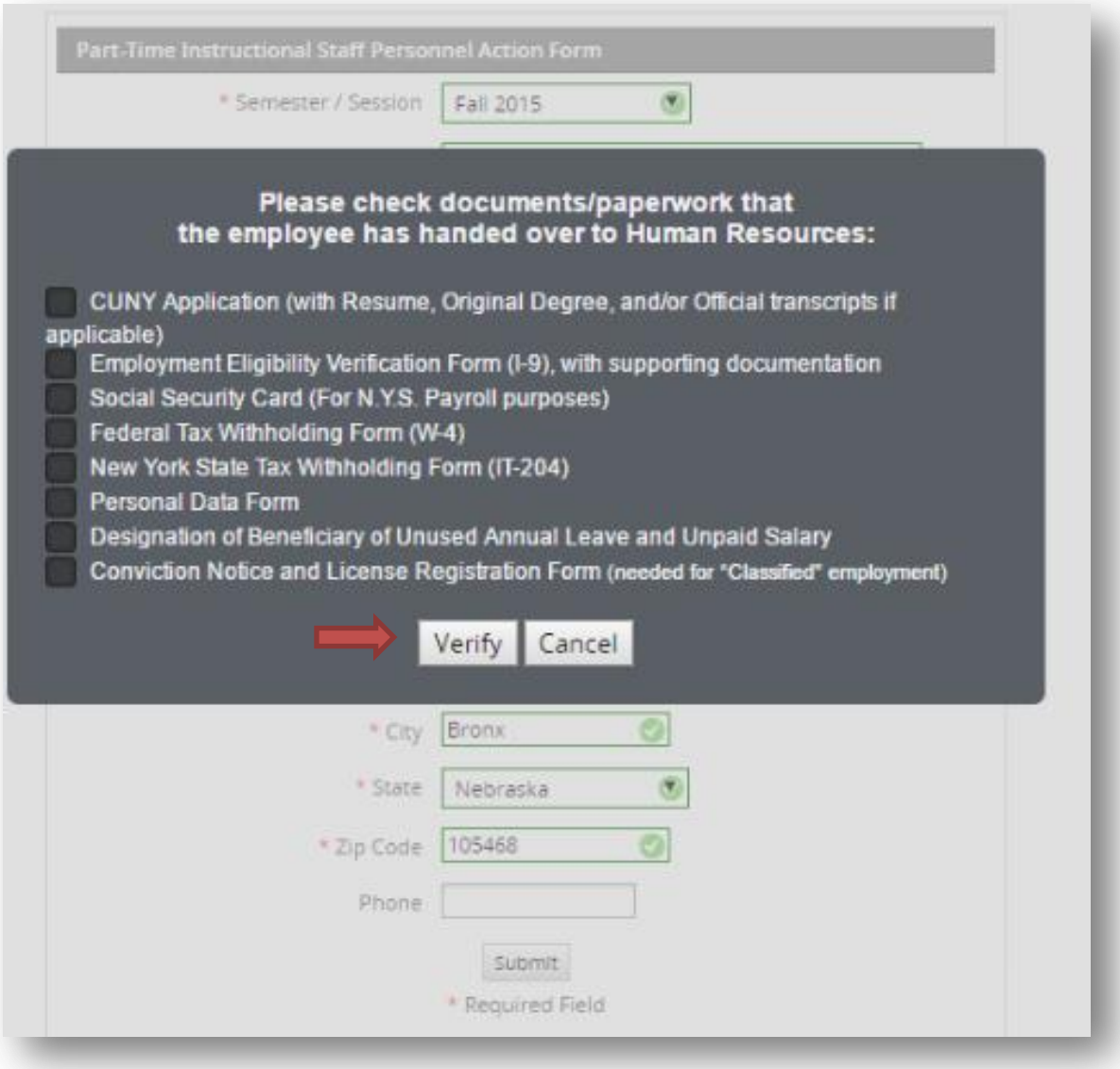
Step 3: Verifying all employee information is correct



- Click “Submit” to move forward if all information is correct.

Step 4: Verifying New Hire Paperwork

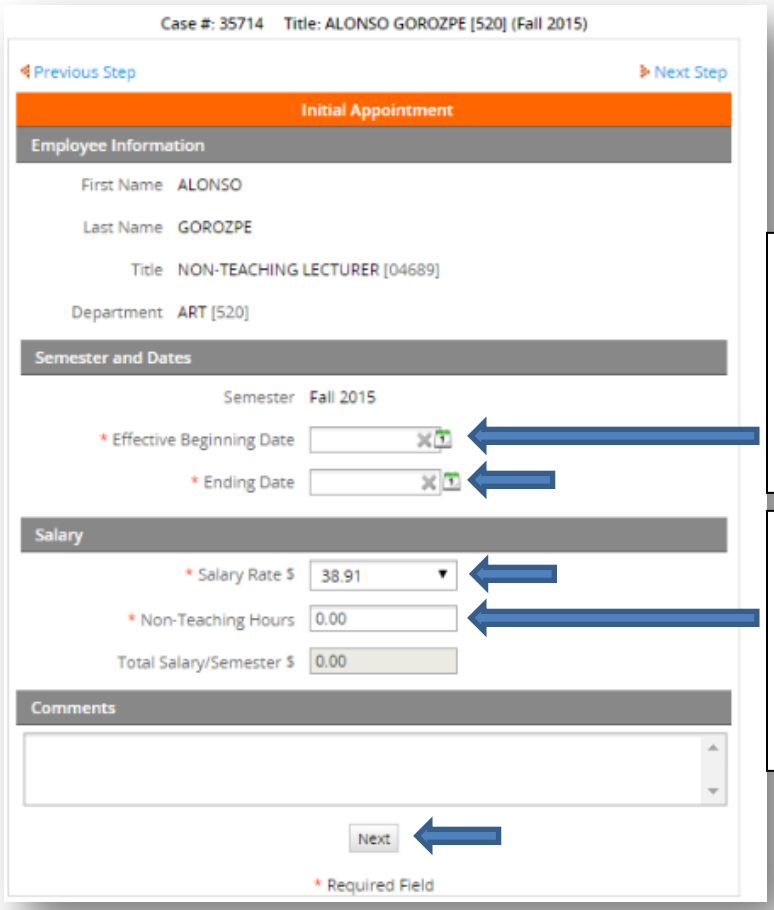
- You will get a pop-up message to verify that all the information was completed in New Hire Packet.



- If all information has been submitted by the new employee, click “Verify” to proceed.

Step 5: Entering employment data

- This is where you will enter the employment information:



Note:

- **For Adjunct CLTs, the beginning and end date must match the semester dates based on the Academic Calendar.**

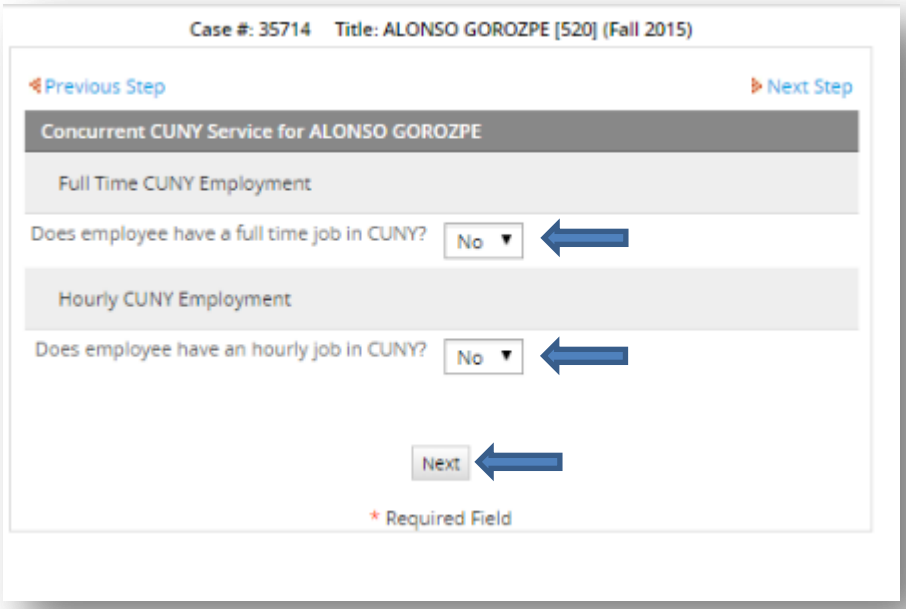
Note:

- **The maximum hours an NTA/Adjunct CLT can work per semester is 225 in the Fall and 175 in the Summer.**

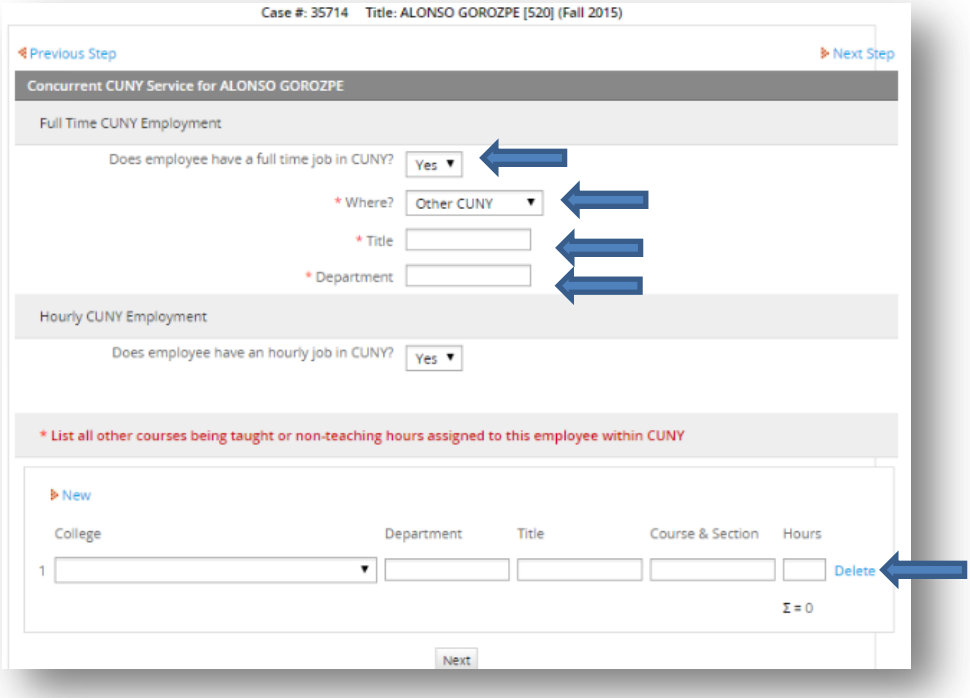
- Enter the "Effective Start Date". **An I-9 must be completed by HR no later than the first day of work.**
- Enter the end date.
- Enter the salary rate, and then click next.

Step 6: Concurrent Service

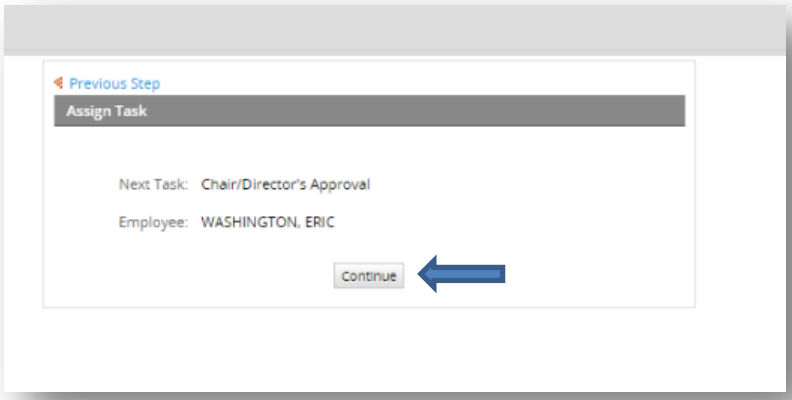
- Verify if the employee has another appointment within CUNY.
- If not, select “No” for both questions, then click next.



- If there is another appointment, then select Yes and complete the requested information:



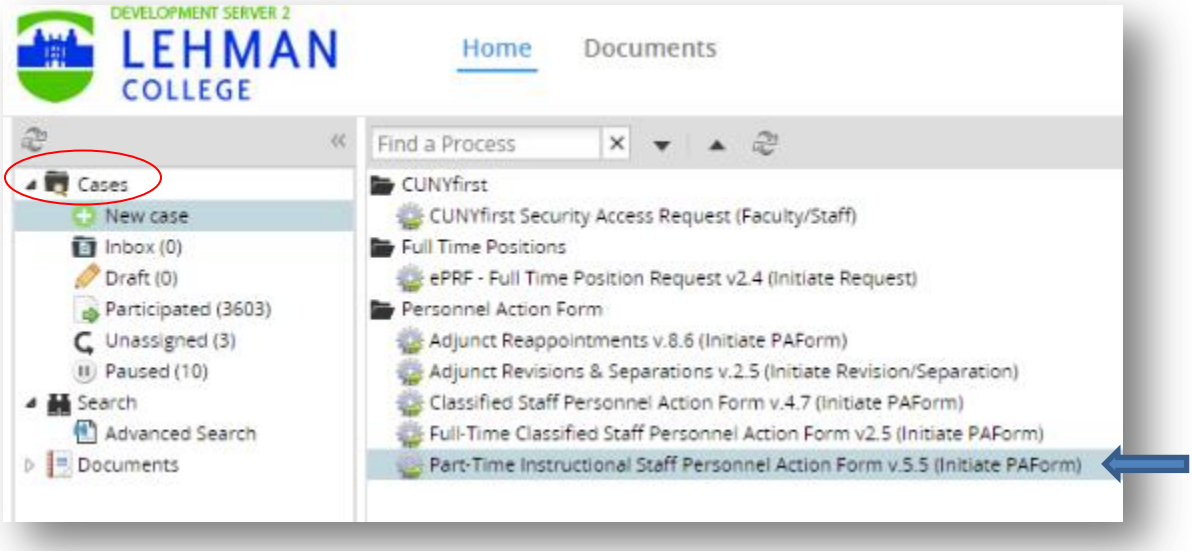
Step 7: Submitting for approval



Revisions

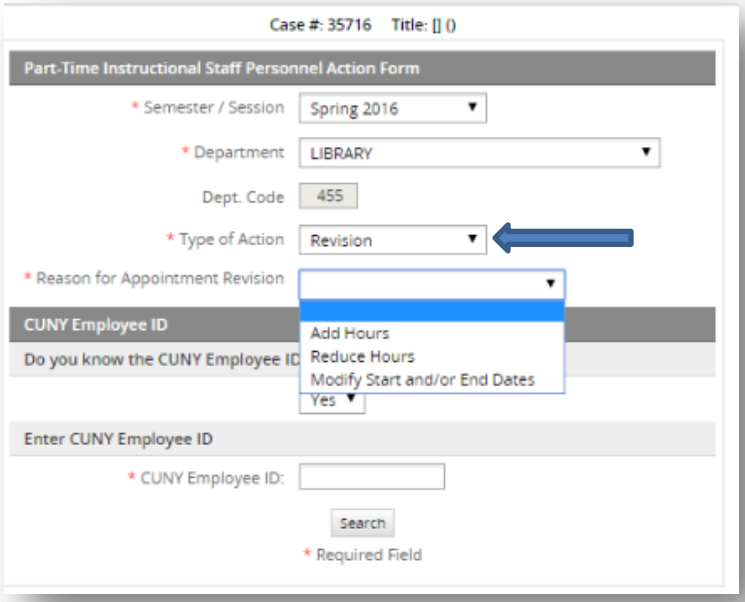
Step 1: Getting to an ePAF that needs revision

- To begin editing the ePAF double-click “New case” from the menu on the left, then double-click “Part-Time Instructional Staff Personnel Action Form v5.5 (Initiate PAForm).”



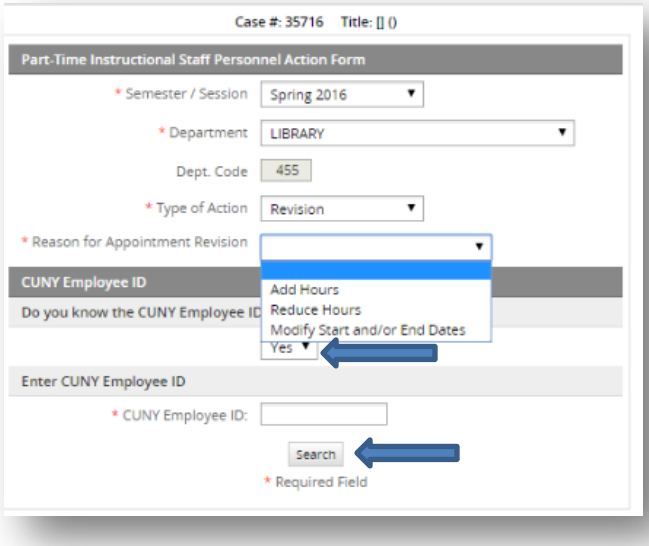
Step 2: Selecting type of action

- You will need to locate the ePAF that you would like to revise by searching for the case number or the employee name.
- Select the semester, department, the type of action and the reason for revision.

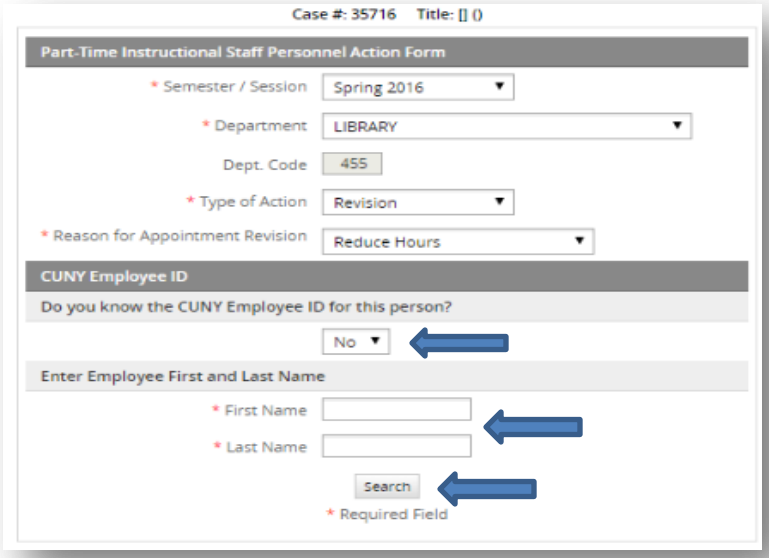


Step 3: Searching for employee

- Search by CUNYFirst ID (if you know it):

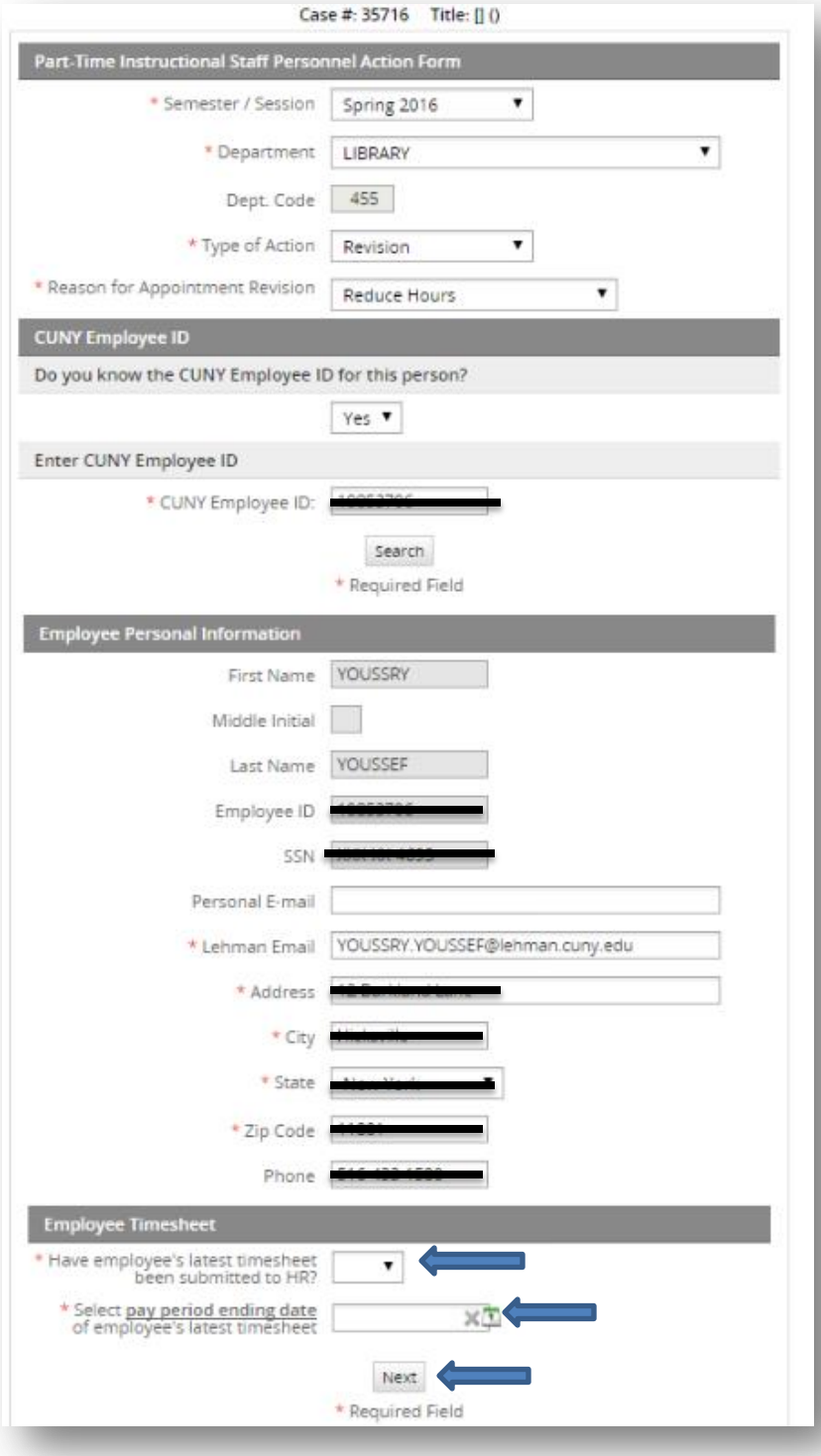


- If you don't know the CUNYFirst ID, then search by last name:

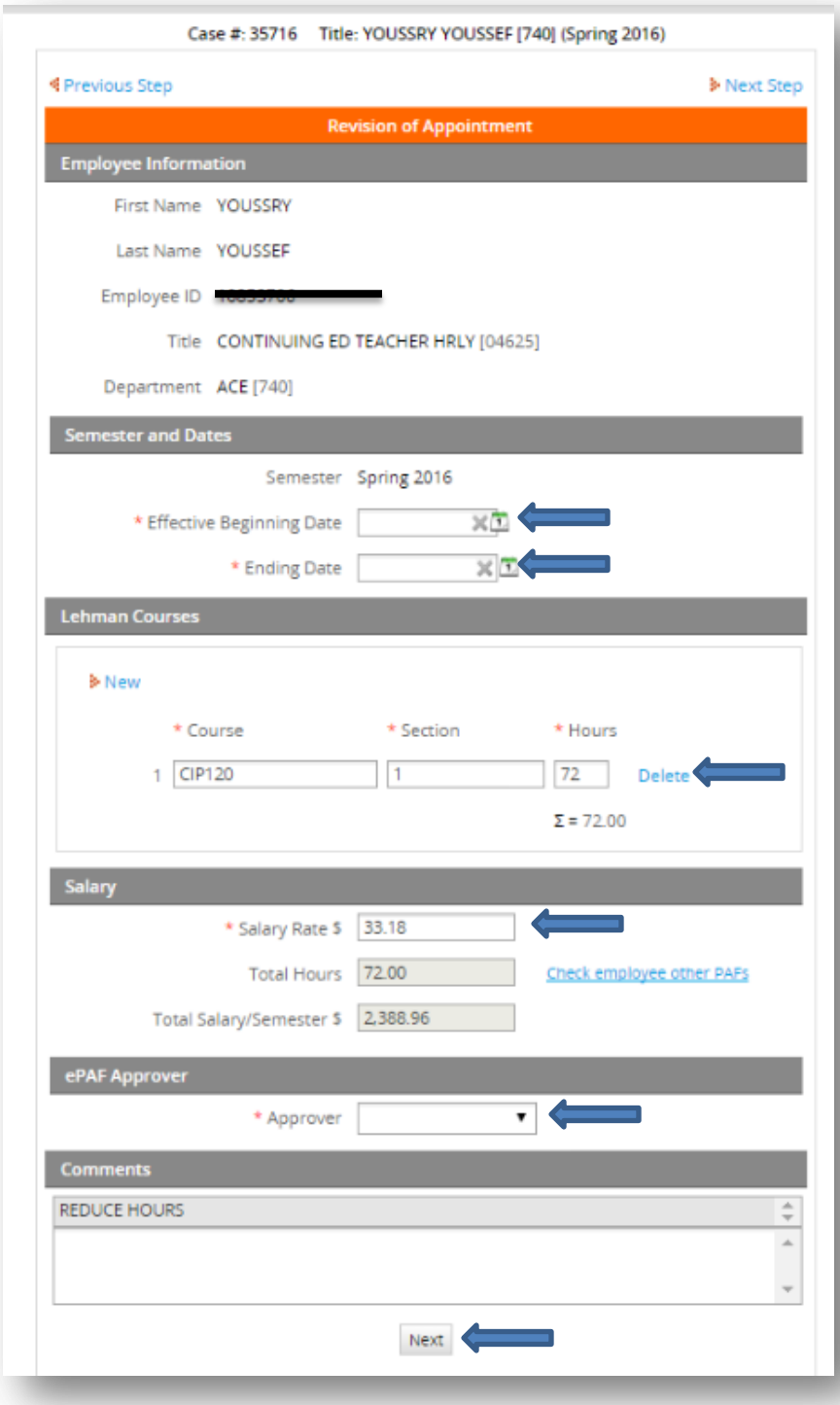


Step 4: Entering the changes

- Double check that you are working on the right employee.
- Under the "Employee Timesheet" section, you **will need to verify if the employee's latest timesheet has been submitted.**
- You will also need to select the last pay period end date by selecting it from the calendar in order to move forward.
- See next page for screenshots.



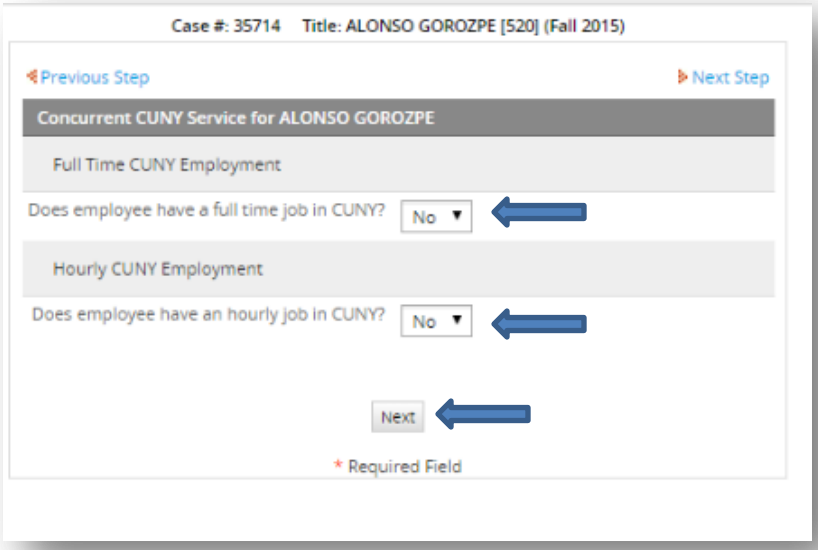
- On the next page you will make the changes.



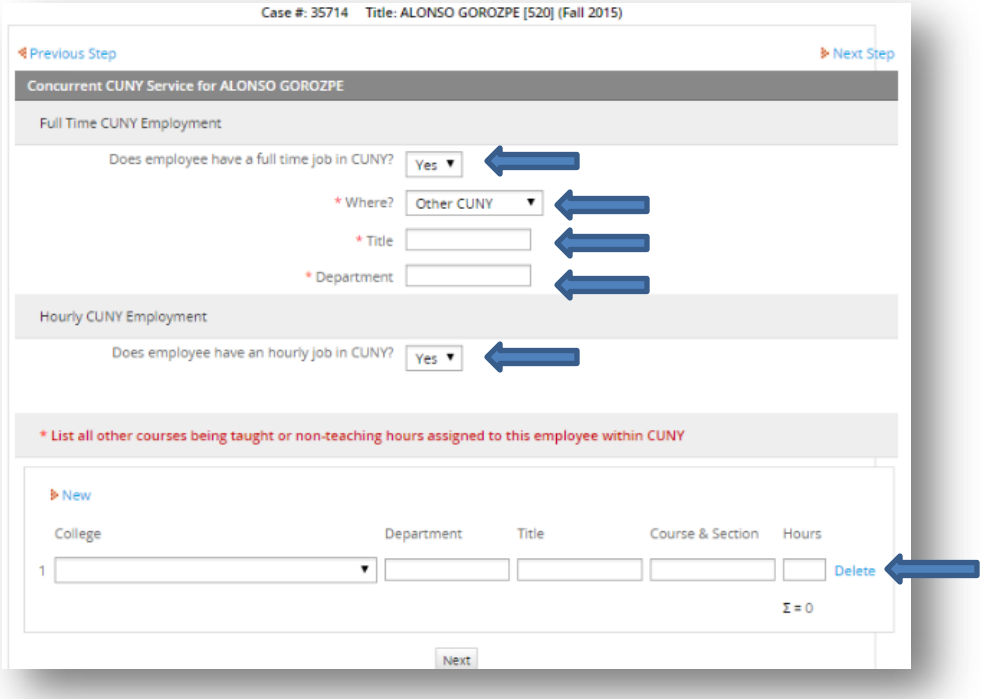
- Make changes requested to start/end date, hours, courses, salary rate.
- Select appropriate approver from the drop-down list.
- Click next to move forward.

Step 5: Concurrent Service

- On the next page you will need to verify concurrent service for the employee.
- Verify if the employee has another appointment within CUNY.
- If not, select “No” for both questions, then click next.

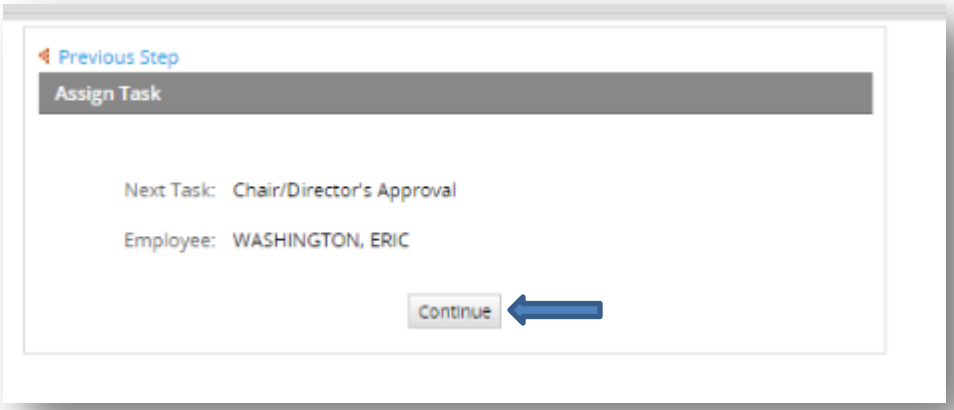


- If there is another appointment, then select Yes and complete the requested information:



Step 6: Submitting for approval

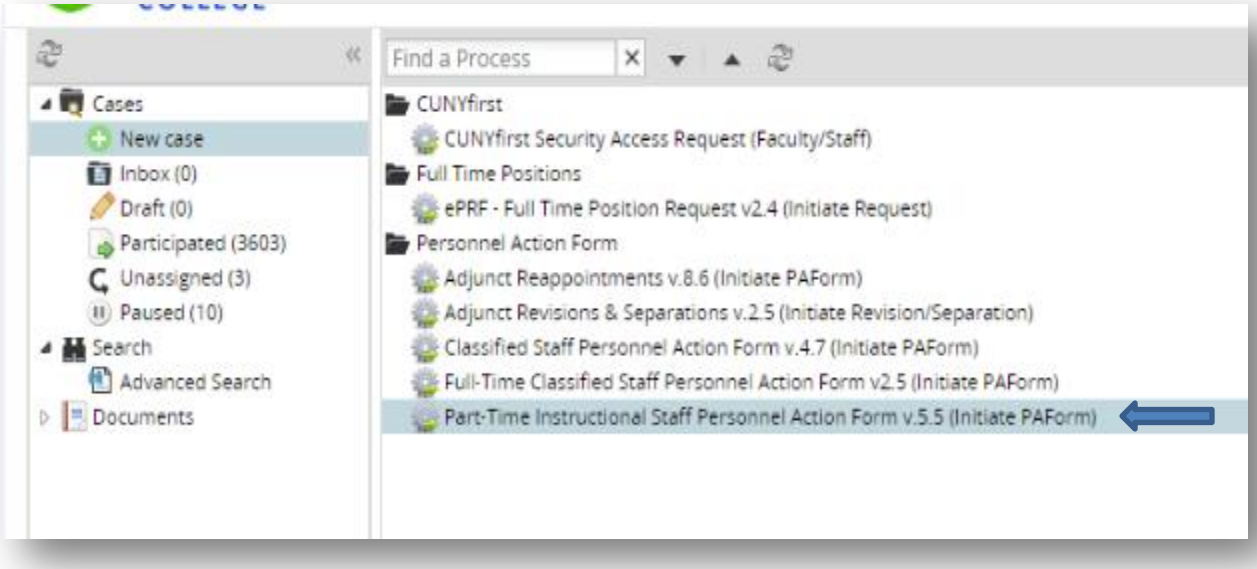
- After all changes have been made, submit the revised ePAF for approval.



Terminations/Separations

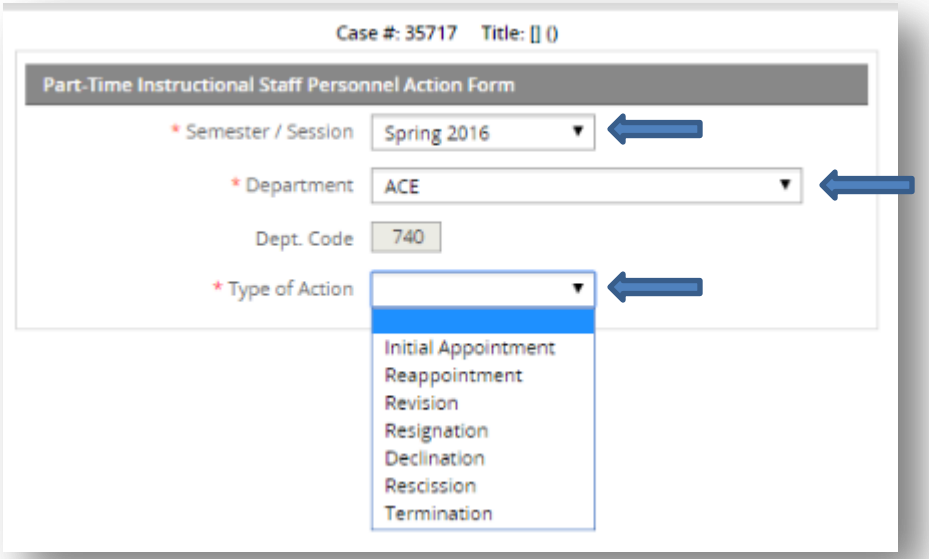
Step 1: Getting to the right ePAF

To begin creating the ePAF double-click “New case” from the menu on the left, then double-click “Part-Time Instructional Staff Personnel Form” (Initiate PAForm).



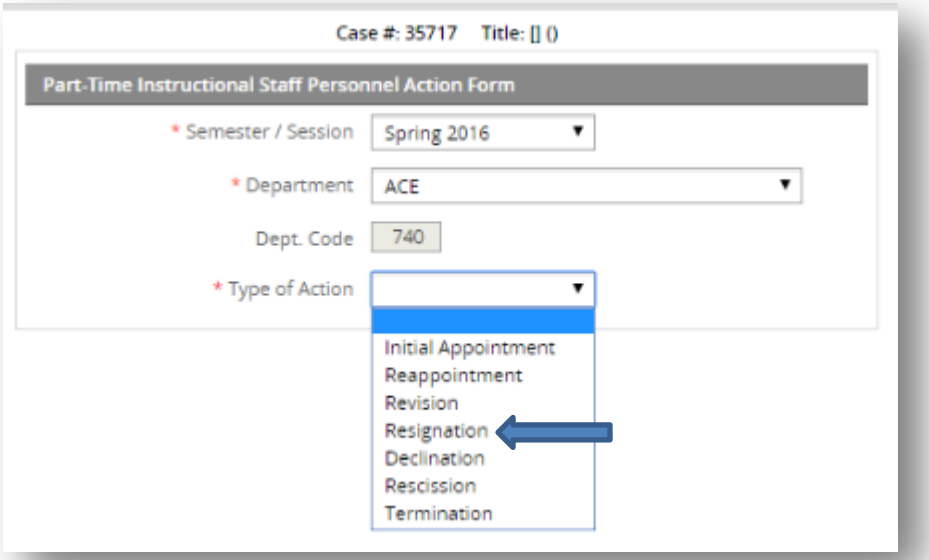
Step 2: Selecting the right action

- Locate the ePAF by searching for case number or employee name.
- Select the correct semester, department then select type of action requested.

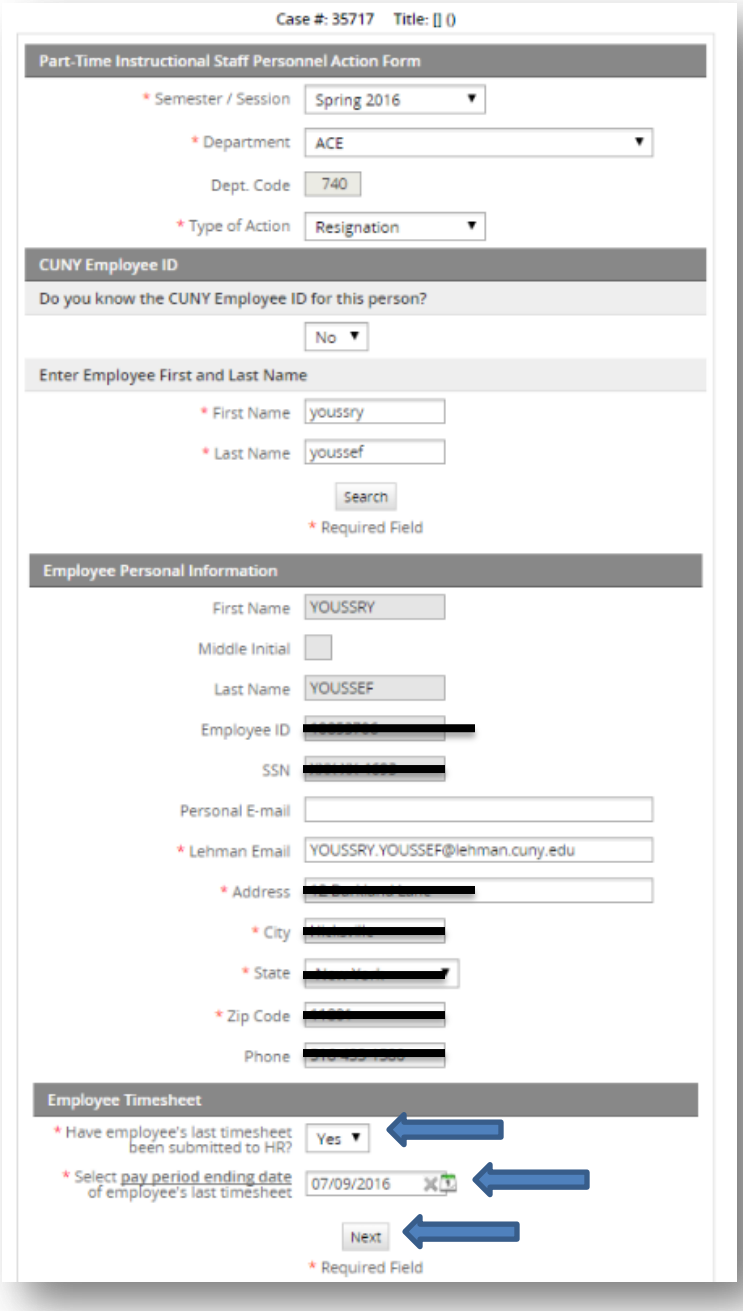


Resignation

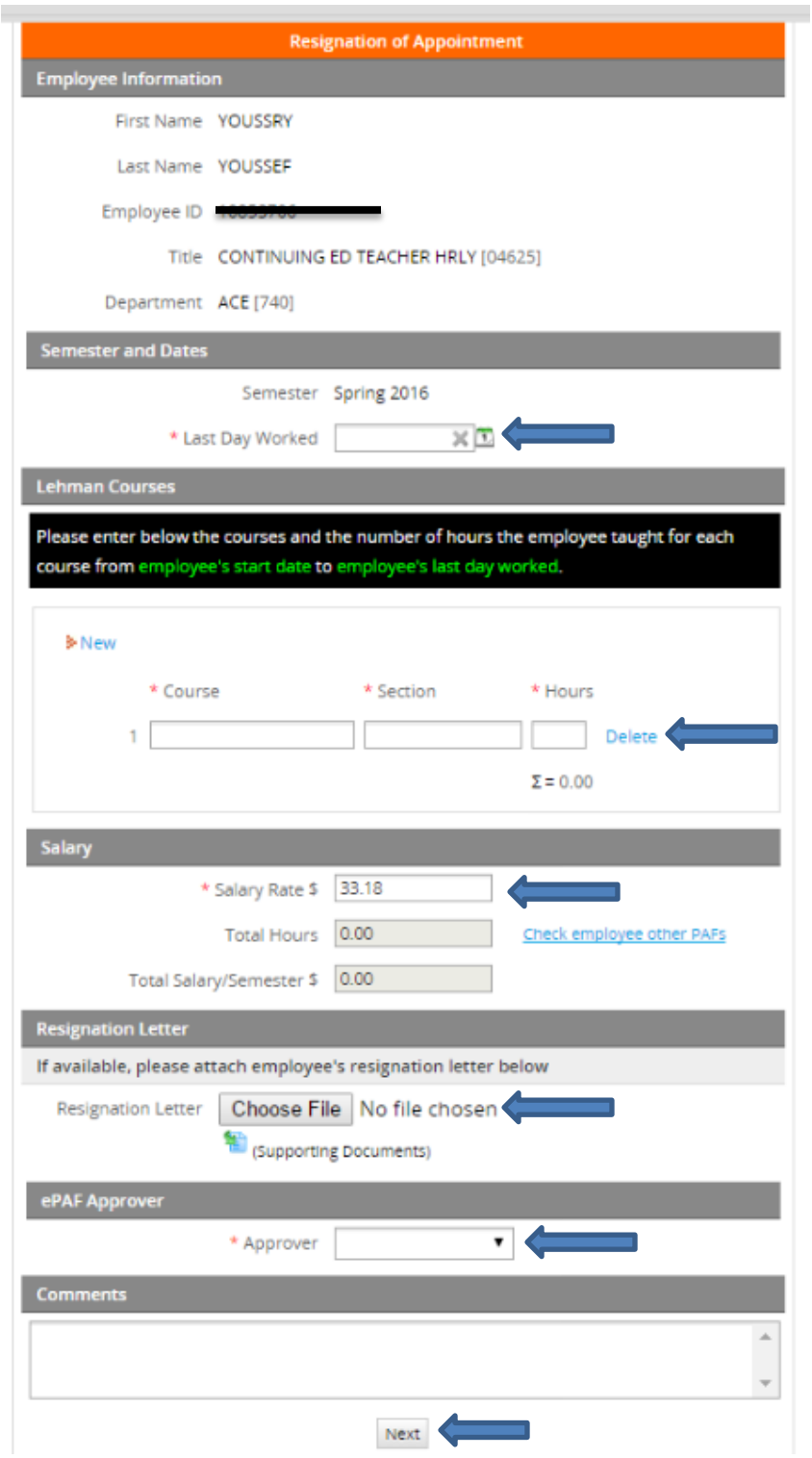
- This action is used when an employee voluntarily leaves his/her position.



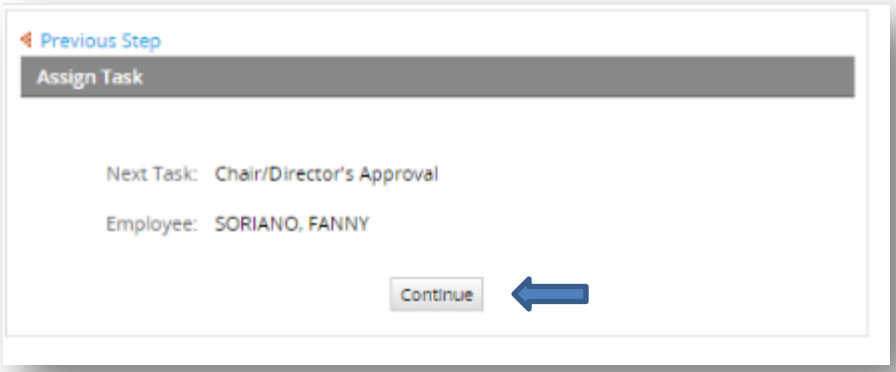
- Under the “Employee Timesheet” section, you **will need to verify if the employee’s latest timesheet has been submitted.**



- Click next to move forward.
- On the next page, enter the last day worked.
- Also enter the amount of hours the employee taught from their start date to the last date worked.

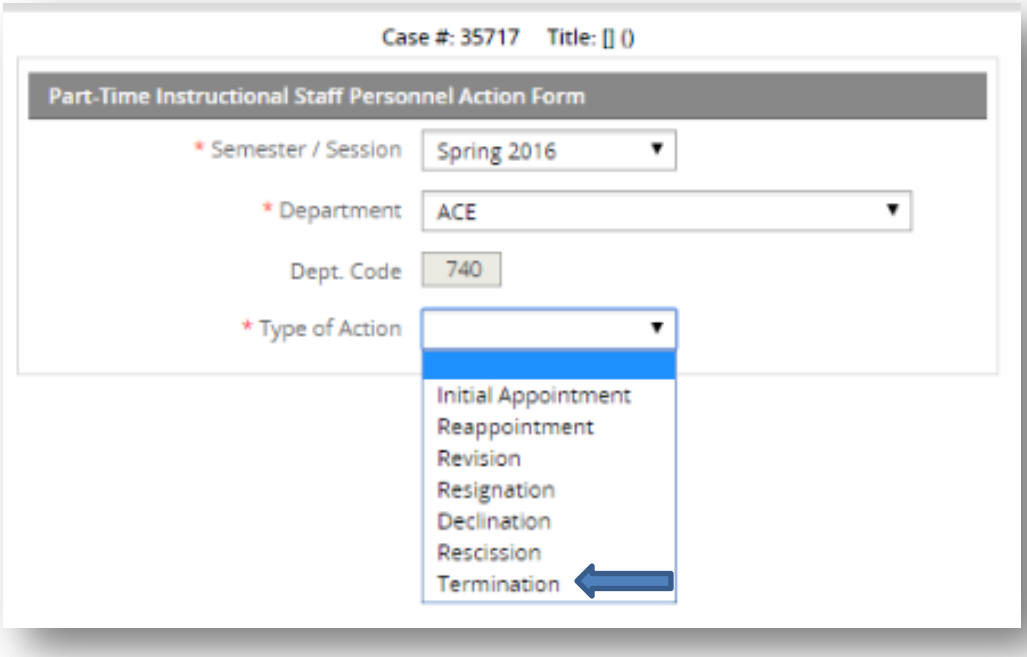


- Upload the resignation letter, if any.
- Click next to submit for approval.

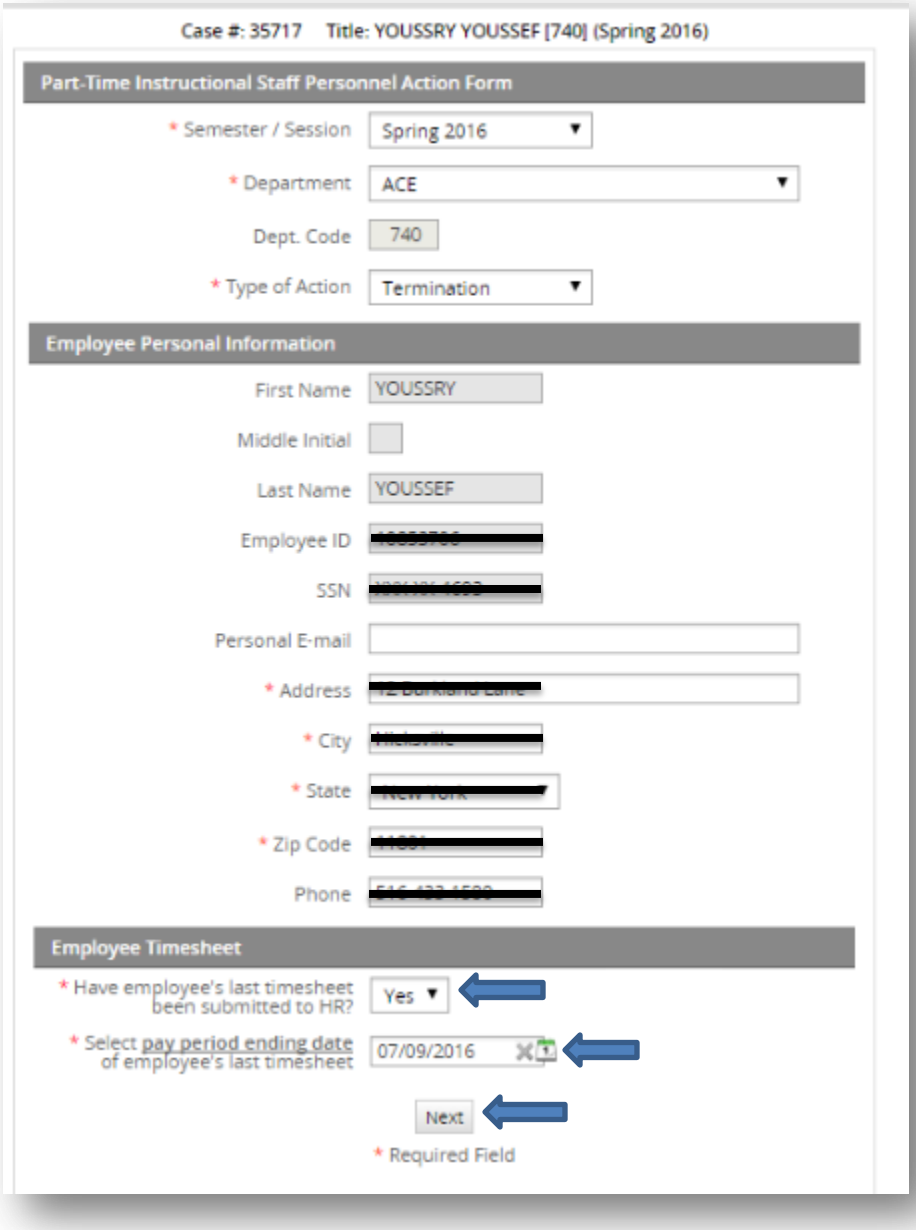


Termination

- Select Termination as the type of action.
- This action is used when an employee involuntarily leaves his/her position, or the appointment has come to an end and a reappointment is not expected.

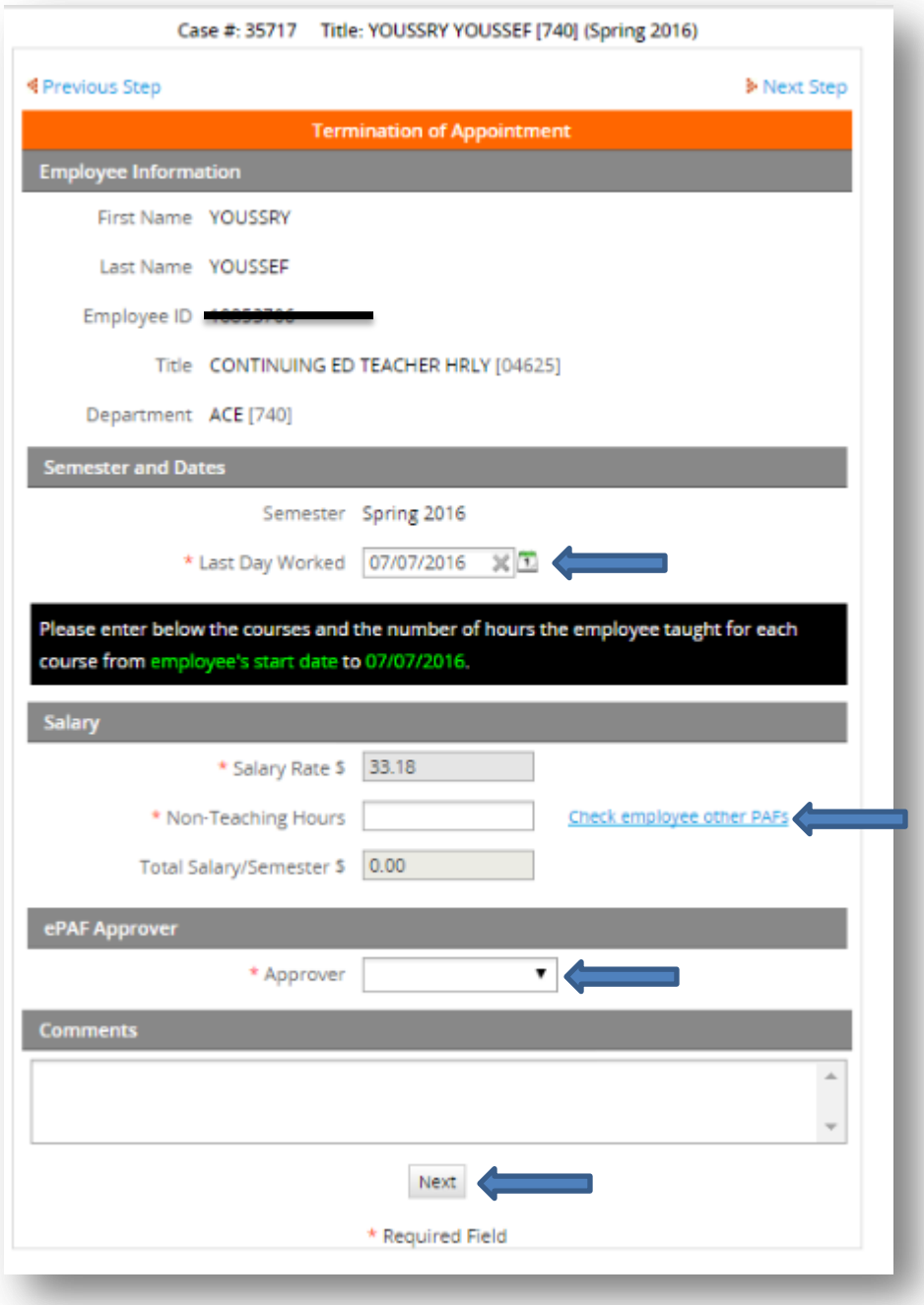


- Under the "Employee Timesheet" section, you **will need to verify if the employee's latest timesheet has been submitted.**

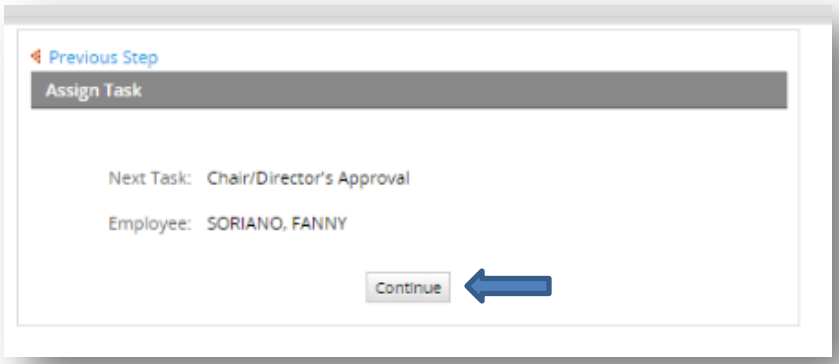


- Click next to move forward.
- On the next page, enter the last day worked.
- Also enter the amount of hours the employee taught from their start date to the last date worked.

- Select the approver if there are multiple approvers assigned.

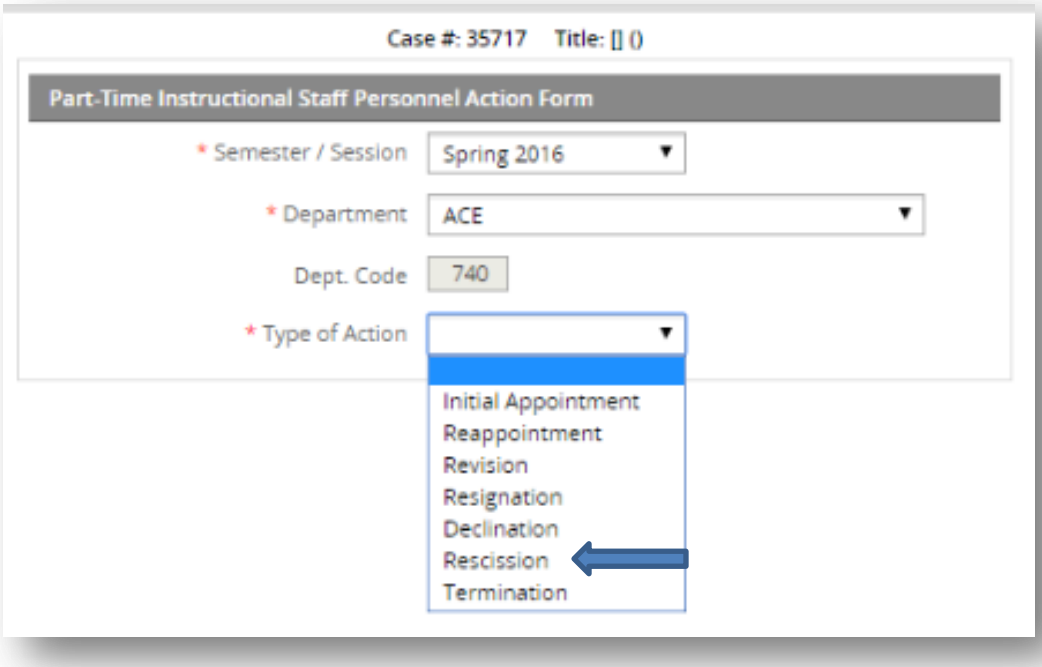


- Click next to submit for approval.

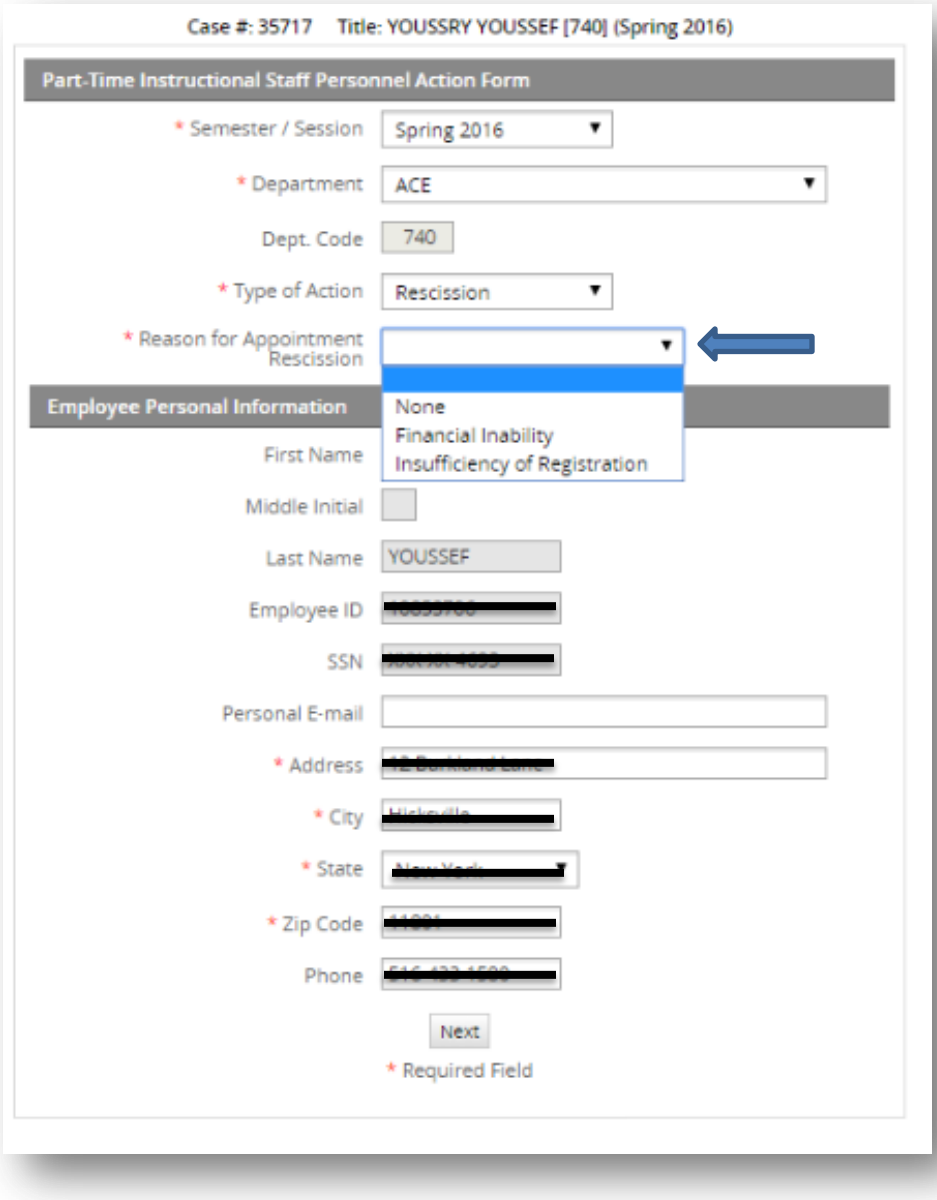


Rescission

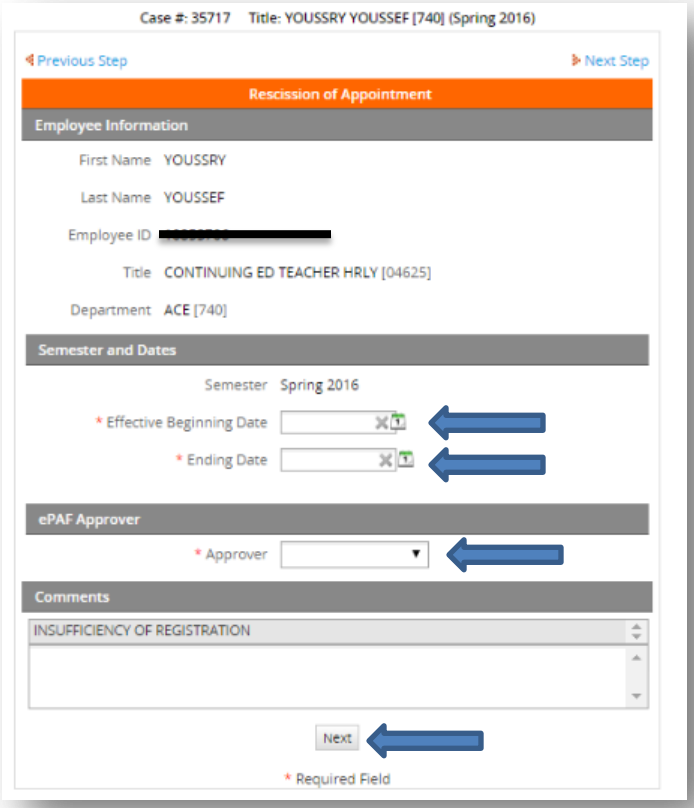
- This action is used when an employee has not worked at all or will not work at all after accepting the initial appointment.
- Select Rescission as type of action.



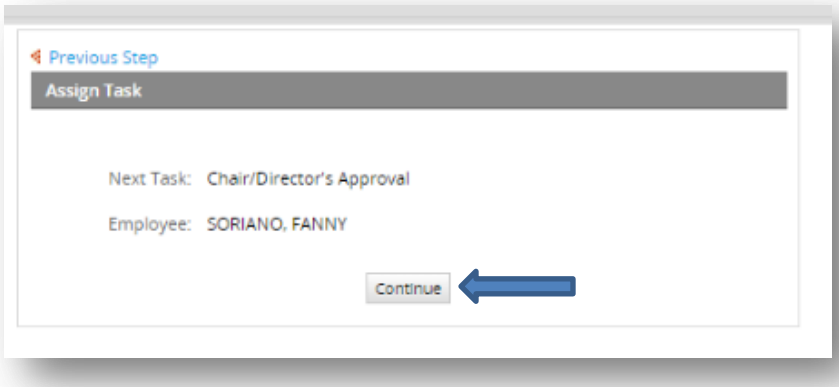
- Select reason for appointment rescission.



- Click next to move forward.
- On the next page, enter effective beginning date and end date of the initial appointment.
- Select approver.

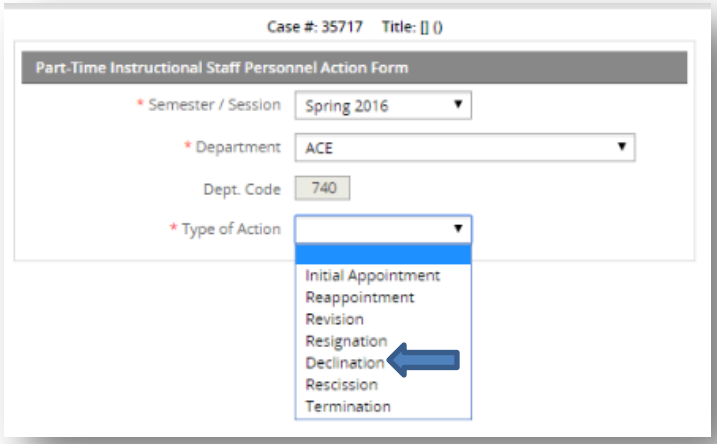


- Click next to submit for approval.

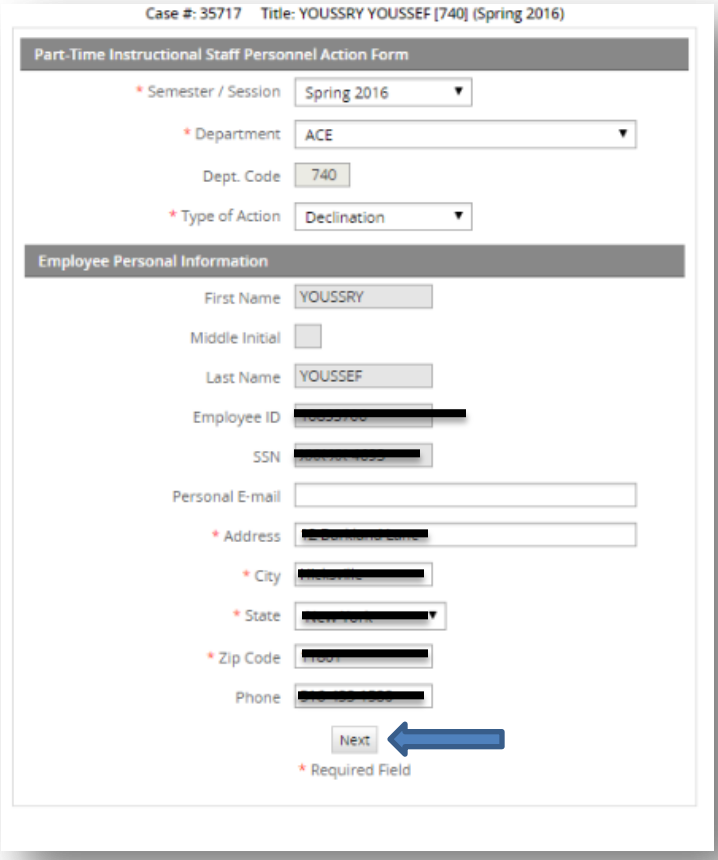


Declination

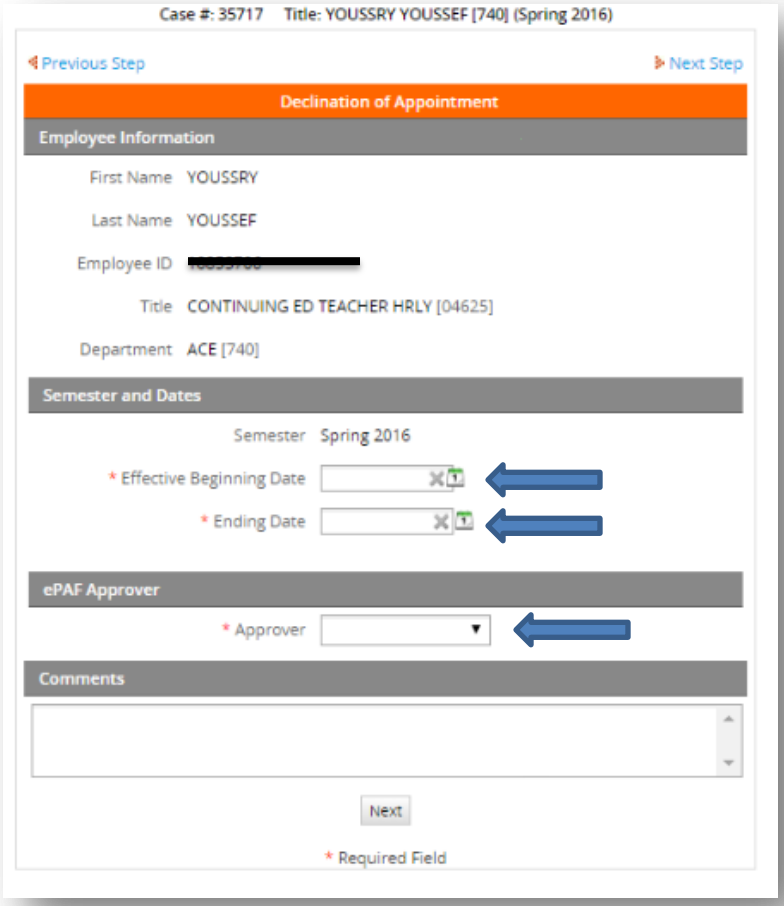
- This option is used when the employee declines the position.
- Select declination as the type of action.



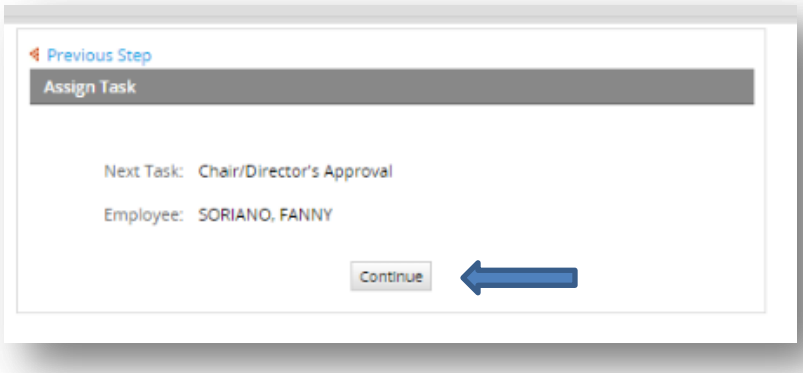
- Verify all information is correct.



- Enter effective beginning date, end date and approver.



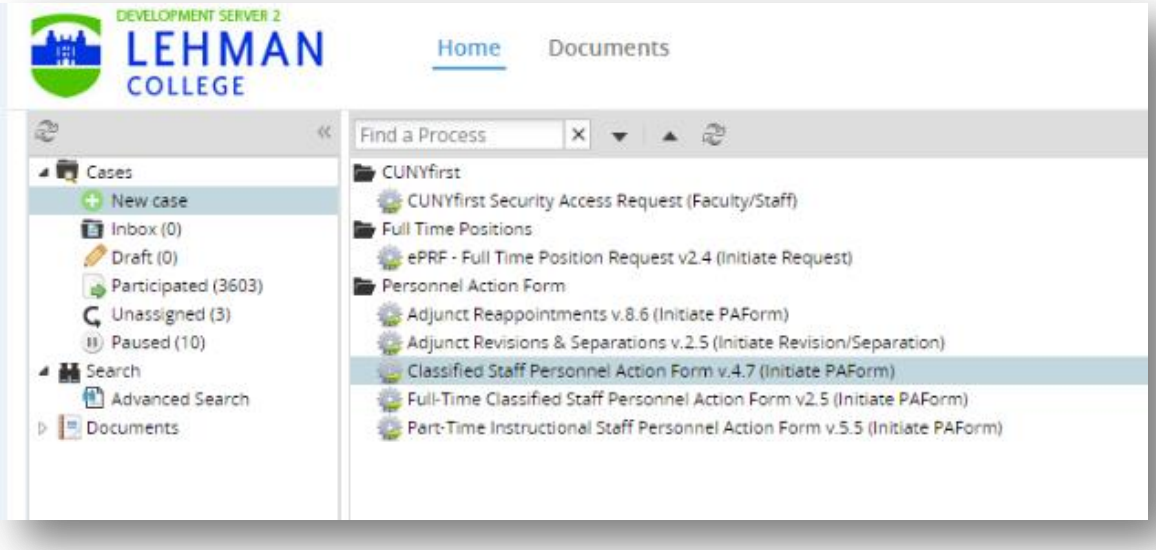
Step 5: Submit for approval



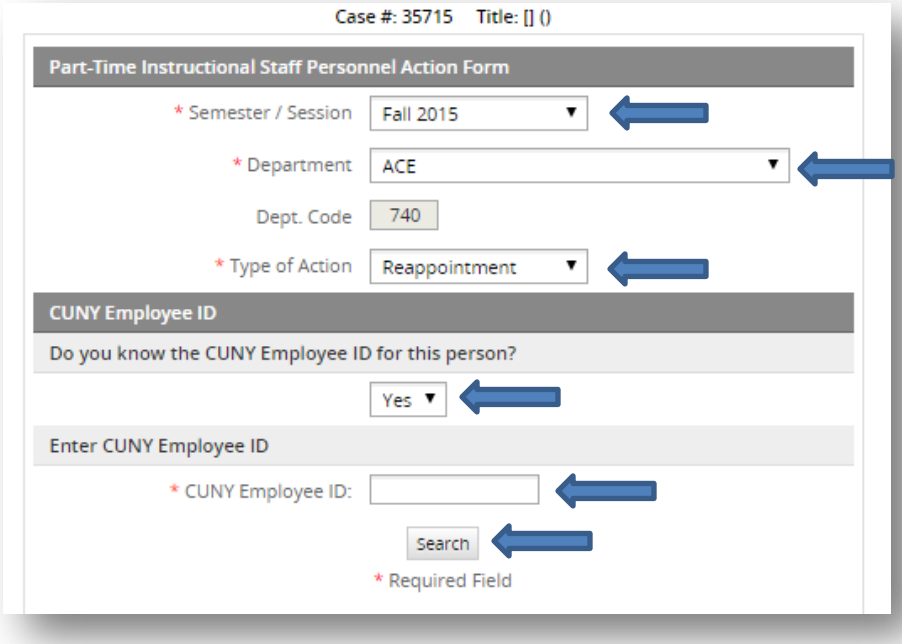
Reappointments

Step 1: Getting to the right ePAF

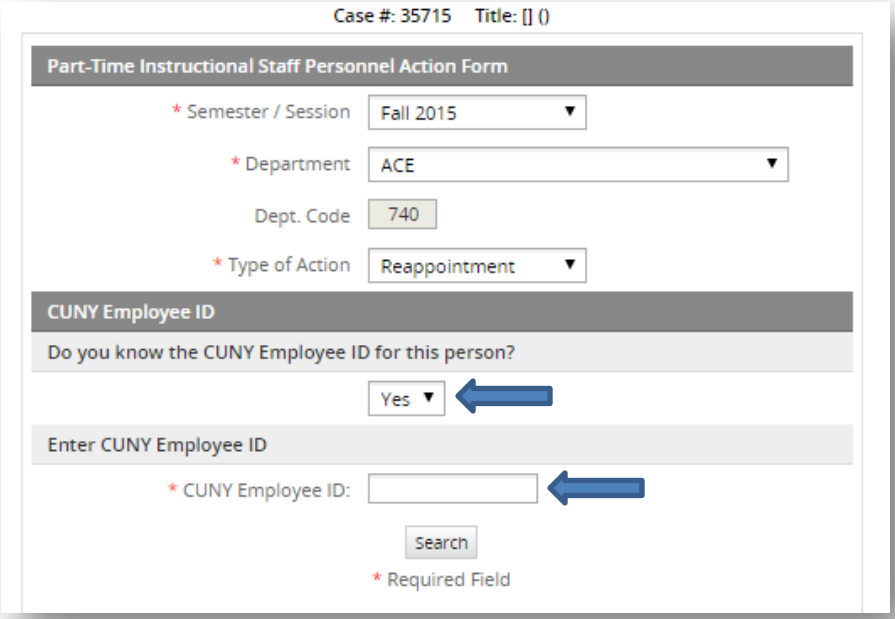
To begin the reappointment ePAF double-click “New case” from the menu on the left, and then double-click “Part-Time Instructional Staff Personnel Form” (Initiate PAForm).



Step 2: Selecting the type of action and searching for employee

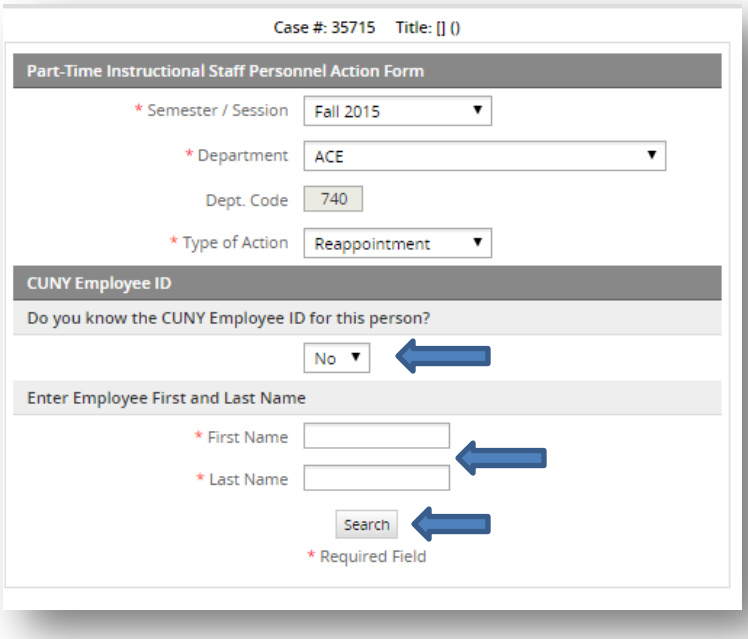


- Search for employee by CUNYFirst ID:



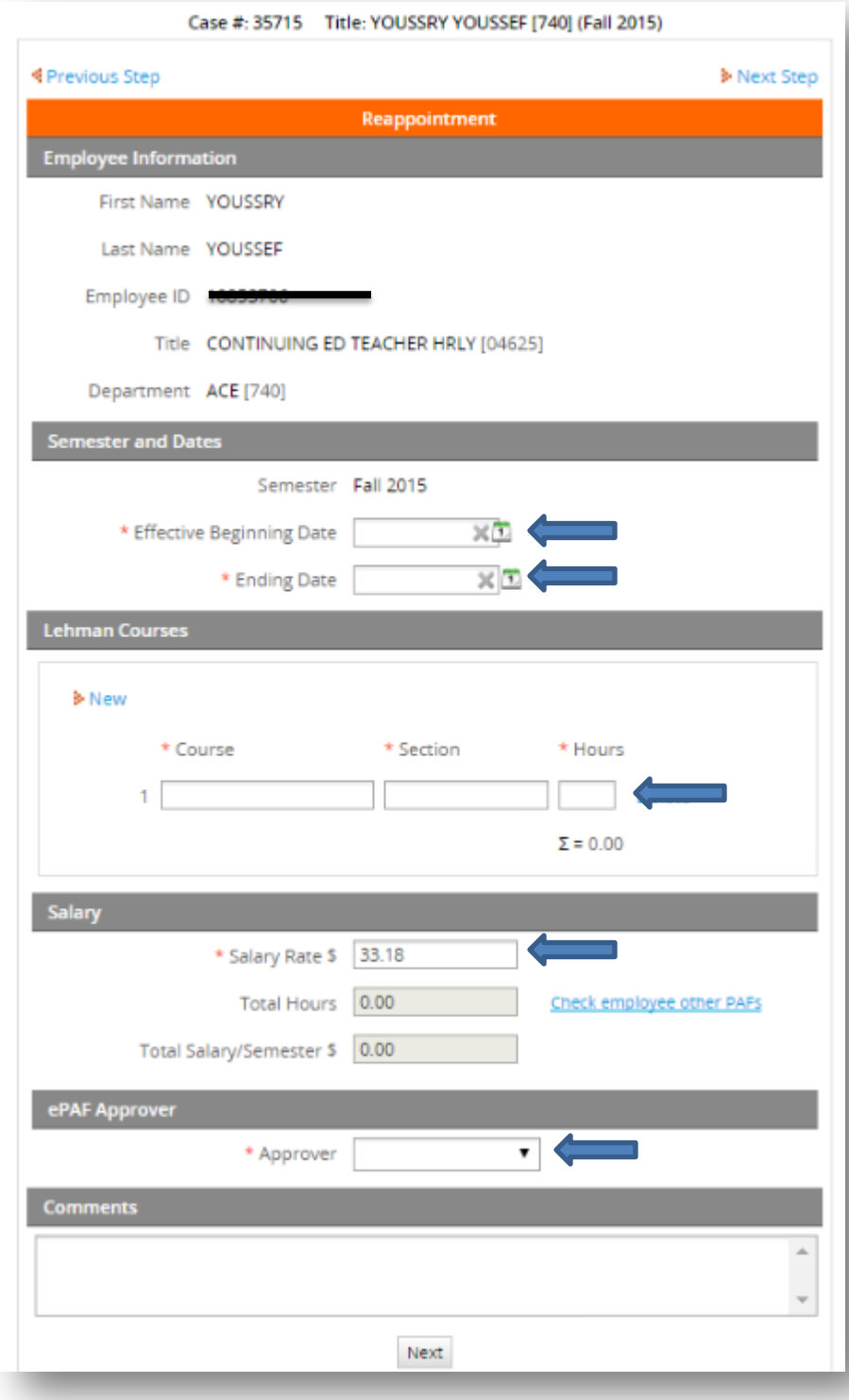
OR

- Search for employee by name:



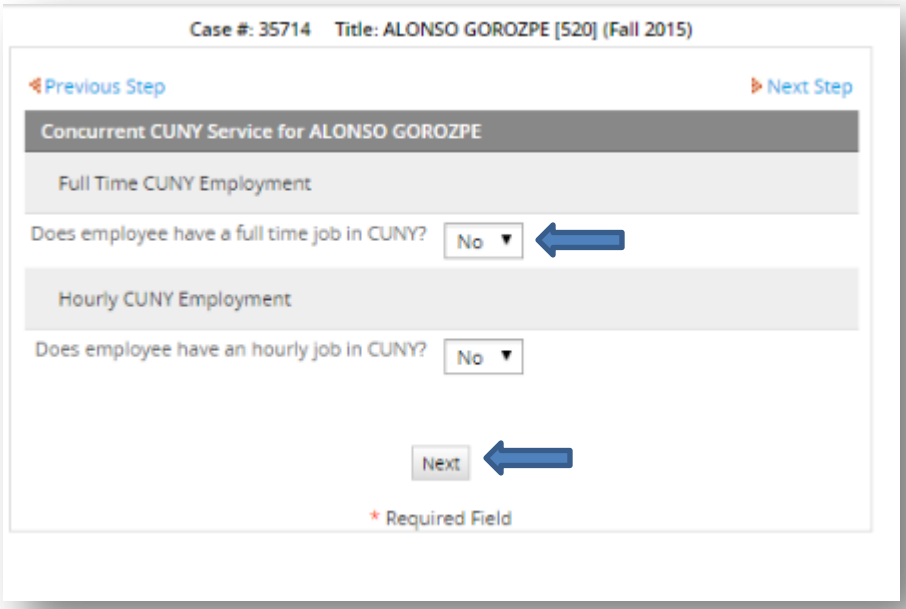
Step 3: Entering reappointment information

- Enter the new effective start date, rate of pay, works hours and shift differential.

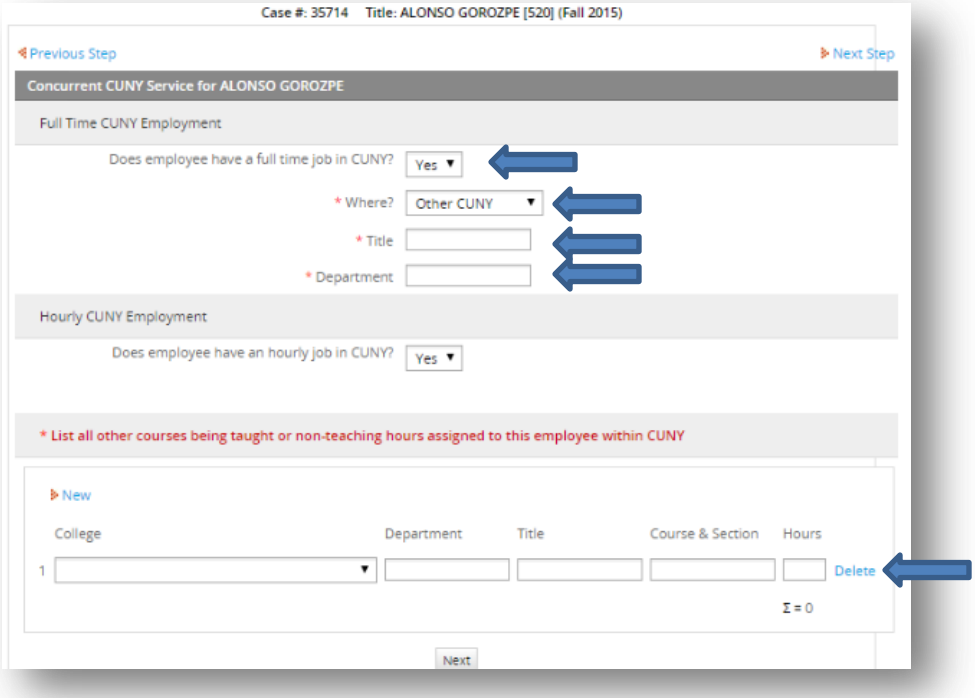


Step 4: Concurrent Service

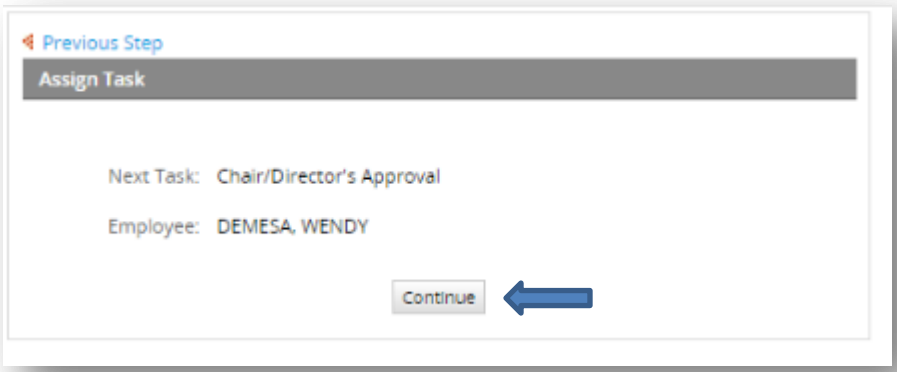
- Verify if the employee has another appointment within CUNY.
- If not, select “No” for both questions, then click next.



- If there is another appointment, then select Yes and complete the requested information:



Step 5: Submitting for approval



This concludes the ePAF guide.

For additional questions or comments, please reach out to the Office of Human Resources at 718-960-8181.