



# ePAF User Guide

## Hourly PSC Titles:

Non-Teaching Adjuncts

Adjunct College Lab Tech

Continuing Education Teachers

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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.

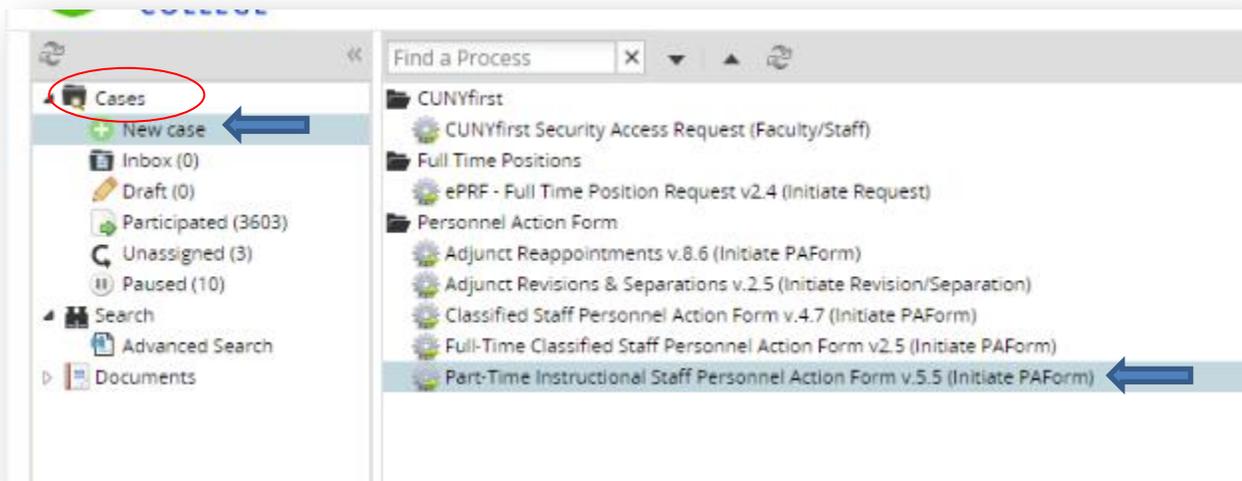
As we utilize this system, it is important that we continue to follow the Lehman College/CUNY policies and procedures. This will ensure that appointments are processed faster, take proactive control over expenses, and ultimately more employees being paid on-time.

## 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.

Case #: 35714 Title: [] ()

**Part-Time Instructional Staff Personnel Action Form**

\* Semester / Session

\* Department

Dept. Code

\* Type of Action

\* Employee Job Title

**Employee Personal Information**

First Name

Last Name

SSN

Personal E-mail

\* Address

\* City

\* State

\* Zip Code

Phone

\* Required Field

Select semester, Department, Initial Appointment and Employee Job Title

All fields with \* must be completed.

- Click “Submit” to move forward.

### Step 3: Verifying all employee information is correct

Case #: 35714 Title: ALONSO GOROZPE [520] (Fall 2015)

**Part-Time Instructional Staff Personnel Action Form**

\* Semester / Session

\* Department

Dept. Code

\* Type of Action

\* Employee Job Title

**Employee Personal Information**

First Name

Last Name

SSN

Personal E-mail

\* Address

\* City

\* State

\* Zip Code

Phone

←

\* Required Field

- 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.

The screenshot shows a web form titled "Part-Time Instructional Staff Personnel Action Form". A dropdown menu for "Semester / Session" is set to "Fall 2015". A dark grey pop-up box is overlaid on the form, containing the following text:

**Please check documents/paperwork that the employee has handed over to Human Resources:**

- CUNY Application (with Resume, Original Degree, and/or Official transcripts if applicable)
- Employment Eligibility Verification Form (I-9), with supporting documentation
- Social Security Card (For N.Y.S. Payroll purposes)
- Federal Tax Withholding Form (W-4)
- New York State Tax Withholding Form (IT-204)
- Personal Data Form
- Designation of Beneficiary of Unused Annual Leave and Unpaid Salary
- Conviction Notice and License Registration Form (needed for "Classified" employment)

At the bottom of the pop-up, there are two buttons: "Verify" and "Cancel". A red arrow points to the "Verify" button. Below the pop-up, the form fields for "City" (Bronx), "State" (Nebraska), and "Zip Code" (105468) are visible, each with a green checkmark. A "Phone" field is empty. A "Submit" button is at the bottom, and a legend indicates "\* Required Field".

- 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:

Case #: 35714 Title: ALONSO GOROZPE [520] (Fall 2015)

Previous Step Next Step

### Initial Appointment

Employee Information

First Name ALONSO  
Last Name GOROZPE  
Title NON-TEACHING LECTURER [04689]  
Department ART [520]

Semester and Dates

Semester Fall 2015

\* Effective Beginning Date

\* Ending Date

Salary

\* Salary Rate \$ 38.91

\* Non-Teaching Hours 0.00

Total Salary/Semester \$ 0.00

Comments

Next

\* Required Field

#### 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.

Case #: 35714 Title: ALONSO GOROZPE [520] (Fall 2015)

◀ Previous Step Next Step ▶

**Concurrent CUNY Service for ALONSO GOROZPE**

Full Time CUNY Employment

Does employee have a full time job in CUNY? No ▼

Hourly CUNY Employment

Does employee have an hourly job in CUNY? No ▼

Next

\* Required Field

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

Case #: 35714 Title: ALONSO GOROZPE [520] (Fall 2015)

◀ Previous Step Next Step ▶

**Concurrent CUNY Service for ALONSO GOROZPE**

Full Time CUNY Employment

Does employee have a full time job in CUNY? Yes ▼

\* Where? Other CUNY ▼

\* Title

\* Department

Hourly CUNY Employment

Does employee have an hourly job in CUNY? Yes ▼

\* List all other courses being taught or non-teaching hours assigned to this employee within CUNY

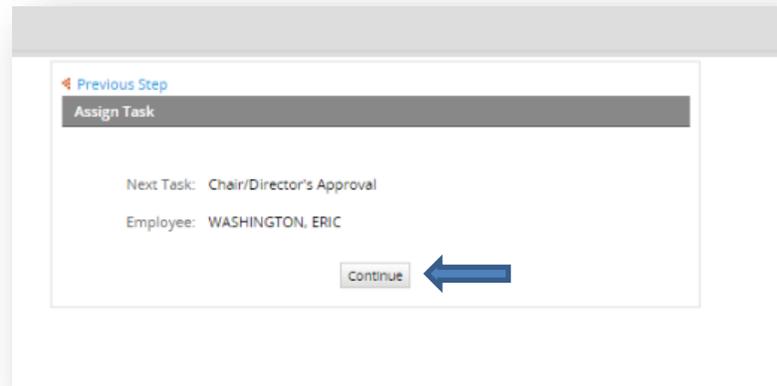
▶ New

College	Department	Title	Course & Section	Hours	
1					Delete

Σ = 0

Next

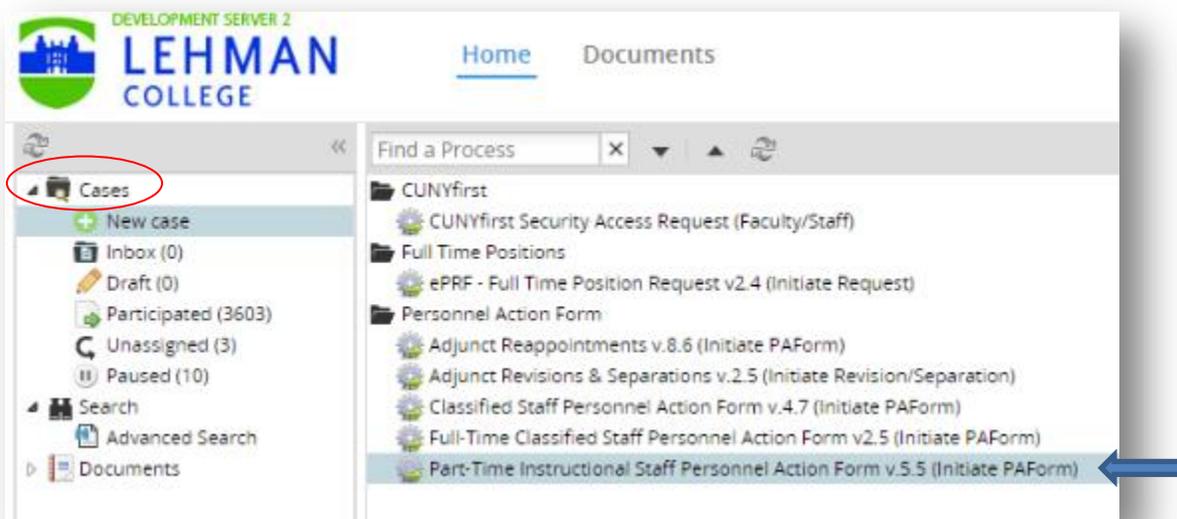
## Step 7: Submitting for approval



## Revisions

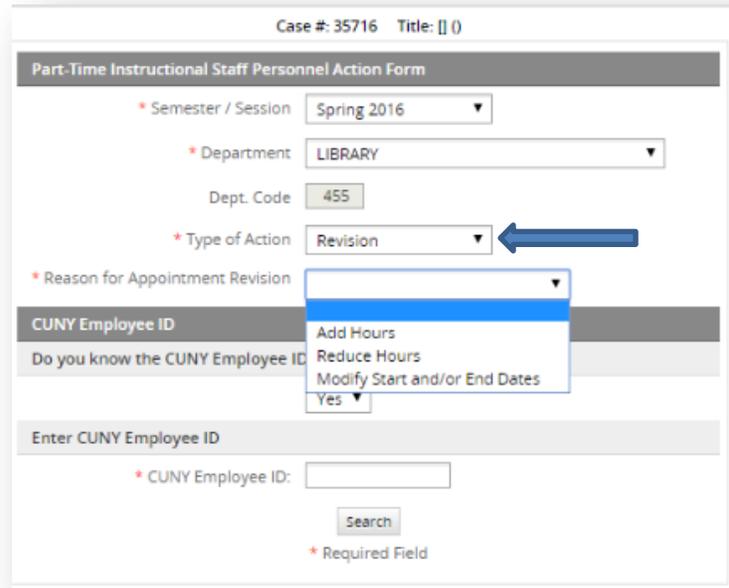
### Step 1: Getting to an ePAF that needs revision

- 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.



Case #: 35716 Title: [] ()

Part-Time Instructional Staff Personnel Action Form

\* Semester / Session: Spring 2016

\* Department: LIBRARY

Dept. Code: 455

\* Type of Action: Revision

\* Reason for Appointment Revision: [Dropdown]

CUNY Employee ID

Do you know the CUNY Employee ID: [Dropdown]

Enter CUNY Employee ID

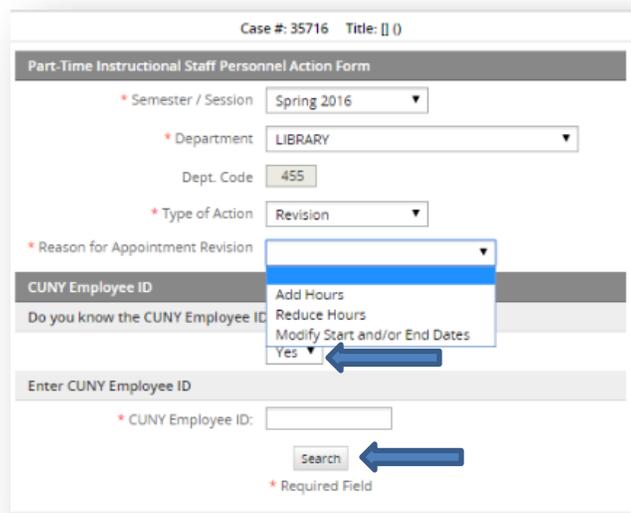
\* CUNY Employee ID: [Text Box]

Search

\* Required Field

## Step 3: Searching for employee

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



Case #: 35716 Title: [] ()

Part-Time Instructional Staff Personnel Action Form

\* Semester / Session: Spring 2016

\* Department: LIBRARY

Dept. Code: 455

\* Type of Action: Revision

\* Reason for Appointment Revision: [Dropdown]

CUNY Employee ID

Do you know the CUNY Employee ID: [Dropdown]

Enter CUNY Employee ID

\* CUNY Employee ID: [Text Box]

Search

\* Required Field

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

Case #: 35716 Title: [] ()

**Part-Time Instructional Staff Personnel Action Form**

\* Semester / Session: Spring 2016

\* Department: LIBRARY

Dept. Code: 455

\* Type of Action: Revision

\* Reason for Appointment Revision: Reduce Hours

**CUNY Employee ID**

Do you know the CUNY Employee ID for this person?

No

**Enter Employee First and Last Name**

\* First Name

\* Last Name

Search

\* Required Field

#### 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.

Case #: 35716 Title: [] ()

### Part-Time Instructional Staff Personnel Action Form

\* Semester / Session

\* Department

Dept. Code

\* Type of Action

\* Reason for Appointment Revision

### CUNY Employee ID

Do you know the CUNY Employee ID for this person?

### Enter CUNY Employee ID

\* CUNY Employee ID:

\* Required Field

### Employee Personal Information

First Name

Middle Initial

Last Name

Employee ID

SSN

Personal E-mail

\* Lehman Email

\* Address

\* City

\* State

\* Zip Code

Phone

### Employee Timesheet

\* Have employee's latest timesheet been submitted to HR?

\* Select pay period ending date of employee's latest timesheet

\* Required Field

- On the next page you will make the changes.

Case #: 35716 Title: YOUSRY YOUSSEF [740] (Spring 2016)

◀ Previous Step ▶ Next Step

### Revision of Appointment

Employee Information

First Name YOUSRY  
 Last Name YOUSSEF  
 Employee ID ██████████  
 Title CONTINUING ED TEACHER HRLY [04625]  
 Department ACE [740]

Semester and Dates

Semester Spring 2016

\* Effective Beginning Date  ←

\* Ending Date  ←

Lehman Courses

▶ New

*	* Course	* Section	* Hours	
1	<input type="text" value="CIP120"/>	<input type="text" value="1"/>	<input type="text" value="72"/>	Delete ←
			Σ = 72.00	

Salary

\* Salary Rate \$  ←

Total Hours  [Check employee other PAFs](#)

Total Salary/Semester \$

ePAF Approver

\* Approver  ←

Comments

REDUCE HOURS

←

- 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.

Case #: 35714 Title: ALONSO GOROZPE [520] (Fall 2015)

[◀ Previous Step](#) [▶ Next Step](#)

**Concurrent CUNY Service for ALONSO GOROZPE**

Full Time CUNY Employment

Does employee have a full time job in CUNY? No ▼

Hourly CUNY Employment

Does employee have an hourly job in CUNY? No ▼

Next

\* Required Field

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

Case #: 35714 Title: ALONSO GOROZPE [520] (Fall 2015)

[◀ Previous Step](#) [▶ Next Step](#)

**Concurrent CUNY Service for ALONSO GOROZPE**

Full Time CUNY Employment

Does employee have a full time job in CUNY? Yes ▼

\* Where? Other CUNY ▼

\* Title

\* Department

Hourly CUNY Employment

Does employee have an hourly job in CUNY? Yes ▼

\* List all other courses being taught or non-teaching hours assigned to this employee within CUNY

[▶ New](#)

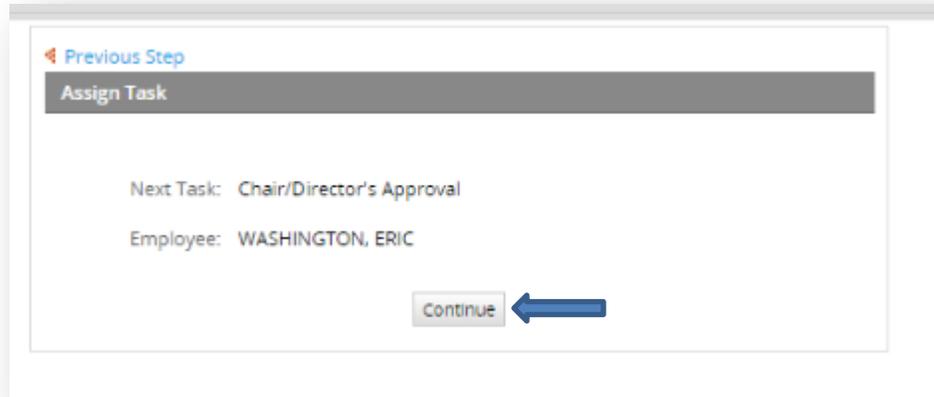
College	Department	Title	Course & Section	Hours	
1					Delete

I = 0

Next

## Step 6: Submitting for approval

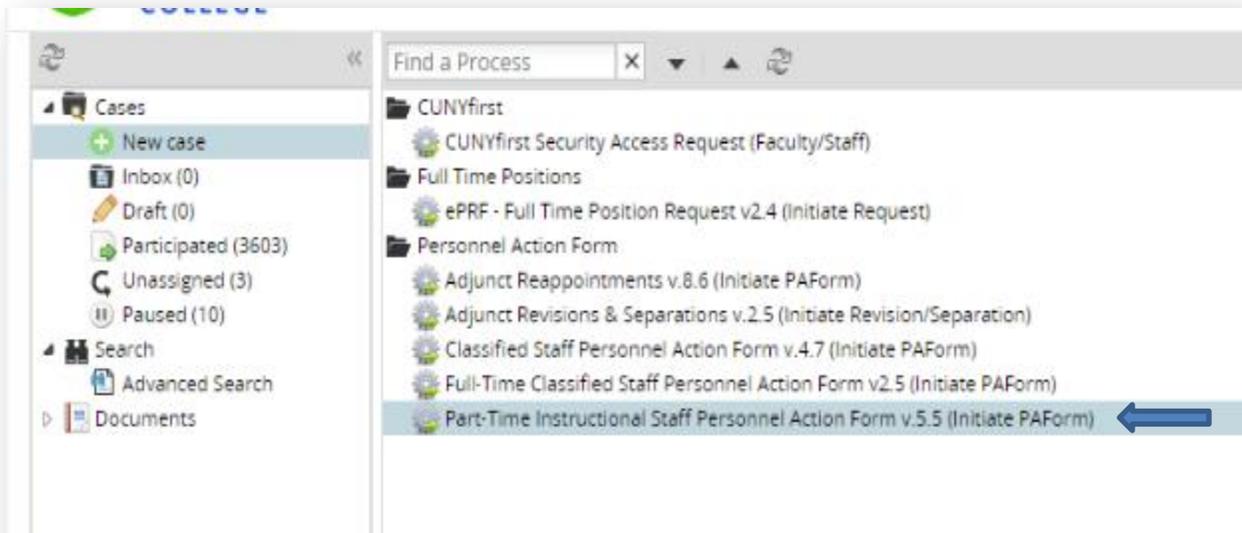
- After all changes have been made, submit the revised ePAF for approval.



## 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.

Case #: 35717 Title: [] ()

Part-Time Instructional Staff Personnel Action Form

\* Semester / Session: Spring 2016

\* Department: ACE

Dept. Code: 740

\* Type of Action: [Dropdown Menu]

The dropdown menu for 'Type of Action' is open, showing the following options: Initial Appointment, Reappointment, Revision, Resignation, Declination, Rescission, and Termination. Blue arrows point to the 'Spring 2016' dropdown, the 'ACE' dropdown, and the 'Type of Action' dropdown.

## Resignation

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

Case #: 35717 Title: [] ()

Part-Time Instructional Staff Personnel Action Form

\* Semester / Session: Spring 2016

\* Department: ACE

Dept. Code: 740

\* Type of Action: [Dropdown Menu]

The dropdown menu for 'Type of Action' is open, showing the following options: Initial Appointment, Reappointment, Revision, Resignation, Declination, Rescission, and Termination. A blue arrow points to the 'Resignation' option.

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

Case #: 35717 Title: [] ()

**Part-Time Instructional Staff Personnel Action Form**

\* Semester / Session

\* Department

Dept. Code

\* Type of Action

**CUNY Employee ID**

Do you know the CUNY Employee ID for this person?

**Enter Employee First and Last Name**

\* First Name

\* Last Name

\* Required Field

**Employee Personal Information**

First Name

Middle Initial

Last Name

Employee ID

SSN

Personal E-mail

\* Lehman Email

\* Address

\* City

\* State

\* Zip Code

Phone

**Employee Timesheet**

\* Have employee's last timesheet been submitted to HR?  ←

\* Select pay period ending date of employee's last timesheet  ←

←

\* Required Field

- 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.

**Resignation of Appointment**

**Employee Information**

First Name YOUSSRY  
 Last Name YOUSSEF  
 Employee ID ██████████  
 Title CONTINUING ED TEACHER HRLY [04625]  
 Department ACE [740]

**Semester and Dates**

Semester Spring 2016  
 \* Last Day Worked

**Lehman Courses**

Please enter below the courses and the number of hours the employee taught for each course from **employee's start date** to **employee's last day worked**.

**New**

	* Course	* Section	* Hours	
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete
			$\Sigma = 0.00$	

**Salary**

\* Salary Rate \$    
 Total Hours  [Check employee other PAFs](#)  
 Total Salary/Semester \$

**Resignation Letter**

If available, please attach employee's resignation letter below

Resignation Letter  No file chosen   
 (Supporting Documents)

**ePAF Approver**

\* Approver

**Comments**

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

Previous Step

Assign Task

Next Task: Chair/Director's Approval

Employee: SORIANO, FANNY

Continue 

### 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.

Case #: 35717 Title: [] ()

Part-Time Instructional Staff Personnel Action Form

\* Semester / Session

\* Department

Dept. Code

\* Type of Action   
Initial Appointment  
Reappointment  
Revision  
Resignation  
Declination  
Rescission  
Termination 

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

Case #: 35717 Title: YOUSSEF YOUSSEF [740] (Spring 2016)

**Part-Time Instructional Staff Personnel Action Form**

\* Semester / Session

\* Department

Dept. Code

\* Type of Action

**Employee Personal Information**

First Name

Middle Initial

Last Name

Employee ID

SSN

Personal E-mail

\* Address

\* City

\* State

\* Zip Code

Phone

**Employee Timesheet**

\* Have employee's last timesheet been submitted to HR?  ←

\* Select pay period ending date of employee's last timesheet  ←

←

\* Required Field

- 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.

Case #: 35717 Title: YOUSSEF YOUSSEF [740] (Spring 2016)

[Previous Step](#) [Next Step](#)

### Termination of Appointment

**Employee Information**

First Name YOUSSEF  
Last Name YOUSSEF  
Employee ID ██████████  
Title CONTINUING ED TEACHER HRLY [04625]  
Department ACE [740]

**Semester and Dates**

Semester Spring 2016  
\* Last Day Worked 07/07/2016  ←

Please enter below the courses and the number of hours the employee taught for each course from **employee's start date** to 07/07/2016.

**Salary**

\* Salary Rate \$ 33.18  
\* Non-Teaching Hours  [Check employee other PAFs](#) ←  
Total Salary/Semester \$ 0.00

**ePAF Approver**

\* Approver  ▼ ←

**Comments**

←

\* Required Field

- Click next to submit for approval.

◀ Previous Step

Assign Task

Next Task: Chair/Director's Approval

Employee: SORIANO, FANNY

Continue 

## 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.

Case #: 35717 Title: [] 0

Part-Time Instructional Staff Personnel Action Form

\* Semester / Session

\* Department

Dept. Code

\* Type of Action   
  
  
  
  
  
 

- Select reason for appointment rescission.

Case #: 35717 Title: YOUSSEF YOUSSEF [740] (Spring 2016)

**Part-Time Instructional Staff Personnel Action Form**

\* Semester / Session Spring 2016 ▼

\* Department ACE ▼

Dept. Code 740

\* Type of Action Rescission ▼

\* Reason for Appointment Rescission ▼ 

**Employee Personal Information**

First Name

Middle Initial

Last Name YOUSSEF

Employee ID

SSN

Personal E-mail

\* Address

\* City

\* State

\* Zip Code

Phone

Next

\* Required Field

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

Case #: 35717 Title: YOUSRY YOUSSEF [740] (Spring 2016)

◀ Previous Step ▶ Next Step

### Rescission of Appointment

**Employee Information**

First Name: YOUSRY  
Last Name: YOUSSEF  
Employee ID: ██████████  
Title: CONTINUING ED TEACHER HRLY [04625]  
Department: ACE [740]

**Semester and Dates**

Semester: Spring 2016

\* Effective Beginning Date:   ←

\* Ending Date:   ←

**ePAF Approver**

\* Approver:  ▼ ←

**Comments**

INSUFFICIENCY OF REGISTRATION

Next ←

\* Required Field

- Click next to submit for approval.

◀ Previous Step

### Assign Task

Next Task: Chair/Director's Approval

Employee: SORIANO, FANNY

Continue ←

## Declination

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

Case #: 35717 Title: [] ()

**Part-Time Instructional Staff Personnel Action Form**

\* Semester / Session: Spring 2016

\* Department: ACE

Dept. Code: 740

\* Type of Action: Declination

Initial Appointment  
Reappointment  
Revision  
Resignation  
Declination  
Rescission  
Termination

- Verify all information is correct.

Case #: 35717 Title: YOUSSEF YOUSSEF [740] (Spring 2016)

**Part-Time Instructional Staff Personnel Action Form**

\* Semester / Session: Spring 2016

\* Department: ACE

Dept. Code: 740

\* Type of Action: Declination

**Employee Personal Information**

First Name: YOUSSEF

Middle Initial: [ ]

Last Name: YOUSSEF

Employee ID: [REDACTED]

SSN: [REDACTED]

Personal E-mail: [ ]

\* Address: [REDACTED]

\* City: [REDACTED]

\* State: [REDACTED]

\* Zip Code: [REDACTED]

Phone: [REDACTED]

Next

\* Required Field

- Enter effective beginning date, end date and approver.

Case #: 35717 Title: YOUSSEY YOUSSEF [740] (Spring 2016)

◀ Previous Step ▶ Next Step

**Declination of Appointment**

**Employee Information**

First Name: YOUSSEY  
Last Name: YOUSSEF  
Employee ID: ██████████  
Title: CONTINUING ED TEACHER HRLY [04625]  
Department: ACE [740]

**Semester and Dates**

Semester: Spring 2016

\* Effective Beginning Date   ←

\* Ending Date   ←

**ePAF Approver**

\* Approver  ▼ ←

**Comments**

Next

\* Required Field

### Step 5: Submit for approval

◀ Previous Step

**Assign Task**

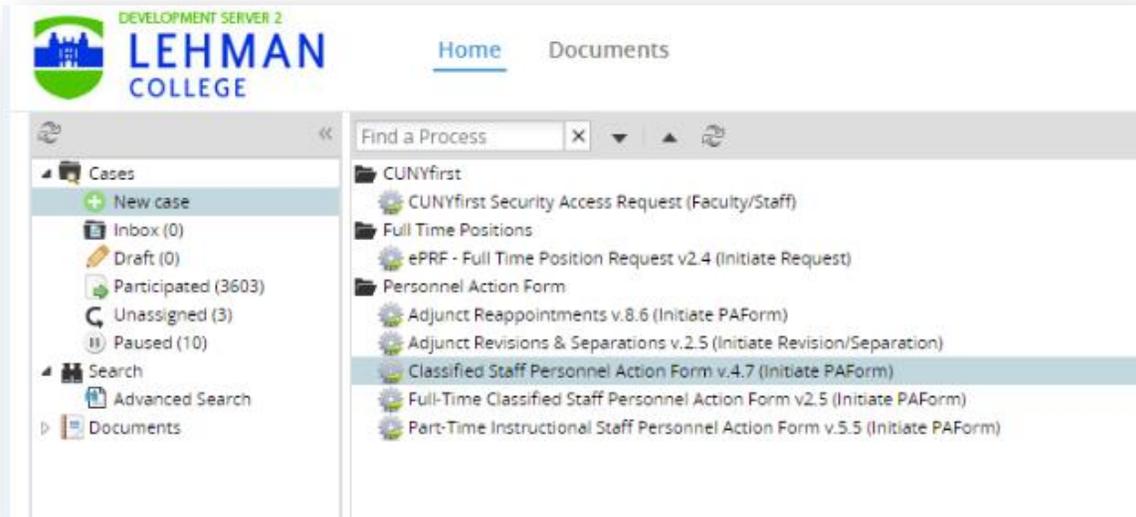
Next Task: Chair/Director's Approval  
Employee: SORIANO, FANNY

Continue ←

## 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

Case #: 35715 Title: [] ()

**Part-Time Instructional Staff Personnel Action Form**

\* Semester / Session: Fall 2015

\* Department: ACE

Dept. Code: 740

\* Type of Action: Reappointment

**CUNY Employee ID**

Do you know the CUNY Employee ID for this person?

Yes

Enter CUNY Employee ID

\* CUNY Employee ID: [ ]

Search

\* Required Field

- Search for employee by CUNYFirst ID:

Case #: 35715 Title: [] ()

**Part-Time Instructional Staff Personnel Action Form**

\* Semester / Session

\* Department

Dept. Code

\* Type of Action

**CUNY Employee ID**

Do you know the CUNY Employee ID for this person?

←

**Enter CUNY Employee ID**

\* CUNY Employee ID:  ←

\* Required Field

OR

- Search for employee by name:

Case #: 35715 Title: [] ()

**Part-Time Instructional Staff Personnel Action Form**

\* Semester / Session

\* Department

Dept. Code

\* Type of Action

**CUNY Employee ID**

Do you know the CUNY Employee ID for this person?

←

**Enter Employee First and Last Name**

\* First Name  ←

\* Last Name  ←

←

\* Required Field

### Step 3: Entering reappointment information

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

Case #: 35715 Title: YOUSSEY YOUSSEF [740] (Fall 2015)

◀ Previous Step Next Step ▶

#### Reappointment

##### Employee Information

First Name: YOUSSEY  
Last Name: YOUSSEF  
Employee ID: ██████████  
Title: CONTINUING ED TEACHER HRLY [04625]  
Department: ACE [740]

##### Semester and Dates

Semester: Fall 2015

\* Effective Beginning Date:   ←

\* Ending Date:   ←

##### Lehman Courses

▶ New

* Course	* Section	* Hours
1	<input type="text"/>	<input type="text"/>

Σ = 0.00

##### Salary

\* Salary Rate \$:  ←

Total Hours:  [Check employee other PAFs](#)

Total Salary/Semester \$:

##### ePAF Approver

\* Approver:  ▼ ←

##### Comments

Next

## Step 4: Concurrent Service

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

Case #: 35714 Title: ALONSO GOROZPE [520] (Fall 2015)

[Previous Step](#) [Next Step](#)

### Concurrent CUNY Service for ALONSO GOROZPE

Full Time CUNY Employment

Does employee have a full time job in CUNY?  ←

Hourly CUNY Employment

Does employee have an hourly job in CUNY?

←

\* Required Field

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

Case #: 35714 Title: ALONSO GOROZPE [520] (Fall 2015)

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### Concurrent CUNY Service for ALONSO GOROZPE

Full Time CUNY Employment

Does employee have a full time job in CUNY?  ←

\* Where?  ←

\* Title  ←

\* Department  ←

Hourly CUNY Employment

Does employee have an hourly job in CUNY?

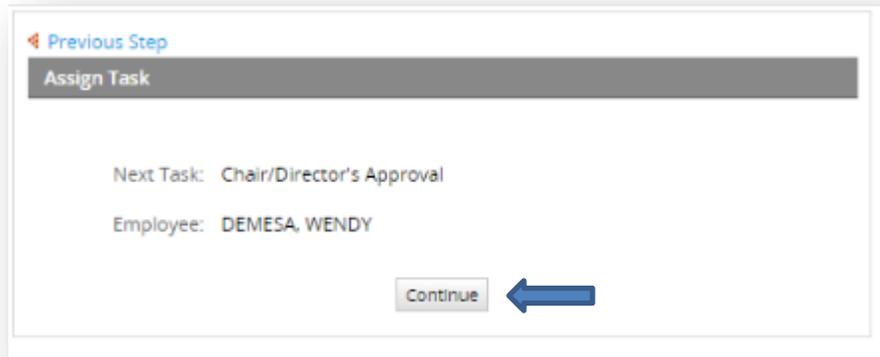
\* List all other courses being taught or non-teaching hours assigned to this employee within CUNY

[New](#)

College	Department	Title	Course & Section	Hours	
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/> ←

Σ = 0

## 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.