

# ePRF User Guide

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# Introduction

# User guide for the Electronic Position Request Form (ePRF) System

This document has been designed to assist Lehman Administration Staff with the ePRF system to request a new position or to revise a current position.

The system requires a multi-step electronic approval process by user roles – Initiator, Director/Chairperson, VP/Dean's Approval (if Academic Department then it will go to the Provost), Human Resources, Budget, VP, President and then to Human Resources.

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 ePRF 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.

# **New ePRF**

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

# Step 1: Getting to the ePRF

To begin creating the ePRF double-click "New case" from the menu on the left, then double-click "ePRF- Full Time Position Request v2.60 (Initiate Request).



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

# **Step 2: Selecting the Action Type**

• Select the "Action Type" from the drop-down.

Full Time Posit	tion Request Form (PRF)	
Search will beg fully signed Fu	gin <u>ONLY</u> after department/division receives an e-mail with an attached Il-Time Position Request Form.	
	* Action Type New PRF Revised PRF * Required Field	

• Click "Next" to continue.



# Step 3: Completing an ePRF- Overview

		Next Step	
Ν	lew PRF		
Full Time Position Request Form (PRF)			
Search will begin <u>ONLY</u> after department/ fully signed Full-Time Position Request Fo	'division receives an e-mail with an rm.	attached	
* Hiring Department		•	
* Request Type		•	
* Requested Salary / Range \$			
* Proposed Payroll Title		•	
* Proposed Functional Title			Fill in all required
* Funding Source			_ Information marked
* Proposed Appointment Date			with an asterisk *
* Do you intend to appoint a substitute/temporary/acting employee while the search is being conducted?			
* Current Employee Name			
* Current Employee Payroll Title		•	
* Current Employee Functional Title			
Supporting Documents			
Attach a memo of justification, current and descriptions	d proposed organizational charts ar	id job	
Justification	Choose File No file chosen		Upload the following in
	(justification)		PDF format:
Organizational Chart	Choose File No file chosen		(1) Justification
	(organizational chart)		(2) Org. Chart
Job Description	Choose File No file chosen		(3) Job Description
Comments	A		· · · ·
		*	
		-	
	Next		
* Req	uired Field		

#### **New Position**

Case #: 3	5757 Title: []			
	▶ Ne	xt Step		
Ν	lew PRF			
Full Time Position Request Form (PRF)				
Search will begin <u>ONLY</u> after department/ fully signed Full-Time Position Request Fo	division receives an e-mail with an attach rm.	ed		
* Hiring Department	HUMAN RESOURCES	•		
* Request Type	NEW POSITION	•		
* Requested Salary / Range \$				Fill in all
* Proposed Payroll Title		•		information
* Proposed Functional Title		-		marked with
* Funding Source		•		
* Proposed Appointment Date				
×				
* Do you intend to appoint a substitute/temporary/acting employee while the search is being conducted?		•		
Supporting Documents				
ttach a memo of justification, an organiza	tional chart, and a job description			
* Justification	Choose File No file chosen	* -	]	Lipload the following
	(justification)			PDF format
* Organizational Chart	Choose File No file chosen	1	-	(1) Justification
	(organizational chart)	- 8		(2) Org. Chart
* Job Description	Chasse File No file chasses	<b>*</b>		(3) Job Descript
	(job description)			
Comments	• • •	-		
		Ţ		
[	Navt			
* Req	uired Field			

-

#### **Promotion**

		Next Step		
N	ew PRF			
Full Time Position Request Form (PRF)				
Search will begin <u>ONLY</u> after department/ fully signed Full-Time Position Request Fo	division receives an e-mail with an at ˈm.	tached		
* Hiring Department	HUMAN RESOURCES	•		
* Request Type	PROMOTION	T		
* Is this a civil service promotion from civil service list?		T		
* Requested Salary / Range \$				
* Proposed Payroll Title		•	Fill in all required	
* Proposed Functional Title			information	
* Funding Source		•	marked with an	
* Proposed Appointment Date			asterisk	
* Do you intend to appoint a substitute/temporary/acting employee while the search is being conducted?		•		
* Current Employee Name				
* Current Employee Payroll Title		T		
* Current Employee Functional Title				
Supporting Documents				
Optional] Attach a memo of justification, a	n organizational chart, and a job des	cription	_	
Justification	Choose File No file chosen			
	(Justification)		Upload the following	in
Organizational Chart	Choose File No file chosen	1	PDF format:	
	(organizational chart)		(1) Justification	
Job Description	Choose File No file chosen		(3) Job Descriptio	n
	(Job description)			_
Comments				
		A		
		-		
	Next			

This action is used to promote someone into another position.

#### Reclassification

This action is used to reclassify a position from one type to another.

Case #: 3	5757 Title: []	_		
	В	Next Step		
N	ew PRF			
Full Time Position Request Form (PRF)				
Search will begin <u>ONLY</u> after department/ fully signed Full-Time Position Request Fo	division receives an e-mail with an att rm.	ached		
* Hiring Department	HUMAN RESOURCES	۲		
* Request Type	RECLASSIFICATION	•		
* Requested Salary / Range \$				
* Proposed Payroll Title		۲		
* Proposed Functional Title				
* Funding Source		۲		Fill in all required
* Proposed Appointment Date				information
×				marked with an
* Do you intend to appoint a substitute/temporary/acting employee while the search is being conducted?		Ŧ		asterisk *
* Current Employee Name				
* Current Employee Payroll Title		•		
* Current Employee Functional Title				
Supporting Documents				
Attach a memo of justification, current and descriptions	l proposed organizational charts and j	ob		
Justification	Choose File No file chosen	1		
	(Justification)		U	pload the following in
Organizational Chart	Choose File No file chosen	1	P	<b>DF</b> format:
	(organizational chart)			(1) Justification
		-		(2) Org. Chart
Job Description	(ob description)	-		(3) Job Description
e	(Job description)	_		
Comments				
		*		
		<b>T</b>		
	Next			
* Req	uired Field			

# Reorganization

This action is used where there is a change in the organizational structure.

Case #: 3	35757 Title: []			
		Next Step		
1	New PRF			
Time Position Request Form (PRF)				
rch will begin <u>ONLY</u> after department y signed Full-Time Position Request Fo	/division receives an e-mail with an vrm.	attached		
* Hiring Department	HUMAN RESOURCES	•		
* Request Type	REORGANIZATION	•		
* Requested Salary / Range \$				
* Proposed Payroll Title		•		
* Proposed Functional Title				Fill in a
* Funding Source		•		informa
* Proposed Appointment Date				marked asteris
* Do you intend to appoint a substitute/temporary/acting employee while the search is being conducted?				
* Current Employee Name				
* Current Employee Payroll Title		•		
* Current Employee Functional Title				
porting Documents				
h a memo of justification, current an iptions	d proposed organizational charts a	nd job		
Justification	(Justification)			pload the
Organizational Chart	(organizational chart)	<u> </u>	-  P[	<b>DF</b> forma (1) Jus (2) Or
Job Description	(Job description)			(3) Job
nments				
		* *		
	Next			
* Rec	quired Field			

# Replacement

This action is used to replace a position with a new person if someone has vacated the position.

Case #: 3!	5757 Title: []			
	3	Next Step		
N	ew PRF			
Full Time Position Request Form (PRF)				
Search will begin <u>ONLY</u> after department/ fully signed Full-Time Position Request For	division receives an e-mail with an att m.	ached		
* Hiring Department	HUMAN RESOURCES	•		
* Request Type	REPLACEMENT	•		
* Requested Salary / Range \$				
* Proposed Payroll Title		•		
* Proposed Functional Title				
* Funding Source		•	г	
* Proposed Appointment Date				Fill in all required
* Do you intend to appoint substitute/temporary/acting employee while the search is being conducted?		•		marked with an asterisk *
* Current Employee Name			l	
* Current Employee Payroll Title		•		
* Current Employee Functional Title				
* Current Employee Last day of work				
×				
Supporting Documents	n ergenizational chart and a job days	viction		
loptional Attach a memo or justification, a	ri organizacional chart, and a job desc			
Justiliation	(Justification)			
Organizational Chart	Choose File No file chosen (organizational chart)			
Job Description	Choose File No file chosen	*		
· ·	(Job description)	- 1		
Comments				
		-		
	Next			
* Req	uired Field			

# **Revised ePRF**

To begin revising the ePRF double-click "New case" from the menu on the left, then double-click "ePRF- Full Time Position Request v2.60 (Initiate Request).



# **Step 2: Selecting the Action Type**

• Select the "Action Type" from the drop-down.



Click "Next" to continue.

# Step 3: Completing a revised ePRF- Overview

		•	Next Step	
N	ew PRF			
II Time Position Request Form (PRF)	division reseive	s ap o mail with ap att	shed	
ly signed Full-Time Position Request Fo	rm.	s an e-man with an att	actieu	
* Hiring Department			•	
* Request Type			•	
* Requested Salary / Range \$				
* Proposed Payroll Title			_	
* Despected Suppliered Title				Fill in all required
<ul> <li>Proposed Functional Title</li> </ul>				information marked
* Funding Source			•	
* Proposed Appointment Date				
* Do vou intend to appoint a				
substitute/temporary/acting employee while the search is being conducted?			•	
* Current Employee Name				
* Current Employee Payroll Title			•	
* Current Employee Functional Title				
pporting Documents				
ach a memo of justification, current and criptions	l proposed orga	nizational charts and j	ob	
Justification	Choose File	No file chosen	ר 👻	Lipload the following in
	(Justification)			PDF format:
Organizational Chart	Choose File	No file chosen	1	(1) Justification
	(organizational c	hart)		(2) Org. Chart
Job Description	Choose File	No file chosen		(3) Job Description
	(Job description)			
mments				
			A	
			-	
	Next			
* Rea	uired Field			
			-	

# **Revising a New Position**

		Next Step	
Rev	ised PRF		
Ill Time Position Request Form (PRF)			
earch will begin <u>ONLY</u> after department/ Illy signed Full-Time Position Request For	division receives an e-mail with an m.	attached	
* Hiring Department	REGISTRAR	•	
* Request Type	NEW POSITION	•	
* Requested Salary / Range \$	35,576-41,623		
* Proposed Payroll Title	ASSISTANT TO HEO	•	Fill in all required information marked
* Proposed Functional Title	COORDINATOR OF GRADUATE LEV	LAUDITS.	with an asterisk *
* Funding Source	TAX LEVY	•	
* Proposed Appointment Date	01/26/2016		
* Do you intend to appoint a substitute/temporary/acting employee while the search is being conducted?	NO		
pporting Documents			
ach a memo of justification, an organiza	tional chart, and a job description		
* Justification	(Justification)		Upload the following in <b>PDF</b> format:
* Organizational Chart	Choose File No file chosen (organizational chart)		<ul> <li>(1) Justification</li> <li>(2) Org. Chart</li> <li>(2) Just Description</li> </ul>
* Job Description	(Job description)	<u> </u>	(3) Job Description
mments			
		*	
	Next		
* Req	uired Field		

abb

# **Revising a Reclassification**

Case #: 3	5759 Hoe. []	
	Next Step	
Rev	nsed PRF	
ni nine Posicion Request Porni (PRP)		
ly signed Full-Time Position Request Fo	m.	
* Hiring Department	TIONTOTIC ADMINISTRATION T	
* Request Type	RECLASSIFICATION	
* Requested Salary / Range \$	98.431 - 102.253	
* Proposed Payroll Title	HE OFFICER	
Proposed Functional Title		Fill in all required
* Funding Source	TAX LEVY	with an asterisk *
* Proposed Appointment Date	01/01/2016	
~		
* Do you intend to appoint a substitute/temporary/acting employee while the search is being conducted?	NO	
* Current Employee Name	NESTOR MONTICO	
* Current Employee Payroll Title	HE ASSOCIATE	
Current Employee Functional Title		
pporting Documents		
ch a memo of justification, current and criptions	proposed organizational charts and job	
Justification	Choose File No file chosen	۲
	(justification)	Upload the following in
		PDF format:
Urganizational Chart	Choose File No file chosen	(1) Justification
	(organizational chart)	(2) Org. Chart
Job Description	Choose File No file chosen	(3) Job Description
	(Job description)	
mments		
initial as a second sec		
	*	
	÷	
	Next	
* Reg	uired Field	

• Click "Next" to submit for approval.

# **Revising a Replacement**

			2.4 125	
1.200			Next Step	
Re	nsed PRF			
III TIME Position Request Form (PRF)			and the set	
ly signed Full-Time Position Request Fo	rm.	rs an e-mail with an	attacheo	
* Hiring Department	PUBLIC SAFE	TY & SEC.	۲	
* Request Type	REPLACEMEN	UT.	•	
* Requested Salary / Range \$	40,720			
* Proposed Payroll Title	CAMPUS PEA	CE OFFICER -1	٠	
* Proposed Functional Title	CAMPUS PEAC	E OFFICER		Г
* Funding Source	TAX LEVY		٠	Fill in all required
* Proposed Appointment Date	01/29/2016			information marked
×				WITH dif asterisk
* Do you intend to appoint a substitute/temporary/acting employee while the search is being conducted?	NO		۲	
* Current Employee Name		-		
* Current Employee Payroll Title	CAMPUS PEA	CE OFFICER -1	٠	
* Current Employee Functional Title	CAMPUS PEAC	E OFFICER		
* Current Employee Last day of work	12/12/2015			
×	8			
pporting Documents				
cional Attach a memo or justification, a	in organization	ai charc, and a job d	escription	
Justinearon	Choose File	No file chosen		
	Quantitation	_		
Organizational Chart	Choose File	No file chosen	-	
	(organizational c	(hart)		
Job Description	Choose File	No file chosen	1	

• Click "Next" to submit for approval.

**Please note:** The revision process is not represented in this guide for the Promotions and Reorganizations because those processes have not yet occurred in the ePRF system. This manual will be updated when we have information to share.

This concludes the ePRF guide. For additional questions or concerns, please reach out to the Office of Human Resources at 718-960-8181. Thank you.