ePAF User Guide
Hourly Classified Titles:

College Assistants
Student Aides
IT Hourly
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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 Electronic Personnel Action Form (ePAF) system for the following processes:

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

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 an ePAF for a classified hourly position 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 “Classified Staff Personnel Action Form V.4.7 (Initiate PAForm).

Please note that moving forward each ePAF will be identified by a “Case #”. The only time the Initiator (Department Secretary or Administrator) 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

- Immediately on the next screen, a message will pop up about new hire paperwork. Click “ok” to proceed.
- Under the “Classified Staff Personnel Action Form” section, select the appropriate Department.
- Select type of action as “Initial Appointment”.
- Select Employee Job Title.
- Under “Employee Personal Information” section, fill out all the employee’s information, then click “submit”.
- This process will be the same for new College Assistants, Student Aides and IT Hourly positions.
- Screenshot for this step is below.
Step 3: Verifying new hire paperwork was completed

- After clicking “Submit” in step 2, you will get a pop-up message asking for verification of new hire paperwork.
• If all paperwork and information has been submitted by the new employee, click “Verify” to proceed.

**Step 4: Entering employment data**

• This is where you will enter the employment information under the “Hourly Appointment” section.

- Enter the “Effective Start Date”. **This date must match the I-9 completion date as well as the first day of work on the employee’s timesheet.**
- Enter the salary rate.
• Enter the amount of work hours the employee is being hired for. **Please note: if work hours total more than 500 hours, the system automatically adds Annual Leave and Sick Leave hours.**
• If the employee will work more than 1 hour between the hours of 6:00 P.M. and 8:00 A.M. **shift differential hours are required.**
• Include comments as needed; then click “Next”.

**Step 5: Submitting for approval**

• The ePAF has now been created and has been sent to the next level approver.
• Click Continue.

**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 “Classified Staff Personnel Action Form V.4.7 (Initiate PAForm).”
Step 2: Selecting type of action

- You will need to locate the ePAF that you would like to revise by typing in the case # or searching the system by employee name.
- Select the department, and then select “Revision” as the type of action.

Step 3: Reason for revision

- Select the reason for the appointment revision.

  - Initial Appointments are for new hires.
  - Reappointment is to be used when someone has been terminated and is coming back, or at the beginning of the new fiscal year.
  - Revision: add; reduce hours, change salary, change start date, etc.
  - Resignation: employee voluntarily leaves
  - Termination: employee has been terminated/ not reappointed.
  - Rescission: employee never worked.
Step 4: Selecting/Searching for employee

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

- If you don’t know the CUNYFirst ID, then search by last name:
Revising to add hours

- You will need to enter the **total** amount of hours that the employee needs to have (including the additional amount).
- Enter Shift Differential amount, if required by work schedule.
- The salary can also be changed on this screen but it requested that another revision ePAF be used for that.

![Image of ePAF screen showing Employee Information and Hourly Appointment]

- Click next to send the revised ePAF to the next level approver.

Revising to reduce hours

- Select “Reduce Hours” as the revision reason.
- Select “Yes/No” if employee’s latest timesheet has been submitted.
- Select the pay period ending date of the most recent timesheet that has been submitted.
- The salary can also be changed on this screen but it requested that another revision ePAF be used for that.

- Click “Next” to move forward.
- On the next page (see below) you will enter the reduction in hours.
- You will need to enter the total amount of hours that the employee needs to have.
- Enter any Shift Differential, if required by employee’s work schedule.
- Enter any desired comments.
- Click next to send to next approver.

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**Revising to increase salary**

- Select “Increase Salary Rate” as the revision option.
- Select “Yes/No” if employee’s latest timesheet has been submitted.
• Select the pay period ending date of the **most recent timesheet that has been submitted.**

• Click “Next” to move forward.
• On the next page (see below) you will enter the salary changes.
• Select the Effective Start Date.
• Enter current salary rate.
• Enter the effective date of the **new salary.**
• Enter new salary rate.
• Enter any desired comments.
• Click next to send to next approver.
Revising to modify start date

- Select “Modify Start and/or End Dates” as the revision option.
- Select “Yes/No” if employee’s latest timesheet has been submitted.
- Select the pay period ending date of the most recent timesheet that has been submitted.
• Click “Next” to move forward.
• On the next page (see below) you will enter the new start date. **Please note that an end date cannot be changed; a termination ePAF will be needed when the employee stops working.**
• Select the correct effective start date.
• Verify that the work hours and shift hours are correct.
- Enter any desired comments.
- Click next to send to next approver.
Terminations/Separations

Step 1: Getting to the right ePAF

To begin terminating the ePAF double-click “New case” from the menu on the left, then double-click “Classified Staff Personnel Action Form V.4.7 (Initiate PAForm).

Step 2: Selecting the right action

Resignation
- This action is used when an employee voluntarily resigned from his/her position.
- Enter last day work and upload resignation letter if available.

- Submit for approval.
**Termination**

- This action is used when an employee involuntarily leaves his/her position or the appointment has come to an end and no reappointment will be made.
- Select Termination as the type of action:

![Image of action form]

- Select last day worked:

![Image of calendar form]
Submit for approval

Rescission

- This action is used when an employee will not be working after initially accepting appointment.
- Select Rescission as the type of action.
- Select the effective start date of the ePAF you would like to rescind.

- 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 “Classified Staff Personnel Action Form V.4.7 (Initiate PAForm).

Step 2: Selecting the type of action and searching for employee
• Search for employee by CUNYFirst ID:

![Image of Classified Staff Personnel Action Form]

OR

• Search for employee by name:

![Image of Classified Staff Personnel Action Form]

* Department: HUMAN RESOURCES
* Dept. Code: 305
* 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

Enter Employee First and Last Name
* First Name
* Last Name
  ▼ Search
  ▼ Required Field
Step 3: Verify all information is correct:

![Image of step 3: Classified Staff Personnel Action Form]

- Department: HUMAN RESOURCES
- Dept. Code: 305
- Type of Action: Reappointment

![Image of step 3: CUNY Employee ID]

- Do you know the CUNY Employee ID for this person? Yes
- Enter CUNY Employee ID: 00000000

![Image of step 3: Employee Personal Information]

- First Name: TEST
- Last Name: TEST
- Employee ID: 00000000
- SSN: XXX-XX-0000
- Personal Email:
- Lehman Email: lehmanemail@ny.edu
- Address: [Address Information]
- City: [City Information]
- State: [State Information]
- Zip Code: [Zip Code Information]
- Phone: [Phone Information]
Step 4: Entering Reappointment information

- Enter the new effective start date, rate of pay, works hours and shift differential.
Step 5: Submitting for approval

This completes the user guide.

For questions and comments, please reach out to the office of Human Resources at 718-960-8181.