ePAF User Guide

Teaching Adjuncts
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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 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 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 “Adjunct Reappointments v.8.6 (Initiate PAF).”

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

- Under the “Part-Time Instructional Staff Personnel Action Form” section, select the appropriate semester and 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”.
- Screenshot for this step is below.
Step 3: Verifying all employee information is correct

- Ensure that all of the employee’s information is accurate.
- Click “Submit” to move forward.

Select semester, Department, Initial Appointment and Employee Job Title

All fields with * must be completed.
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.
- On the next page you will enter the employment information.
- Important: an I-9 must be on file in Human Resources no later than the first day of employment. Failure to have an I-9 is a violation of Federal Laws. Departments must send employees to HR to complete an I-9; it cannot be done at the Department. An I-9 should be done as far in advance of the start date as possible.

Step 5: Entering employment data

- Enter the “Course”, “Section”, and “Hours”. If more than one course needs to be entered, click “New” and the top of the “Lehman Courses” section.
- Enter the “Professional Hours” (if any). Note: if an employee is teaching at least 90 hours, then 15 professional are required by one of the employment departments.
- Screenshot for this step is below.
• Enter the “P & B Approval Date” (if known).
• Click “Next” to move forward.

**Step 6: Workload**

• This is where you will upload the workload that the adjunct received.
Choose the correct workload from your computer by clicking “Choose File”. Click “Upload” to retrieve the document.

**Step 7: Concurrent Service**

- Verify if the employee has another appointment within CUNY.
- If not, select “No” for both questions and then click “Next” to move forward.
- If there is another appointment, then select “Yes”.
- Enter the information as requested.
- Click “Next” to move forward.
Step 8: 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 “Adjunct Revisions & Separations” (Initiate PAForm).

Step 2: Selecting type of action

- You will need to enter the Case # for the ePAF that you would like to revise.
- All current information about the ePAF will be displayed.
- Select the type of action and enter reason for the revision in the “Comments” box.
After clicking “Submit”, you will be brought to a second screen to verify the adjunct’s information.

Double check that you are working on the correct adjunct.
Step 4: Entering the changes

- Under the “Lehman Courses” section, you can adjust the hours, add, or remove any courses.
- You can also add or remove the “Professional Hours”.

- Click “Next” to move forward after making revisions.
- You will then be brought to the Workload screen to upload a revised workload.

Step 5: 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:

![Image of the ePAF form](image)

**Step 6: Submitting for approval**

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

![Image of the ePAF form](image)
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 “Adjunct Revisions & Separations” (Initiate PAForm).

Step 2: Selecting the right action

- Search for the ePAF by typing in the case number then click “Search”.

![Diagram of ePAF process]

![Example of ePAF form with case number input and options to select type of action and comments]

*Required Field
Resignation

- This action is used when an employee voluntarily leaves his/her position.
- Select “Resignation” as the type of action.
- Enter comments for the resignation. Click “Submit” to move forward.

- Enter all information requested; upload a resignation letter if provided.
• On the next page you will adjust the hours actually taught.

• Correct the hours the adjunct taught (if any) for the courses.
• Remove the 15 professional hours from the ePAF (if needed).
• Click “Next” to move forward and submit for approval.
Declination

- This action is used when an employee has declined the appointment.
- Select “Declination” as the type of action.
- Enter comments about the declination.

Submit for approval

Rescission

- This action is used when an employee was hired but did not work at all, or will not work at all.
• 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.
• Double-click “Part-Time Instructional Staff Personnel Form” (Initiate PAForm).
Step 2: Selecting the type of action and searching for employee

- Select the Semester, Department and Type of Action.

- Search for employee by CUNYFirst ID:
OR

- Search for employee by name:

![Image of employee search form](image)

**Step 3: Entering reappointment information**

- Enter the Effective beginning and end semester dates per the academic calendar, the rate of pay then select an approver.

![Image of reappointment form](image)
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 user guide. For additional questions/comments, please contact the Office of Human Resources at 718-960-8181.