



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.

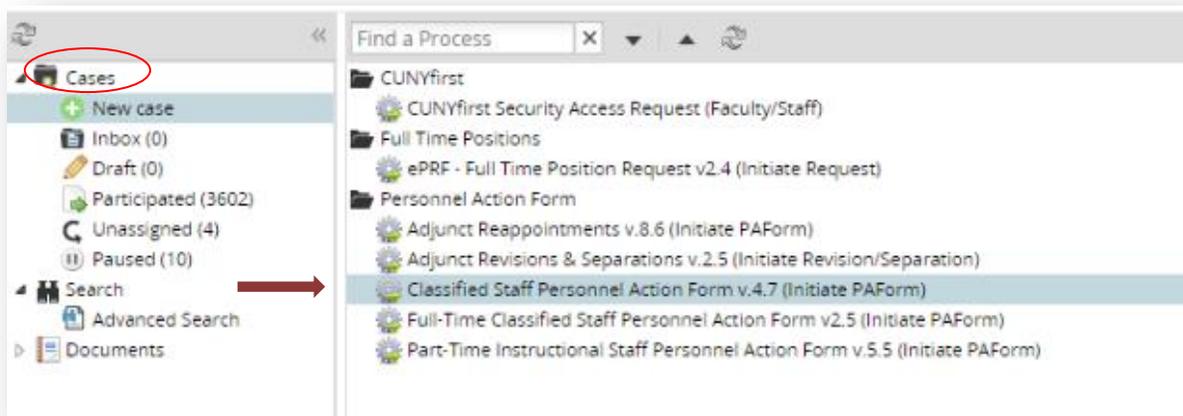
As we utilize this system, it is important that we continue to follow the Lehman College/CUNY policies and procedures. This will ensure that appointments are processed faster, take proactive control over expenses, and ultimately more employees being paid on-time.

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.

Information ▾ Actions ▾ Case Notes

Case #: 35706

Case #: 35706 Title: {} ()

Classified Staff Personnel Action Form

- * Department: HUMAN RESOURCES
- Dept. Code: 305
- * Type of Action: Initial Appointment
- * Employee Job Title: Please Select

Employee Personal Information

- * First Name:
- * Last Name:
- * SSN:
- Personal E-mail:
- * Address:
- * City:
- * State:
- * Zip Code:
- Phone:

Submit

* Required Field

forms2.lehman.edu says:

Before you are able to submit an initial appointment PA, the new employee needs to provide all required documents/paperwork to Human Resources. For more information visit www.lehman.edu/human-resources/new-employee-packages.php

Prevent this page from creating additional dialogs.

OK

All fields with * must be completed.

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.

Case #: 35707 Title: {} ()

Classified Staff Personnel Action Form

- * Department: HUMAN RESOURCES

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)

Verify Cancel

- * State: New York
- * Zip Code: 11374
- Phone:

Submit

* Required Field

- 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.

Case #: 35708 Title: KATHERINE FUENTES [305] ()

Previous Step Next Step

Initial Appointment

Employee Information

First Name: KATHERINE
 Last Name: FUENTES
 Title: COLLEGE ASSISTANT [10102]
 Department: HUMAN RESOURCES [305]

Hourly Appointment

* Effective Start Date: Employee's first Select start date in this box.

End Date:

* Salary Rate \$:

1040 Hours Waiver

* Work Hours: Enter the amount of work hours in this

Annual Leave:

Sick Leave:

Total Hours:

Shift Differential \$: = 0.00 hrs. Enter the amount of shift hours in this box.

Total Salary \$:

Comments

Check this box to include this comment as a remark in the ePAF

Next

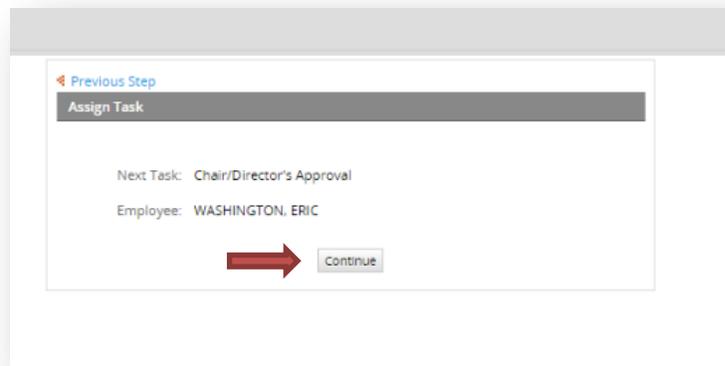
* Required Field

- 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

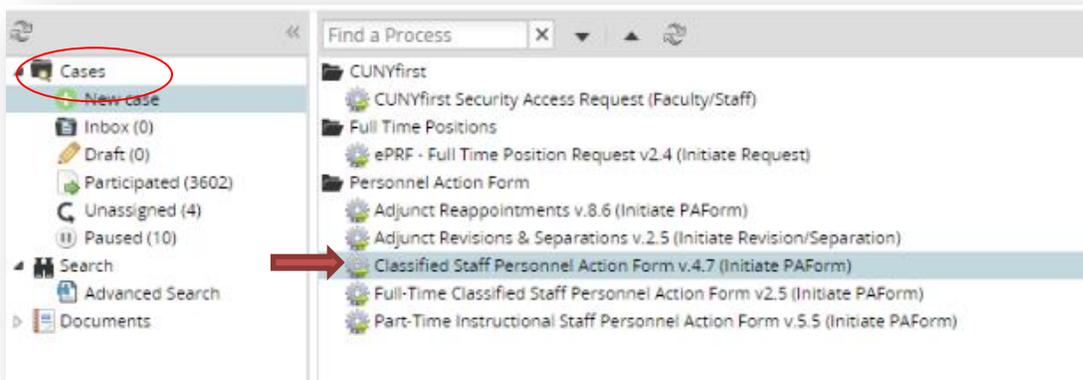
- The ePAF has now been created and has been sent to the next level approver.
- Click Continue.



Revisions

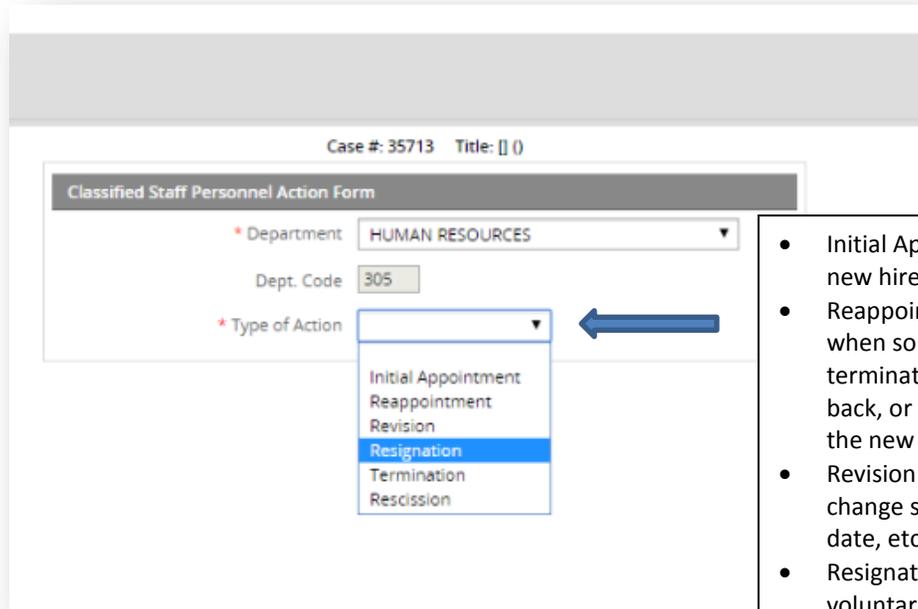
Step 1: Getting to an ePAF that needs revision

- 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.

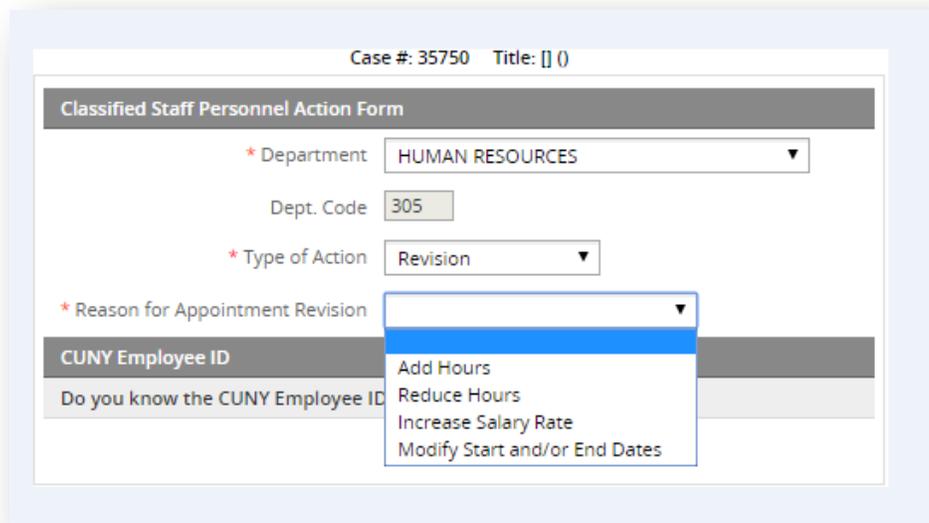


The screenshot shows a web form titled "Classified Staff Personnel Action Form" with the case number "35713" and title "[] ()". The form includes a "Department" dropdown menu set to "HUMAN RESOURCES" and a "Dept. Code" text box containing "305". The "Type of Action" dropdown menu is open, showing options: "Initial Appointment", "Reappointment", "Revision", "Resignation", "Termination", and "Rescission". A blue arrow points to the "Revision" option.

- 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 3: Reason for revision

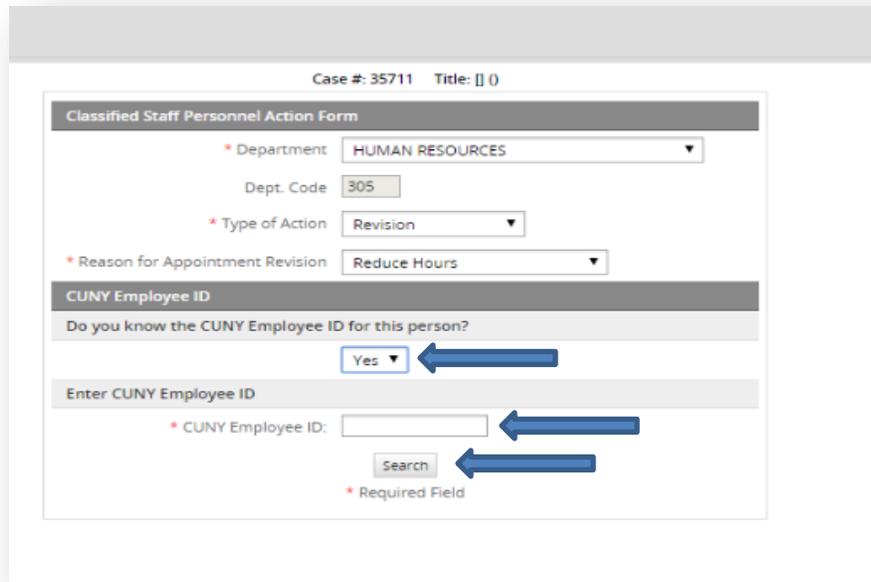
- Select the reason for the appointment revision.



The screenshot shows the same web form as in Step 2, but with the "Type of Action" dropdown menu set to "Revision". The "Reason for Appointment Revision" dropdown menu is open, showing options: "Add Hours", "Reduce Hours", "Increase Salary Rate", and "Modify Start and/or End Dates".

Step 4: Selecting/Searching for employee

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



Case #: 35711 Title: [] ()

Classified Staff Personnel Action Form

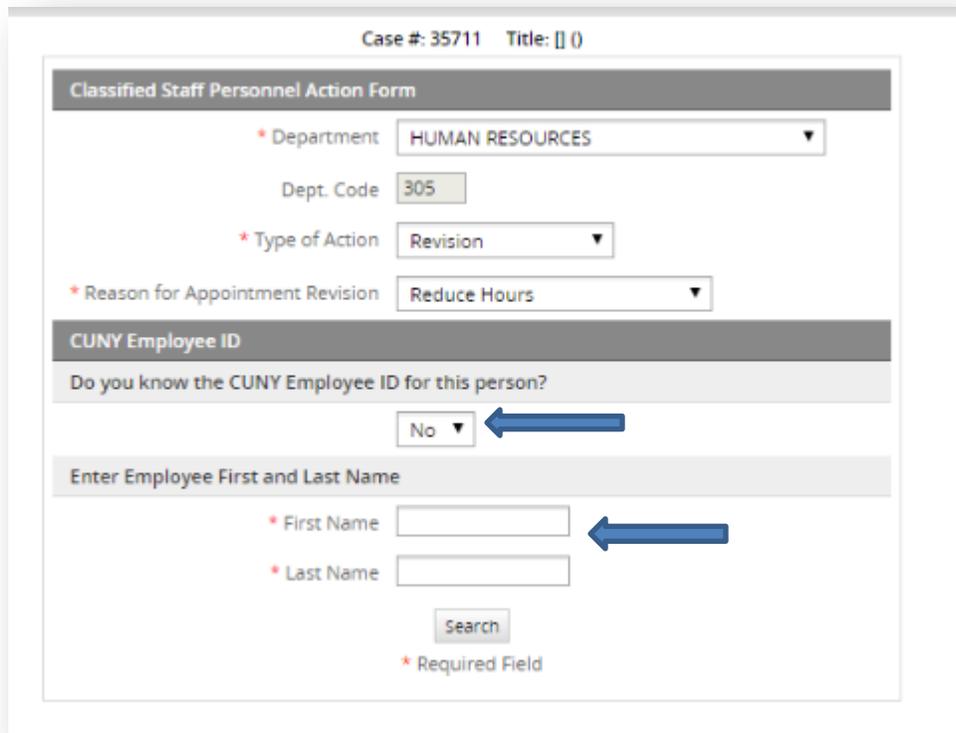
* Department: HUMAN RESOURCES
Dept. Code: 305
* Type of Action: Revision
* Reason for Appointment Revision: Reduce Hours

CUNY Employee ID
Do you know the CUNY Employee ID for this person?
Yes

Enter CUNY Employee ID
* CUNY Employee ID:
Search
* Required Field

Blue arrows point to the 'Yes' dropdown, the CUNY Employee ID text input field, and the 'Search' button.

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



Case #: 35711 Title: [] ()

Classified Staff Personnel Action Form

* Department: HUMAN RESOURCES
Dept. Code: 305
* 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

Blue arrows point to the 'No' dropdown, the First Name text input field, and the Last Name text input field.

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.

Case #: 35750 Title: RABYA CHOUDHURY [305] ()

Previous Step Next Step

Revision of Appointment

Employee Information

First Name RABYA
Last Name CHOUDHURY
Employee ID [REDACTED]
Title COLLEGE ASSISTANT [10102]
Department HUMAN RESOURCES [305]

Hourly Appointment

* Effective Start Date 07/01/2016 (Employee's first day of work)
End Date 06/30/2017
* Salary Rate \$ 14
 1040 Hours Waiver
* Work Hours 320
 Overwrite Annual & Sick Leaves Employee has 5 years or more of service
Annual Leave 0
Sick Leave 0
Total Hours 320
Shift Differential \$ 0
Total Salary \$ 4,480.00

Comments

Reason for Revision: ADD HOURS

Check this box to include this comment as a remark in the ePAF

Next

- 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.

Case #: 35750 Title: RABYA CHOUDHURY [305] (FY17)

Classified Staff Personnel Action Form

* Department: HUMAN RESOURCES

Dept. Code: 305

* Type of Action: Revision

* Reason for Appointment Revision: Reduce Hours

Employee Personal Information

* First Name: RABYA

Middle Initial: S

* Last Name: CHOUDHURY

Employee ID: [REDACTED]

* SSN: [REDACTED]

Personal E-mail: [REDACTED]

* Lehman Email: RABYA.CHOUDHURY@baruchmail.cuny.edu

* Address: [REDACTED]

* City: [REDACTED]

* State: New York

* Zip Code: 10012

Phone: [REDACTED]

Employee Timesheet

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

* Select pay period ending date of employee's latest timesheet: [REDACTED]

Next

* Required Field

- 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.

Case #: 35750 Title: RABYA CHOUDHURY [305] (FY17)

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

Revision of Appointment

Employee Information

First Name RABYA
 Last Name CHOUDHURY
 Employee ID ██████████
 Title COLLEGE ASSISTANT [10102]
 Department HUMAN RESOURCES [305]

Hourly Appointment

* Effective Start Date 07/01/2016 (Employee's first day of work)
 End Date 06/30/2017
 * Salary Rate \$ 14
 1040 Hours Waiver
 * Work Hours 320
 Overwrite Annual & Sick Leaves Employee has 5 years or more of service
 Annual Leave 0
 Sick Leave 0
 Total Hours 320
 Shift Differential \$ 0
 Total Salary \$ 4,480.00

Comments

Reason for Revision: REDUCE HOURS

Check this box to include this comment as a remark in the ePAF

* Required Field

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**.

Case #: 35750 Title: RABYA CHOUDHURY [305] (FY17)

Classified Staff Personnel Action Form

* Department

Dept. Code

* Type of Action

* Reason for Appointment Revision ←

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

- 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.

Case #: 35750 Title: RABYA CHOUDHURY [305] (FY17)

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

Revision of Appointment

Employee Information

First Name RABYA
 Last Name CHOUDHURY
 Employee ID [REDACTED]
 Title COLLEGE ASSISTANT [10102]
 Department HUMAN RESOURCES [305]

Hourly Appointment

* Effective Start Date 07/01/2016 (first day of work)
 End Date 06/30/2017
 * Current Salary Rate \$
 * Effective Date of Wage Increase
 * New Salary Rate \$ 14

Comments

Reason for Revision: INCREASE SALARY RATE

Check this box to include this comment as a remark in the ePAF

Next

* Required Field

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.**

Classified Staff Personnel Action Form

* Department

Dept. Code

* Type of Action

* Reason for Appointment Revision

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

- 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.

Case #: 35750 Title: RABYA CHOUDHURY [305] (FY17)

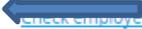
[Previous Step](#) [Next Step](#)

Revision of Appointment

Employee Information

First Name RABYA
Last Name CHOUDHURY
Employee ID [REDACTED]
Title COLLEGE ASSISTANT [10102]
Department HUMAN RESOURCES [305]

Hourly Appointment

* Effective Start Date 07/01/2016   Effective start day of work
End Date 06/30/2017
* Salary Rate \$ 14
 1040 Hours Waiver 
* Work Hours 320  [click employee other PAFs](#)
 Overwrite Annual & Sick Leaves Employee has 5 years or more of service 
Annual Leave 0
Sick Leave 0
Total Hours 320
Shift Differential \$ 0 
Total Salary \$ 4,480.00

Comments

Reason for Revision: MODIFY START AND/OR END DATES

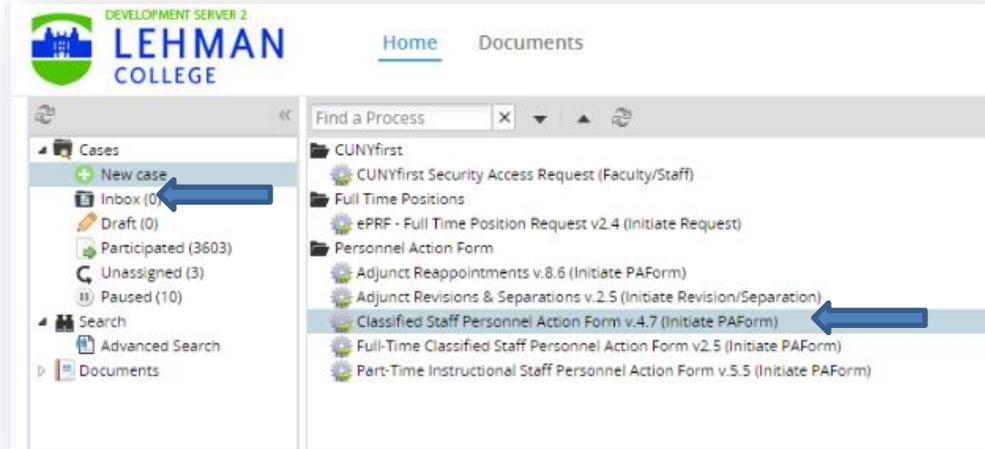
Check this box to include this comment as a remark in the ePAF



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.

Case #: 35713 Title: RABYA CHOUDHURY [305] ()

◀ Previous Step Next Step ▶

Resignation of Appointment

Employee Information

First Name: RABYA
Last Name: CHOUDHURY
Employee ID: [REDACTED]
Title: COLLEGE ASSISTANT [10102]
Department: HUMAN RESOURCES [305]

Hourly Appointment

* Last Day Worked: [REDACTED]

Resignation Letter

If available, please attach employee's resignation letter below

Resignation Letter: Choose File No file chosen

(Supporting Documents)

Comments

- Submit for approval.

◀ Previous Step

Assign Task

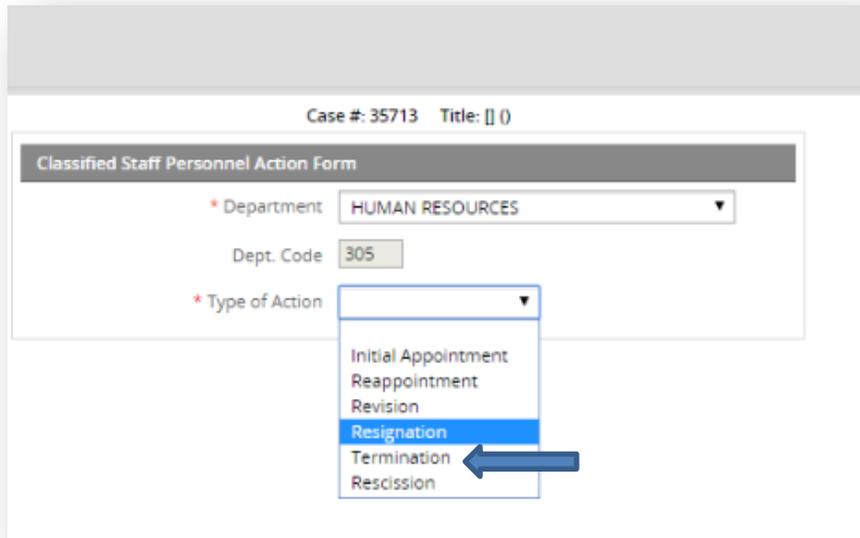
Next Task: Chair/Director's Approval

Employee: WASHINGTON, ERIC

Continue

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:



Case #: 35713 Title: [] ()

Classified Staff Personnel Action Form

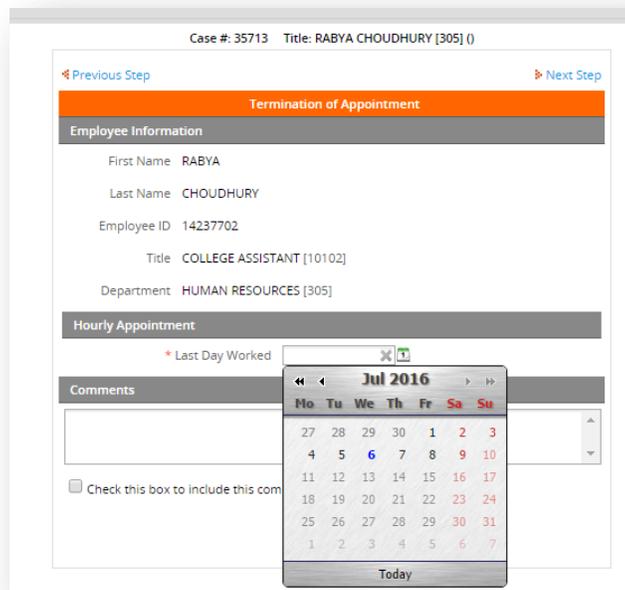
* Department: HUMAN RESOURCES

Dept. Code: 305

* Type of Action:

- Initial Appointment
- Reappointment
- Revision
- Resignation
- Termination**
- Rescission

- Select last day worked:



Case #: 35713 Title: RABYA CHOUDHURY [305] ()

◀ Previous Step ▶ Next Step

Termination of Appointment

Employee Information

First Name: RABYA
Last Name: CHOUDHURY
Employee ID: 14237702
Title: COLLEGE ASSISTANT [10102]
Department: HUMAN RESOURCES [305]

Hourly Appointment

* Last Day Worked

Comments

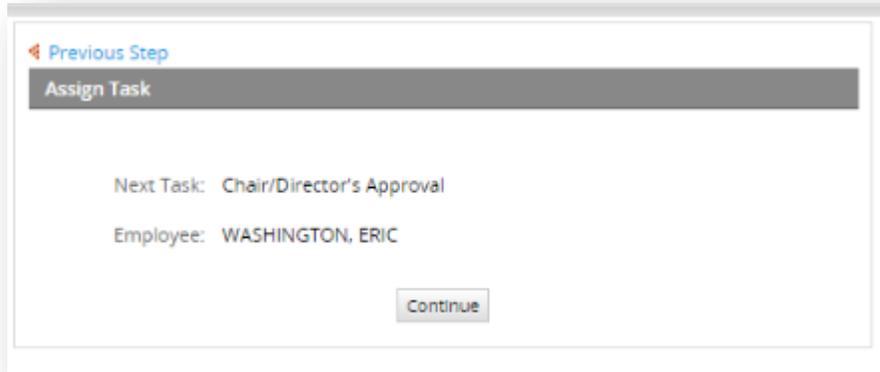
Check this box to include this comment

Calendar: Jul 2016

No	Tu	We	Th	Fr	Sa	Su
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today

- Submit for approval



Previous Step

Assign Task

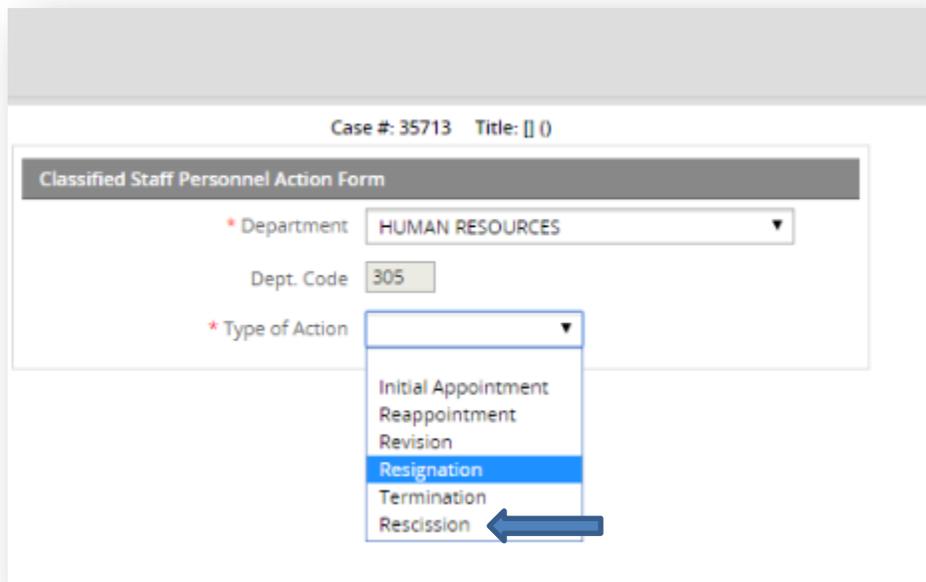
Next Task: Chair/Director's Approval

Employee: WASHINGTON, ERIC

Continue

Rescission

- This action is used when an employee will not be working after initially accepting appointment.
- Select Rescission as the type of action.



Case #: 35713 Title: [] ()

Classified Staff Personnel Action Form

* Department: HUMAN RESOURCES

Dept. Code: 305

* Type of Action:

- Initial Appointment
- Reappointment
- Revision
- Resignation
- Termination
- Rescission

- Select the effective start date of the ePAF you would like to rescind.

Case #: 35713 Title: RABYA CHOUDHURY [305] ()

◀ Previous Step ▶ Next Step

Rescission of Appointment

Employee Information

First Name: RABYA
Last Name: CHOUDHURY
Employee ID: ██████████
Title: COLLEGE ASSISTANT [10102]
Department: HUMAN RESOURCES [305]

Hourly Appointment

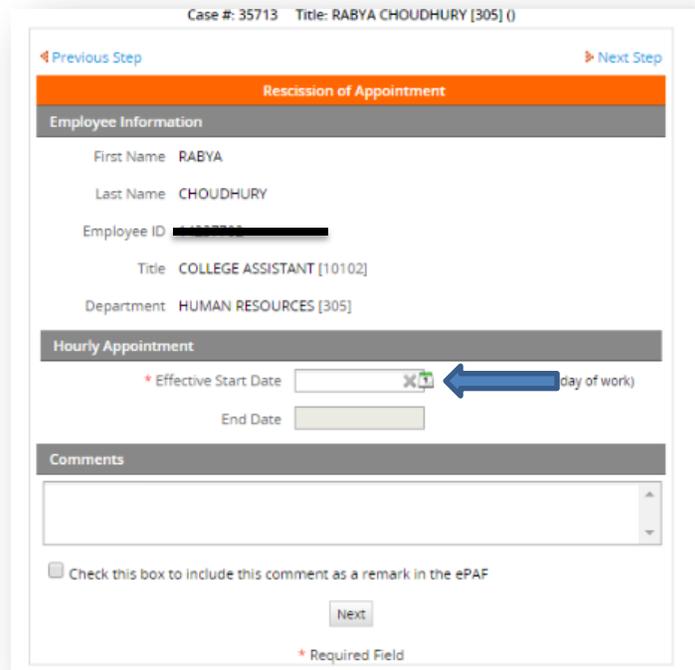
* Effective Start Date: day of work
End Date:

Comments

Check this box to include this comment as a remark in the ePAF

Next

* Required Field



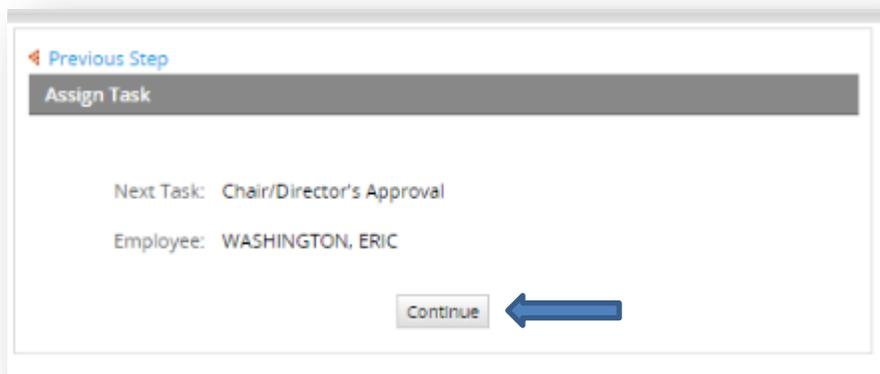
- Submit for approval.

◀ Previous Step

Assign Task

Next Task: Chair/Director's Approval
Employee: WASHINGTON, ERIC

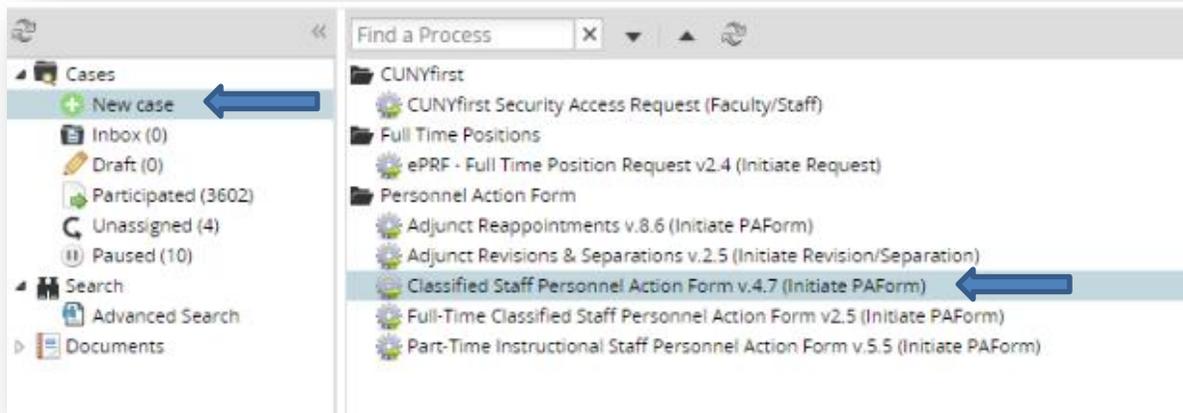
Continue



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



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

Case #: 35703 Title: [] ()

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

- Search for employee by CUNYFirst ID:

Case #: 35703 Title: [] ()

Classified Staff Personnel Action Form

* 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 #: 35703 Title: [] ()

Classified Staff Personnel Action Form

* 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: Verify all information is correct:

Case #: 35704 Title: []

Classified Staff Personnel Action Form

* 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

* 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

* Required Field

Step 4: Entering Reappointment information

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

Case #: 35704 Title: TEST TEST [305] ()

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

Reappointment

Employee Information

First Name TEST
Last Name TEST
Employee ID 00000000
Title COLLEGE ASSISTANT [10102]
Department HUMAN RESOURCES [305]

Hourly Appointment

Hourly Appointment

* Effective Start Date (first day of work)

End Date

* Salary Rate \$

1040 Hours Waiver

* Work Hours (other PAFs)

Overwrite Annual & Sick Leaves Employee has 5 years or more of service

Annual Leave
Sick Leave
Total Hours

Shift Differential \$

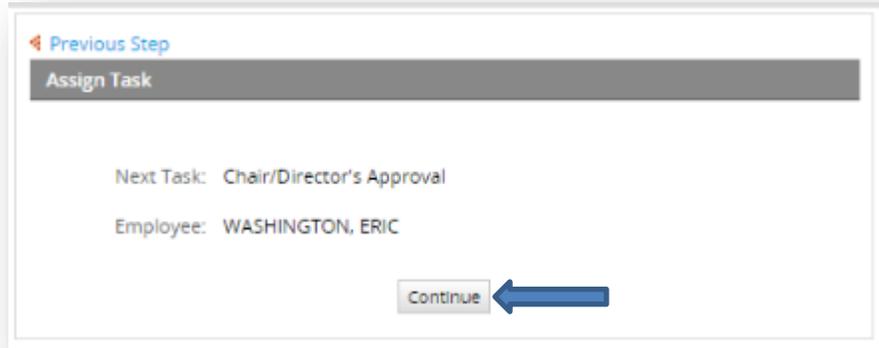
Total Salary \$

Comments

Check this box to include this comment as a remark in the ePAF

* Required Field

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.