



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.

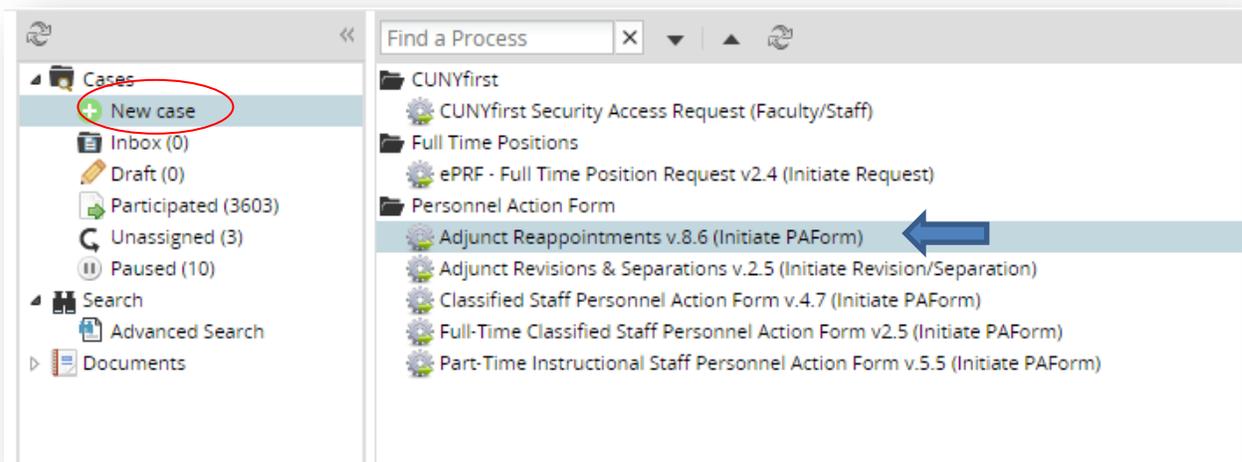
As we utilize this system, it is important that we continue to follow the Lehman College/CUNY policies and procedures. This will ensure that appointments are processed faster, take proactive control over expenses, and ultimately more employees being paid on-time.

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 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

- 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.

Case #: 35714 Title: ()

Part-Time Instructional Staff Personnel Action Form

* Semester / Session: Fall 2015

* Department: ART

Dept. Code: 520

* 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

Select semester, Department, Initial Appointment and Employee Job Title

All fields with * must be completed.

Step 3: Verifying all employee information is correct

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

Case #: 35719 Title: ()

Adjunct Personnel Action Form

* Semester / Session: Spring 2016

* Department: HISTORY

Dept. Code: 680

* Type of Action: Initial Appointment

* Employee Job Title: ADJ LECTURER

Employee Personal Information

Salutation:

* First Name: ANDREA

* Last Name: HENDERSON

* SSN:

* Personal E-mail: email@email.com

* Address: 123 Fake Street

* City: Bronx

* State: Nebraska

* Zip Code: 105468

Phone:

Submit

* Required Field

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.

Part-Time Instructional Staff Personnel Action Form

* Semester / Session: Fall 2015

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

* City: Bronx

* State: Nebraska

* Zip Code: 10548

Phone:

Submit

* Required Field

- 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.

Case #: 35719 Title: ANDREA HENDERSON (Spring 2016)

Previous Step Next Step

Type of Action: Initial Appointment

Department Information

First Name: ANDREA
 Last Name: HENDERSON
 Department: HISTORY [680]
 * Title: ADJ LECTURER
 Title Code: 04294

Lehman Courses

New

* Course	* Section	* Hours	Delete
1		0	

Σ = 0.00

Salary

* Salary Rate \$: Please select
 Professional Hours: 0.00
 Teaching/Non-Teaching Hours: 0.00
 Total Hours: 0.00
 Total Salary/Semester \$: 0.00

Semester and Dates

Semester: Spring 2016
 * Effective Beginning Date: 01/29/2016
 * Ending Date: 05/28/2016
 P & B Approval Date: [X] [U]

Comments

Next

* Required Field

Click "New" to add more courses if needed.

- 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.

Case #: 35719 Title: ANDREA HENDERSON (Spring 2016)

Previous Step

Employee Workload Reporting Form

The workload reporting form has been sent via email to ANDREA HENDERSON . If you want to download a copy of this workload, click the link below.

[Download Workload] [Resend Workload]

Upload Signed Workload

If you have received the workload reporting form signed by ANDREA HENDERSON, please upload it below to proceed to the next step. Note that for uploads only PDF files are accepted.

* Employee Workload: Choose File | No file chosen
 (Employee Workload)

Upload

* Required Field

- Choose the correct workload from your computer by clicking “Choose File”.
- Click “Upload” to retrieve the document.

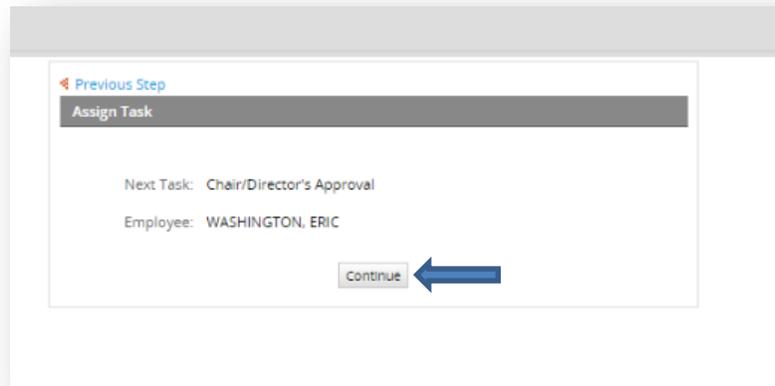
Step 7: Concurrent Service

- 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.

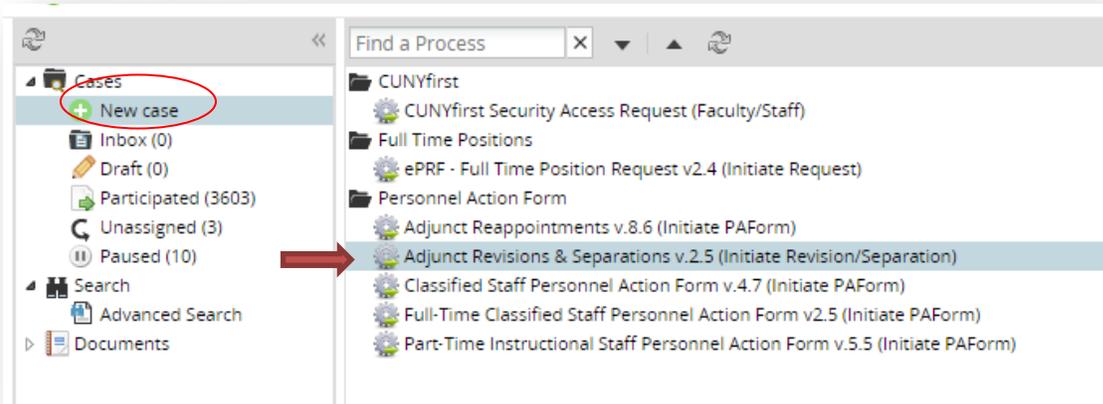
Step 8: Submitting for approval



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.

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”.

First Name **RUSSELL**
Last Name **DALE**
Employee ID **[REDACTED]**
Department **PHILOSOPHY [760]**
* Title **ADJ ASST PROFESSOR**
Title Code **04293**

Lehman Courses [Check other P/Asstns](#)

[New](#)

	* Course	* Section	* Hours	
1	PHI 221	K301	45	Delete
2	PHI 231	01W	45	Delete

Σ = 90.00

Salary

* Salary Rate \$ **76.48**
Professional Hours **15.00**
Teaching/Non-Teaching Hours **90.00**
Total Hours **105.00**
Total Salary/Semester \$ **8,030.40**

Sixth Semester Increase

Sixth Semester Increase? **No**

Semester and Dates

Semester **Spring 2016**
* Effective Beginning Date **01/29/2016**
* Ending Date **05/28/2016**
P & B Approval Date **11/30/2015**

Comments

Jason Gaines wrote: 2016-07-07, 15:43:41
REVISION
NOTE: THIS CASE IS A REVISION OF CASE #32359
Change hours

The 15.00 professional hours are to be used as office hours except as otherwise directed by the department chair.

Next ←

* Required Field

- Click “Next” to move forward after making revisions.

- You will then be brought to the Workload screen to upload a revised workload.

Case #: 35719 Title: ANDREA HENDERSON (Spring 2016)

[Previous Step](#)

Employee Workload Reporting Form

The workload reporting form has been sent via email to ANDREA HENDERSON . If you want to download a copy of this workload, click the link below.

[[Download Workload](#)] [[Resend Workload](#)]

Upload Signed Workload

If you have received the workload reporting form signed by ANDREA HENDERSON, please upload it below to proceed to the next step. Note that for uploads only PDF files are accepted.

* Employee Workload No file chosen 

 (Employee Workload)



* Required Field

Step 5: 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)

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.

Previous Step

Assign Task

Next Task: Chair's Approval

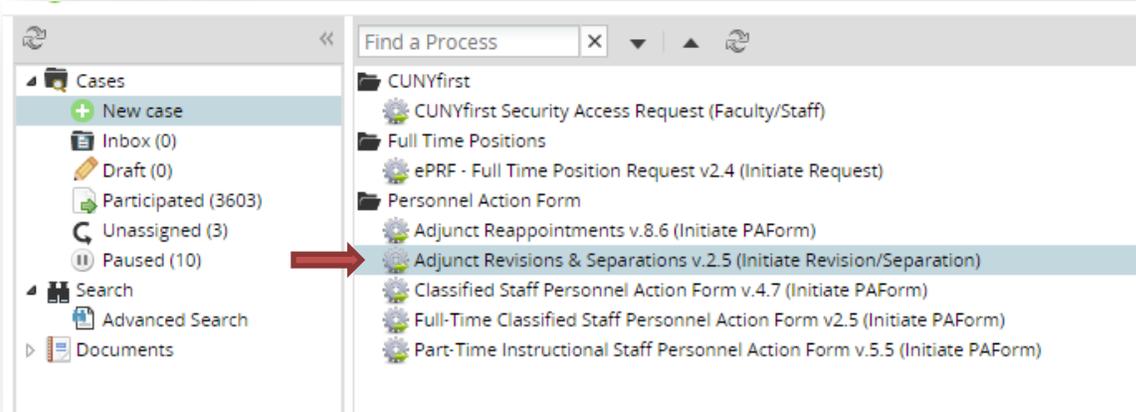
Employee: MAHON, JAMES

Continue

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”.

The screenshot shows a form titled 'Personnel Action Form for Revisions / Separations'. It includes a search field with the case number '32559' and a 'Search' button. Below this is a table for 'Case #32559 Information' with fields for Department (PHILOSOPHY), Semester (Spring 2016), Employee (DALE, RUSSELL), and Employee ID. A table of 'Courses' is also present. The 'Type of Action' dropdown menu is open, showing options: Revision, Rescission, Declination, and Resignation. A 'Submit' button is at the bottom. Blue arrows indicate the search and action selection steps.

Department:	PHILOSOPHY	Semester:	Spring 2016
Employee:	DALE, RUSSELL	Employee ID:	██████████

Courses	Hours
PHI 221-K301	45
PHI 231-01W	45

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.

The screenshot shows a web form with a dropdown menu for 'Type of Action'. The dropdown is open, showing options: Revision, Rescission, Declination, and Resignation. A blue arrow points to the 'Resignation' option. Below the dropdown is a 'Submit' button, also indicated by a blue arrow. A red asterisk and the text '* Required Field' are visible at the bottom of the form.

- Enter all information requested; upload a resignation letter if provided.

The screenshot shows a web form titled 'Personnel Action Form for Revisions / Separations' for Case # 35722, Title: RUSSELL DALE (Spring 2016) [Declination]. The form includes a search bar for Case # 32559, a table for Case #32559 Information, a 'Type of Action' dropdown set to 'Resignation', an 'Adjunct's Last Day Worked' field set to 04/05/2016, a 'Comments' field with the text 'Teach in another college', and a 'Supporting Documents' section with a 'Choose File' button and 'No file chosen' text. A 'Next' button is at the bottom. Blue arrows point to the Case # input, Search button, Type of Action dropdown, Last Day Worked field, Comments field, and Choose File button. A red asterisk and the text '* Required Field' are visible at the bottom.

Department:	PHILOSOPHY	Semester:	Spring 2016
Employee:	DALE, RUSSELL	Employee ID:	██████████
Courses		Hours	
PHI 221-K301		45	
PHI 231-01W		45	

- On the next page you will adjust the hours actually taught.

Case #: 35722 Title: RUSSELL DALE (Spring 2016) [Resignation]

[Previous Step](#)

Resignation of Appointment

Department Information

First Name: RUSSELL
 Last Name: DALE
 Employee ID: [REDACTED]
 Department: PHILOSOPHY
 Title: ADJ ASST PROFESSOR

Lehman Courses [Check other ePAFs](#)

Please enter the number of hours the adjunct taught for each course from 01/29/2016 to 04/05/2016.

Course	Section	* Hours
1 PHI 221	K301	<input type="text"/>
2 PHI 231	01W	<input type="text"/>
		Σ = 0.00

Salary

Salary Rate \$ 76.48
 Professional Hours 15.00
 Teaching/Non-Teaching Hours 0.00
 Total Hours 15.00
 Total Salary/Semester \$ 1,147.20

Semester and Dates

Semester: Spring 2016
 Effective Beginning Date: 01/29/2016
 Ending Date: 05/28/2016

* Required Field

- 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.

[Previous Step](#)

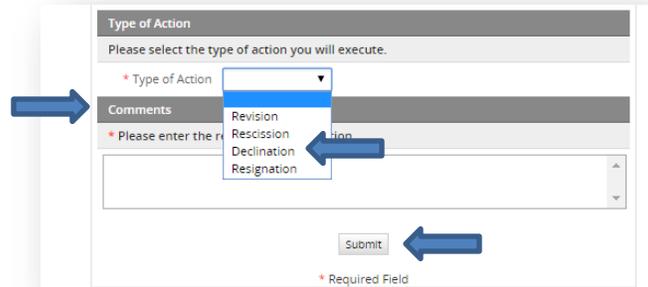
Assign Task

Next Task: Chair's Approval

Employee: MAHON, JAMES

Declination

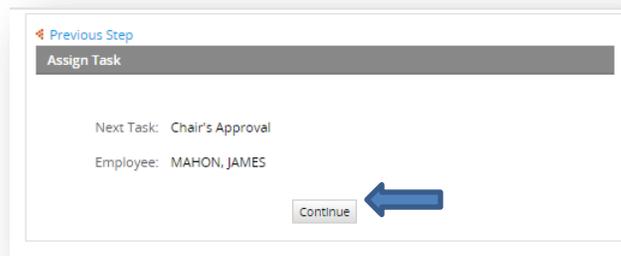
- This action is used when an employee has declined the appointment.
- Select “Declination” as the type of action.
- Enter comments about the declination.



The screenshot shows a web form with the following sections:

- Type of Action**: A dropdown menu with the instruction "Please select the type of action you will execute." The dropdown is open, showing options: Revision, Rescission, Declination, and Resignation. A blue arrow points to the "Declination" option.
- Comments**: A text area with the instruction "* Please enter the r...". A blue arrow points to the text area.
- Submit**: A button with a blue arrow pointing to it.
- * Required Field**: A label at the bottom of the form.

- Submit for approval

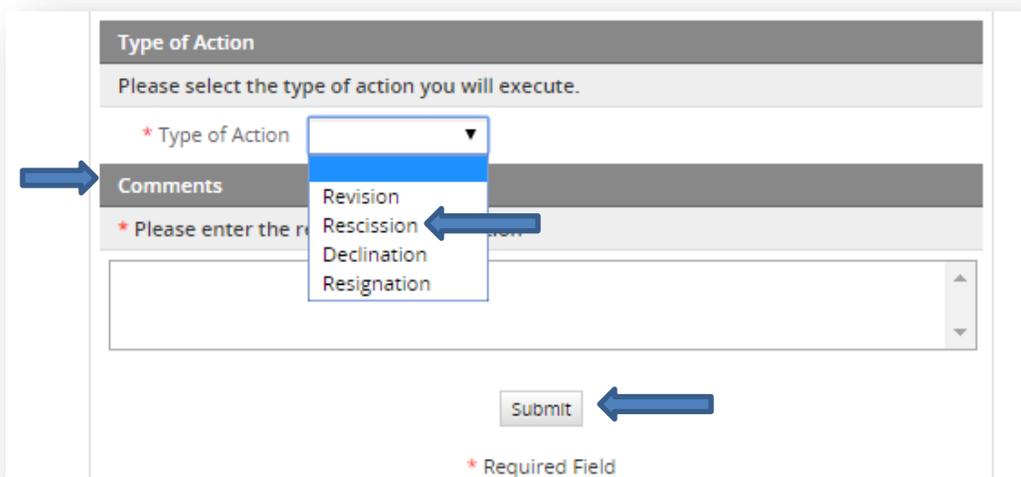


The screenshot shows a web form with the following sections:

- Previous Step**: A header with a back arrow icon.
- Assign Task**: A header.
- Next Task**: Chair's Approval
- Employee**: MAHON, JAMES
- Continue**: A button with a blue arrow pointing to it.

Rescission

- This action is used when an employee as hired but did not work at all, or will not work at all.



The screenshot shows a web form with the following sections:

- Type of Action**: A dropdown menu with the instruction "Please select the type of action you will execute." The dropdown is open, showing options: Revision, Rescission, Declination, and Resignation. A blue arrow points to the "Rescission" option.
- Comments**: A text area with the instruction "* Please enter the r...". A blue arrow points to the text area.
- Submit**: A button with a blue arrow pointing to it.
- * Required Field**: A label at the bottom of the form.

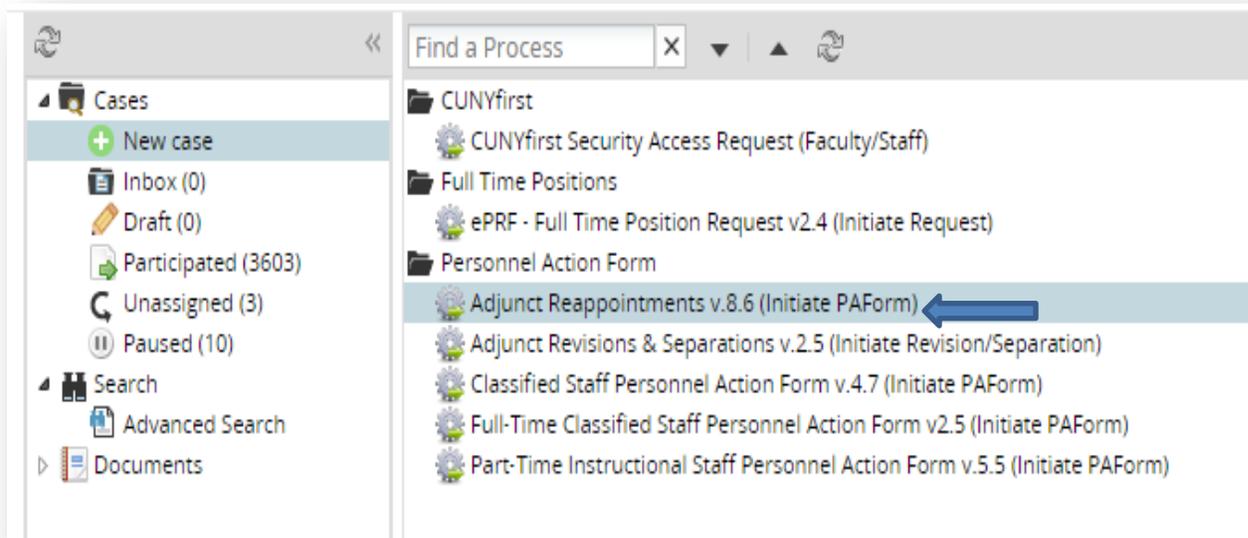
- Submit for approval.



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.

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

- 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: Fall 2015

* Department: ACE

Dept. Code: 740

* Type of Action: Reappointment

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 3: Entering reappointment information

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

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

Previous Step Next Step

Reappointment

Employee Information

First Name: YOUSSEF

Last Name: YOUSSEF

Employee ID: [REDACTED]

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	Delete
1			

Σ = 0.00

Salary

* Salary Rate \$: 33.18

Total Hours: 0.00

Total Salary/Semester \$: 0.00

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? 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

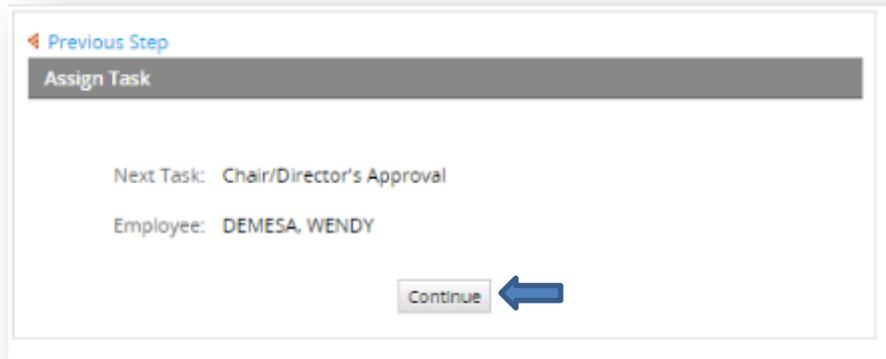
[New](#)

College	Department	Title	Course & Section	Hours
1				

Σ = 0

Next

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.