

Document # <b>MSOP12</b>	Title: <b>Creating Electronic Personnel Action Forms (ePAF)</b>	Print Date: <b>7-25-2014</b>
Revision # <b>1.0</b>	Prepared By: <b>Dr. Dativa Del Rosario</b>	Date Prepared: <b>7-25-2014</b>

**Purpose:** The purpose of this procedure is to serve as a guide to creating an Electronic Personnel Action Form using the ePAF system.

**Scope:** This guide applies to all administrators, faculty, staff, and auxiliaries who wish to process to create an Electronic Personnel Action Form.

**Responsibilities:**

ePAFs, the Peralta Electronic Personnel Action Form System replaces the paper-form personnel action form for almost all actions created on campus with a new, very user friendly web-based system.

The four functions for ePAF are: (1) Assign – Create an additional assignment, new primary assignment, new hire, rehire, all student assignments, stipends and shift differentials. (2) Change – Change an existing assignment including start date, end date, FTE or hours, shift differential, budget combination codes and 10 and 11 month classified non-working schedule. (3) Terminate/Separate – Terminate an assignment due to resignation, retirement, death or involuntary termination for performance during the classified probation period. (4) Leave of Absence – Create a new leave or return an employee to active status at the conclusion of a leave.

**Procedure:**

**1.0 PICK THE EMPLOYEE, ACTION AND ASSIGNMENT:**

- 1.1 Click – “To Initiate A New ePAF”.
- 1.2 Identify Employee Information – Either by Employee ID # or filling out the Last Name & First Name Fields.
- 1.3 Select Employee – If Employee is on record the option to “Select This Employee” appears. The option to create a new employee is also available.
- 1.4 Select Action – User either clicks Assign Employee, Change Existing Assignment, Leave of Absence or Separate/Terminate. User also must input the effective date of this action.
- 1.5 Assignment Action – User selects the assignment to be impacted. All active assignments are displayed but only those from the initiator’s location can be selected.

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## **2.0 ASSIGNMENT ACTION:**

- 2.1 User selects one primary box (additional assignment, reassign to new primary assignment, stipend). If Reassign is selected one of the subordinate boxes (permanent, temporary, return from temporary) must be selected.
- 2.2 New Hire/Rehire Name & Address – The minimum information required is the home address and checking the box to copy over the home address into the mailing fields.
- 2.3 Select Position – User can either select a vacant single position or use a check box at the bottom of the screen to indicate the type of pooled position to which the employee should be assigned. Pooled positions are never ‘full time regular’.
- 2.4 Pooled Position Definition – This screen is used only if the position is not in the Position Control Table and is therefore a ‘pooled position’. The user selects the department for the new assignment from a pull down menu. This is arranged by department code and cost center. Second, a job code is selected from either the numerical pull down menu or the alpha job name list. Third, the user completes the combo codes telling how the assignment has been budgeted.
- 2.5 Assignment Detail (all assignments except Stipends) – The user must enter on this screen the information based on the type of assignment. Required entries are marked with a red asterisk. End date, hours per week or FTE, Benefit Plan, Shift Differential and Total Estimated Cost Excluding Benefits is entered here. For Stipends, the user provides the following information in a comment box: Amount, Description, Reason, and End Date.
- 2.6 Assign Confirmation Screen – At the conclusion of initiating the Assign action, the confirmation screen appears to allow for the user to check and review their work. The option to ‘Return to Previous Screen’ is available. The user also has the opportunity to add miscellaneous information in a comment box provided. The user is then able to ‘Submit the ePAF’ which forwards the document to the next approver. The user also has the option to ‘Send this ePAF to my Inbox’. The ePAF will then sit in the user’s own Inbox and will be held there indefinitely until retrieved.

## **3.0 APPROVING AN EPAF:**

- 3.1 Approver’s Inbox – Approver’s access ePAFs awaiting their action through their ePAF Inbox. The ePAFs are accessed from the main menu item: ‘Check Here – To Approve an ePAF’.
- 3.2 The Approver’s Inbox contains all ePAFs awaiting action including those sent forward or returned from other approver/initiators and for initiators, those held in their own inbox.
- 3.3 Clicking on a specific ePAF open the approval screen for that action and allows approval, edit, cancel, or return. Exiting an item without taking action holds the item in your Inbox. The Inbox contains only active ePAFs awaiting action. Those that have been submitted for approval or cancelled no longer appear here but can be found using various searches for specific ePAFs. Each ePAF carries a unique ePAF # that can be used to retrieve it later.

3.4 Actions available for Approvers are ‘Approve this ePAF’ (moves to the next approver), ‘Edit this ePAF’ (Allow direct editing of fields on the ePAF), ‘Return ePAF’ (Allows the approver to select any prior approver or initiator as the person to whom the ePAF should be returned) and ‘Cancel this ePAF’ (The ePAF will remain inactive in the ePAF history but can never be restarted. Once cancelled a new replacement ePAF will be necessary).

3.5 Approver’s Comments Screen – Depending on which action the approver has selected, the last screen will allow the approver to enter comments and will display the role of the next approver. Comments are optional, but become mandatory if the approver edits, cancels or returns the ePAF.

**4.0 APPROVAL WORK FLOW**

4.1 Faculty ePAFs – Approval process flows in this order: (1)Initiator, (2) Cost Center Manager, (3) Office of Instruction Academic Specialist, (4) Vice President of Instruction, (5) Business Office Staff, (6) Business Office Manager, (7) President, (8) to the District.

4.2 Classified ePAFs – Approval process flows in this order: (1) Initiator, (2) Cost Center Manager, (3) Vice President (by cost center), (4) Business Office Staff, (5) Business Office Manager, (6) President, (7) to the District.

4.3 Student Worker ePAFs – Approval process flows in this order: (1) Initiator, (2) Cost Center Manager, (3) Financial Aid Coordinator, (4) Vice President (by cost center), (5) Business Office Staff, (6) Business Office Manager, (7) to the District.

**Effectiveness Criteria:**

- This procedure is to serve as a guide to creating an Electronic Personnel Action Form using the ePAF system.

**Forms/Records:**

Form #	Record Retention	
<b>Required by Standard</b>		
ePAFS version 1.0 Uses Guide for Initiators & Approvers	Peralta Community College Website <a href="http://web.peralta.edu/hr/files/2012/08/ePAFS-Users-Guide-Initiators-Approvers-8-24-12.pdf">http://web.peralta.edu/hr/files/2012/08/ePAFS-Users-Guide-Initiators-Approvers-8-24-12.pdf</a>	

**Revision History:**

Revision	Date	Description of changes
1.0	7/25/14	Initial Release