



Peralta Community College District

ePAFS version 1.0
Electronic Personnel Action Form System

**Users Guide for Initiators &
Approvers**

Version 8/24/12

The most current version of this document can always be found at:
[\\glenpark.ad.peralta.edu\pccddata\data\ePAFS](http://glenpark.ad.peralta.edu/pccddata/data/ePAFS)

ePAFS 1.0 Users Guide – Initiators & Approvers

EPAFS INTRODUCTION.....	1
WHO SUPPORTS AND MANAGES EPAFS	2
GETTING IMMEDIATE SUPPORT ON CAMPUS	2
IMPROVING AND UPGRADING EPAFS VER. 1.0.....	2
IF YOU FIND AN ERROR WITH EPAFS.....	2
ROLES & RESPONSIBILITIES	4
READ-ONLY USERS	4
LOCATING AND LOGGING ON TO EPAFS VIA THE PCCD WEB SITE	5
EPAF MAIN MENU	6
APPROVERS QUICK START GUIDE	7
EMAIL NOTIFICATION.....	7
APPROVERS IN BOX.....	8
APPROVING AN EPAF	9
APPROVER’S COMMENTS SCREEN	10
USING THE EPAFS HISTORY SCREENS	11
EDITING AN EPAF	12
INITIATOR’S GUIDE	13
1.0 PICK THE EMPLOYEE, ACTION, AND ASSIGNMENT	13
1.1 SELECT LOCATION	13
1.2 IDENTIFY EMPLOYEE	14
1.3 SEARCH RESULTS - SELECT EMPLOYEE	15
1.4 SELECT ACTION.....	16
1.5 SELECT EXISTING ASSIGNMENT	17
2.1 ASSIGNMENT ACTION	18
2.2 NEW HIRE / REHIRE NAME AND ADDRESSES	19
2.3 SELECT POSITION	20
2.4 POOLED POSITION DEFINITION	21
<i>As Seen for All Actions Except Stipends.....</i>	<i>21</i>
<i>As Seen for Stipends.....</i>	<i>22</i>
2.5 ASSIGNMENT DETAIL	23
<i>As Seen for All Actions Except Stipends.....</i>	<i>23</i>
<i>As Seen for Stipends:.....</i>	<i>24</i>
2.6 ASSIGN CONFIRMATION SCREEN	25
2.7 ASSIGN APPROVER’S SCREEN.....	26
3.0 CHANGE EXISTING ASSIGNMENT.....	27
3.1 CHANGE EXISTING ASSIGNMENT	27
3.4 CURRENT POOLED POSITION COMBO CODE	28
3.2 CHANGE EXISTING ASSIGNMENT CONFIRMATION SCREEN	29
3.3 CHANGE APPROVER’S SCREEN.....	30

4.0 TERMINATION AND SEPARATION	31
4.1 SEPARATE EMPLOYEE / TERMINATE ASSIGNMENT.....	32
4.4 CURRENT POOLED POSITION COMBO CODE	33
4.2 TERMINATE / SEPARATE CONFIRMATION SCREEN	34
4.3 TERMINATE / SEPARATE APPROVERS SCREEN.....	35
5.0 LEAVES OF ABSENCE	36
CHANGE OF PRACTICE FOR LEAVE RETURNS	37
5.1 CREATE A NEW LEAVE OF ABSENCE OR RETURN FROM LEAVE	38
<i>Create a New Leave.....</i>	38
<i>Create a Return from Leave</i>	39
5.2 LOA CONFIRMATION SCREEN.....	40
5.3 APPROVE LOA OR RETURN FROM LOA	41
APPENDICES.....	42
WORKFLOW	42
<i>District Approval Workflow</i>	43
<i>Merritt Approval Workflow.....</i>	44
<i>Alameda Approval Workflow</i>	45
<i>Laney Approval Workflow.....</i>	46
<i>Berkeley Approval Workflow.....</i>	47
<i>District Operating Departments Workflow</i>	48
REPORTS	49

ePAFS Introduction

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. ePAFS has five main features:

1. **Electronic workflow:** The electronic forms are passed from initiator through all the required levels of approval as defined by your campus and the district office. These are never lost and the location and status of any ePAF can be immediately determined.
2. **Live data feed from PeopleSoft:** Whenever an entry is required for data that is already present in PeopleSoft ePAFS will pre-fill or allow selection from the most current PeopleSoft HR data.
3. **No knowledge or use of PeopleSoft HR and payroll codes required:** The data you must read or enter is always presented in plain English. The codes required by PeopleSoft are created accurately behind the scenes.
4. **Wizard-based design:** By asking you a series of simple questions to which you respond, ePAFS creates your electronic PAF. Based on your responses you will be shown and asked to respond to only information that is relevant to the action you are preparing.
5. **Behind the scenes data validation:** A large number of rules have been incorporated behind each screen that are designed to help you build an accurate ePAF.

ePAFS is not designed to handle 100% of PA transactions. There are still a small number of infrequent or sensitive transactions that must be handled directly by District HR. ePAFS will alert you if the action you are trying to create requires this type of special attention.

ePAF organizes everything you would commonly do with a personnel action into four intuitive action groups:

ASSIGN: Create an additional assignment, new primary assignment (temp or perm) including transfer between campuses, new hire, rehire, all student assignments, new stipends, and new shift differentials.

CHANGE: Change an existing assignment including: start date, end date, FTE or Hours, shift differential, combination code (budget code), and 10 and 11 month classified non-working schedule.

TERMINATE / SEPARATE: Terminate an assignment. Separate an employee from employment with the district due to: resignation, retirement, death, or involuntary termination for performance during the classified probation period.

LEAVE OF ABSENCE: Create a new leave or return an employee to active status at the conclusion of a leave.

Who Supports and Manages ePAFS

ePAFS is sponsored by District HR. David Betts, Director HR is the executive sponsor.

The master ePAFS System Administrator is Cody Pelletier, District HR who:

- Provides support to campus users that cannot be adequately addressed by campus resources.
- Maintains the system; ensures it is up and operating; performs necessary maintenance, and resolves with the development team or the District IT group any system-wide software problem that may occur.
- Maintains and prioritizes requests for future enhancements.

Getting Immediate Support on Campus

You can receive immediate assistance on campus from these campus ePAFS administrators:

	Campus ePAF Administrator	Alternate
	Campus ePAF Administrator	Alternate
Alameda:	MaryBeth Benvenuti	Ava Lee-Pang
Berkeley	Shirley Slaughter	John Pang
Laney	Connie Willis	
Merritt	Dettie Del Rosario	

Your campus ePAFS administrator is equipped to:

- Provide authorization to new users to use ePAFS.
- Assign specific individuals to the roles in their campus ePAFS workflow.
- Temporarily replace an approver due to illness or absence.
- Provide new user training.
- Adjust campus approval workflows as required.

Improving and Upgrading ePAFS ver. 1.0

Version 1.0, like all software, is a work in progress. You are likely to see features and capabilities that you'd like to have in ePAFS, and these ideas and suggestions should be sent to the ePAFS System Administrator. The ePAFS Steering Committee is assigned the responsibility of planning the modifications to the system and coordinating logical rollouts of features in the future.

If You Find an Error with ePAFS

Version 1.0 has been heavily tested but like any software it is possible that you may discover a previously undetected problem.

If ePAFS does not work as you expected, has an error in the way it produces the ePAF, has a logic error in programming, or does not perform in a way that is convenient and useful for you, **make careful notes and email them to the ePAFS System Administrator.**

The best way to do this is to paste a copy of the ePAFS screen into an email message, describe in detail what you were trying to do, what you expected to happen, and what you believe is in error.

To copy and paste a copy of a screen into an email message:

1. Open a new blank email message.
2. While the target screen is visible on your computer, press the Print Screen key on your computer. This places the image on your computer's clipboard.
3. Return to the blank email message and either right click and press 'paste' or hit CNTRL and the V keys together. The screen image will now be pasted into your email.
4. Complete the text description of the problem and email as you would normally.

Roles & Responsibilities

There are two roles which most users will fall into:

Initiator: The initiator is the individual who first creates the ePAF. This might typically be the administrative assistant to a college Dean or VP, or they may be the Dean or VP themselves. The initiator cannot further approve the ePAF. Initiators may HOLD or SUBMIT items they have created.

Approver: An approver is a member of administration who is authorized to approve personnel actions (and also may initiate personnel actions). After reviewing the action, approvers may APPROVE, EDIT, HOLD, CANCEL or RETURN actions sent to them for approval.

Initiators may create ePAFs for any assignment on their campus. Approvers are determined by role, cost center, or object code depending on the specific assignment and action type of the ePAF.

There is one other special role:

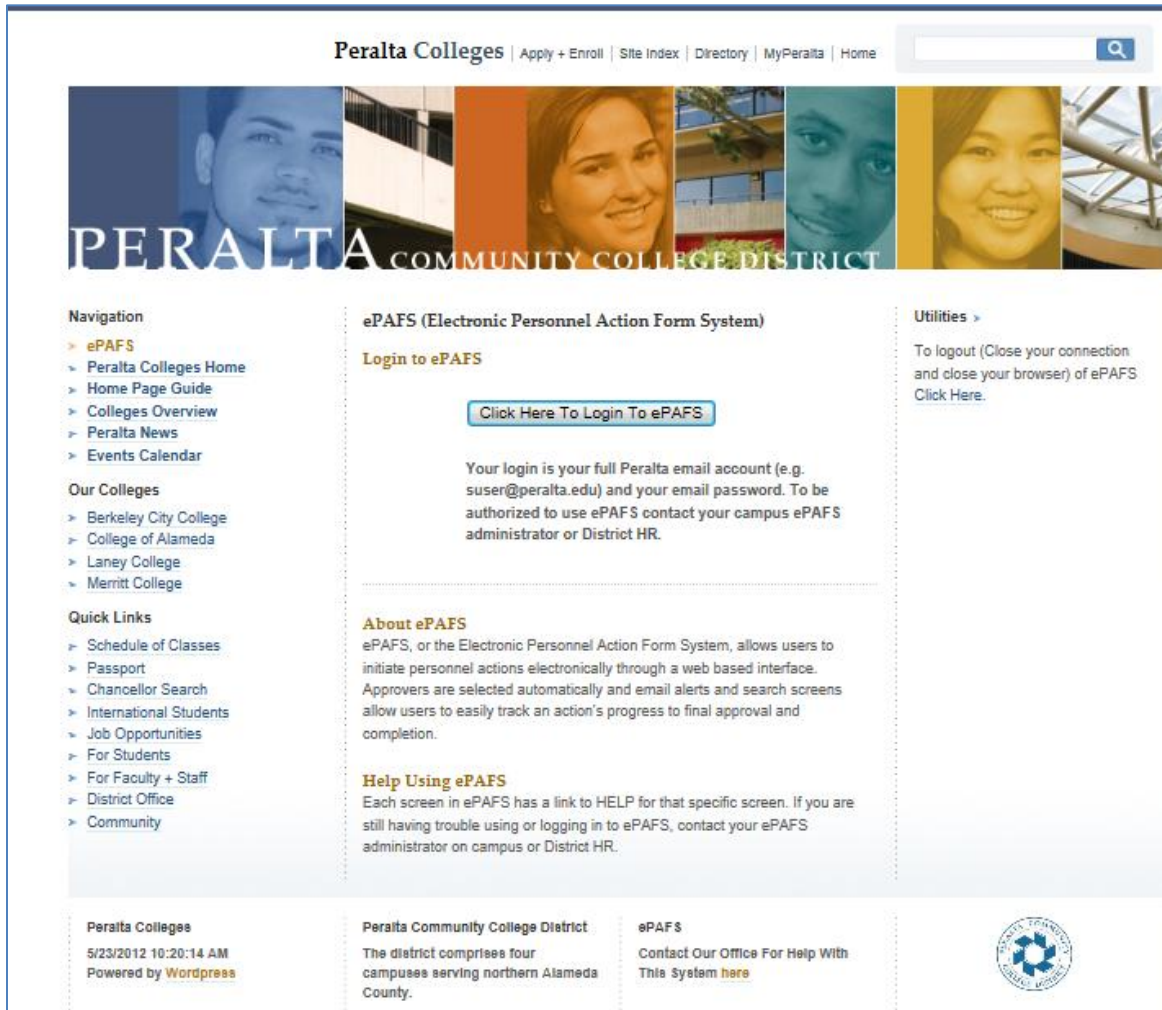
Final Reviewer (District HR Generalists): The final reviewers in all cases are the District HR Generalists who conduct a final technical review of the transaction for accuracy and enter it into PeopleSoft.

Read-Only Users

Individuals designated by campus or district system administrators may also be given read-only access to the system where they can view ePAFS that are in-process or complete and have access to the many ePAFS reports.

Locating and Logging On to ePAFS via the PCCD Web Site

The link to ePAFS can be found on the District HR page. That link will bring you to the Login page.



Screen shot 5/23/12

Once you have been authorized to use ePAFS:

- Your User ID is your full Peralta email address (e.g. jsmith@peralta.edu).
- Your password is your Peralta email password.

ePAFS resides 'behind the Peralta firewall' on the secure faculty and staff network. If you are on campus and connected to the network, you can access ePAFS.

Off campus ePAFS can be accessed if you have an authorized VPN connection to the network.

ePAF Main Menu

From the Main Menu you can:

- Initiate a new ePAF
- Find an ePAF – to discover its current status, including which approver currently controls the next action.
- Approve an ePAF. The majority of users are Approvers and will use primarily this menu.
- Management Reports: A variety of standard and custom reports.
- Other Menus: System Administrator's menus.

PERALTA COMMUNITY COLLEGE DISTRICT

Navigation

- **ePAFS**
- [Peralta Colleges Home](#)
- [Home Page Guide](#)
- [Colleges Overview](#)
- [Peralta News](#)
- [Events Calendar](#)

Our Colleges

- [Berkeley City College](#)
- [College of Alameda](#)
- [Laney College](#)
- [Merritt College](#)

Quick Links

- [Schedule of Classes](#)
- [Passport](#)
- [Chancellor Search](#)
- [International Students](#)
- [Job Opportunities](#)
- [For Students](#)
- [For Faculty + Staff](#)
- [District Office](#)
- [Community](#)

ePAFS (Electronic Personnel Action Form System)

Main Menu

- [Click Here - To Initiate A New ePAF](#) - Initiate a personnel action.
- [Click Here - To Find An ePAF](#) - Find a personnel action.
- [Click Here - To Approve An ePAF](#) - Items pending your review.
- [Click Here - For Management Reports](#) - All system reports.
- [Click Here - For Other Menus](#) - All other menus.

About the Main Menu

From the ePAFS Main Menu users can reach all the system's features. Use "Initiate a New ePAF" to add or change an employee's assignments, including separations and terminations, and recording certain types of leaves. "Other Menus" are restricted to ePAFS system administrators.

Utilities

[To logout \(Close your connection and close your browser\) of ePAFS Click Here.](#)

Screen shot 5/23/12

Approvers Quick Start Guide

Most authorized users of ePAFS will be Approvers. Although Approvers can also be Initiators, if all you will be doing is to review and approve ePAFs, here's what you need to know to get started.

Email Notification

ePAFS automatically generates a series of emails that will come to your Peralta email address, and the first and most important is the one telling you when an ePAF is ready for your action.

From: From ePAFS: Holton, Steve [mailto:xxxxx@xxxx.edu]
Sent: 06/15/2012 10:52 AM
To: Vorhies, William
Subject: NOTICE: YOUR APPROVAL REQUIRED FOR ePAF # 55
Importance: High

ePAF SENT TO YOU FOR APPROVAL FROM: Holton, Steve

To OI Academic Specialist:

The following ePAF:

Department: Laney - Communications
Position: Instructor - 405
Employee: Henderson, Larry
Action: Leave
Effective Date: 6/12/2012

has been sent to you for approval.

[Click Here To Approve / Edit ePAF # 55](#)

Comments From Holton, Steve: Test Approval

NOTE: Replies to this e-mail will be sent to ePAFS User: Holton, Steve.

This type of email is generated every time an action is taken on an ePAF. When you approve the ePAF a similar email will be sent alerting the next approver.

If you EDIT or CANCEL the ePAF an email will be sent to all prior approvers and the initiator to let them know the action you've taken.

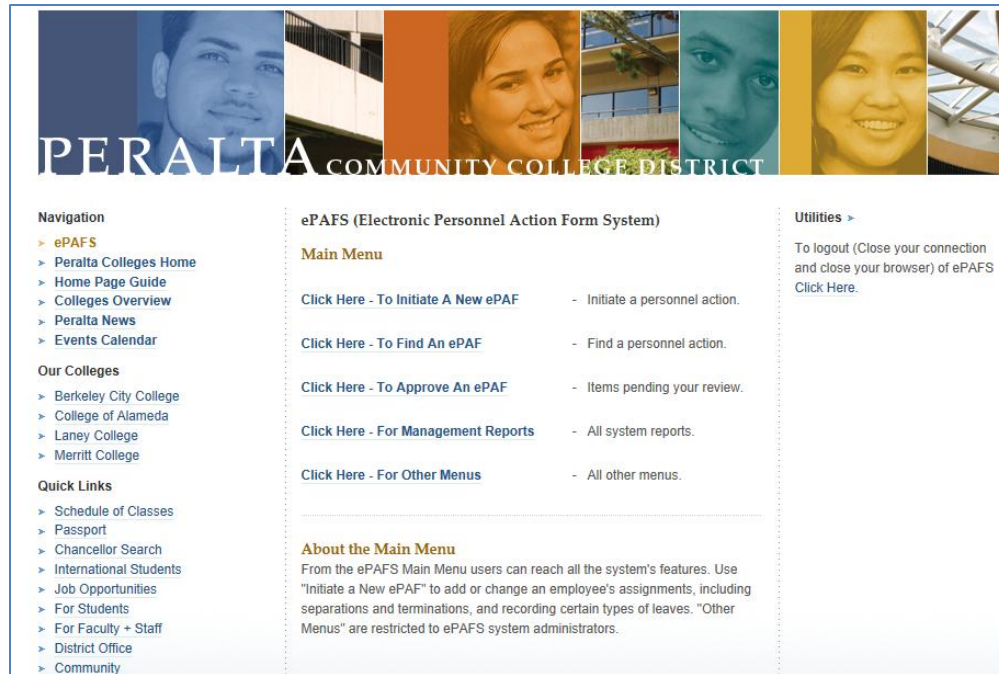
If you need to communicate directly with the previous approver a reply to this email will be delivered to that individual.

All initiators and approvers also receive a final confirmation email when the ePAF has been fully approved and is ready to be input into PeopleSoft by the HR Generalists.

Clicking on the embedded hyperlink will take you to the ePAFS main menu (or sign in page if you are not already logged on).

Approvers In Box

Approvers access ePAFS awaiting their action through their ePAFS Inbox (not to be confused with their Peralta email Inbox or PeopleSoft Inbox). The ePAFS Inbox is accessed from the main menu item: [Click Here – To Approve an ePAF](#).



Screen shot 5/23/12

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.

Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help
Approval Menu For: Vorhies, William						
ePAF #	Job Title	Name	Employee #	Action	Status	Department
8 - View It	Warehouse Worker-Driver (B) - 593H	Abigail, Smith	10014117	Assign	In wvorhies's Inbox	Applied Arts - 253
11 - View It	Instructor/Temporary - 407B	Abigail, Smith	10014117	Assign	In wvorhies's Inbox	Applied Arts - 253
19 - View It	Account Clerk I - 003H	Henderson, Larry	10004867	Assign	In wvorhies's Inbox	Instructional-VP - 251
20 - View It	Account Clerk I - 003H	Henderson, Larry	10004867	Assign	In wvorhies's Inbox	Instructional-VP - 251
21 - View It	Instructor - 405A	Henderson, Larry	10004867	Assign	In wvorhies's Inbox	Instructional-VP - 251
36 - View It	Student Ambassador - 348	Brown, Edward M.	10050047	Change	In wvorhies's Inbox	Student Services-VP - 841
39 - View It	Student Ambassador - 348	Brown, Edward M.	10050047	Change	In wvorhies's Inbox	Student Services-VP - 841

Screen shot 6/7/12

Clicking on a specific ePAF opens 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 canceled no longer appear here but can be found using the various searches for specific ePAFS.

Note that each ePAF carries a unique ePAF # that can be used to retrieve it later.

Approving an ePAF

When you open an ePAF for review the screen will contain a full summary of the action. The data will be slightly different based on whether this is an ASSIGN, CHANGE, TERMINATE / SEPARATE, or LEAVE. Here is an example for an ASSIGN approver's screen.

Return To My Inbox		Peralta Colleges - ePAFS		Click Here For Help																																		
2.7 Approve Assignment - ePAF # 202																																						
Approve This ePAF		Edit This ePAF		Return This ePAF To Previous Approver																																		
Approve This ePAF		Edit This ePAF		Return This ePAF																																		
Cancel This ePAF																																						
<table border="1"> <thead> <tr> <th>Position Description</th> <th>Job Code</th> <th>Position #</th> <th>Currently Assigned To</th> <th>Employee #</th> <th>Assignment Ends</th> <th>On Leave</th> <th>Department</th> </tr> </thead> <tbody> <tr> <td>Counselor</td> <td>401</td> <td>00000891</td> <td></td> <td></td> <td></td> <td></td> <td>Berkeley/Student Services-VP - 841</td> </tr> </tbody> </table>						Position Description	Job Code	Position #	Currently Assigned To	Employee #	Assignment Ends	On Leave	Department	Counselor	401	00000891					Berkeley/Student Services-VP - 841																	
Position Description	Job Code	Position #	Currently Assigned To	Employee #	Assignment Ends	On Leave	Department																															
Counselor	401	00000891					Berkeley/Student Services-VP - 841																															
<table border="1"> <thead> <tr> <th>Action For This ePAF</th> <th>Start Date</th> <th>End Date</th> <th>Assign Employee</th> <th>Employee #</th> <th>FTE</th> <th>Hourly Rate</th> <th>Est. Cost</th> <th>Benefit Plan</th> <th>Grade</th> <th>Step</th> </tr> </thead> <tbody> <tr> <td>Reassign to New Primary Asmt - Perm</td> <td>7/9/12</td> <td></td> <td>Berezin, Joan</td> <td>10001662</td> <td>1.1</td> <td>\$0</td> <td>\$50000</td> <td>PFF - Peralta Full-Time Faculty Plan</td> <td></td> <td></td> </tr> <tr> <td colspan="11">View Employee Assignments</td> </tr> </tbody> </table>						Action For This ePAF	Start Date	End Date	Assign Employee	Employee #	FTE	Hourly Rate	Est. Cost	Benefit Plan	Grade	Step	Reassign to New Primary Asmt - Perm	7/9/12		Berezin, Joan	10001662	1.1	\$0	\$50000	PFF - Peralta Full-Time Faculty Plan			View Employee Assignments										
Action For This ePAF	Start Date	End Date	Assign Employee	Employee #	FTE	Hourly Rate	Est. Cost	Benefit Plan	Grade	Step																												
Reassign to New Primary Asmt - Perm	7/9/12		Berezin, Joan	10001662	1.1	\$0	\$50000	PFF - Peralta Full-Time Faculty Plan																														
View Employee Assignments																																						
<table border="1"> <thead> <tr> <th>Budget: Location</th> <th>Fund</th> <th>Cost Center</th> <th>Object</th> <th>Program</th> <th>Activity</th> <th>Project</th> <th>Line</th> <th>Percent</th> </tr> </thead> <tbody> <tr> <td>8 - Berkeley</td> <td>01</td> <td>841</td> <td>1203</td> <td>1</td> <td>631100</td> <td>0000</td> <td>00</td> <td>100%</td> </tr> </tbody> </table>						Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent	8 - Berkeley	01	841	1203	1	631100	0000	00	100%															
Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent																														
8 - Berkeley	01	841	1203	1	631100	0000	00	100%																														
<table border="1"> <thead> <tr> <th>ePAF Entered By</th> <th>Enter Date</th> <th>Enter Time</th> <th>Current Status</th> <th>Location</th> <th>Department</th> <th>Action</th> <th>Action Reason</th> <th>Pay Group</th> </tr> </thead> <tbody> <tr> <td>Vorhies, William</td> <td>7/3/12</td> <td>9:12 AM</td> <td>In worhies's Inbox</td> <td>Berkeley</td> <td>Student Services-VP - 841</td> <td>DTA</td> <td>CTR</td> <td>P77</td> </tr> </tbody> </table>						ePAF Entered By	Enter Date	Enter Time	Current Status	Location	Department	Action	Action Reason	Pay Group	Vorhies, William	7/3/12	9:12 AM	In worhies's Inbox	Berkeley	Student Services-VP - 841	DTA	CTR	P77															
ePAF Entered By	Enter Date	Enter Time	Current Status	Location	Department	Action	Action Reason	Pay Group																														
Vorhies, William	7/3/12	9:12 AM	In worhies's Inbox	Berkeley	Student Services-VP - 841	DTA	CTR	P77																														
<table border="1"> <thead> <tr> <th>Comments</th> <th>Date</th> <th>Time</th> <th>Entered By</th> </tr> </thead> <tbody> <tr> <td>xxx</td> <td>7/3/12</td> <td>9:12 AM</td> <td>Vorhies, William</td> </tr> </tbody> </table>						Comments	Date	Time	Entered By	xxx	7/3/12	9:12 AM	Vorhies, William																									
Comments	Date	Time	Entered By																																			
xxx	7/3/12	9:12 AM	Vorhies, William																																			
For A History Of Changes To This ePAF And An Approval History Click Here .																																						

Screen shot 7/5/12

Actions available:

1. Approve this ePAF: Moves to next approver.
2. Edit this ePAF: Allows direct editing of fields on this screen. Note that only some validations are operative when changes are made on this screen which may introduce errors. Approvers should take care to ensure entries are accurate.
3. Return ePAF: Allows the approver to select any prior approver or initiator as the person to whom the ePAF should be returned. Comments directing what changes are to be made should be entered. Note that the ePAF will move more quickly through the approval process if the approver simply makes the required changes. Returning the ePAF requires that it then be reapproved by all intermediate approvers which will delay processing.
4. Cancel this ePAF: The ePAF will remain inactive in the ePAF history but can never be restarted. Once canceled a new replacement ePAF will be necessary.

In addition to the details of the personnel action, at the bottom of the screen are the comments entered by each initiator and approver that may help explain their intent.

The [ePAF History](#) link at top right opens a page showing the complete history of actions and changes to this ePAF. The link at lower left 'For a History of Changes' leads to the same history screens.

Commands for PRINT and DOWNLOAD also appear at upper right on this screen.

Approver's Comments Screen

Depending on which action you have selected, the last screen will allow you to enter comments and will display the role of the next approver.

The screenshot shows a web application interface for Peralta Colleges - ePAFS. At the top, there is a navigation bar with three links: "Return To Main Menu", "Peralta Colleges - ePAFS", and "Click Here For Help". The main content area is titled "Approve ePAF". Below this title, the following information is displayed: "ePAF #: 70", "Employee: Arrington, Gary", "Job Code: Custodian - 046", "Action: Leave", and "Next Approver: Business Office Staff". There is a text input field labeled "Your Comments:" with a vertical scrollbar on the right side. Below the input field is a button labeled "Press To Approve". At the bottom left of the screen, there is a link "< Return To ePAF # 70".

Screen shot 6/13/12

Comments are optional if you are approving the action. They are mandatory if you EDIT, CANCEL, or RETURN the ePAF and will be displayed in the notification emails. There is no limit on comment length.

If you elect RETURN, you will be allowed to select the specific prior initiator/approver to whom you want the action returned. Remember that RETURN creates the most delay because all prior approvers will be required to review the action again. It would be preferable to EDIT or even CANCEL the action. All prior initiator/approvers will be notified of your cancelation or the changes you have made via email.

Keep in mind that your comments are part of the permanent record and cannot be edited or erased once the action leaves your in box.

Using the ePAFS History Screens

If you need to see any portion of the history of the ePAF you are reviewing, use the ePAFS History links in the upper right or lower left of the approval screen which will open this six-part history report.

Return To Main Menu			Peralta Colleges - ePAFS		
Change History Of ePAF # 20					
Edit History	Campus Routing	District Routing	Status History	Email History	Inbox History
Status Changed To	Changed By	Name	Change Date		
In Vorhies, William's Inbox	wvorhies	Vorhies, William	6/4/2012 9:31:59 AM		

Screen shot 6/4/12.

Edit History: Shows what changes were made by which approver and the 'from' and 'to' values.

Campus Routing: Shows the campus approval routing and which approvers have already taken action including the date on which the approval occurred.

District Routing: Same information for approvers in the District Office for this ePAF. Only appears once the action has entered the District Routing.

Status History: Different view of the current location of the ePAF along with its time and date history of actions by prior approvers.

Email History: Record of notice emails sent.

Inbox History: In and out time and date for each approver.

Editing an ePAF

As initiator or approver, when you open or reopen an ePAF from your inbox you have the opportunity to change many elements of the ePAF that has been sent to you. Selecting EDIT on the approvers' screen will open an EDIT screen that is unique to that action type. Fields that can be changed are shown in open boxes that can be over written or selected from a pull-down list.

This example of an ASSIGN action offers the most opportunity for changing entries.

Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help					
2.7 Edit ePAF - ePAF # 19											
Save Changes And Exit						Cancel Changes And Exit					
<input type="button" value="Save Changes And Exit"/>						<input type="button" value="Cancel Changes And Exit"/>					
Position Description	Job Code	Position #	Currently Assigned To	Employee #	Assignment Ends	On Leave	Department				
Account Clerk I	003H						Alameda/Instructional-VP - 251				
Action For This ePAF	Start Date	End Date	Assign Employee	Employee #	Hours	Rate	Rate Type	Est. Cost	Benefit Plan	Grade	Step
Assign	6/5/12	6/14/12	Henderson, Larry	10004867		\$0	Hourly	\$30	TCB - Tempo		
Edit Employee's Name / Address											
Budgets Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent			
2 - Alameda	03	251	2352	1	662200	0000	00	100%			
Add Another Budget Line View Valid Combo Codes											
ePAF Entered By	Enter Date	Enter Time	Current Status	Location	Department						
Vorhies, William	6/4/12	9:31 AM	In vorhies's Inbox	Alameda	Instructional-VP - 251						
Comments						Date	Time	Entered By			
see text						6/4/12	9:31 AM	Vorhies, William			
Add Another Note											
For A History Of Changes To This ePAF And An Approval History Click Here .											

Screen shot 6/11/12

Information that cannot be changed by an approver:

1. Action type (ASSIGN, etc.)
2. Employee
3. Position (if single – if pooled the elements of the position can be changed)
4. Effective Date.

These elements fundamentally define the action and changing any of these would invalidate the tests and restrictions that were applied during initiation. If any of these elements need to be changed then the correct course of action is to CANCEL the ePAF and initiate a new one.

Initiator's Guide

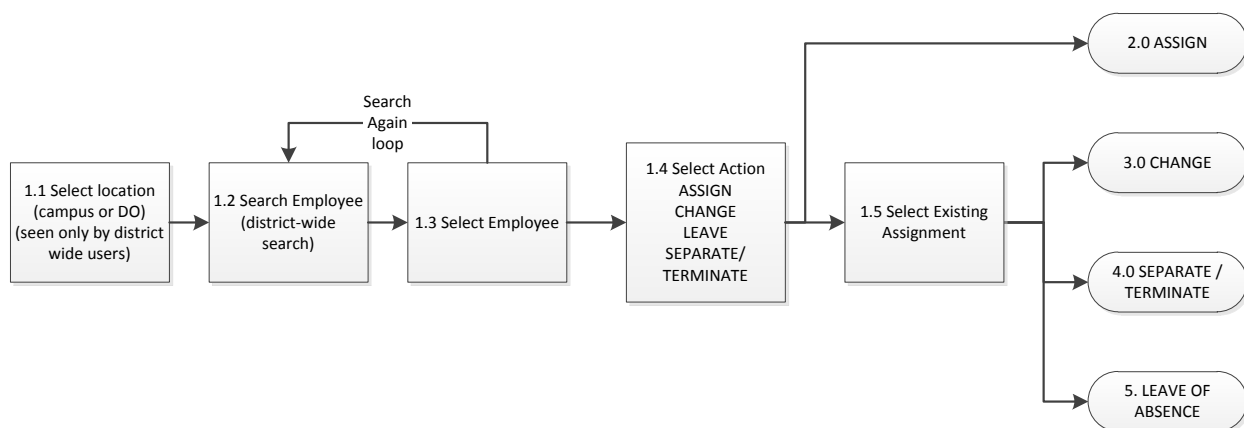
The following pages will lead you through initiating the four different action types:

- ASSIGN
- CHANGE
- TERMINATE / SEPARATE
- LEAVE OF ABSENCE

In each action type the screens are numbered but the key thing to remember is that you will be presented only those screens that are necessary for your action. For example, capturing the name and address information will only occur if the action is for a new hire or rehire.

1.0 Pick the Employee, Action, and Assignment

Many of the first several screens will be used for all action types.



1.1 Select Location

District wide authorized users will select via this menu. Other users will not see this screen based on their log in and will begin on screen 1.2.

Cancel And Return To Main Menu		Peralta Colleges - EPAF System	Click Here For Help
1.1 Select Location			Location/Dept: District Wide
Select A Location			
Berkeley City College	Berkeley	Click Here To Select This Location	
College of Alameda	Alameda	Click Here To Select This Location	
District Office	District	Click Here To Select This Location	
Laney College	Laney	Click Here To Select This Location	
Merritt College	Merritt	Click Here To Select This Location	

Screen shot 5/23/12

1.2 Identify Employee

Cancel And Return To Main Menu

Peralta Colleges - ePAFS

Click Here For Help

1.2 Identify Employee

Identify An Employee For Your ePAF

Enter Employee #:

Or

Employee Last Name: (May be left blank if first name entered)

First Name: (May be left blank if last name entered)

<< Return To Previous Page Click Here To Continue >>

Screen shot 8/24/12

Searching the database for the employee is required to ensure the data is correct for current employees and to determine eligibility for rehire for prior employees. If the employee is not found on the next screen, you will be provided an opportunity to record the name, address, and other information for a new employee (new hire).

In order to avoid error, please enter only one of employee number or first and/or last name. Either first name or last name or both first and last name may be entered.

If you're not sure exactly how the name is spelled you can use "%" as a wild card (entering JOHNS% would return all the names beginning with these letters, e.g. Johnston, Johnson, etc.). Use the first name to further limit the search. If you are unsure of spelling, use the "%" wildcard.

This is a search of all current and prior employees district wide regardless of where any currently active assignments may be located.

1.3 Search Results - Select Employee

Cancel And Return To Main Menu		Peralta Colleges - ePAFS			Click Here For Help	
1.3 Select Employee					Location/Dept: Berkeley	
Employee Name	Employee #	Location	Department	Date Of Birth		
White, Beverly	10006238	Merritt	Student Services/EOPS/DSPS - 642	Click To View	Click Here To Select This Employee	
White, Beverly A.	10028120	N/A	N/A	Click To View	Click Here To Select This Employee	
White, Beverly Ann	10530181	N/A	N/A	Click To View	Click Here To Select This Employee	
White, Beverly J.	10326852	N/A	N/A	Click To View	Click Here To Select This Employee	
White, Beverly N.	10261084	N/A	N/A	Click To View	Click Here To Select This Employee	

[<< Search Again](#) [This Is A New Employee](#)

Screen shot 8/24/12

Your search will return three types of individuals:

1. Current employees can be identified since they will have an entry under location and department reflecting their current assignment. If an employee has more than one active assignment, be aware that it may be in a different location or department.
2. Separated Employees such as prior employees or retirees with no current assignments.
3. Students.

Both separated employees and students will have employee ID numbers. The great majority of entries without a location/department entry will be students. These are displayed because it is not uncommon for students to be hired either as student workers or later as actual full time or part time employees of the district.

Since many individuals have essentially identical names, ePAFS can also display DOB (month and day only) to help you differentiate one employee from another. The month and day can be displayed but for security cannot be printed.

The page carries a “Search Again” button that will take you back to the search screen 1.2 where you can redo your search.

If you determine that the employee is not now nor ever has been an employee of Peralta use the “This is a New Employee” button which will lead you to a screen where the name and address information can be entered for a new hire.

1.4 Select Action

Cancel And Return To Main Menu		Peralta Colleges - ePAFS																																																											
1.4 Select Action																																																													
<u>Employee Name</u>	<u>Employee #</u>	<u>Location</u>	<u>Department</u>	<u>Date Of Birth</u>	<u>Social Security #</u>																																																								
Henderson, Larry	10004867	Laney	Communications - 555	Click To View	Click To View																																																								
<input type="button" value="Assign Employee"/> <input type="button" value="Change Existing Assignment"/> <input type="button" value="Leave Of Absence"/> <input type="button" value="Separate / Terminate"/> <input type="button" value="Return To Previous Page"/>		<p>The effective date of this action is: 5/25/2012</p> <table border="1"> <thead> <tr> <th colspan="7"><< May 2012 >></th> </tr> <tr> <th>Sun</th> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th>Fri</th> <th>Sat</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> <td>12</td> </tr> <tr> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> <td>19</td> </tr> <tr> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> <td>26</td> </tr> <tr> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>31</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>This is the first day on which your action will begin.</p>				<< May 2012 >>							Sun	Mon	Tue	Wed	Thu	Fri	Sat			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									
<< May 2012 >>																																																													
Sun	Mon	Tue	Wed	Thu	Fri	Sat																																																							
		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																																																									

Screen shot 5/25/12

Select the type of action you wish to take:

Assign Employee: New Hire, Rehire, Reassign to a New Primary Assignment (temp or perm), Additional Assignment, New Stipend.

Change Existing Assignment: Change effective or end date, hours per week/FTE, shift differential, combination (budget) codes, non-working days for 10 or 11 month classified employees.

Leave of Absence: Create new leave or show return from leave for selected leave types.

Separate / Terminate: Separate an employee from the employment of the District. This might be for resignation, retirement, or death. Terminate an assignment, for example, when funding is no longer available.

Note that ePAFS is designed to handle the most common types of personnel actions that are initiated on campus. Some types are still reserved for District HR use only. If you don't find the specific action you want to take, call District HR for guidance.

Important: Effective Date: This field must be filled in to indicate the actual effective date of the change.

For all types of ASSIGN and CHANGE actions, this is the first day on which the action is intended to start.

For new LEAVES this is the employee's last day of work.

For LEAVE returns, this is the employee's first day back to work.

For SEPARATIONS and TERMINATIONS, this is the employee's last day of work.

ePAFS will prompt you with these rules for LEAVE and SEPARATION / TERMINATION

If your action is 30 or more days retroactive you will be asked to provide a reason.

1.5 Select Existing Assignment

The CHANGE, LEAVE, and SEPARATE/TERMINATE action groups require the selection of a specific current assignment to be acted upon based on the employee selected in 1.3. This screen is not seen in the ASSIGN group.

Cancel And Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help	
1.5 Select Assignment		Action Selected: Change		Effective Date: 6/4/2012		Location/Dept: Laney/Communications - 555	
Employee Name	Employee #	Job Title	Job #	Location	Department	End Date	
Henderson, Larry	10004867	Instructor	405	Laney	Communications - 555	<input type="button" value="Select This Assignment"/>	
Henderson, Larry	10004867	Instructor/Temporary	407A	Laney	Communications - 555	<input type="button" value="Select This Assignment"/>	
<input type="button" value=" << Return To Previous Page"/>							

Screen shot 5/25/12

Select the assignment you want to impact. Even if there is only one assignment be sure to review this carefully to ensure this is the assignment on which you want to take action.

All active assignments are displayed but only those from the initiator's location can be selected.

Note that if this is to SEPARATE an employee from the employment of the District, be sure to SEPARATE all active assignments.

Similarly for LEAVES or LEAVE RETURNS, if an employee is on leave it is highly likely that all active assignments must be place on (or returned from) LEAVE.

2.1 Assignment Action

Cancel And Return To Main Menu		Peralta Colleges - ePAFS
2.1 Assignment Action		Action Selected: Assign Effective Date: 5/25/2012
Select New Assignment Type		
<p><input type="radio"/> Give this employee (Larry Henderson) an additional assignment</p> <p><input checked="" type="radio"/> Reassign this employee (Larry Henderson) to a new primary assignment</p> <p><input type="radio"/> This move is permanent</p> <p><input type="radio"/> This move is to a temporary assignment</p> <p><input type="radio"/> This employee is returning from a temporary assignment to their original primary assignment</p> <p><input type="radio"/> This is a request for a new stipend</p>		
<< Return To Previous Page		Click Here To Continue >>

Screen shot 5/25/12

Select one primary box (additional assignment, reassign to new primary assignment, stipend) and if you have selected 'Reassign' also select one of the subordinate boxes (permanent, temporary, return from temporary).

If the employee you selected is a new hire, a rehire, or a returning retiree you may have noticed that you are not shown this screen. ePAFS can already determine what to do in these cases.

2.2 New Hire / Rehire Name and Addresses

Cancel And Return To Main Menu		Peralta Colleges - ePAFS	
2.2 Name And Address		Action Selected: Rehire	Effective Date: 5/29/12
<u>Name</u>	<u>Employee #</u>		
White, Beverly J.	10326852		
<p style="color: red; font-size: small;">NOTE: No prior address found for this user. Please enter information below.</p>			
<p>Name</p> <p>* First Name: <input type="text" value="Beverly"/></p> <p> Middle Name: <input type="text" value="J"/></p> <p>* Last Name: <input type="text" value="White"/></p>	<p>Home Address</p> <p>* Street: <input type="text"/></p> <p> Street: <input type="text"/></p> <p> Street: <input type="text"/></p> <p>* City: <input type="text"/></p> <p>* State: <input type="text" value="California"/></p> <p>* Zip: <input type="text"/></p> <p> Phone: <input type="text"/> Ext.: <input type="text"/></p> <p> Email: <input type="text"/></p>	<p>Mailing Address <input type="checkbox"/> Same As Home Address</p> <p>Street: <input type="text"/></p> <p>Street: <input type="text"/></p> <p>Street: <input type="text"/></p> <p>City: <input type="text"/></p> <p>State: <input type="text" value="California"/></p> <p>Zip: <input type="text"/></p> <p>Phone: <input type="text"/> Ext.: <input type="text"/></p> <p>Email: <input type="text"/></p>	
<input type="checkbox"/> * I have confirmed that these addresses are current and accurate.			
<input style="border: 1px solid gray;" type="button" value=" << Return To Previous Page "/>		<input style="border: 1px solid gray;" type="button" value=" Click Here To Continue >> "/>	

Screen shot 5/29/12

The minimum information required is the home address and checking the box to copy over the home address into the mailing address fields. If this is a rehire, ePAFS displays the last addresses contained in the district files. Be sure to confirm these since they may be old and outdated. ePAFS will require that you check the box confirming that you have validated that the addresses are current and accurate. Note that ePAFS will not accept foreign addresses. For foreign addresses see District HR.

If possible, also gather phone and email information.

2.3 Select Position

Cancel And Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help	
2.3 Select Position		Action Selected: Additional Assignment		Effective Date: 5/29/12		Location/Dept: Merritt	
Name		Employee #					
White, Beverly		10006238					
Positions For Department: President's Office - 601							
Job Title	Job Code	Position #	Currently Assigned To	Employee #	Assignment Ends	On Leave	
College President	605	00000704	Adams, Robert Anthony	10009040		Click Here To Select This Position	
STAFF ASST/PRESIDENT'S OFFICE	945	00000703	Harding, Stefanie	10002036		Click Here To Select This Position	
Exec Asst/President's Office	954	00000701	Bryson, Judy	10000542		Click Here To Select This Position	
Please select a reason why the position could not be found:							
<input type="radio"/> It is an extra service academic assignment							
<input type="radio"/> It is a part time adjunct academic assignment							
<input checked="" type="radio"/> It is for an hourly short term assignment							
<input type="radio"/> It is for a student worker							
Continue Without A Position # >>							
<< Return To Previous Page							

Screen shot 5/29/12

Select either 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.

Single positions are 'full time regular' and only one person can occupy the position at any time. These are controlled individually through the budget and a record maintained in the Position Control Table.

Pooled positions are never 'full time regular' and several employees can be assigned to the same type of job at the same time. They also do not have position numbers. At the bottom of the screen you can indicate if this is to be an Extra Service or Part Time Adjunct, or short term hourly or student worker assignment. On the next screen we will ask you some details about this position including how it should be paid for (what is the combo code). For single positions, that information is already known and maintained in the Position Control Table.

It is possible that the position you want to fill is a single position (full time regular) but does not appear in the Position Control Table. If this is the case, contact your Business Office or District HR as creating a new position requires a budget process. Once the position is fully approved and shown in Position Control, it will appear on this screen and you can assign an employee to it.

It is also possible that when you select a single position that is currently vacant ePAFS gives you a message that you cannot use the position because it is not budgeted. Contact your Business Office regarding this condition.

ePAFS does not automate the process of checking for adequate budget. It will check to see if the single position has been budgeted at all in the current fiscal year.

2.4 Pooled Position Definition

As Seen for All Actions Except Stipends

This screen is used only if the position is not in the Position Control Table and is therefore by definition a pooled position. This page however is not for the creation of new single positions that may be needed in the Position Control Table. These must be created through the budget process before they can be used or accessed by ePAFS.

2.4 Define Position Action Selected: Reassign to New Primary Assmt - Perm Effective Date: 5/29/12 Location/Dept: Merritt/Student Services/EOPS/DSPS - 642

Enter Position Information

Enter Department: Student Services/EOPS/DSPS - 642
Job Code: 405A - Instructor
Job Code Description: Instructor - 405A
Bargaining Unit: PFT - Peralta Federation Teachers

Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent	
6 - Merritt	01	642	1101	1	011600	0809	01	50%	Remove Line
6 - Merritt	01	642	1206	1	644100	0000	00	50%	Remove Line

[Add Another Budget Line](#)

[<< Return To Previous Page](#) [View Valid Budget Combinations](#) [Click Here To Continue >>](#)

Screen shot 5/29/12

First select the department for new assignment from the pull down. Note that department code and cost center are almost always the same thing so the combo code entry will default the cost center to the code you have selected.

Second, select the job code from either the numerical pull down or the alpha job name list.

Third, complete the combo codes telling how the assignment has been budgeted.

You may enter the elements of the combo code one at a time and each field has been filtered to show only valid values. Note that although all the elements individually may be valid, all eight elements of the combo code together must exist in the Combo Code Master Table in order to be completely valid.

In order to see and select which valid combinations have been established for this department, click on “View Valid Budget Combinations”. When this list appears you can further filter it by any element by entering it in the field at the top of the screen and clicking “Run Search”.

Submit An ePAF For Location: College of Alameda For Employee: White, Beverly - Employee #: 10006238 [Click Here To Return To Your ePAF](#)

List Of Valid Budget Code Combinations

Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	
2 - Alameda	All	255	All	All	All	All	All	Run Search

Fund	Cost Center	Object	Program	Activity	Project	Line Code	
11	255	2354	1	672700	1845	00	Add To My ePAF
11	255	2354	1	672700	1948	00	Add To My ePAF
11	255	2352	1	672700	1845	00	Add To My ePAF
11	255	2451	1	094700	1845	00	Add To My ePAF
11	255	2451	1	493030	1845	00	Add To My ePAF
11	255	2102	1	672700	1845	00	Add To My ePAF

Screen shot 5/29/12

Note that the first combo code cost center cannot be changed since it belongs to the department selected. Second and subsequent combo codes also default to this department but can be over written to account for those rare cases where an assignment may be shared between two departments (cost centers).

If you have entered more than one combination code the percentage fields at the end of each line must total 100%.

As Seen for Stipends

[Cancel And Return To Main Menu](#) **Peralta Colleges - ePAFS** [Click Here For Help](#)

2.4 Stipend Combo Code Action Selected: Assign Effective Date: 6/1/12 Location/Dept: Merritt/Student Services/EOPS/DSPS - 642

Enter Combo Code Information

Enter Department: Student Services/EOPS/DSPS - 642
 Job Code: Not Applicable
 Job Code Description: Not Applicable
 Bargaining Unit: No Bargaining Unit Found

Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent
6 - Merritt	11	642	2353	1	647200	1093	00	100%

[Add Another Budget Line](#)

[<< Return To Previous Page](#) [View Valid Budget Combinations](#) [Click Here To Continue >>](#)

Screen shot 6/6/12

When 'Stipend' is indicated on 2.1, action moves directly to 2.4 where a combo code must be entered. Job code is not required.

2.5 Assignment Detail

As Seen for All Actions Except Stipends

Cancel And Return To Main Menu		Peralta Colleges - ePAFS			Click Here For Help	
2.5 Assignment Detail		Action Selected: Reassign to New Primary Asmt - Perm		Effective Date: 5/1/12	Location/Dept: Laney/Student Services-Matriculation - 542	
Job Title	Job #	Location	Department	Position #		
Clerical Assistant II	024	Laney	Student Services-Matriculation - 542	00000488		
Assign Employee		Employee #				
Brown, Edward M.		10001688				
Selected: Add This Assignment						
Effective Date: 5/1/2012		End Date:		Total Estimated Cost Rate: per hour \$0.00 (For assistance click here for the Benefits Worksheet.)		
* Hours per week: 40				Recommended Grade:		
Benefit Plan: PRB - Peralta Regular Benefit Plan				* Total est. cost excluding benefits: \$300.00 Recommended Step:		
Shift Differential: Monday Tuesday Wednesday Thursday Friday Saturday Sunday						
<< Return To Previous Page		Click Here To Continue >>				

Screen shot 6/6/12

The data you must enter on this screen varies based on the type of assignment. Required entries are marked with a red asterisk (*).

Effective Date: Cannot be changed on this screen. To change the effective date return to screen 1.4 Select Action.

End date: Is now a mandatory entry for many types of assignments. This is the last day on which work will be performed.

Hours per week or FTE:

If fund = 3 (fee based) then the hours per week/FTE field is inactive and cannot be filled. It is not meaningful for fee based assignments.

If the fund is any other fund except 03 then hours per week/FTE is a required field.

- For classified regular single position the value is recorded as hours per week defaulted to the standard (budgeted) hours from the Position Control Table but can be over written to a smaller value. Larger values require a budget action prior to assignment.
- For all certificated contract and part time adjunct the value is recorded as FTE. This is a free form fill in with no conversion to hours. ePAFS does not calculate or check for total load or convert to equated hours.
- For short term hourly the value is hours per week. This is a free form fill in.
- For students the value is hours per week. This is a free form fill in. Remember that students are limited to a maximum of 20 hours per week during the semester but may work more than this limit during the summer and intercessions.



Benefit Plan: Usually there is only one choice and it is displayed. However, if the assignment is Administration (pay group ADM) or contract certificated (pay group P10, P11, or P12) a drop down menu will present the two available choices.

Shift Differential: If the assignment is eligible for a shift differential based on job code, a drop down box for each day of the week will be presented. Use these boxes only if the assignment

will be assigned to work outside of normal business hours. For the days on which work will regularly be during non-standard hours, select from swing, graveyard, or split shifts.

Total Estimated Cost Excluding Benefits: This field is required by your Business Office to evaluate the cost of the assignment against budget. Consult your Business Office for the method of calculation appropriate for your location. The rate per hour (or month, or annual) is an optional field. You may also recommend grade and step for the assignment.

As Seen for Stipends:

Cancel And Return To Main Menu		Peralta Colleges - ePAFS	
2.5 Assignment Detail		Action Selected: Stipend	Effective Date: 5/31/12
Assign Employee	Employee #		
Henderson, Andrea M.	10008624		
Selected: Add Stipend			
Effective Date: 5/31/2012 		* End Date: <input type="text"/> 	
* Describe Stipend: <input type="text"/>			
<< Return To Previous Page		Click Here To Continue >>	Please enter an end date.

Screen shot 5/30/12

Stipends: All the information necessary to process your stipend must be described in the comment box on this screen including: Amount, description, reason, and end date. This information is used by Payroll. Questions and follow up regarding stipends should be directed to Payroll, not to District HR.

2.6 ASSIGN Confirmation Screen

Cancel And Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help			
2.6 Assign Confirmation		Action Selected: Additional Assignment				Effective Date: 5/31/12		Location/Dept: Merritt/Student Services/EOPS/DSPS - 642	
Job Title	Job #	Location	Department	Position #					
Account Clerk I	003H	Merritt	Student Services/EOPS/DSPS - 642	00000773					
ePAF Action	Start Date	End Date	Assign Employee	Employee #	Hrs per week	Rate per hour	Estimated Cost	Benefit Plan	
Assign	5/31/12		Henderson, Andrea	10000630	15	\$0.00	\$300.00	TCB - Temporary Classified Benefits	
Hide Employee's Address									
Home Address					Mailing Address				
2724 Bartlett Street Oakland, CA, 94602 510/326-9197					2724 Bartlett Street Oakland, CA, 94602				
Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent	
6 - Merritt	11	642	2354	1	647200	1094	00	100%	
First Approver		Users In This Role							
Enter Comments For This ePAF In The Box Below:									
<div></div>									
<< Return To Previous Page			Save This ePAF To My Inbox			Click Here To Submit This ePAF			

Screen shot 5/31/12.

At the conclusion of initiating the ASSIGN action, the confirmation screen 2.6 for assignments appears to allow you to check your work.

Review your data carefully. If revisions are necessary use the “Return to Previous Screen” button to back up to the page on which the information was first entered.

This is your opportunity to enter whatever explanatory comments you wish in the comments box. It is good practice to provide some explanation for subsequent approvers. Some comment is mandatory.

You may either ‘Submit’ your ePAF which means send to the next approver, or “Send this ePAF to my Inbox”. If you send the ePAF to your inbox it will be held there indefinitely until you retrieve it. To do so, on the main menu, use “Approve ePAF” which will open your ePAF inbox where you can click on the item, and once open, change or submit it for approval.

2.7 ASSIGN Approver's Screen

Return To Main Menu		Peralta Colleges - ePAFS		Click Here For Help																							
2.7 Approve Assignment - ePAF # 41 <small>REASON EFFECTIVE DATE IS MORE THAN 30 DAYS RETROACTIVE! Last document.</small>																											
Approve This ePAF		Edit This ePAF		Return This ePAF To Previous Approver																							
Approve This ePAF		Edit This ePAF		Return This ePAF																							
Approve This ePAF		Edit This ePAF		Return This ePAF																							
Approve This ePAF		Edit This ePAF		Return This ePAF																							
<table border="1"> <thead> <tr> <th>Position Description</th> <th>Job Code</th> <th>Position #</th> <th>Currently Assigned To</th> <th>Employee #</th> <th>Assignment Ends</th> <th>On Leave</th> <th>Department</th> </tr> </thead> <tbody> <tr> <td>Account Clerk I</td> <td>003H</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Merritt/Student Services/EOPS/DSPS - 642</td> </tr> </tbody> </table>						Position Description	Job Code	Position #	Currently Assigned To	Employee #	Assignment Ends	On Leave	Department	Account Clerk I	003H						Merritt/Student Services/EOPS/DSPS - 642						
Position Description	Job Code	Position #	Currently Assigned To	Employee #	Assignment Ends	On Leave	Department																				
Account Clerk I	003H						Merritt/Student Services/EOPS/DSPS - 642																				
<table border="1"> <thead> <tr> <th>Action For This ePAF</th> <th>Start Date</th> <th>End Date</th> <th>Assign Employee</th> <th>Employee #</th> <th>Hours</th> <th>Hourly Rate</th> <th>Est. Cost</th> <th>Benefit Plan</th> <th>Grade</th> <th>Step</th> </tr> </thead> <tbody> <tr> <td>Assign</td> <td>2/1/12</td> <td>6/8/12</td> <td>White, Beverly</td> <td>10006238</td> <td>20</td> <td>\$0</td> <td>\$3000</td> <td>TCB - Temporary Classified Benefits</td> <td></td> <td></td> </tr> </tbody> </table>						Action For This ePAF	Start Date	End Date	Assign Employee	Employee #	Hours	Hourly Rate	Est. Cost	Benefit Plan	Grade	Step	Assign	2/1/12	6/8/12	White, Beverly	10006238	20	\$0	\$3000	TCB - Temporary Classified Benefits		
Action For This ePAF	Start Date	End Date	Assign Employee	Employee #	Hours	Hourly Rate	Est. Cost	Benefit Plan	Grade	Step																	
Assign	2/1/12	6/8/12	White, Beverly	10006238	20	\$0	\$3000	TCB - Temporary Classified Benefits																			
View Employee's Address																											
<table border="1"> <thead> <tr> <th>Budget Location</th> <th>Fund</th> <th>Cost Center</th> <th>Object</th> <th>Program</th> <th>Activity</th> <th>Project</th> <th>Line</th> <th>Percent</th> </tr> </thead> <tbody> <tr> <td>6 - Merritt</td> <td>11</td> <td>642</td> <td>2354</td> <td>1</td> <td>647200</td> <td>1094</td> <td>00</td> <td>100%</td> </tr> </tbody> </table>						Budget Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent	6 - Merritt	11	642	2354	1	647200	1094	00	100%				
Budget Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent																			
6 - Merritt	11	642	2354	1	647200	1094	00	100%																			
<table border="1"> <thead> <tr> <th>ePAF Entered By</th> <th>Enter Date</th> <th>Enter Time</th> <th>Current Status</th> <th>Location</th> <th>Department</th> </tr> </thead> <tbody> <tr> <td>Vorhies, William</td> <td>6/6/12</td> <td>9:39 AM</td> <td>In vorhies's Inbox</td> <td>Merritt</td> <td>Student Services/EOPS/DSPS - 642</td> </tr> </tbody> </table>						ePAF Entered By	Enter Date	Enter Time	Current Status	Location	Department	Vorhies, William	6/6/12	9:39 AM	In vorhies's Inbox	Merritt	Student Services/EOPS/DSPS - 642										
ePAF Entered By	Enter Date	Enter Time	Current Status	Location	Department																						
Vorhies, William	6/6/12	9:39 AM	In vorhies's Inbox	Merritt	Student Services/EOPS/DSPS - 642																						
<table border="1"> <thead> <tr> <th>Comments</th> <th>Date</th> <th>Time</th> <th>Entered By</th> </tr> </thead> <tbody> <tr> <td>test test</td> <td>6/6/12</td> <td>9:39 AM</td> <td>Vorhies, William</td> </tr> <tr> <td>REASON EFFECTIVE DATE IS MORE THAN 30 DAYS RETROACTIVE! Last document.</td> <td>6/6/12</td> <td>9:39 AM</td> <td>Vorhies, William</td> </tr> </tbody> </table>						Comments	Date	Time	Entered By	test test	6/6/12	9:39 AM	Vorhies, William	REASON EFFECTIVE DATE IS MORE THAN 30 DAYS RETROACTIVE! Last document.	6/6/12	9:39 AM	Vorhies, William										
Comments	Date	Time	Entered By																								
test test	6/6/12	9:39 AM	Vorhies, William																								
REASON EFFECTIVE DATE IS MORE THAN 30 DAYS RETROACTIVE! Last document.	6/6/12	9:39 AM	Vorhies, William																								
For A History Of Changes To This ePAF And An Approval History Click Here																											

Screen shot 6/6/12

This is the screen seen by all approvers summarizing the initiated assignment. It is also displayed for the Initiator after submission to provide an opportunity to print or save an electronic copy.

Actions available:

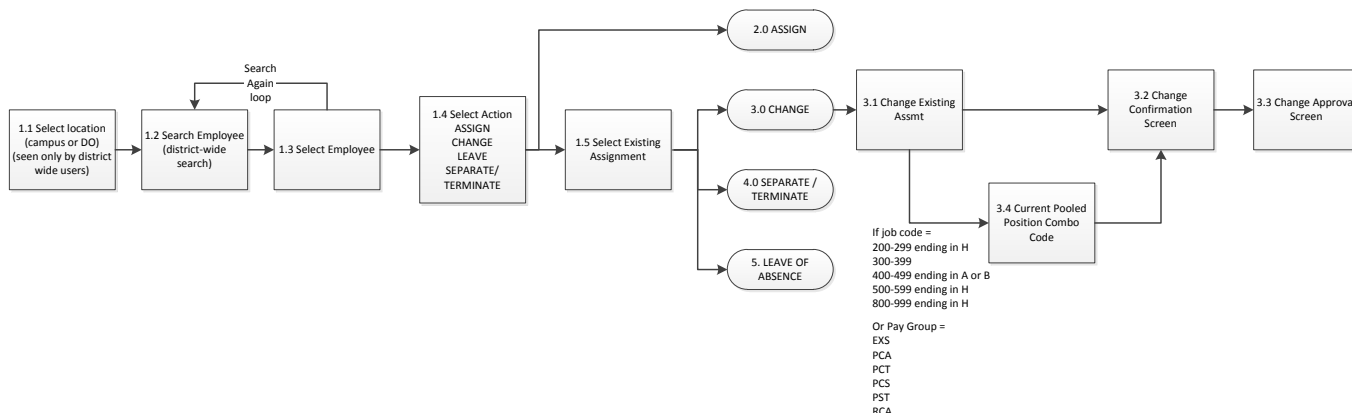
1. Approve this ePAF: Moves to next approver.
2. Edit this ePAF: Allows direct editing of fields on this screen. Note that not all validations are operative when changes are made on this screen which may introduce errors. Approvers should take care to ensure entries are accurate.
3. Return ePAF: Allows the approver to select any prior approver or initiator as the person to whom the ePAF should be returned. Comments directing what changes are to be made should be entered. Note that the ePAF will move more quickly through the approval process if the approver simply makes the required changes. Returning the ePAF requires that it then be reapproved by all intermediate approvers which will delay processing.
4. Cancel this ePAF: The ePAF will remain inactive in the ePAF history but can never be restarted. Once canceled a new replacement ePAF will be necessary.

By exiting without taking any action the ePAF remains on HOLD in your inbox.

The [ePAF History](#) link at top right opens a page showing the complete history of actions and changes to this ePAF. At lower left is a link: For A History Of Changes To This ePAF And An Approval History [Click Here](#) leads to the same history reports.

Commands for PRINT and DOWNLOAD also appear at upper right on this screen.

3.0 Change Existing Assignment



When CHANGE is selected, the first required action is to select the specific assignment to be impacted on screen 1.5.

The information to be changed is contained on a single screen.

3.1 Change Existing Assignment

Cancel And Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help	
3.1 Change Existing Assignment		Action Selected: Change		Effective Date: 6/4/2012		Location/Dept: Laney/Business Office - 531	
Employee Name	Employee #	Job Title	Job #	Location	Department	End Date	
Arrington, Gary	10001974	Custodian	046	Peralta	Business Office		
Please Select Change Type:		Please select a change type from the list.					
<div> <div>None Selected</div> <div> None Selected Change Effective Date Change End Date Change Hours Per Week or FTE Change Shift Differential Change Combo Codes Change Non-Working Schedule </div> </div>							

Screen shot 6/4/12.

First select which of the six available actions is desired via the pull-down menu. Only one category of item can be changed per ePAF. Available changes are:

1. Change effective date: In this case this means the start date of the assignment.
2. Change the end date: Subject to some restrictions to being in the same fiscal year for some categories of assignment.
3. Change Hours per Week or FTE.
4. Change Shift Differential: Also use this to report a shift differential for the first time. This data goes directly to Payroll, not District HR.
5. Change Combo Codes: This data goes directly to District Finance, not District HR.
6. Change Non-Working Times for Classified 10 and 11 month Assignments: In the comments field provided fully describe the change in non-working days and times. This data goes directly to Payroll, not to District HR.

If the action is not relevant to the selected assignment it is not displayed.

The screen then refreshes to allow data entry.

Cancel And Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help	
3.1 Change Existing Assignment		Action Selected: Change		Effective Date: 6/4/2012		Location/Dept: Laney/Business Office - 531	
Employee Name	Employee #	Job Title	Job #	Location	Department	End Date	
Arrington, Gary	10001974	Custodian	046	Peralta	Business Office		
Please Select Change Type: <input type="text" value="Change Effective Date"/>							
* Change Effective Date To: <input type="text" value="6/4/2012"/>							
<< Return To Previous Page		Click Here To Continue >>					

Screen shot 6/4/12

The fields available for entering change data will vary based on the change selected. Fields are pre-formatted and if existing data is found in PS, the field will display the current data. Note that in the case of shift differential and change in classified non-working schedule this data is not found in PeopleSoft.

3.4 Current Pooled Position Combo Code

Cancel And Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help		
3.4 Current Pooled Position Combo Code		Action Selected: Change		Effective Date: 6/15/2012		Location/Dept: Merritt/Child Care - 411		
Employee Name	Employee #	Job Title	Job #	Location	Department	Start Date	End Date	
Brown, Bernice	10008551	Children's Center Assist. III	308	Merritt	Child Care	9/22/06		
Enter Combo Codes Below								
Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent
6 - Merritt	<input type="text" value=""/>	<input type="text" value="411"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	100%
Add Another Budget Line								
<< Return To Previous Page		View Valid Budget Combinations		Click Here To Continue >>				

Screen shot 6/15/12

For CHANGE when the existing assignment to be modified is pooled, no combo code is available in the PeopleSoft HR database. In order for your action to be processed you must enter the current combo code(s).

3.2 Change Existing Assignment Confirmation Screen

Cancel And Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help			
3.2 Change Existing Assignment Confirmation		Action Selected: Change		Effective Date: 6/8/12		Location/Dept: Laney/Communications - 555			
Job Title	Job #	Location	Department	Position #					
Instructor/Temporary	407A	Laney	Communications - 555	TBD					
ePAF Action	Change Type	Employee	Employee #	Change Description					
Change	End Date	Henderson, Larry	10004867	Change end date to 6/6/12					
Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent	
First Approver		Users In This Role							
Enter Comments For This ePAF In The Box Below:									
test test									
<< Return To Previous Page			Save This ePAF To My Inbox			Click Here To Submit This ePAF			

Screen shot 6/4/12.

At the conclusion of initiating the CHANGE action, the confirmation screen 3.2 for CHANGE actions appears to allow you to check your work.

Review your data carefully. If revisions are necessary use the “Return to Previous Screen” button to back up to the page on which the information was first entered.

This is your opportunity to enter whatever explanatory comments you wish in the comments box. It is good practice to provide some explanation for subsequent approvers.

You may either ‘Submit’ your ePAF which means send to the next approver, or “Send this ePAF to my Inbox”. If you send the ePAF to your inbox it will be held there indefinitely until you retrieve it. To do so, on the main menu, use “Approve ePAF” which will open your ePAF inbox where you can click on the item, and once open, change or submit it for approval.

3.3 CHANGE Approver's Screen

Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help																				
3.3 Approve Assignment Change - ePAF # 44																										
Approve This ePAF			Edit This ePAF		Return This ePAF To Previous Approver		Cancel This ePAF																			
<input type="button" value="Approve This ePAF"/>			<input type="button" value="Edit This ePAF"/>		<input type="button" value="Return This ePAF"/>		<input type="button" value="Cancel This ePAF"/>																			
<table border="1"> <thead> <tr> <th>Position Description</th> <th>Job Code</th> <th>Position #</th> <th>Currently Assigned To</th> <th>Employee #</th> <th>Assignment Ends</th> <th>On Leave</th> <th>Department</th> </tr> </thead> <tbody> <tr> <td>Custodian</td> <td>046</td> <td>00000440</td> <td>Arrington, Gary</td> <td>10001974</td> <td></td> <td></td> <td>Laney/Business Office - 531</td> </tr> </tbody> </table>									Position Description	Job Code	Position #	Currently Assigned To	Employee #	Assignment Ends	On Leave	Department	Custodian	046	00000440	Arrington, Gary	10001974			Laney/Business Office - 531		
Position Description	Job Code	Position #	Currently Assigned To	Employee #	Assignment Ends	On Leave	Department																			
Custodian	046	00000440	Arrington, Gary	10001974			Laney/Business Office - 531																			
<table border="1"> <thead> <tr> <th>Action For This ePAF</th> <th>Change Type</th> <th>Employee</th> <th>Employee #</th> <th>Change Description</th> </tr> </thead> <tbody> <tr> <td>Change</td> <td>Hours</td> <td>Arrington, Gary</td> <td>10001974</td> <td>Change Hours from 40 to 30</td> </tr> </tbody> </table>									Action For This ePAF	Change Type	Employee	Employee #	Change Description	Change	Hours	Arrington, Gary	10001974	Change Hours from 40 to 30								
Action For This ePAF	Change Type	Employee	Employee #	Change Description																						
Change	Hours	Arrington, Gary	10001974	Change Hours from 40 to 30																						
<table border="1"> <thead> <tr> <th>Budget: Location</th> <th>Fund</th> <th>Cost Center</th> <th>Object</th> <th>Program</th> <th>Activity</th> <th>Project</th> <th>Line</th> <th>Percent</th> </tr> </thead> <tbody> <tr> <td>5 - Laney</td> <td>01</td> <td>531</td> <td>2102</td> <td>1</td> <td>653000</td> <td>0000</td> <td>00</td> <td>100%</td> </tr> </tbody> </table>									Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent	5 - Laney	01	531	2102	1	653000	0000	00	100%
Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent																		
5 - Laney	01	531	2102	1	653000	0000	00	100%																		
<table border="1"> <thead> <tr> <th>ePAF Entered By</th> <th>Enter Date</th> <th>Enter Time</th> <th>Current Status</th> <th>Location</th> <th>Department</th> </tr> </thead> <tbody> <tr> <td>Vorhies, William</td> <td>6/6/12</td> <td>10:49 AM</td> <td>In wvorhies's Inbox</td> <td>Laney</td> <td>Business Office - 531</td> </tr> </tbody> </table>									ePAF Entered By	Enter Date	Enter Time	Current Status	Location	Department	Vorhies, William	6/6/12	10:49 AM	In wvorhies's Inbox	Laney	Business Office - 531						
ePAF Entered By	Enter Date	Enter Time	Current Status	Location	Department																					
Vorhies, William	6/6/12	10:49 AM	In wvorhies's Inbox	Laney	Business Office - 531																					
<table border="1"> <thead> <tr> <th>Comments</th> <th>Date</th> <th>Time</th> <th>Entered By</th> </tr> </thead> <tbody> <tr> <td>test test</td> <td>6/6/12</td> <td>10:49 AM</td> <td>Vorhies, William</td> </tr> </tbody> </table>									Comments	Date	Time	Entered By	test test	6/6/12	10:49 AM	Vorhies, William										
Comments	Date	Time	Entered By																							
test test	6/6/12	10:49 AM	Vorhies, William																							
For A History Of Changes To This ePAF And An Approval History Click Here .																										

Screen shot 6/6/12.

This is the screen seen by all approvers summarizing the initiated change to an existing assignment. It is also displayed for the Initiator after submission to provide an opportunity to print or save an electronic copy.

Actions available:

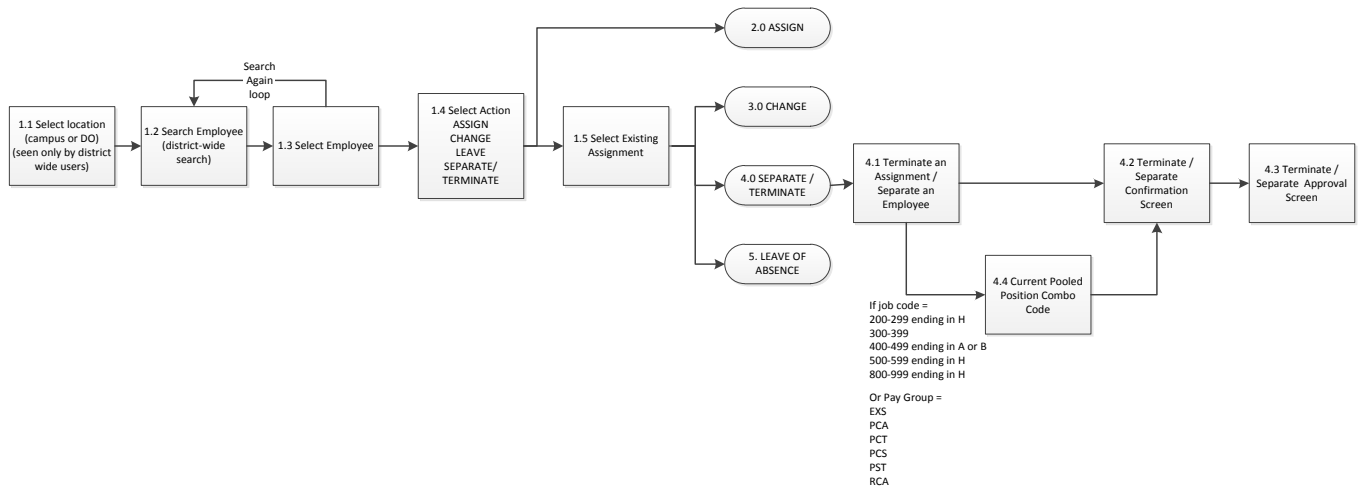
1. Approve this ePAF: Moves to next approver.
2. Edit this ePAF: Allows direct editing of fields on this screen. Note that most validations are not operative when changes are made on this screen which may introduce errors. Approvers should take care to ensure entries are accurate.
3. Return ePAF: Allows the approver to select any prior approver or initiator as the person to whom the ePAF should be returned. Comments directing what changes are to be made should be entered. Note that the ePAF will move more quickly through the approval process if the approver simply makes the required changes. Returning the ePAF requires that it then be reapproved by all intermediate approvers which will delay processing.
4. Cancel this ePAF: The ePAF will remain inactive in the ePAF history but can never be restarted. Once canceled a new replacement ePAF will be necessary.

By exiting without taking any action the ePAF remains on HOLD in your inbox.

The [ePAF History](#) link at top right opens a page showing the complete history of actions and changes to this ePAF. At lower left is a link: For A History Of Changes To This ePAF And An Approval History [Click Here](#) leads to the same history reports.

Commands for PRINT and DOWNLOAD also appear at upper right on this screen.

4.0 Termination and Separation



The following **TERMINATE / SEPARATE** actions can be initiated on campus with ePAFS (many types of **TERMINATE / SEPARATE** are restricted to District HR use only).

1. Terminate an assignment.
2. Separate an employee from employment with the district due to:
 - a. Resignation
 - b. Retirement
 - c. Death
 - d. Involuntary termination for performance during classified probation period.

Note that when selecting **TERMINATE / SEPARATE** on screen 1.4 ePAFS prompts the user that the effective date must be the employee's last day of work. This information will be further interpreted by the HR Generalist before entry into PS based on HR rules to determine the PS effective date (next calendar day, next weekday, next non-holiday working day, etc.)

4.1 Separate Employee / Terminate Assignment

Cancel And Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help	
4.1 Separate Employee Or Terminate An Assignment		Action Selected: Termination		Effective Date: 6/8/2012		Location/Dept: Laney/Business Office - 531	
Employee Name	Employee #	Job Title	Job #	Location	Department	Start Date	End Date
Arrington, Gary	10001974	Custodian	046	Laney	Business Office	3/16/99	
<p>Please Select One Of The Following:</p> <ul style="list-style-type: none"><input type="radio"/> Employee is retiring with benefits<input type="radio"/> Employee voluntarily resigned<input type="radio"/> Employee died<input type="radio"/> Employee separated for performance during probation (Classified only)<input type="radio"/> Assignment ended (Students, part time hourly, adjunct only)<input type="radio"/> Assignment ended because of end of funded faculty contract <div style="display: flex; justify-content: space-between;"><div><< Return To Previous Page</div><div>Click Here To Continue >></div></div>							

Screen shot 6/8/12.

Select the desired action from the list. If the action is not appropriate for the assignment you have indicated it will not be available for selection.

Note that several types of separations and terminations are reserved for the use of District HR only. If you do not see the type of separation or termination on the list that you need, call District HR.

Also, if you are separating an employee from the employment of the District, be sure you have identified and separated all of their active assignments.

If an employee is retiring who currently has an active Extra Service adjunct assignment, you must terminate this assignment along with all others even if they will be returning immediately to again teach adjunct. In this case a new Part Time Adjunct assignment for the retiree will need to be entered with an effective date after the separation for retirement date.

4.4 Current Pooled Position Combo Code

Cancel And Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help		
4.4 Current Pooled Position Combo Code		Action Selected: Termination		Effective Date: 6/22/2012		Location/Dept: Merritt/Child Care - 411		
<u>Employee Name</u>	<u>Employee #</u>	<u>Job Title</u>	<u>Job #</u>	<u>Location</u>	<u>Department</u>	<u>Start Date</u>	<u>End Date</u>	
Brown, Bernice	10008551	Children's Center Assist. III	308	Merritt	Child Care	9/22/06		
Enter Combo Codes Below								
Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent
6 - Merritt	<input type="text"/>	411 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	100%
Add Another Budget Line								
<< Return To Previous Page		View Valid Budget Combinations		Click Here To Continue >>				

Screen shot 6/15/12

For TERMINATE / SEPARATE when the existing assignment to be modified is pooled, no combo code is available in the PeopleSoft HR database. In order for your action to be processed you must enter the current combo code(s).

4.2 Terminate / Separate Confirmation Screen

Cancel And Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help			
4.2 Terminate / Separate Confirmation		Action Selected: Termination				Effective Date: 6/8/12		Location/Dept: Laney/Communications - 555	
Job Title	Job #	Location	Department		Position #				
Instructor	405	Laney	Communications - 555		00000677				
ePAF Action	Termination Date	Employee	Employee #	Termination / Separation Description					
Termination	6/8/2012	Henderson, Larry	10004867	Employee voluntarily resigned					
Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent	
5 - Laney	01	555	1202	1	100200	0000	00	20%	
5 - Laney	01	555	1101	1	100200	0000	00	80%	
First Approver		Users In This Role							
OI Academic Specialist									
Enter Comments For This ePAF In The Box Below:									
comment comment									
<input data-bbox="212 779 388 800" type="button" value=" << Return To Previous Page "/> <input data-bbox="415 779 591 800" type="button" value=" Save This ePAF To My Inbox "/> <input data-bbox="618 779 794 800" type="button" value=" Click Here To Submit This ePAF "/>									

Screen shot 6/8/12

At the conclusion of initiating the TERMINATE / SEPARATE action, the confirmation screen 4.2 for TERMINATE / SEPARATE actions appears to allow you to check your work.

Review your data carefully. If revisions are necessary use the “Return to Previous Screen” button to back up to the page on which the information was first entered.

This is your opportunity to enter whatever explanatory comments you wish in the comments box. It is good practice to provide some explanation for subsequent approvers.

You may either ‘Submit’ your ePAF which means send to the next approver, or “Send this ePAF to my Inbox”. If you send the ePAF to your inbox it will be held there indefinitely until you retrieve it. To do so, on the main menu, use “Approve ePAF” which will open your ePAF inbox where you can click on the item, and once open, change or submit it for approval.

4.3 Terminate / Separate Approvers Screen

Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help		
4.3 Approve Termination / Separation - ePAF # 52								
Approve This ePAF		Edit This ePAF		Return This ePAF To Previous Approver		Cancel This ePAF		
<input type="button" value="Approve This ePAF"/>		<input type="button" value="Edit This ePAF"/>		<input type="button" value="Return This ePAF"/>		<input type="button" value="Cancel This ePAF"/>		
Position Description	Job Code	Position #	Currently Assigned To	Employee #	Assignment Ends	On Leave	Department	
Instructor	405	00000677	Henderson, Larry	10004867			Laney/Communications - 555	
Action For This ePAF	Termination Date	Employee	Employee #	Termination / Separation Description				
Termination	6/8/2012	Henderson, Larry	10004867	Employee voluntarily resigned				
Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent
5 - Laney	01	555	1202	1	100200	0000	00	20%
5 - Laney	01	555	1101	1	100200	0000	00	80%
ePAF Entered By	Enter Date	Enter Time	Current Status	Location	Department			
Vorhies, William	6/8/12	12:14 PM	In vorhies's Inbox	Laney	Communications - 555			
Comments					Date	Time	Entered By	
comment comment					6/8/12	12:14 PM	Vorhies, William	
For A History Of Changes To This ePAF And An Approval History Click Here								

Screen shot 6/8/12.

This is the screen seen by all approvers summarizing the initiated TERMINATE / SEPARATE action. It is also displayed for the Initiator after submission to provide an opportunity to print or save an electronic copy.

Actions available:

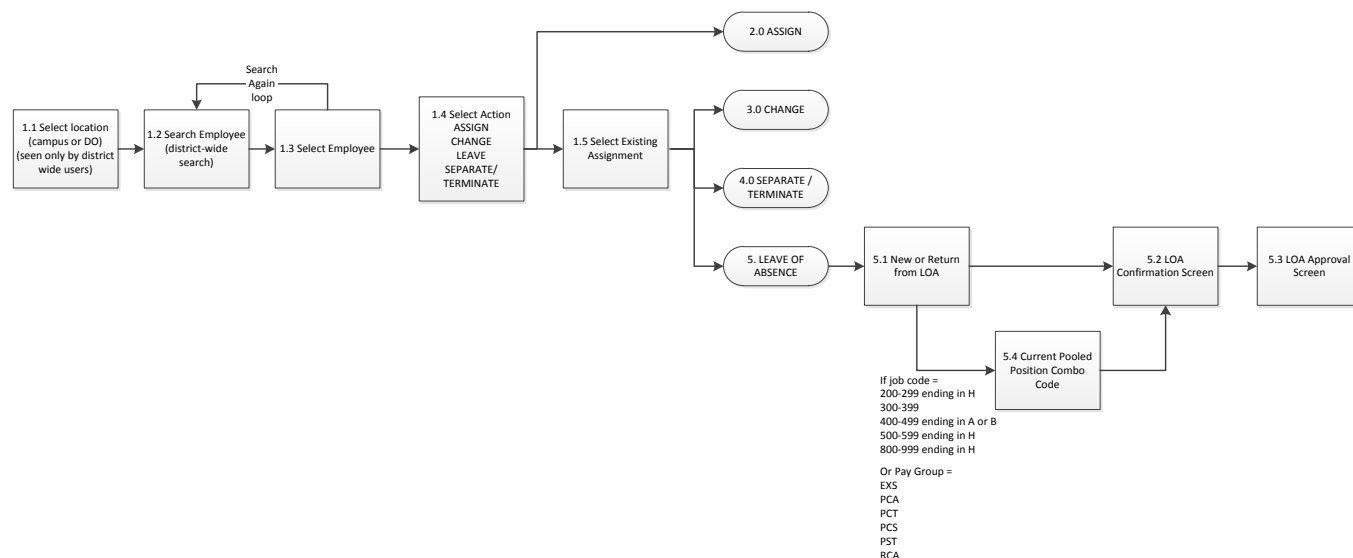
1. Approve this ePAF: Moves to next approver.
2. Edit this ePAF: Allows direct editing of fields on this screen. Note that most validations are not operative when changes are made on this screen which may introduce errors. Approvers should take care to ensure entries are accurate.
3. Return ePAF: Allows the approver to select any prior approver or initiator as the person to whom the ePAF should be returned. Comments directing what changes are to be made should be entered. Note that the ePAF will move more quickly through the approval process if the approver simply makes the required changes. Returning the ePAF requires that it then be reapproved by all intermediate approvers which will delay processing.
4. Cancel this ePAF: The ePAF will remain inactive in the ePAF history but can never be restarted. Once canceled a new replacement ePAF will be necessary.

By exiting without taking any action the ePAF remains on HOLD in your inbox.

The [ePAF History](#) link at top right opens a page showing the complete history of actions and changes to this ePAF. At lower left is a link: For A History Of Changes To This ePAF And An Approval History [Click Here](#) leads to the same history reports.

Commands for PRINT and DOWNLOAD also appear at upper right on this screen.

5.0 Leaves of Absence



When LEAVE is selected, the first required action is to select the specific employee and assignment to be impacted on screen 1.5.

The information to be changed is contained on a single screen.

Note that in this version of ePAFS the system will not identify whether a position is currently on leave. Also, if an employee is placed on or returned from leave it would be logical that all of that employee's active assignments be impacted. In this version of ePAFS the system will not check for all active or on-leave assignments and this will be monitored by the HR Generalists at the time of entry in PS.

The following Leave of Absence (LOA) actions can be initiated on campus with ePAFS (many types of LOAs are restricted for district HR use only).

1. Unpaid

- a. Education
- b. Military Service
- c. Research Work Experience
- d. Sabbatical
- e. General Leave Without Pay

2. Paid

- a. Exchange (exchange of faculty employee with other institution each continuing to pay its own employee while seconded).
- b. Military
- c. Sabbatical

Note that when selecting LEAVE OF ABSENCE on screen 1.4 ePAFS prompts the user that the effective date must be the employee's last day of work (or first day back to work if returning from leave). This information will be further interpreted by the HR Generalist before entry into PS based on HR rules to determine the PS effective date (next calendar day, next weekday, next non-holiday working day, etc.)

Change of Practice for Leave Returns

In order to close a potential exposure for unintentional overpayment you must now create a PA Return from Leave for all of these leave types. Previously, while these leaves were required to have return dates recorded when submitted, pay was automatically restored on these dates, without further confirmation that the employee had returned to work either before or after this originally scheduled date.

5.1 Create a New Leave of Absence or Return from Leave

Rev. 6/11/12

Cancel And Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help	
5.1 Create New Leave Of Absence Or Return From Leave		Action Selected: Leave		Effective Date: 6/1/2012		Location/Dept: Laney/Communications - 555	
Employee Name	Employee #	Job Title	Job #	Location	Department	Start Date	End Date
Henderson, Larry	10004867	Instructor	405	Laney	Communications - 555	8/18/03	
Please Select Leave Of Absence Or A Return From Leave: <div>None Selected None Selected Create A New Leave Of Absence Enter A Return From Leave</div>							
<div><< Return To Previous Page</div>							

Screen shot 6/11/12 – edits complete.

The first time this screen appears, select to either create a new leave or a return from leave.

Create a New Leave

Cancel And Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help	
5.1 Create New Leave Of Absence Or Return From Leave		Action Selected: Leave		Effective Date: 6/22/2012		Location/Dept: District/Financial Services/Budget - 141	
Employee Name	Employee #	Job Title	Job #	Location	Department	Start Date	End Date
Benvenuti, Marybeth	10009070	Asst Vice Chanc For Budget & F	646	District	Financial Services/Budget	7/31/07	
Please Select Leave Of Absence Or A Return From Leave: Create A New Leave Of Absence							
<div><input type="radio"/> Paid <input type="radio"/> Unpaid Military Service</div> <div><input type="radio"/> Paid <input type="radio"/> Unpaid Sabbatical - Not Available</div> <div><input type="radio"/> Paid <input type="radio"/> Unpaid Work Exchange - Not Available</div> <div><input type="radio"/> Paid <input type="radio"/> Unpaid Education - Not Available</div> <div><input type="radio"/> Paid <input type="radio"/> Unpaid Research Work Experience - Not Available</div> <div><input type="radio"/> Paid <input checked="" type="radio"/> Unpaid General Unpaid Leave</div> <div>* Expected Return Date: 7/9/2012</div>							
<div><< Return To Previous Page</div> <div>Click Here To Continue >></div>							

Screen shot 6/19/12 – edits complete.

When creating a new leave, select from among the available options. Leave types that are not applicable to the assignment cannot be selected.

Many types of leaves are reserved for entry only by District HR. If the specific leave type you want does not appear, call District HR.

Note that if the employee has more than one active assignment it is very likely that all assignments must be placed on leave. Use separate ePAFS to place all active assignments on leave.

Create a Return from Leave

Cancel And Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help																																																		
5.1 Create New Leave Of Absence Or Return From Leave		Action Selected: Return		Effective Date: 6/1/2012		Location/Dept: Laney/Communications - 555																																																		
Employee Name	Employee #	Job Title	Job #	Location	Department	Start Date	End Date																																																	
Henderson, Larry	10004867	Instructor	405	Laney	Communications	8/18/03																																																		
Please Select Leave Of Absence Or A Return From Leave: Enter A Return From Leave																																																								
<p>* First Working Day (After Return From Leave) Will Be: 6/18/2012</p> <table border="1"> <thead> <tr> <th colspan="7">June 2012</th> </tr> <tr> <th>Sun</th> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th>Fri</th> <th>Sat</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>1</td> <td>2</td> </tr> <tr> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> </tr> <tr> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> </tr> <tr> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> </tbody> </table>								June 2012							Sun	Mon	Tue	Wed	Thu	Fri	Sat						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
June 2012																																																								
Sun	Mon	Tue	Wed	Thu	Fri	Sat																																																		
					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																																																		
<< Return To Previous Page		Click Here To Continue >>																																																						

Screen shot 6/11/12.

If returning an employee's assignment from leave, enter the first day the employee will resume working. This will be further interpreted by the HR Generalist before entry into PS based on HR rules to determine the PS effective date (prior calendar day, prior weekday, prior non-holiday working day, etc.)

5.2 LOA Confirmation Screen

Cancel And Return To Main Menu		Peralta Colleges - ePAFS				Click Here For Help			
5.2 Leave Of Absence Confirmation		Action Selected: Leave		Effective Date: 6/1/12		Location/Dept: Laney/Communications - 555			
Job Title	Job #	Location	Department	Position #					
Instructor	405	Laney	Communications - 555	00000677					
ePAF Action	Leave To Begin	Employee	Employee #	Type Of Leave					
Leave	6/1/2012	Henderson, Larry	10004867	General Unpaid Leave					
Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent	
5 - Laney	01	555	1202	1	100200	0000	00	20%	
5 - Laney	01	555	1101	1	100200	0000	00	80%	
First Approver		Users In This Role							
OI Academic Specialist									
Enter Comments For This ePAF In The Box Below:									
A comment is required.									
<input data-bbox="215 777 386 793" type="button" value=" << Return To Previous Page "/> <input data-bbox="418 777 589 793" type="button" value=" Save This ePAF To My Inbox "/> <input data-bbox="621 777 792 793" type="button" value=" Click Here To Submit This ePAF "/>									

Screen shot 6/11/12.

At the conclusion of initiating the NEW OR RETURN LOA action, the confirmation screen 5.2 for LOA actions appears to allow you to check your work.

Review your data carefully. If revisions are necessary use the “Return to Previous Screen” button to back up to the page on which the information was first entered.

This is your opportunity to enter whatever explanatory comments you wish in the comments box. It is good practice to provide some explanation for subsequent approvers.

You may either ‘Submit’ your ePAF which means send to the next approver, or “Send this ePAF to my Inbox”. If you send the ePAF to your inbox it will be held there indefinitely until you retrieve it. To do so, on the main menu, use “Approve ePAF” which will open your ePAF inbox where you can click on the item, and once open, change or submit it for approval.

5.3 Approve LOA or Return from LOA

Return To Main Menu		Peralta College - ePAFS				Click Here For Help			
5.3 Approve Leave Of Absence Or Return From Leave - ePAF # 19									
Approve This ePAF		Edit This ePAF		Return This ePAF To Previous Approver			Cancel This ePAF		
<input type="button" value="Approve This ePAF"/>		<input type="button" value="Edit This ePAF"/>		<input type="button" value="Return This ePAF"/>			<input type="button" value="Cancel This ePAF"/>		
Position Description	Job Code	Position #	Currently Assigned To	Employee #	Assignment Ends	On Leave	Department		
Instructor	405	00000677	Henderson, Larry	10004867			Laney/Communications - 555		
Action For This ePAF	Termination Date	Employee	Employee #	Termination / Separation Description					
Leave	6/1/2012	Henderson, Larry	10004867	General Unpaid Leave					
Budget: Location	Fund	Cost Center	Object	Program	Activity	Project	Line	Percent	
5 - Laney	01	555	1202	1	100200	0000	00	20%	
5 - Laney	01	555	1101	1	100200	0000	00	80%	
ePAF Entered By	Enter Date	Enter Time	Current Status	Location	Department				
Vorhies, William	6/11/12	3:46 PM	In vorhies's Inbox	Laney	Communications - 555				
Comments						Date	Time	Entered By	
A comment is required.						6/11/12	3:46 PM	Vorhies, William	
For A History Of Changes To This ePAF And An Approval History Click Here									

Screen shot 6/11/12.

This is the screen seen by all approvers summarizing the initiated TERMINATE / SEPARATE action. It is also displayed for the Initiator after submission to provide an opportunity to print or save an electronic copy.

Actions available:

1. Approve this ePAF: Moves to next approver.
2. Edit this ePAF: Allows direct editing of fields on this screen. Note that most validations are not operative when changes are made on this screen which may introduce errors. Approvers should take care to ensure entries are accurate.
3. Return ePAF: Allows the approver to select any prior approver or initiator as the person to whom the ePAF should be returned. Comments directing what changes are to be made should be entered. Note that the ePAF will move more quickly through the approval process if the approver simply makes the required changes. Returning the ePAF requires that it then be reapproved by all intermediate approvers which will delay processing.
4. Cancel this ePAF: The ePAF will remain inactive in the ePAF history but can never be restarted. Once canceled a new replacement ePAF will be necessary.

By exiting without taking any action the ePAF remains on HOLD in your inbox.

The [ePAF History](#) link at top right opens a page showing the complete history of actions and changes to this ePAF. At lower left is a link: For A History Of Changes To This ePAF And An Approval History [Click Here](#) leads to the same history reports.

Commands for PRINT and DOWNLOAD also appear at upper right on this screen.

Appendices

Workflow

Vertical workflow ‘channels’ on campus are defined exclusively by location, cost center, and object as determined by reading the first combo code on the PA. The routing is designed to always begin from the bottom to ensure that all approvers always see the appropriate PAs. Stops within a channel are defined exclusively by cost center (department).

Workflows are defined in two separate sections, the campus workflow and the district workflow. When the ePAF completes the campus workflow it automatically enters the district workflow.

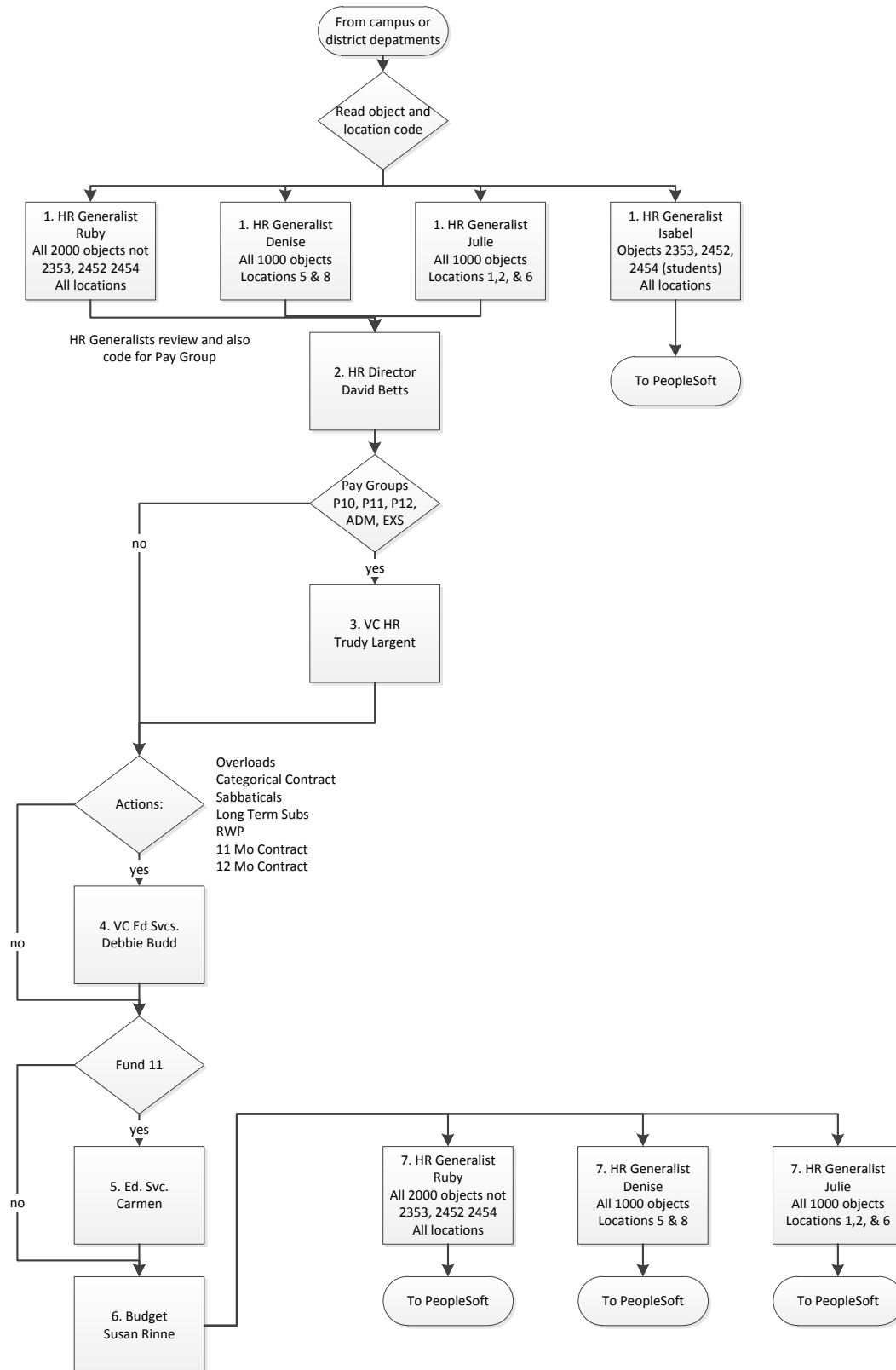
Because workflow is entirely dependent on cost center and object code, when combo codes are not present (as in the case of single positions without combo codes recorded in PS) or where the code is recorded as “SUSPENSE” (TBD), workflow cannot operate.

When this condition is detected on any of the confirmation screens for any of the action groups ePAFS displays the message “No valid combo code found for this assignment. ePAF cannot proceed”

There are instances in which a PA may be initiated by District HR. The normal workflow behavior of these items will be to start at the bottom of the appropriate campus approval channel. If desired, District HR can bypass campus approval by having the PA held in the in box of the initiator, then rerouted from campus to district by the ePAFS System Administrator, Cody Pelletier.

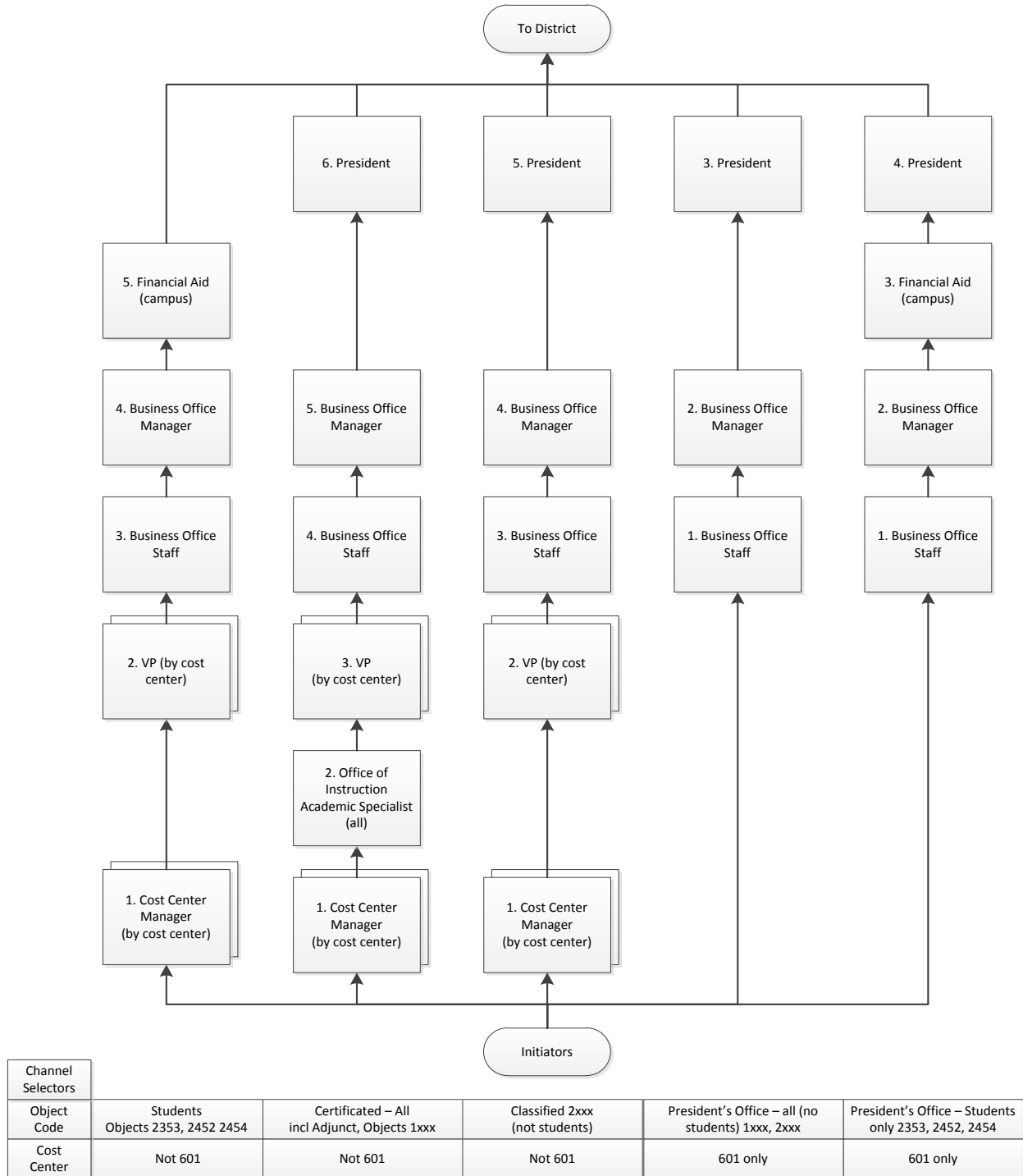
District Approval Workflow

Rev. 4/19/12 – reconfirmed 5/1/12



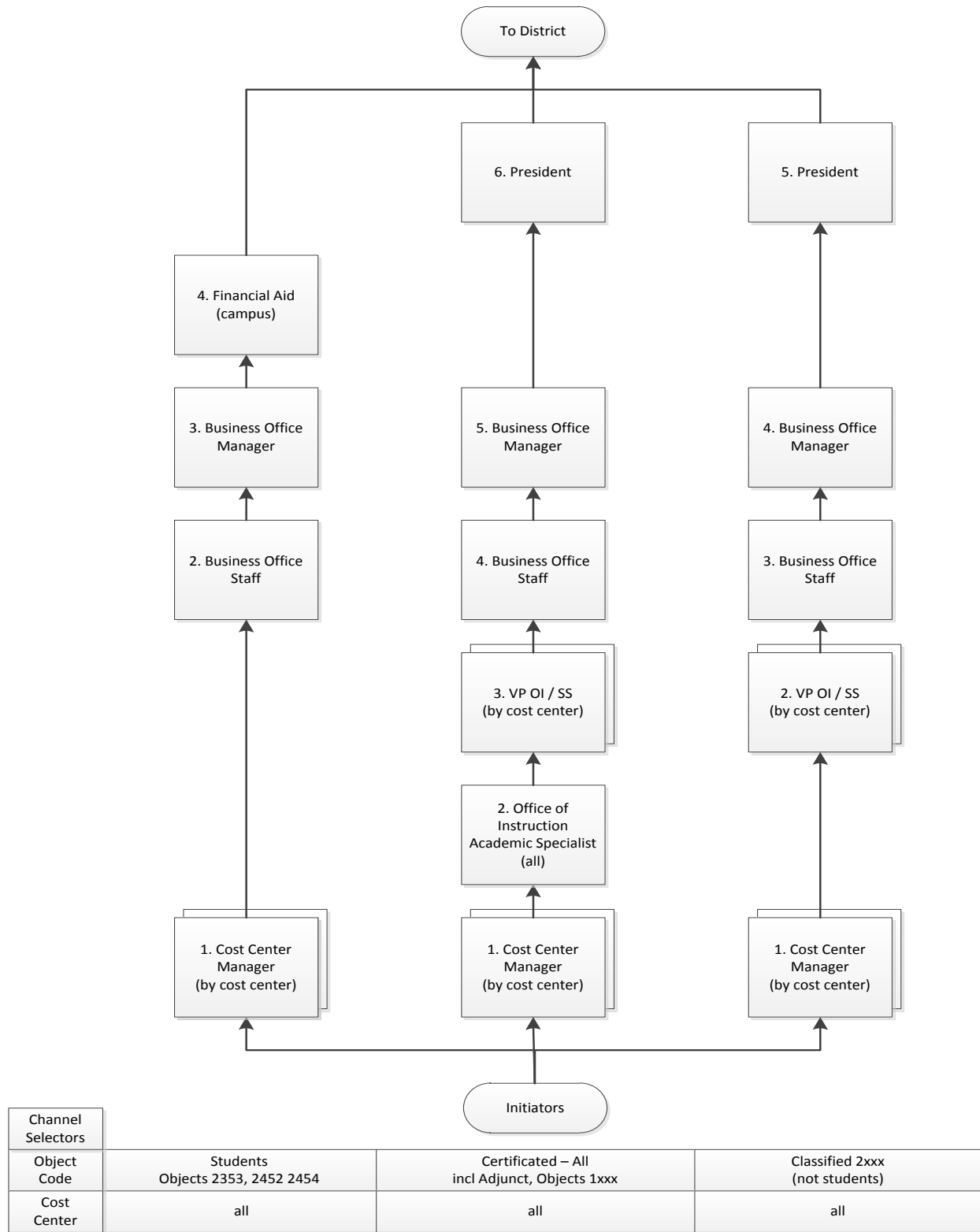
Merritt Approval Workflow

Rev. 5/1/12



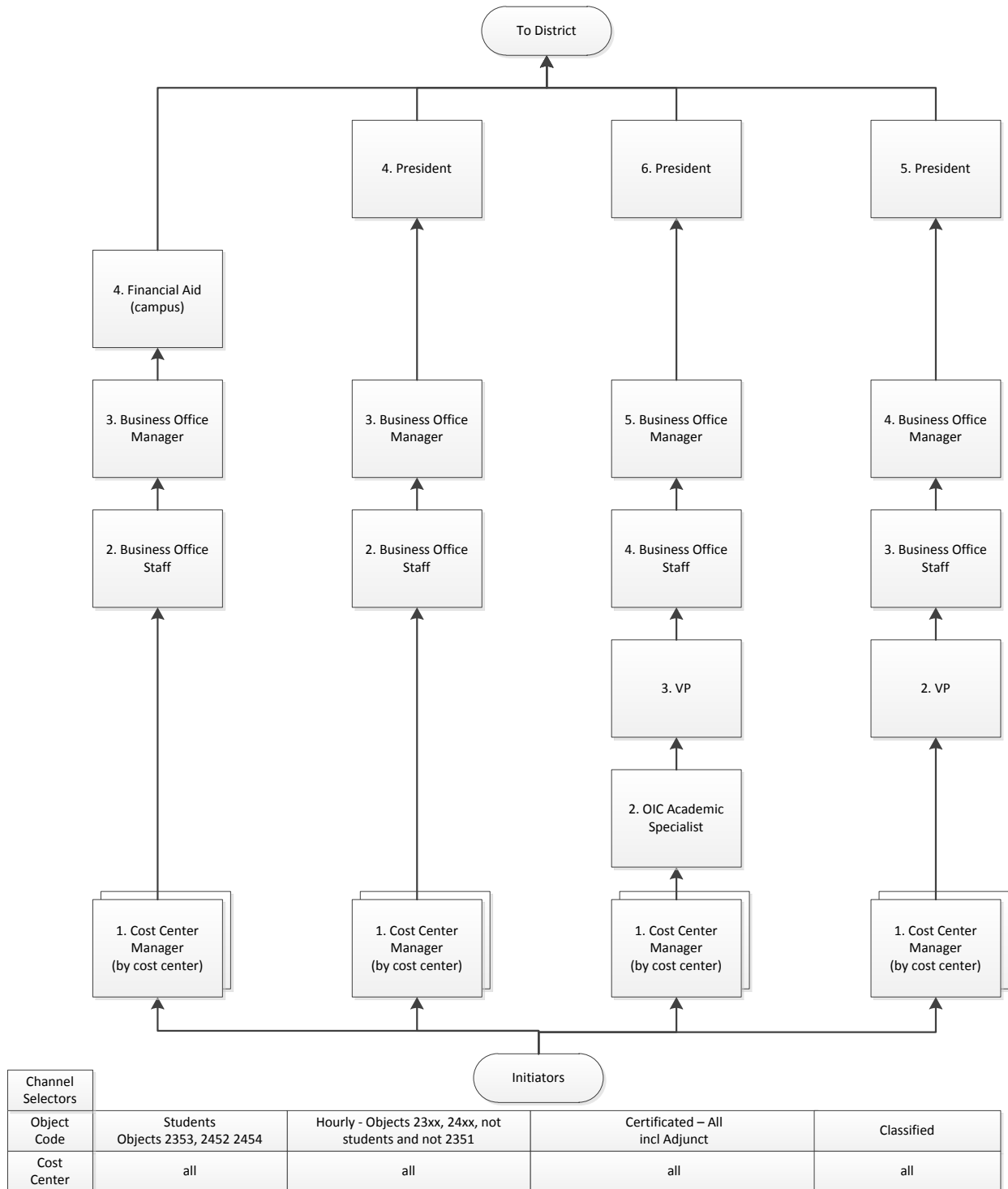
Alameda Approval Workflow

Rev. 4/18/12 - Reconfirmed 5/1/12



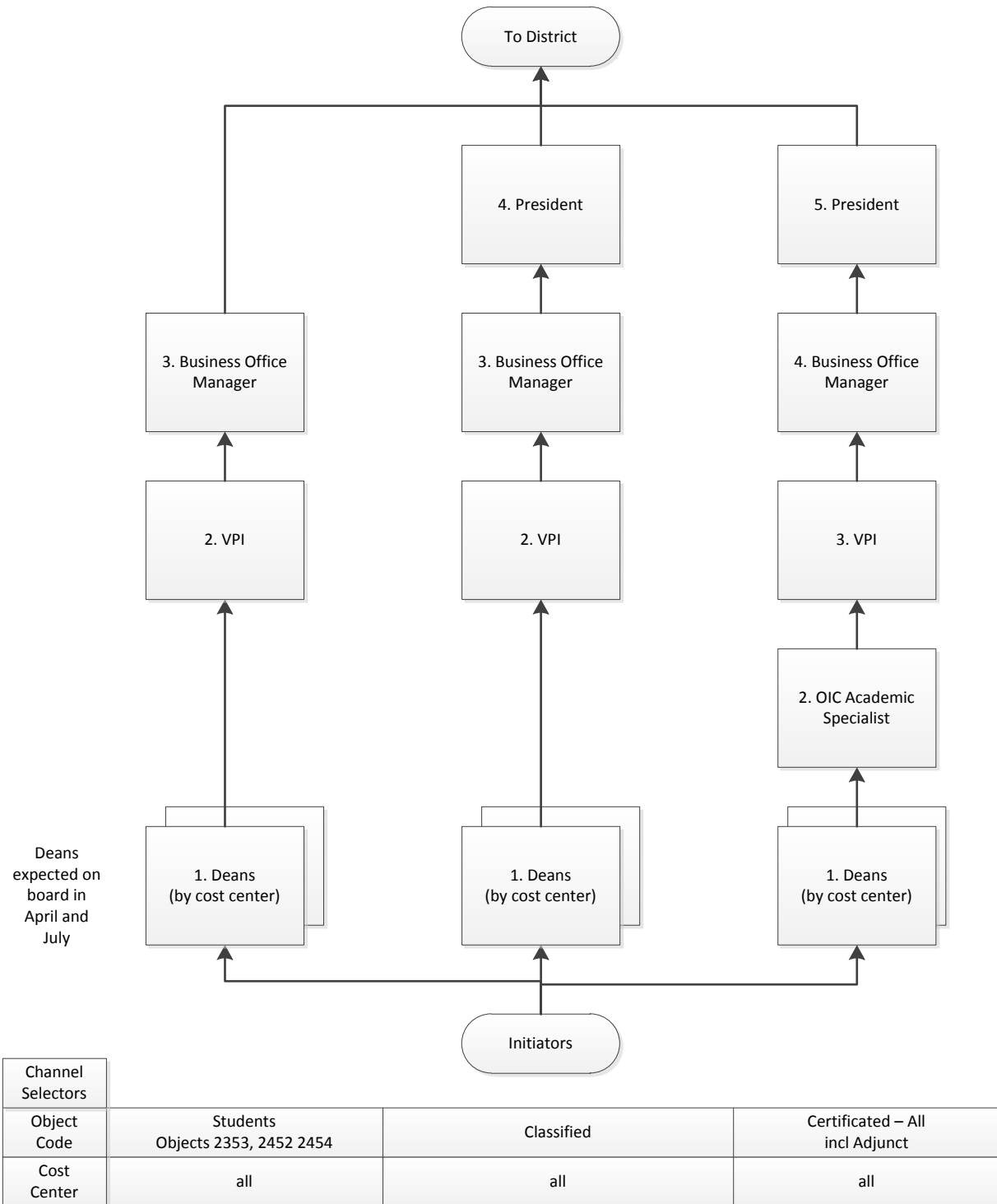
Laney Approval Workflow

Rev. 4/17/12 - Reconfirmed 5/1/12



Berkeley Approval Workflow

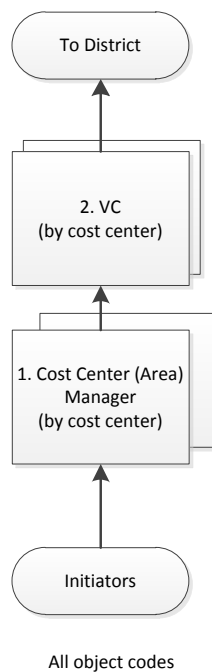
Rev. 5/1/12



District Operating Departments Workflow

This single workflow accommodates all seven major district operating departments. All can be differentiated based on cost center.

1. Chancellor's Office (including BOT)
2. Office of General Counsel
3. Finance & Administration (including IT, purchasing and payroll)
4. Ed Services
5. Student Service and Financial Aid (including child care)
6. General Services
7. Human Resources



Reports

A variety of standard pre-defined reports are available. Reports fall into two broad categories: Status monitoring, describing the status or history of individual PAs, and Process Monitoring, describing the performance of aspects of the ePAFS system and its users.

These reports all allow filtering by any combination of the following factors (using logical AND statements):

- location at the college level
- department as defined by cost center
- user defined time period based on entered stop and end dates
- individual user defined by their Peralta email address prefix.

1. Status Monitoring:

- a. PA's currently in process
- b. PA's entered in the past user-defined time period
- c. PA's overdue for approval (based on a user defined time considered to be 'overdue')
- d. PA's rejected/cancelled
- e. All PA's for a specific employee (by single employee ID only).

2. Process Monitoring

- a. Average time in queue by approver/department
- b. PA's entered with retroactive effective dates
- c. Total time from initiation to final approval

In addition we provide a reporting mechanism by which Finance and Payroll can monitor those ePAFS which are not entered in HCM but are generated exclusively for the purpose of informing Finance and Payroll regarding changes.

All reports are accessible to all initiator/approvers with some being logically restricted to the individual's college and cost centers.

Users requiring detailed instruction on how to utilize these reports should refer to the most current "ePAFS Project Master.doc".