



## STANDARD OPERATING PROCEDURE

<b>DEPARTMENT</b>	Business and Administrative Services	<b>TITLE</b>	Electronic Personnel Action Form System
<b>PURPOSE</b>	The purpose of this procedure is to serve as a guide to creating an Electronic Personnel Action Form (ePAF) using the <a href="#">ePAF system</a> .		
<b>PROCEDURE</b>			
<p>ePAFS, or the Electronic Personnel Action Form System, allows users to initiate personnel actions electronically through a web based interface. Approvers are selected automatically and email alerts and search screens allow users to easily track an action's progress to final approval and completion.</p> <p>Access the ePAF System through: <a href="http://apps.peralta.edu">apps.peralta.edu</a></p> <p><b>PROCEDURE:</b></p> <p><b>Pick the employee, action and assignment</b></p> <ul style="list-style-type: none"> <li>• Pick the employee, action and assignment</li> <li>• Click – “To initiate a New ePAF”</li> <li>• Identify Employee Information: by Employee ID # or filling out the Last Name First Name</li> <li>• Select Employee – If employee is on record the option to select this employee or to create a new employee.</li> <li>• Select Action – Either click Assign Employee, Change Existing Assignment, Leave of Absence or Separate/Terminate. Must input the effective date.</li> </ul> <p><b>Assignment Action:</b></p> <ul style="list-style-type: none"> <li>• User selects one primary box (additional assignment, reassign to new primary assignment, stipend).</li> <li>• New Hire/Rehire Name &amp; Address – The minimum information required is the home address and checking the box to copy over the home address into the mailing fields.</li> <li>• Select Position – Select a vacant single position or use a check box at the bottom of the screen to indicate if this is to be an Extra Service or Part Time Adjunct, or short term hourly or student worker assignment.</li> <li>• The user selects the department for the new assignment from a pull down menu. This is arranged by department code and cost center. Second, a job code is selected from either the numerical pull down menu or the alpha job name list. Lastly, the user completed the combo codes telling how the assignment has been budgeted.</li> <li>• Assignment Detail – The user must enter on this screen the information based on the type of assignment. Required entries are marked with a red asterisk. End date, hours per week of FTE, benefit plan, shift differential and total estimated cost excluding benefits is entered here. For stipends, the user provides the following information in a comment box: Amount, description, reason and end date.</li> <li>• Assign Confirmation Screen – At the conclusion of initiating the Assign action, the confirmation screen appears to allow for the user to check and review their work. The user is then able to submit the ePAF which forwards the documents to the next approver.</li> </ul>			



**Approving an ePAF:**

- Approver’s Inbox – Approver’s access ePAFs awaiting their action through their ePAF inbox. The ePAFs are accessed from the main menu item: Check Here –To Approve an ePAF.
- The Approver’s inbox contains all ePAFs awaiting action including those sent forward or returned from other approver/initiators.
- Action available for Approvers are “Approve this ePAF” (moves to the next approver), “Edit this ePAF” (allow direct editing of fields on the ePAF), “Return ePAF” (Allows the approver to select any prior approver or initiator as the person to whom the ePAF should be returned) and “Cancel this ePAF” (once cancelled a new replacement ePAF will be necessary).
- Approver’s Comments Screen –Depending on which action the approver has selected, the last screen will allow the approver to enter comments and will display the role of the next approver. Comments are optional, but become mandatory if the approver edits, cancel or returns the ePAF.

**Approval Work Flow**

- Faculty ePAFs –Approval process flows in this order: Initiator<Cost Center Manager< Office of Instruction Academic Specialist < Vice President of Instruction < Business Office Staff < Vice President of Administrative Services < President < to the District.
- Classified ePAFs –Approval process flows in this order: Initiator < Cost Center < Manager < Vice President (by cost center) < Business Office Staff < Vice President of Administrative Services < President < to the District.
- Student Worker ePAFs –Approval process flows in this order: Initiator <Cost Center Manager < Business Office Staff < Vice President of Administrative Services < to the District.

**DEFINITIONS AND ABBREVIATIONS**

ePAF – Electronic Action Form

**RESOURCES**

Peralta HR Website: <https://web.peralta.edu/hr/epaf-guides/>  
 Users Guide for Initiators & Approvers: <https://web.peralta.edu/hr/files/2012/08/ePAFS-Users-Guide-Initiators-Approvers-8-24-12.pdf>

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