



Workforce Management Organization

PeopleFlow Automated PRF and PAF Processing System

Module 10 – Steps to Initiate Title Change PAF

VERSION: 4.0

July 19, 2010

(ALL SCREEN SHOTS SUBJECT TO CHANGE)

PEOPLEFLOW: Initiating a Title Change PAF task process

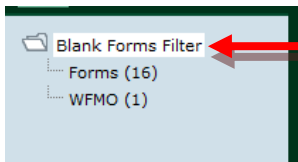
Upon login the **To Do List** appears on the screen. From this screen initiate any of the forms which are assigned to your user role. To initiate a new PAF, move to the **Blank Forms** icon and select the desired action to initiate.

1. Click the **Blank Forms** action icon:



Notice that the **Blank Forms** icon is highlighted, once the page opens.

Figure 1: Action Icons



Also the navigation panel on the left hand side reads **Blank Forms Filter:** indicating that you are at the current page to initiate a new form.

Figure 2: Blank Forms Filter Panel

2. Click once on the applicable PAF from the alphabetical list of available forms. **Note, New Hire/Re-Hire PAFs and Transfer PAFs are initiated differently – see PeopleFlow Module # X for steps to initiate these actions).**

- PAF – One Time Payment
- PAF – Name Change
- PAF – Leave of Absence
- PAF – Salary Change
- PAF – Salary Distribution Change
- PAF – Separation
- PAF – Status Change
- **PAF – Title Change**

3. Navigation procedures for all forms is as follows:

- The **Tab** key on the keyboard will move the cursor sequentially through the various fields in the form
- **Shift + Tab** will move the cursor back one field at a time
- All fields are required; with the exception of those marked 'optional.' Furthermore, shaded fields are read only and will automatically populate.

4. Make a note of the unique system generated **PAF Number** (folder name) at the upper right corner of the form – this PAF number becomes an identifier to locate the PAF throughout the process. (See Figure 3)

5. Enter **Employee Number**

Once entered, all other fields (SSN, Current Org Number, Org Name, Last Name, First Name, and Middle Name) will populate automatically. (See figure 1 on next page)

Figure 3: Title Change PAF - Employee Information Section

(ALL SCREEN SHOTS SUBJECT TO CHANGE)

Steps continue on following page...

Title Change PAF Process (Continued...)

6. Enter the **Activity Code** from the drop down list (reason for title change)
7. Enter the **Effective Date** of the Title Change
8. Select the **Activity Code (second time)** from the drop down list (type of title change)
9. Enter the **New Job Code** XXXXXX-XXXX (note, title description automatically populates)
10. Select the applicable **Salary Change Code** from the drop down list
11. Select the applicable **Pay Frequency** (Monthly or Bi-Weekly) from the drop down list
12. Enter the new **Actual Salary** – note that all other fields (Annual Salary, Monthly Salary, %FTE, Hourly Rate, and Hours/Period) will populate automatically as illustrated in figure 4.
13. Click **New** and add GL Account, Natural Account, Task (if applicable), Award (if applicable), and % of effort – repeat for all GL accounts. Note: % of effort applied to each account will be calculated and reflected in the Total percent allocated below field. Overall % effort must total 100%.

Title Change

Activity Code 6 Effective date (mm/dd/yyyy) 7

Change Type 8 New Job Class Code Description 9

Title 10 Salary 11 Pay Frequency 12

Annualized Salary	Actual Salary	Monthly Salary	% FTE	Hourly Rate	Hours/Period
\$0.00	\$0.00	\$0.00	0.00	\$0.0000	0.00

Funding Distribution

Account(s) to be charged Total percent effort entered: 0.00

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GL Account	Natural Account	Task	Award	% of Effort
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Figure 4: Title Change - Data Entry Section

Steps continue on following page...

Title Change PAF Process (Continued...)

Form Specific Data – Funding Distribution, Employee Current Information, and Attachment(s)

- 14. Enter Remarks in text box
- 15. Note **Employee current information** (Name, Job Code, Title, Status, Percent FTE, Annual Salary, and Hourly Rate) adjacent to the remarks text box – this information is read only and automatically populates once the employee number is entered
- 16. Add attachment(s) as applicable – system allows for multiple document attachments. If you need to remove attachment, click **Remove this file**
- 17. Click **Submit** the first time – to ‘SAVE’ the form

The screenshot displays a web form with the following sections:

- Remarks (optional):** A large text area for entering remarks, labeled with a circled '14'.
- Employee current information:** A section labeled with a circled '15' containing input fields for Job Code, Title, Status, Percent FTE, and Actual Salary (pre-filled with \$0.00).
- Attachments:** A section labeled with a circled '16' featuring a 'Choose File' button and a file list table with columns for File Name and Size.
- Navigation:** A blue footer bar labeled with a circled '17' containing 'Cancel' and 'Submit' buttons.

Figure 5: Title Change - Funding Distribution, Employee Information and Attachment Section

End of Title Change PAF initiating process