



Workforce Management Organization

PeopleFlow Automated PRF and PAF Processing System

Module 12 – Steps to Process Transfer PAF

VERSION: 4.0

July 19, 2010

(ALL SCREEN SHOTS SUBJECT TO CHANGE)

PEOPLEFLOW: Processing a Transfer PAF

1. Employment team will release the Transfer PAF to the applicable hiring department's PeopleFlow end-user
2. The End-user will receive an e-mail notification of the new action item
3. Log in to PeopleFlow system
4. Click the **To Do List** icon



Figure 1: To Do List Action Icon

5. Find the appropriate PAF from the list and double click on the applicable Transfer PAF (see figure 2)

Folder Name	Subject	Updated	Stage	Priority	Deadline	Message
PAF-000278	PAF Transfer BREES, DREW 15120 EMERGENCY PLANNING PRF-0033	5/6/2010 3:06:28 PM	New Organization	9		Edit
PAF-000280	PAF Transfer DANIEL, CHASE 15120 EMERGENCY PLANNING PRF-0033	4/30/2010 10:41:43 AM	New Organization	9		Edit
PAF-000281	PAF Transfer MEACHEM,ROBERT 23310 REGISTRAR PRF-0033	4/21/2010 2:48:22 PM	New Organization	9		InitiateTransfer
PAF-000282	PAF Transfer BREES,DREW 15120 EMERGENCY PLANNING PRF-0033	4/21/2010 2:52:37 PM	New Organization	9		InitiateTransfer
PAF-000283	PAF Transfer BRUNELL,MARK 15120 EMERGENCY PLANNING PRF-0033	4/21/2010 2:52:50 PM	New Organization	9		InitiateTransfer
PAF-000302	PAF Transfer DANIEL,CHASE 15120 EMERGENCY PLANNING PRF-0033	4/22/2010 10:56:26 AM	New Organization	9		InitiateTransfer
PAF-000307	PAF Transfer BELL,MARK 15120 EMERGENCY PLANNING PRF-0033	4/22/2010 11:11:18 AM	New Organization	9		InitiateTransfer
PAF-000311	PAF Transfer BRUNELL,MARK 15120 EMERGENCY PLANNING PRF-0033	4/22/2010 11:29:59 AM	New Organization	9		InitiateTransfer
PAF-000313	PAF Transfer MEACHEM,ROBERT 23310 REGISTRAR PRF-0033	4/22/2010 11:31:16 AM	New Organization	9		InitiateTransfer
PAF-000315	PAF Transfer THOMAS,PIERRE 15120 EMERGENCY PLANNING PRF-0033	4/22/2010 11:34:16 AM	New Organization	9		InitiateTransfer
PAF-000316	PAF Transfer HAMILTON,LYNELL 15120 EMERGENCY PLANNING PRF-0033	4/22/2010 11:34:42 AM	New Organization	9		InitiateTransfer
PAF-000458	PAF Transfer BREES, DREW 15120 EMERGENCY PLANNING PRF-0033	4/29/2010 3:19:08 PM	New Organization	9		InitiateTransfer
PAF-000467	PAF Transfer BREES, DREW 15120 EMERGENCY PLANNING PRF-0033	4/29/2010 4:31:23 PM	New Organization	9		InitiateTransfer
PAF-000495	PAF Transfer DANIEL, CHASE 15120 EMERGENCY PLANNING PRF-0033	5/4/2010 2:33:51 PM	New Organization	9		InitiateTransfer

Figure 2: Sample - List of available Transfer PAFs to process

Steps continue on following page...

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- The selected Transfer PAF will open, notice all fields that have been automatically populated as a result of the processed PRF linked to this form (see figures 3)
- Note the action buttons at the bottom of the PAF screen: **Edit, Validate, Abort** (see figure 3)
- After reviewing the PAF form, click on **Edit** (see figure 3)

Tulane University Payroll Action Form

PAF Number: PAF-000730
Request Date/Time: 7/20/2010 10:28 AM
Position Control #: 1234560562
PRF Number: PRF-000460

Employee Information

Employee Number: [] SSN: [] Current Org Number: 38351 Org Name: LA HISTORY
Last Name: [] First Name: [] Middle Name: S Suffix: []

Transfer

Employee Status: TRANSFER RF Effective date (mm/dd/yyyy): []
Change Codes: [] New Organization No.: 12120
Organization: TRANSFER UNIVERSITY HUMAN RES
Title: TRANSFER 200244-0001 VISITING LECTURER
Check Code: []
Salary: TRANSFER Pay Frequency: Monthly
Annualized Salary: \$0.00 Actual Salary: \$0.00 Monthly Salary: \$0.00 % FTE: 100.00 Hourly Rate: \$0.0000 Hours/Period: 162.50

Funding Distribution

Account(s) to be charged: [] Total percent effort entered: 100.00

GL Account	Natural Account	Task	Award	% of Effort
216025	5311			100

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Buttons: Validate Edit Abort Close

Annotations: 6 (right side), 7 (table), 8 (Edit button)

Figure 3: Sample - List of available Transfer PAFs to process

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9. The form will reload and you will be able to add the following information (See figures 4)

- **Effective Date** – by either entering in the MM/DD/YY format, or using built-in calendar
- **Check code** – from the drop down list
- **Actual salary** – which auto populates all other fields in this line (Annual salary, monthly salary, % FTE, Hourly Rate, Hours/Period
- **Funding distribution** – edit accounts to be charged by clicking **New**
- **Remarks** – add text remarks if applicable
- **Attachments** – adding document(s) by clicking on **Add new document**
- Click **Submit** the first time – to “SAVE” the form

Transfer Employee Status: TRANSFER RF Effective date (mm/dd/yyyy): 7

Change Codes: TRANSFER New Organization No.: 12120 UNIVERSITY HUMAN RES

Organization: TRANSFER Title: TRANSFER 200244-0001 VISITING LECTURER

Check Code: 7

Salary: TRANSFER Pay Frequency: Monthly

Annualized Salary	Actual Salary	Monthly Salary	% FTE	Hourly Rate	Hours/Period
\$0.00	\$0.00	\$0.00	100.00	\$0.0000	162.50

• The following required fields must be populated: Effective Date, Check Code
• The Effective Date must be in the future and in the format 'mm/dd/yyyy'

Funding Distribution 7 account(s) to be charged Total percent effort entered: 100.00
Click to select an existing row to edit distribution data

GL Account	Natural Account	Task	Award	% of Effort
216025	5311			100

Remarks (optional) 7

Employee current information 7

ELIZABETH S MANLEY
Title: ADJ ASST PROFESSOR
Status: ACTIVE-RP
Job Code: 200160-0001 Percent FTE: 25%
Actual Salary: \$0.00

Attachments 7

Cancel Submit

Figure 4: Sample - Completing effective date, check code, and actual salary fields

Steps continue on following page...

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10. The PAF reloads – will open up again on your screen for an opportunity to check your entries
11. Click **Validate** – to ensure that all data is entered accurately (see other options available at bottom of the page) see figure 9



Figure 7: PAF screen to Validate

12. PAF page reloads one more time (see figure 10)
13. Click **Submit** a second time – to move PAF forward in the process



Figure 8: PAF Screen to Submit Form

End of Transfer PAF initiating Process

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