



Workforce Management Organization

PeopleFlow Automated PRF and PAF Processing System

Module 4 – Steps to Initiate Name Change PAF

VERSION: 4.0

July 19, 2010

(ALL SCREEN SHOTS SUBJECT TO CHANGE)

PEOPLEFLOW: Initiating an *Employee Name Change* PAF task process

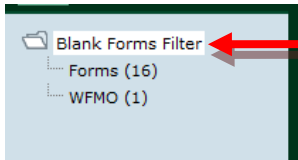
Upon login the **To Do List** appears on the screen. From this screen initiate any of the forms which are assigned to your user role. To initiate a new PAF, move to the **Blank Forms** icon and select the desired action to initiate.

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 3)

Tulane University

Payroll Action Form

Monthly PAFs not in the Payroll Queue by the 15th of the month may not be processed until the following month.

PAF Number 4

Request Date/Time 7/19/2010 4:03 PM

Employee Information

Employee Number 5

SSN

Current Org Number

Org Name

Last Name

First Name

Middle Name

Suffix

Figure 3: Employee Name Change PAF - Employee Information Section

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Steps continue on following page...

6. Enter the **Effective Date** of the name change action
7. Enter new **Last Name, First Name and Middle Name** as applicable
8. Enter **Remarks** in the text box
9. Attach the **Social Security** document to support the PAF request by clicking on the **green clipboard icon** (see red arrow) – please note the reminder across the top that reads “*This name change request will not be processed without a new social security card attached to this PAF*”
10. Upload other attachments by clicking on **Add New Document**; the dialog box will open to upload additional attachment(s) – the system allows for multiple document attachments
11. Click **Submit** the first time – to ‘SAVE’ the form
12. The PAF reloads – will open up again on your screen for an opportunity to check your entries
13. Click **Validate** – to ensure that all data is entered accurately (*validate and other action buttons will appear, at bottom left of screen following step 11*)
14. Click **Submit** a second time – to move the PAF forward in the process

Name Change This name change request will not be processed without a new social security card attached to this PAF. Effective date (mm/dd/y) **6**

New Last Name **7** New First Name New Middle Name New Suffix

Remarks (optional) **8**

Attachments **9** Choose Attachment Type

File Name	Type	Size
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10 Cancel Submit

Figure 4: Lay-out for Employee Name Change PAF

End of Name Change PAF initiating process