



## **Workforce Management Organization**

### **PeopleFlow Automated PRF and PAF Processing System**

### **Module 5 – Steps to Initiate One Time Payment PAF**

VERSION: 4.0

July 19, 2010

(ALL SCREEN SHOTS SUBJECT TO CHANGE)

### PEOPLEFLOW: Initiating a *One Time Payment* PAF task process

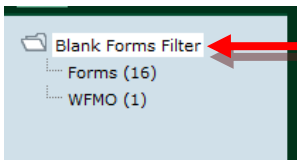
Upon login the **To Do List** appears on the screen. From this screen initiate any of the forms which are assigned to your user role. To initiate a new PAF, move to the **Blank Forms** icon and select the desired action to initiate.

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)

Figure 3: Employee Name Change PAF - Employee Information Section

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Steps continue on following page...

6. Enter **Effective Date** of one-time payment action
7. Enter **1-Time Payment Code**: Select the proper one-time payment code from the drop down list
8. Enter **Org Number**: Select the proper org number from the drop down list
9. Enter **Payment Amount**
10. 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%.

**One-time Payment**

Effective date (mm/dd/yyyy)

1-Time Payment Code  Org Number

Payment Amount

Account(s) to be charged Total effort allocated below:

GL Account	Natural Account	Task	Award	% of Effort
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Figure 4: One Time Payment PAF - Middle Screen

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11. Enter **Remarks** in text box
12. Note **Employee current information** (Name, Job Code, Title, Status, Percent FTE) adjacent to the remarks text box – this information is read only and automatically populates once the employee number is entered
13. Add attachment(s) as applicable – the system allows for multiple document attachments
14. Click **Submit** the first time – to 'SAVE' the form
15. PAF reloads – will open up again on your screen for an opportunity to check your entries
16. Click **Validate** – to ensure that all data is entered accurately (*validate and other action buttons will appear, at bottom left of screen following step 13*)
17. Click **Submit** a second time – to move PAF forward in the process

**Remarks**

11

**Employee current information**

12

Name

Job Code

Title

Status  Percent FTE

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**Attachments**

13 Choose Attachment Type

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File Name	Type	Size
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Cancel Submit

Figure 5: One Time Payment PAF - Bottom Screen

**End of One-time Payment PAF initiating process**