



Workforce Management Organization

PeopleFlow Automated PRF and PAF Processing System

Module 7 – Steps to Initiate Salary Distribution Change PAF

VERSION: 4.0

July 19, 2010

(ALL SCREEN SHOTS SUBJECT TO CHANGE)

PEOPLEFLOW: Initiating a Salary Distribution Change PAF task process

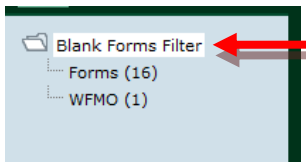
Upon login the **To Do List** appears on the screen. From this screen initiate any of the forms which are assigned to your user role. To initiate a new PAF, move to the **Blank Forms** icon and select the desired action to initiate.

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: Salary Distribution Change PAF - Employee Information Section

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Steps continue on following page...

6. Enter the **Effective Date** of change in salary distribution
7. Note, the default account(s) charged are automatically displayed after entering the employee number

Salary Distribution Change Effective date (mm/dd/yy)

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

Click to select an existing row to edit distribution data

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GL Account	Natural Account	Task	Award	% of Effort
221157	5311			100

Figure 4: Change is salary distribution - default screen

8. To make a change to an account(s) select the GL Account or Natural Account and the row will change color from white (see figure 5) to black and the **Edit** and **Delete** buttons will appear. (See figure 5)

Salary Distribution Change Effective date (mm/dd/yyyy)

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

Click to select an existing row to edit distribution data

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GL Account	Natural Account	Task	Award	% of Effort
221157	5311			100

Figure 5: Change is salary distribution - Editing account distribution

Steps continue on following page...

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9. Click **Edit** (See figure 5 on previous page) and a new shaded range of fields will appear to make edits to the account(s), click **Update** to update the existing account information (See figure 6)

Salary Distribution Change Effective date (mm/dd/yyyy)

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

Click to select an existing row to edit distribution data

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GL Account	Natural Account	Task	Award	% of Effort
221157	5311			100

Update Cancel

GL Account Natural Account Task Award % of Effort

221157 5311 100.00

Figure 6: Change in salary distribution – Update existing account

10. To add a new account or additional accounts click on **New** (see figure 7)

Salary Distribution Change Effective date (mm/dd/yyyy)

Account(s) to be charged Total percent effort entered: 50.00

Click to select an existing row to edit distribution data

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GL Account	Natural Account	Task	Award	% of Effort
221157	5311			50

New

Figure 7: Change in salary distribution - Adding new accounts

Steps continue on following page...

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11. When the shaded range of fields appears, complete all applicable fields, and click **Add** to enter the new account information. Note, **Total percent effort entered** must reflect 100%. (See figure 8)

Figure 8: Change is salary distribution - Entering the new account information

12. Enter **Remarks** in the text box
13. Note the **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
14. Add attachment(s) as applicable – system allows for multiple document attachments
15. Click **Submit** the first time – to 'SAVE' the form
16. PAF reloads – will open up again on your screen for an opportunity to check your entries
17. Click **Validate** – to ensure that all data is entered accurately (*validate and other action buttons will appear, at bottom left of screen following step 15*)
18. Click **Submit** a second time – to move PAF forward in the process

The screenshot displays a web form with two main sections: 'Remarks (optional)' and 'Attachments'. The 'Remarks (optional)' section contains a large text area labeled '12'. To its right, the 'Employee current information' section, labeled '13', includes fields for Name (JILL DOE), Title (ADMIN SECRETARY), Status (ACTIVE-RF), Job Code (304040-0001), Percent FTE (100%), and Actual Salary (\$20,000.00). Below these is the 'Attachments' section, labeled '14', which features a 'Choose File' button and a file list table with columns for 'File Name' and 'Size'. The file list is currently empty. At the bottom right of the form, there are 'Cancel' and 'Submit' buttons, with the 'Submit' button labeled '15'. The interface also shows a 'Page 1 of 1' indicator and navigation arrows.

Figure 9: Change is salary distribution - Remarks and Attachment(s)

End of Change in Salary Distribution PAF initiating process