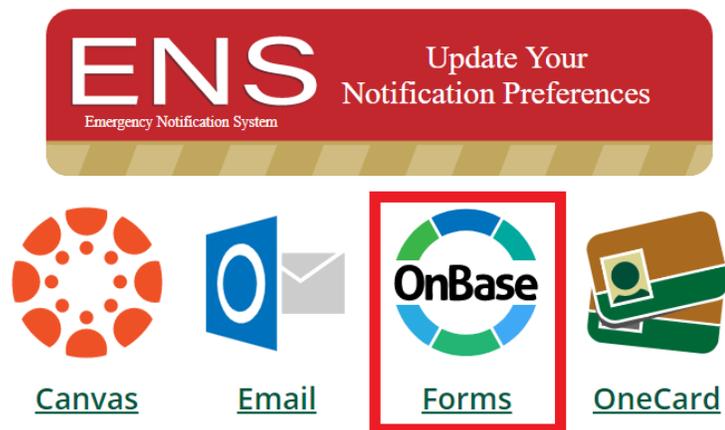


Personnel Transaction Form (PTF) OnBase Submitter Guide

A Personnel Transaction Form (PTF) must be completed for all employee transactions. The department initiating the PTF should complete all appropriate fields on the PTF. Depending on the type of employee, Human Resources-Employment Services or the Office of Faculty Advancement will review the PTF for accuracy and ensure that all necessary fields are completed before the PTF is forwarded to payroll for processing.

Where to find the OnBase Personnel Transaction Form (PTF)



- The Personnel Transaction Form can be found by logging on to “My Sac State” and clicking the OnBase Forms icon.
 - You will be redirected to choose the Personnel Transaction Form from a list of available documents.

Employee Information Section

EMPLOYEE INFORMATION

EmplID * **HR Form #**

REGULAR
 POI
 NO EEMPLID

First Name **Middle Name** **Last Name**

Preferred First Name **Preferred Middle Name** **Preferred Last Name**

College/Program ID

Employee Type * New Temp Current Employee
Employment Status * Probationary Temporary Permanent

Personnel Transaction Categories *

Explanation or Remarks
 Please provide a detailed explanation for submitting the Personnel Transaction Form

Last Day physically worked (if applicable)

Annotations:

- Input Employee ID # (points to EmplID field)
- Select Employee Type (points to Employee Type radio buttons)
- Select Employment Status (points to Employment Status radio buttons)
- Choose Employee Action Type from drop down menu (points to first dropdown menu)
- Select the specific Employee Action from drop down menu (points to second dropdown menu)
- Type in explanation and any notes you have for approvers (points to Explanation or Remarks text area)

- Employee ID Information
 - All employees that have an employee ID can be marked as “REGULAR” and their name and College/program ID information will auto-populate.
 - If “POI” option is selected, the employee ID, name, and College/Program ID information must be filled in manually.
 - If “No EmplID” option is selected, the name and College/Program ID information must be filled in manually.
- Last Day Physically Worked is required for all Separation employee actions.

Job Information Section

Indicate if employee has had and/or will have subordinates →

	CURRENT/UNCHANGED INFO	NEW INFORMATION
	Does Employee have Subordinates? <input type="radio"/> YES <input type="radio"/> NO	Does Employee have Subordinates? <input type="radio"/> YES <input type="radio"/> NO
CMS Position #	<input type="text"/>	<input type="text"/>
Working title	<input type="text"/>	<input type="text"/>
Effective Date	<input type="text"/>	<input type="text"/>
End Date	<input type="text"/>	<input type="text"/>
Job Code	<input type="text"/>	<input type="text"/>
Job Code Description	<input type="text"/>	<input type="text"/>
CBID (Union Code)	<input type="text"/>	<input type="text"/>
Department ID	<input type="text"/>	<input type="text"/>
Department Description	<input type="text"/>	<input type="text"/>
Supervisor Position #	<input type="text"/>	<input type="text"/>
Supervisor Name	<input type="text"/>	<input type="text"/>

Use Load Data button to pull job data information for current/former employee*

Input CMS # and the new information column will auto-populate. Type in any missing information.

- Load Data
 - For employees that have only had one position with Sac State, using the Load Data button will auto-populate the Current/Unchanged Info column automatically.
 - For employees that have or have had more than one position with Sac State, using the Load Data button will pull up a window with their job data information in rows for all current and former positions.
 - To select the job data row you are looking to use for the Current/Unchanged Info column, use the “Select” button at the end of the row for the appropriate position information.
 - Verify all auto-populated job data information for accuracy and edit as applicable.

Submission Information Section

The screenshot shows a form titled "Submission Information Section" with several sections and fields:

- Attach Supporting Documents:** A green header bar with an "Attach" button and a red arrow pointing to it. Text next to the arrow says "Attach any supporting documents".
- PREPARED BY:** A section with four input fields: "First" (containing "Zitlaly"), "Last" (containing "Marin"), "Phone" (containing "916-278-6078"), and "Date" (containing "06/22/2021"). A red arrow points to the "Last" field with the text "Preparer information will auto-populate". Below these fields is an "Other Phone" field. A note below the fields reads: "Enter the Sac State User Name of the next approver in your college/division. (Example: If the user's Sac State email is Harley.Hornet@csus.edu, the Sac State User Name is **Harley.Hornet**). To find the next approver's SacLink ID, go to Outlook/Address Book, search for the approver's info and find the field ALIAS. If you leave this field blank, the form will automatically route to the Quality Control group of your college/division."
- SacLink ID of the next Approver (if applicable):** An input field with a red arrow pointing to it and the text "Input first approver's SacLink ID by following the instructions outlined on the form*". Below the field is a "Clear ID" button.
- READY TO SUBMIT:** A green header bar with a checkbox labeled "I verify the form is complete and ready to be submitted.*" and a red arrow pointing to it with the text "Box must be checked to submit form".
- Submit:** A brown footer bar with a "Submit" button and a red arrow pointing to it with the text "Click Submit button once form is complete".

- Attach Supporting Documents
 - If you choose to use the Attach button to upload supporting documents, the title of the documents will appear to confirm it was uploaded successfully.
- SacLink ID for Approvers
 - Type in the SacLink ID for the first approver.
 - To find the next approver's SacLink ID, go to Outlook/Address Book, search for the approver's info and find the ALIAS field.
 - If you leave this field blank, the form will automatically route to the Quality Control group of your college/division (which is outlined on this [PTF Workflow Scenario document](#)).
 - If the SacLink ID field is left empty, it will not go to the approver but will move to the next office in the workflow, depending on division. In college and divisions that have Quality Control groups, the form will route to the QC. In divisions that do not have QC group, the form will move to HR or OFA.
 - If you type in the incorrect SacLink ID, the document will show that the SacLink ID is invalid. Use the Clear ID button and input the correct approver information.

Troubleshooting Submissions

The screenshot shows a web form for PTF submission. A red box highlights an error message: "onbase.csus.edu says One or more fields are invalid." with an "OK" button. Below this is a section for "Attach Supporting Documents" with an "Attach" button. The "PREPARED BY" section contains fields for First, Last, Phone, Date, and Other Phone. A red arrow points to a "READY TO SUBMIT" section with a checkbox labeled "verify the form is complete and ready to be submitted.*". A red text overlay with an arrow pointing to the checkbox reads: "Required information that is missing will be highlighted in red".

- If there is an error in your submission, the required information that is missing will be highlighted in red.
- Once you correct this information, you will be able to use the Submit button to successfully submit the PTF.
- Once the PTF processing is complete, a copy of the final PTF will be sent to the submitter via OnBase confirmation email.

OnBase PTF Successful Submission Confirmation Page



Form Submitted Successfully.

Thank you for submitting your form with OnBase. Your form will be reviewed and processed accordingly. You will receive an email notification when your form review process is complete.

IRT OnBase