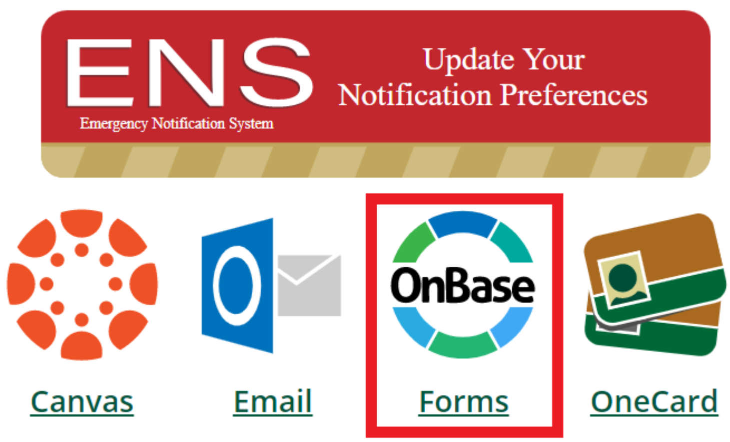
SACRAMENTO STATE
Redefine the Possible

Personnel Transaction Form (PTF) OnBase Submitter Guide

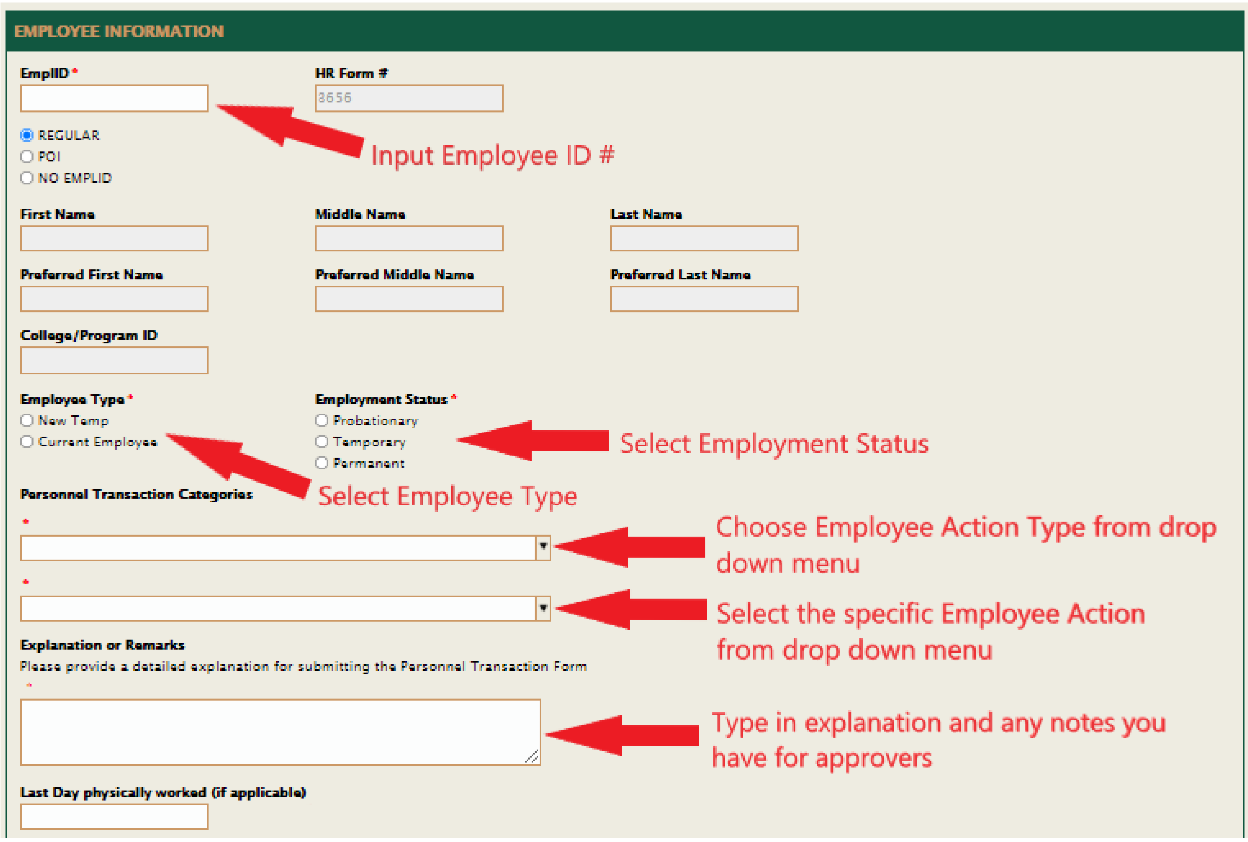
A Personnel Transaction Form (PTF) must be completed for all employee transactions. The department initiating the PTF should complete all appropriate fields on the PTF. Depending on the type of employee, Human Resources-Employment Services or the Office of Faculty Advancement will review the PTF for 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 #

3656

REGULAR
POI
NO EMPLID

Input Employee ID #

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

Select Employment Status

Personnel Transaction Categories

Select Employee Type

*

Choose Employee Action Type from drop down menu

*

Select the specific Employee Action from drop down menu

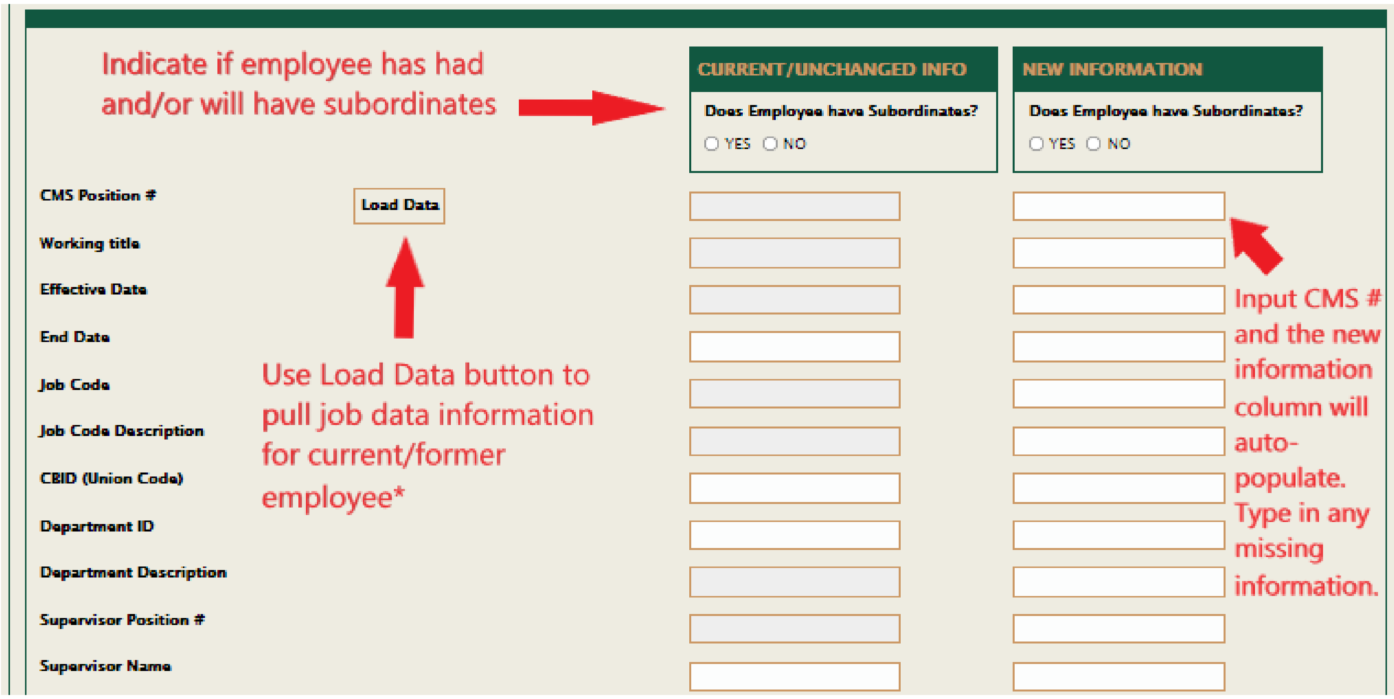
Explanation or Remarks
Please provide a detailed explanation for submitting the Personnel Transaction Form
*

Type in explanation and any notes you have for approvers

Last Day physically worked (if applicable)

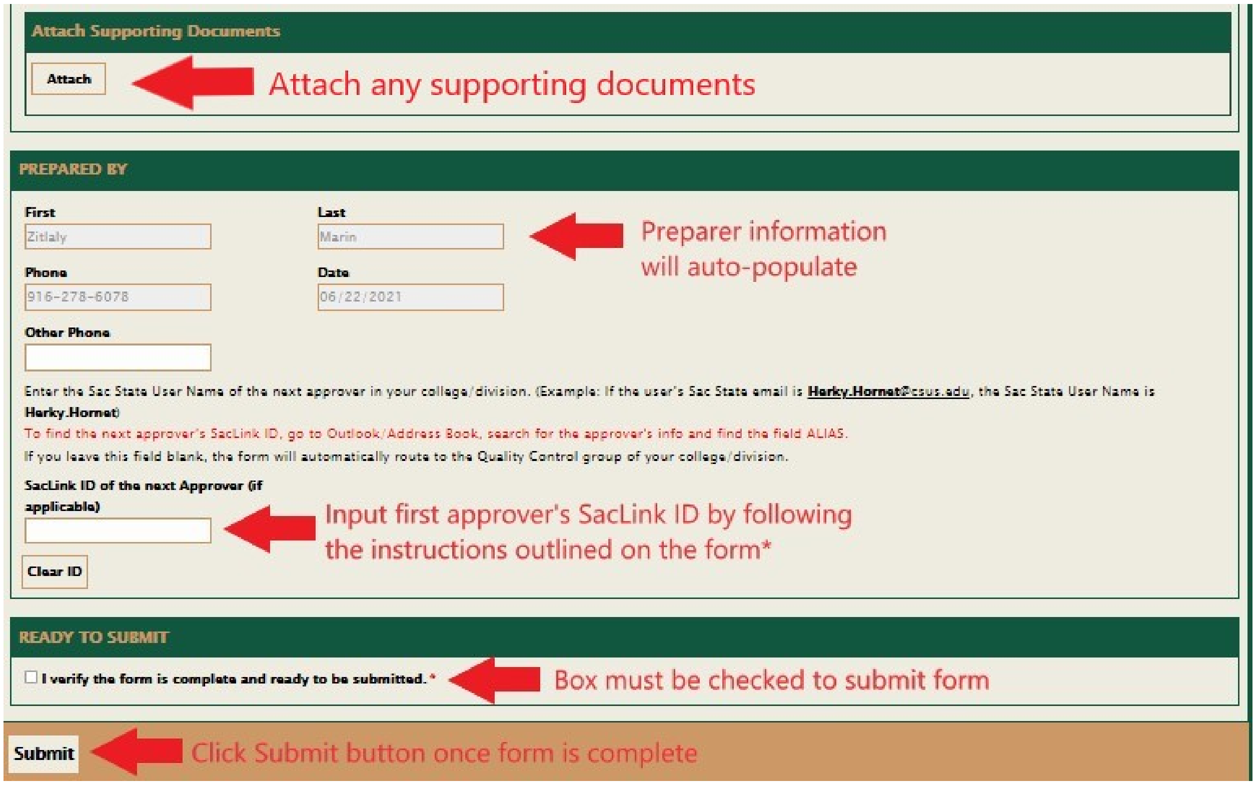
- Employee ID Information
    - All employees that have an employee ID can be marked as “REGULAR” and their name and College/program ID information will auto-populate.
    - If “POI” option is selected, the employee ID, name, and College/Program ID information must be filled in manually.
    - If “No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



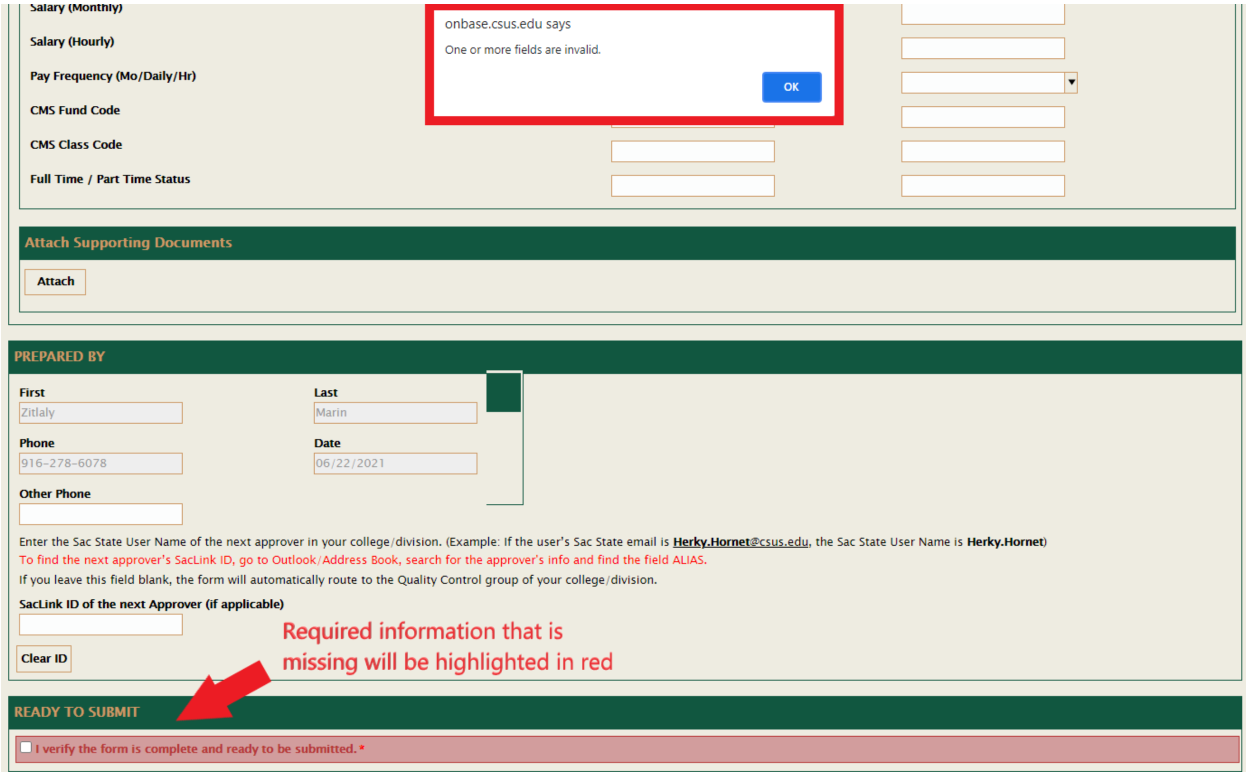
- Load Data
  - For employees that have only had one position with Sac State, using the Load Data button will auto-populate the Current/Unchanged Info column automatically.
  - For employees that have or have had more than one position with Sac State, using the Load Data button will pull up a window 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



- 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



- 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