

OnBase Personnel Transaction Forms' Electronic Workflow Scenarios in all Divisions/Departments.

1. Information Resources and Technology (IRT):

- a. The **Analysts** submit the form for any employee in IRT.
- b. The form can be sent to up to two **Approvers**: a manager and the CIO. The **Submitter** will assign the **first approver** and then the **1st approver assigns the 2nd**, if needed. The PTF can be sent to only one approver or straight to HR if the approver's field on the form is left empty.
- c. After the approvals are completed within the division, the form will route through the automatic workflow: Employment Services – Budget Office – Payroll Office (also Class & Comp, if needed).
- d. When HR completes the PTF processing, the submitter will receive a confirmation email with the form attached.

2. Administration and Business Affairs (ABA except HR):

- a. The designated staff/MPPs submit the form.
- b. The PTF can be sent to up to two **Approvers** within the **Department**. The **Submitter** will assign the **first approver** and then the **1st approver assigns the 2nd**, if needed. The PTF can be sent to only one approver or straight to HR if the approver's field on the form is left empty.
- c. All PTFs from ABA with the exception of HR will route to the **Quality Control** queue (Margaret Hwang and Bena Arao) for review.
- d. The QC group will send the form to the **final approver** (the VP or Administrator in Charge).
- e. After the final approval is completed, the form will automatically route to Employment Services – Budget Office – Payroll Office (also Class & Comp, if needed).
- f. When HR complete the PTF processing, the submitter will receive a confirmation email with the form attached.

3. Administration and Business Affairs (Human Resources):

- a. Any staff/MPP submits the form for any employee in HR.
- b. The form can be sent to up to two **Approvers**: a manager and the **Senior AVP**. The **Submitter** will assign the **first approver** and then the **1st approver assigns the 2nd**, if needed. The PTF can be sent to only one approver or straight to **Employment Services** if the approver's field on the form is left empty.
- c. After the approvals are completed within the division, the form will route through the automatic workflow: Employment Services – Budget Office – Payroll Office (also Class & Comp, if needed).
- d. When the processing is completed, the Submitter will receive a confirmation email with the form attached.

4. Division of University Advancement

- a. The UA Analyst submits the PTF for any employee in UA
- b. The form can be sent to up to two **Approvers**: a manager and the **VP**. The **Submitter** will assign the **first approver** and then the **1st approver assigns the 2nd**, if needed. The PTF can be sent to only one approver or straight to **Employment Services** if the approver's field on the form is left empty.
- c. After the approvals are completed within the division, the form will route through the automatic workflow: Employment Services – Budget Office – Payroll Office (also Class & Comp, if needed).
- d. When the processing is completed, the Submitter will receive a confirmation email with the form attached.

5. Office of the President and Athletics

- a. **Office of the President:**
 - i. The Analyst submits the PTF for any employee in the division
 - ii. The form can be sent to up to two **Approvers**: a manager and the **VP**. The **Submitter** will assign the **first approver** and then the **1st approver assigns the 2nd**, if needed. The PTF can be sent to only one approver or straight to **Employment Services** if the approver's field on the form is left empty.
 - iii. After the approvals are completed within the division, the form will route through the automatic workflow: Employment Services – Budget Office – Payroll Office (also Class & Comp, if needed).
 - iv. When the processing is completed, the Submitter will receive a confirmation email with the form attached.
- b. **Athletics**
 - i. The designated staff submit the form.
 - ii. The PTF can be sent to up to two **Approvers** within the **Department of Athletics**. The **Submitter** will assign the **first approver** and then the **1st approver assigns the 2nd**, if needed. The PTF can be sent to only one approver or straight to HR if the approver's field on the form is left empty.
 - iii. All PTFs from Athletics will route to the **President's Office Quality Control** queue (Kelly Whelan) for review.
 - iv. The QC Analyst will send the form to the **final approver** (the President's Designee).
 - v. After the final approval is completed, the form will automatically route to Employment Services – Budget Office – Payroll Office (also Class & Comp, if needed).
 - vi. When HR complete the PTF processing, the submitter will receive a confirmation email with the form attached.

*All unit 3 employees in Athletics will route the same way within the division but will go to the **Office of Faculty Advancement** instead of Employment Services for processing.*

6. Student Affairs

- a. Staff and MPPs (except for Unit 3 employees):
 - i. The designated staff/MPPs submit the form.
 - ii. The PTF can be sent to up to two **Approvers** within the **Department**. The **Submitter** will assign the **first approver** and then the **1st approver assigns the 2nd**, if needed. The PTF can be sent to only one approver or straight to HR if the approver's field on the form is left empty.
 - iii. All PTFs will route to the **Quality Control** queue (Karyl Burwell's team) for review.
 - iv. The QC group will send the form to the **final approver** (the VP).
 - v. After the final approval is completed, the form will automatically route to Employment Services – Budget Office – Payroll Office (also Class & Comp, if needed).
 - vi. When HR complete the PTF processing, the submitter will receive a confirmation email with the form attached.

*All unit 3 employees in Student Affairs will route the same way within the division but will go to the **Office of Faculty Advancement** instead of Employment Services for processing.*

7. Academic Affairs (all Colleges)

- a. **Staff and MPPs:**
 - i. The Analysts/ASCs submit the form for any staff or MPP
 - ii. If the form is submitted by a non-QC employee, they will be able to send it to the **1st approver** and then the form will automatically route to the **Quality Control** queue within the college (usually College Bus Analysts + their back-ups). If the approver's field on the form is left empty – it will automatically route to the College QC queue.
 - iii. If the QC Analyst submits the form, it will not go back to their queue – they will be able to send it to the **Associate Dean/Dean** for approval.
 - iv. After the Dean's or AD's approval, the form will automatically route to the **Academic Affairs QC** (Angel Thayer-Smith's team) and they will send it to the **Provost** for final approval.
 - v. After that, the form will automatically route to the Employment Services – Budget Office – Payroll Office (also Class & Comp, if needed).
 - vi. When HR complete the PTF processing, the submitter will receive a confirmation email with the form attached.

- b. **Faculty:**

- i. The Analysts/ASCs submit the form for a faculty member.
- ii. If the form is submitted by a non-QC employee, they will be able to send it to the **1st approver** and then the form will automatically route to the **Quality Control** queue within the college (usually College Bus Analysts + their back-ups). If the approver's field on the form is left empty – it will automatically route to the College QC queue.
- iii. If the QC Analyst submits the form, it will not go back to their queue – they will be able to send it to the **Associate Dean/Dean** for approval.
- iv. After the Dean's or AD's approval, the form will automatically route to the **Office of Faculty Advancement** and then to **Academic Affairs QC** (Angel Thayer-Smith's team) - they will send it to the **Provost** for final approval.
- v. After that, the form will automatically route to the Budget Office – OFA - Payroll Office.
- vi. When HR complete the PTF processing, the submitter will receive a confirmation email with the form attached.