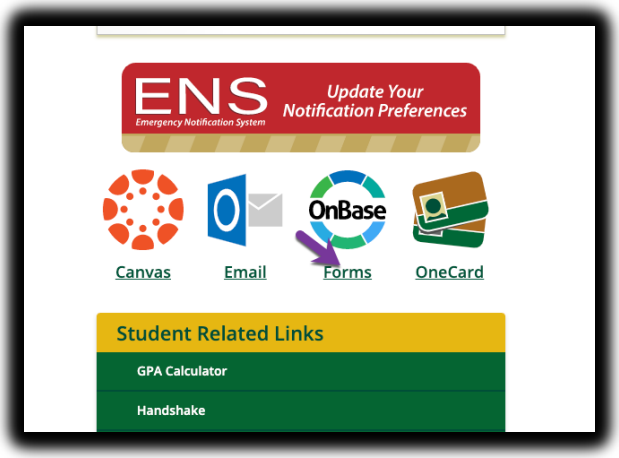
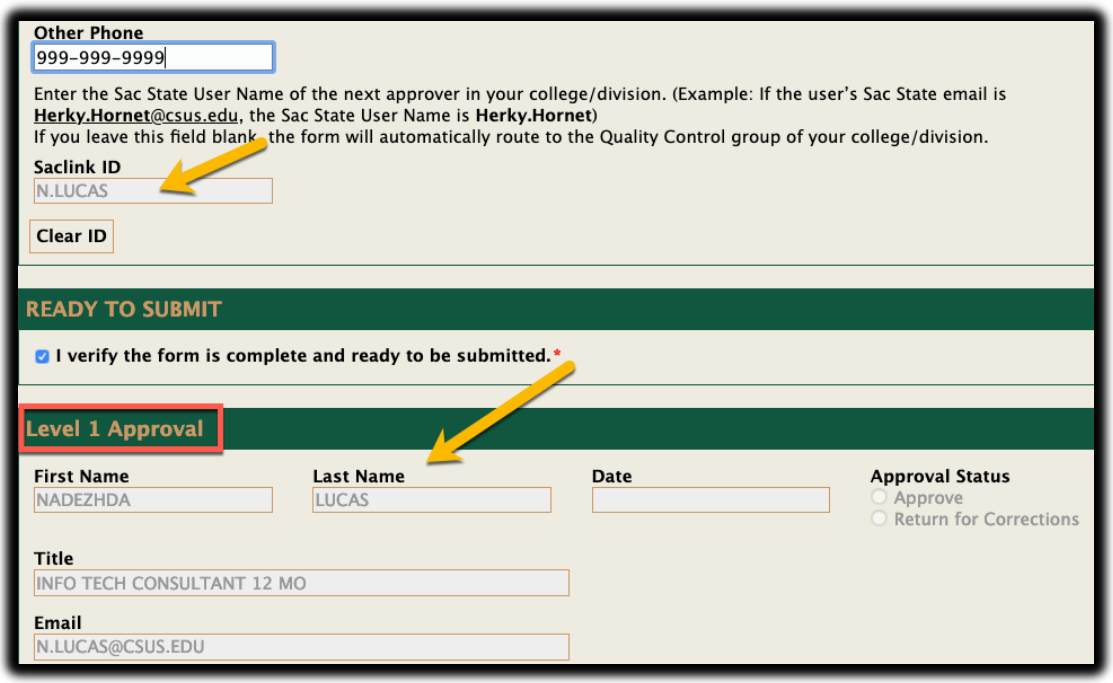
Employee Personnel Transaction OnBase Form and Workflow User Guide for THE APPROVERS

1. The new Employee PTF will be available on My Sac State portal under OnBase forms:

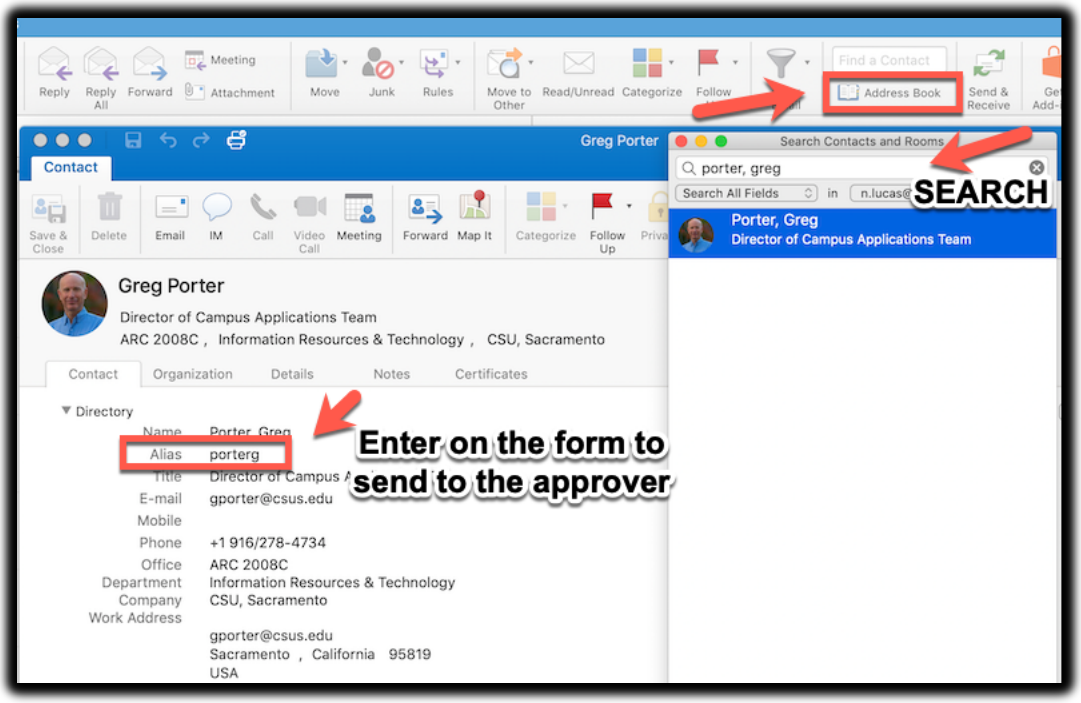


2. When submitters fill out a PTF, they will be able to send it to the appropriate approver within their department/division. ***This is a new feature in OnBase – all other OnBase forms route automatically based on the Department ID or Student Academic Plan***.

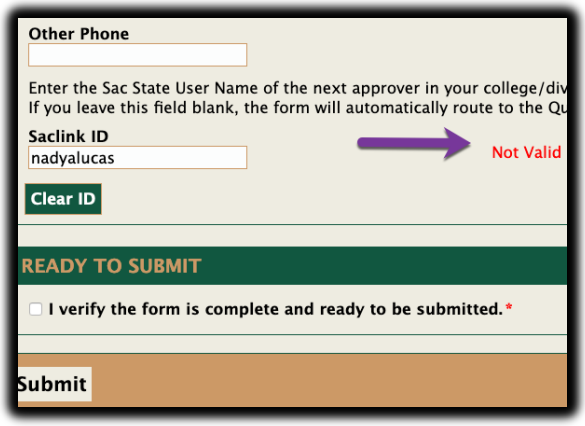
Submitters will enter the approver's **Sac Link ID (Sac State user name)** on the form:



3. In some cases, the Sac Link ID is different from the Sac State Email (**herky.hornet**@csus.edu). To find the approver's Sac Link ID (user name), go to the Outlook/Address Book, search for the employee and see their **ALIAS** – that is their ID. Enter it on the form.



If the SacLink ID is not valid, there will be an appropriate message and the approver's section will not open.



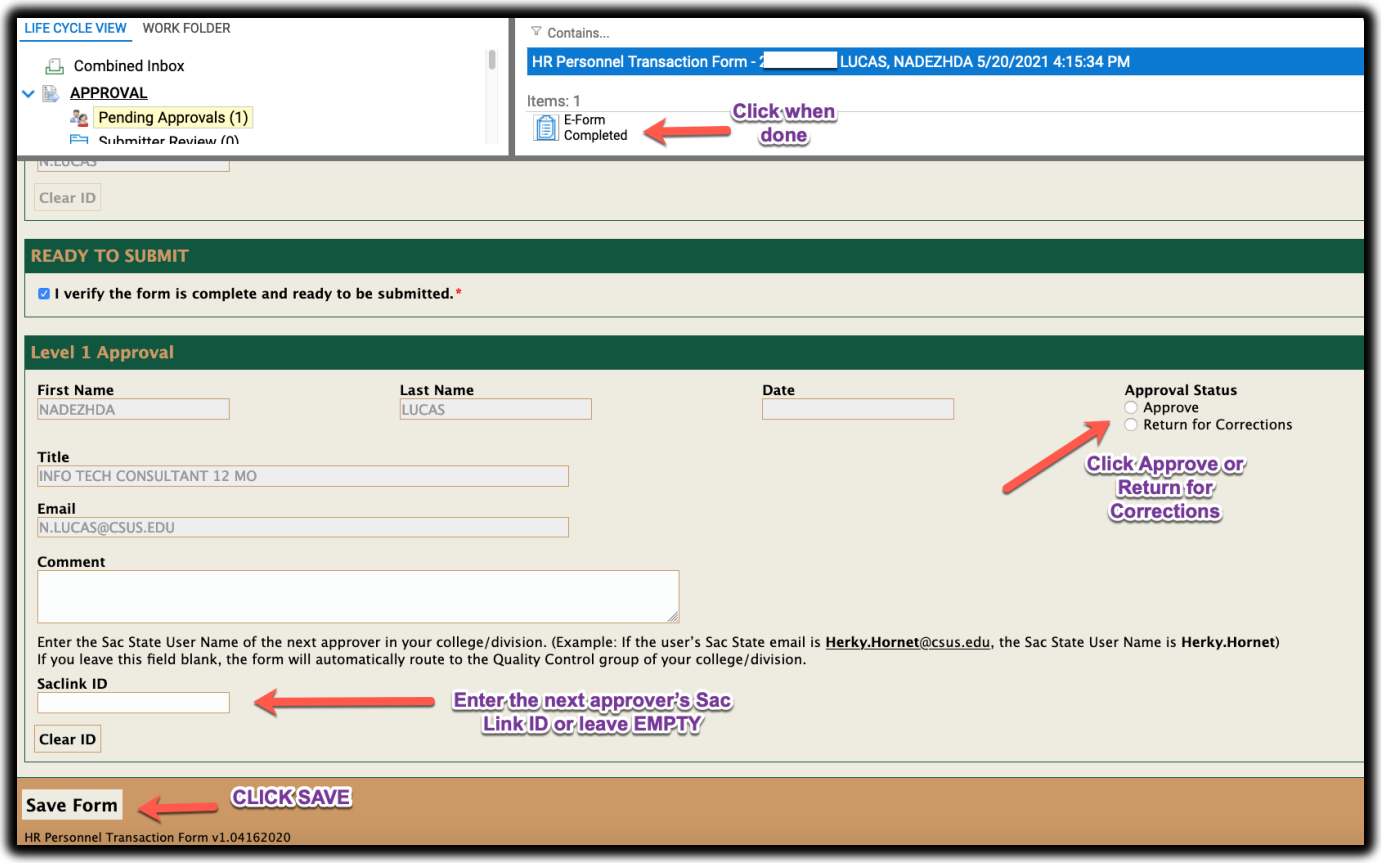
4. If the SacLink ID (user name) field is **left empty**, it will not go to the approver but will move to the next office depending on the division. In colleges and those divisions that

have Quality Control groups, the form will route to the QC. In those divisions that do not have a QC group, the form will move to HR.

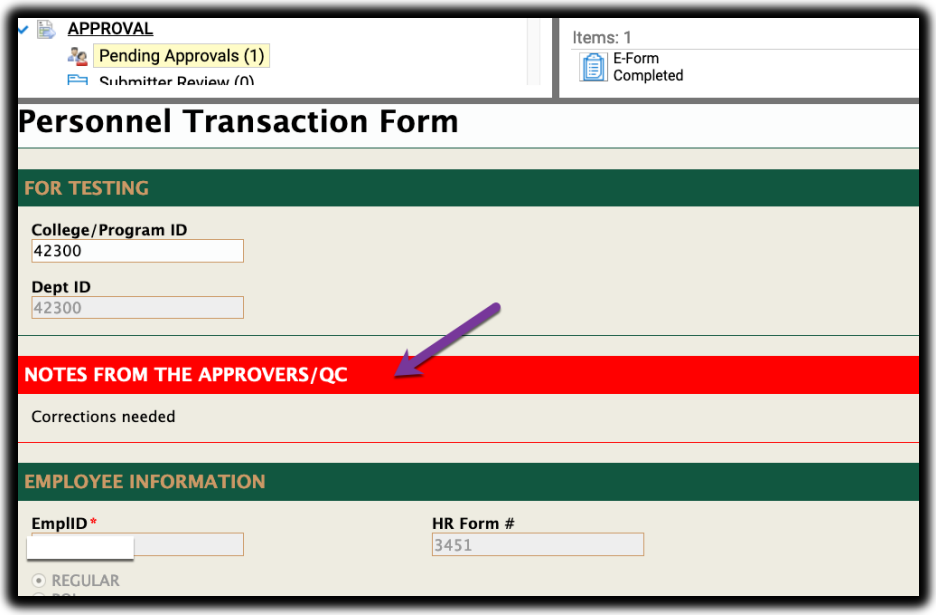
5. When the form routes to the approver, they will receive an email with the link to the form:



6. The approver will click on the link, which will bring them to the form waiting for review/approval:
    a. Review the form
    b. Click **Approve** or **Return for Corrections**. If returning, the comments will be required.
    c. Enter the next approver's Sac Link ID or leave the field empty – the form will move to QC, HR or OFA depending on the division.
    d. Click **Save Form**
    e. Click **E-Form Completed**



When returning for corrections, the notes will display on the top of the form – please put specific details of what needs to be corrected:



7. When finished making corrections, the submitter will need to click **Save** and **E-Form Completed**. The form will return to the same approver that sent it back.

8. The final approver of the form is a VP or AVP (depending on the division and availability of the VP). The QC group will be sending the forms to the final approvers. If there is no QC, it will be up to a first approver to send the form to the VP/AVP for the final approval.

9. A separate document will be provided outlining the PTF workflows in each division.