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.