

## How To Guide for OnBase ePAN

This document is to assist anyone that is submitting an ePAN form and/or using the ePAN Workflow.

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### Submitting an ‘ePAN’ Form

#### Form Tips for Success

1. You will want to use the ‘Tab’ key to move from field to field. The ‘Enter’ key will submit the form when the Submit button is showing.
2. When you enter an employee’s PeopleSoft Employee ID (PS EMPLID) or PeopleSoft Position Number (PS Position Number), give the software time to load the information from PeopleSoft (anywhere from 5 – 15 seconds).
3. When clicking on the drop-down list, click once and give it a second or two. If you continue to click on the drop-down list, the system will get overloaded and not produce the list.
4. If you type an incorrect PS EMPLID.
  - a. Delete the data typed in the field and hit the ‘Tab’ key.
    - i. This will reset the section.
    - ii. Enter the correct PS EMPLID and proceed as normal.
  - b. OR close the form and reopen the form.
    - i. Enter the correct PS EMPLID and proceed as normal.
5. If you get through the ‘New Action Section’ and need to make changes, please close out the form and start over.
  - a. The reason is that all the drop-down selections have coding behind them and some things won’t work properly when you go back.

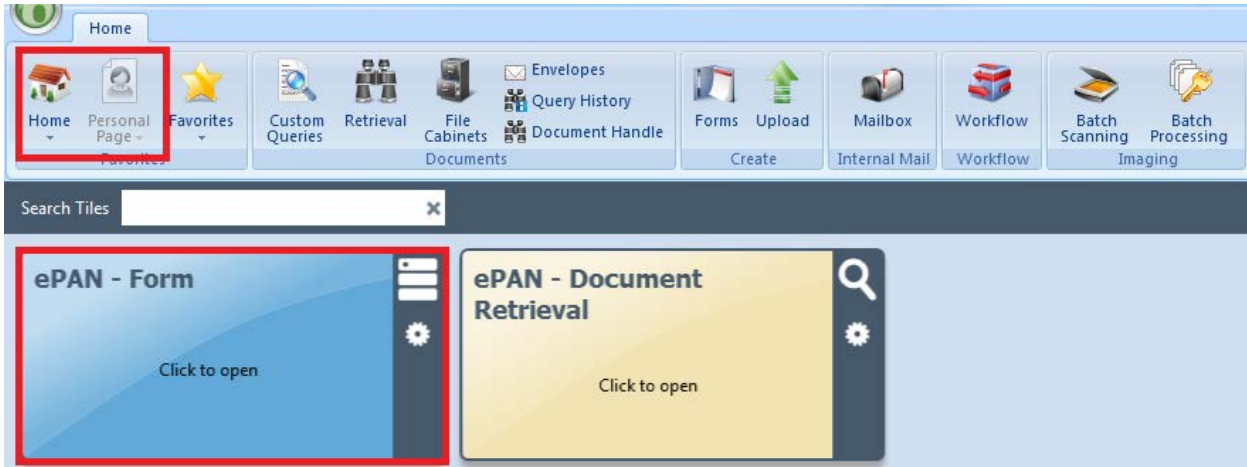
6. Almost all the fields on the ePAN are “read only”.
  - a. If you find something that needs to be changed, please contact Human Resources, so they can update PeopleSoft.

### Things you will need before submitting an ‘ePAN’ Form

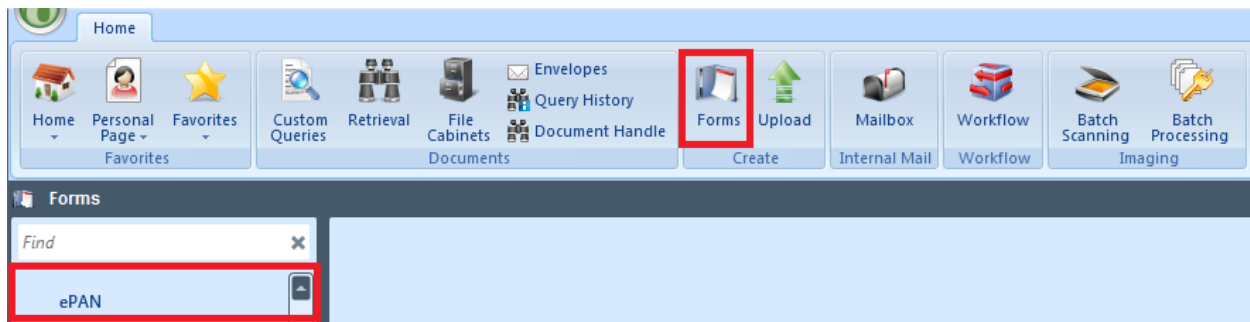
1. The person’s PS EMPLID.
  - a. This is a **REQUIRED FIELD**.
2. The ‘Employment Type’ (i.e. MPP, Staff or Student Assistant).
  - a. This is a **REQUIRED FIELD**.
3. The ‘Type of Action’ (i.e. Appointment, Change of Status, etc).
  - a. This is a **REQUIRED FIELD**.
4. The ‘Reason’ for the selected ‘Type of Action’.
  - a. This is a **REQUIRED FIELD**.
5. The ‘Permanent or Temporary Action’ for the request.
  - a. This is a **REQUIRED FIELD**. It may autofill or not show, depending on what ‘Action’ and ‘Reason’ were selected.
6. The ‘Effective Date’ for the request.
  - a. This is a **REQUIRED FIELD**.
7. The ‘End Date’, if needed for the request.
  - a. This is a **REQUIRED FIELD**, if prompted.
8. The ‘Last Day Physically Worked’, if needed for the request.
  - a. This is a **REQUIRED FIELD**, if prompted.
9. The new ‘PS Position Number’, if needed for the request.
  - a. This is a **REQUIRED FIELD**, if prompted.
10. The new Position’s ‘Time Base (0.0 – 1.0)’.
  - a. You are able to adjust, if needed.
11. The new Positions’ ‘FT Monthly Salary Or Hourly Rate’.
  - a. You are able to adjust, if needed.
12. Whether ‘This Position is Split Funded’, if needed.
13. Any Comments, if needed.
14. Any File Attachments, if needed.

## Filling Out the 'ePAN' Form

From the 'Home Page' or 'Personal Page' (both should be the same, if you followed the instructions in Customizing your 'Personal Page'), click on the 'Tile' called "ePAN - Form".



If you haven't setup your 'Home Page' or 'Personal Page', click on 'Forms' icon in the Ribbon toolbar and then click on 'ePAN'.



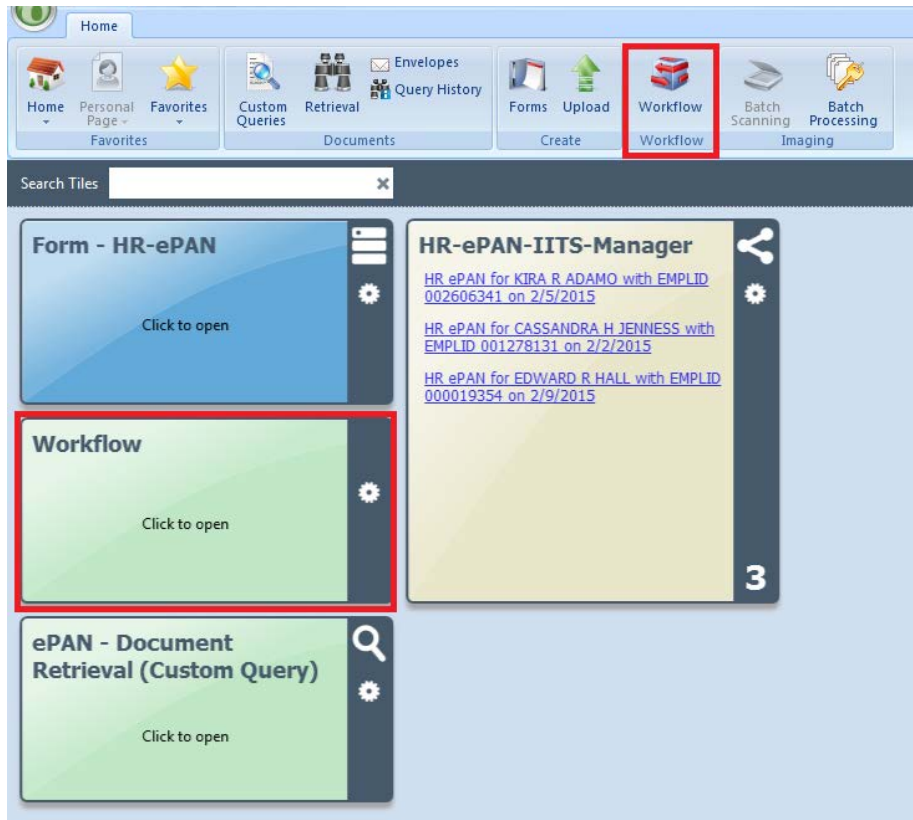
1. Enter the 9 digit PeopleSoft Employee ID (PS EMPLID).
  - a. This is a **REQUIRED FIELD**.
2. Press the 'Tab' key to execute the data query.
3. Click the dropdown named 'Employment Type'.
  - a. Select the appropriate Type (i.e. MPP, Staff or Student Assistant).
    - i. This is a **REQUIRED FIELD**.
4. Click the dropdown named 'Type of Action'.
  - a. Select the appropriate Action. (i.e. Appointment, Change of Status, etc).
    - i. This is a **REQUIRED FIELD**.
5. Click the dropdown named depending on the Action selected above.
  - a. Select the appropriate Reason.
    - i. This is a **REQUIRED FIELD**.

6. Click the dropdown named 'Permanent or Temporary Action'.
  - a. It may autofill or not show, depending on what 'Action' and 'Reason' were selected.
    - i. If it shows and is editable, select the appropriate Action.
      1. This is a **REQUIRED FIELD**.
7. Click on the 'Effective Date' field.
  - a. Select the appropriate Date.
    - i. This is a **REQUIRED FIELD**.
8. Click on the 'End Date' field.
  - a. If it shows, select the appropriate Date.
    - i. This is a **REQUIRED FIELD**.
9. Select the appropriate 'Last Day Physically Worked'.
  - a. If it shows, select the appropriate Date.
    - i. This is a **REQUIRED FIELD**.
10. Enter the 8 digit PeopleSoft Position Number.
  - a. This section and field will only show if needed.
    - i. If it shows, it is a **REQUIRED FIELD**.
11. Press the 'Tab' key to execute the data query.
12. Enter the Employee's 'Time Base (0.0 – 1.0)'.
  - a. If it shows, it is a **REQUIRED FIELD**.
13. Enter the Employee's 'FT Monthly Salary Or Hourly Rate'.
  - a. If it shows, it is a **REQUIRED FIELD**.
14. If the position is Split Funded, click the 'This Position is Split Funded' checkbox.
  - a. Please enter in the 'Comments' field the details of the split funding.
15. Enter any comments in the 'Comment Box (If Needed)' field.
16. Adding file attachments.
  - a. If you need or want to add any file attachments, click on the blue banner named 'Attachment Section (Click to Add or View Attachments)' to expand the section to view.
    - i. Click on the appropriate file type (i.e. PDF, Image, Email Message, Word Document) and add the file.
      1. You can add more than one file or file type to the form.
17. Click the 'Submit' button.

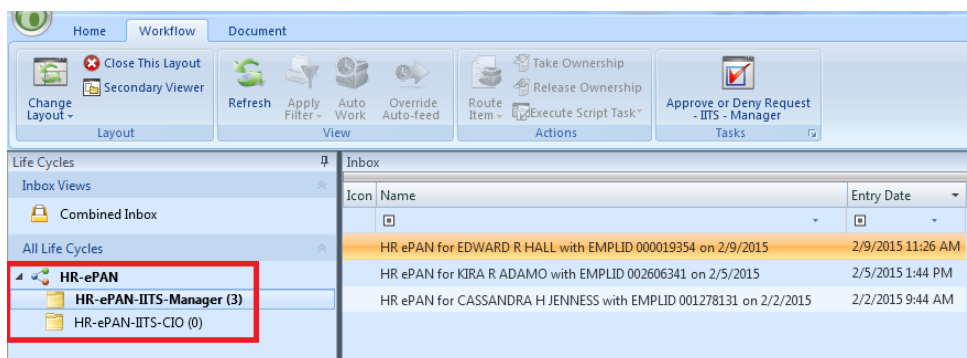
# Workflow

## How to Approve or Deny ePANs?

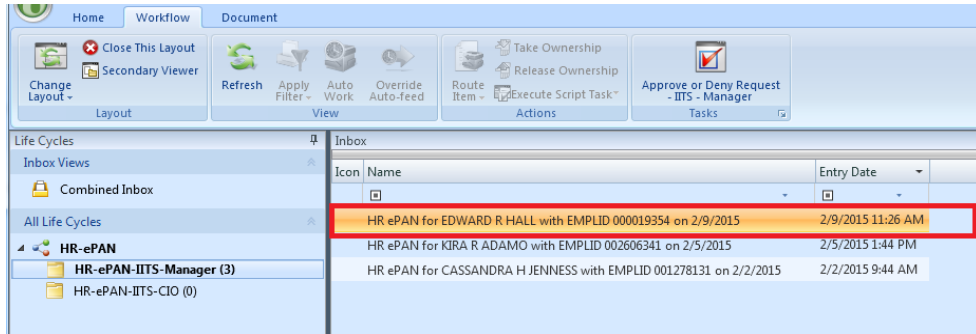
1. Access 'Workflow' from the 'Toolbar Ribbon' icon. You can also create a shortcut on the 'Home' and/or 'Personal Page'.



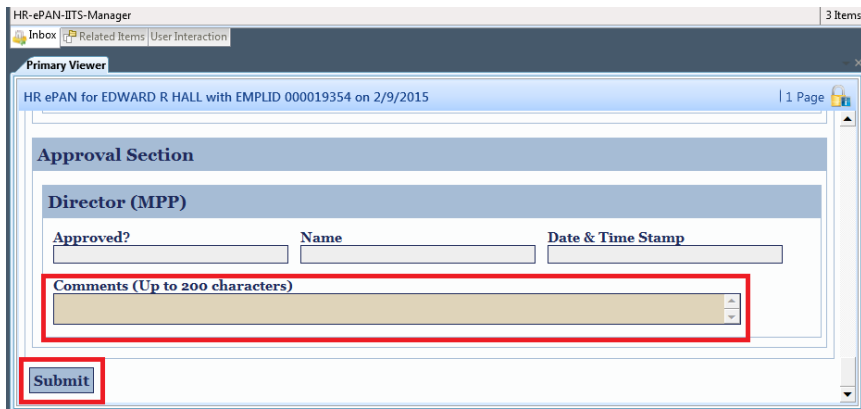
2. On the left side, you should only see the queue(s) that you have permission to view. You may need to click the arrow next to 'HR ePAN' to expand to see the individual queues. Click on a queue to view the items in the queue.
  - a. The number in parenthesis is the number of documents to review.



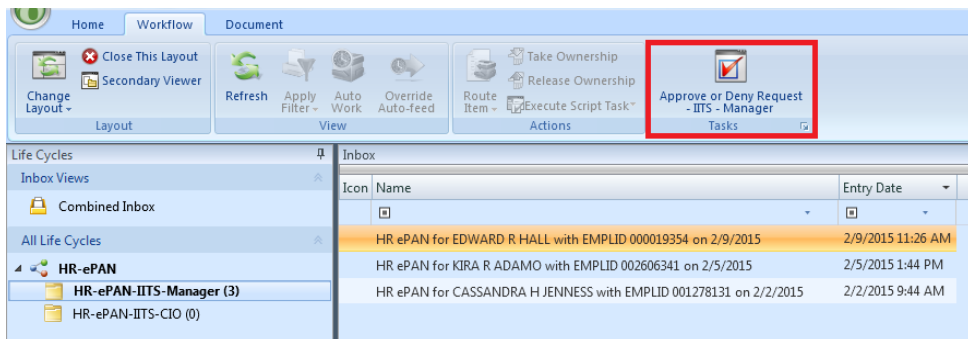
3. Select the ePAN that you'd like to review.



4. Scroll through the document to review it.
  - a. The user **DOES NOT** have to make comments, skip to #5 below.
  - b. However, If the user would like to make any comments, scroll to the bottom of the document, add comments in the appropriate 'Comments' box and click the 'Submit' button.
  - c. This will update the document with the comments. Scroll to the bottom to see the changes, if necessary.



5. Click the 'Approve or Deny Request – <Queue Name>' button in the top right of the ribbon bar.



6. The user will be prompted with a question, “Do you approve the ePAN DeptID #1075 for EDWARD R HALL EMPLID 000019354 eff 3/23/2015 (Doc #2566)?

a. If you want to Approve the ePAN:

i. Click the ‘Yes’ button to approve the ePAN and move it to the next queue.

b. If you want to Deny the ePAN:

i. The user will scroll to the bottom of the document, add Comments in the appropriate ‘Comments’ box and click the ‘Submit’ button.

ii. The form will refresh and the user will need Click the ‘Approve or Deny Request – <Queue Name>’ button in the top right of the ribbon bar.

iii. Click the ‘No’ button at the top of the application.

1. Clicking the ‘No’ button denies the ePAN and sends an email back to the submitter letting them know the request was denied.

2. **If you deny a request, please include comments (See #4 above for instructions).**

c. If you’re not sure whether to Approve or Deny the ePAN:

i. Click the ‘Cancel’ button to exit the decision and return to your queue.

