PAF –PERSONNEL UPDATE FORM
WORKFLOW

The electronic version of the Personnel Update form is intended to streamline updates to active employee records by use of Banner Workflow/EPAF automation for regular, student employees, and temporary employees, and to provide status notifications to the originator from begin to end of the transaction.
Online Personnel Update Form User Guide

Remember: Google Chrome is the required browser

This process excludes the following positions: ADJT%, CLNFAC, CLSTRE, CORFAC, OV%
ADJT%= Adjunct
CLNFAC = Clinical faculty
CLSTRE, = Cluster employee
CORFAC= Core Faculty P/T
OV% = Overloads

1) The (Online) Personnel Update Form/Process Overview

a) The (Online) Personnel Update Form/Workflow will allow users (originators) to request retroactive, current or future dated updates to active employees
b) The (Online) Personnel Update Form/Workflow will be rolled out to users in phases, each corresponding to the Proposed Actions on the paper Personnel Updates form
c) Version 1 of this user manual only includes instructions for the two currently available options on the online form: Labor Distribution Changes (org and/or account distribution changes by percentage) and Scheduled Hours Changes (pay period default hours). A new version will be released with each new phase that is rolled out to users
d) Per the Budget Department, a Position Funds Transfers form (PFT) is required for all personnel updates unless the current and proposed changes to labor distribution are 100% funded by orgs that start with the number 3
e) If a PFT form is required, it must be submitted and approved prior to submitting a personnel update request, as in the current paper process
f) The sponsored project policy attestation is required if any sponsored project org is affected by the personnel update request. The form validates this by tracing any org codes that have a value of “CAG” in the location field in the current - and proposed changes to labor distribution if applicable
g) All types of personnel updates will go through the same approval chain as follows:
   a. PAF Approver - for all position types (except student employees); OR Student Employment Approver for student positions
   b. Budget Approver – for all regular positions, if a PFT is required but not submitted with a personnel update request
   c. Compensation Approver – for all regular positions (excludes temporary and student positions)
   d. Payroll Approver – for the retroactive portion of all personnel updates
h) Denial of the request by any approver will end the process and the originator will need to resubmit the request
i) Originator will receive a notification email upon submission of the Personnel Update Form, then after approval or denial by each approver in the approval chain
2) Process Actors

a) Originators
1- HR Contacts: receive access upon request to their Center’s Strategic Business Partner to usually all positions in their Center (access can only be limited by org code)
2- HR Contacts backups: receive access upon request to their Center’s Strategic Business Partner usually to a subset of positions in their Center (access can only be limited by org code)
3- Student Hire Supervisors: receive automatic access to all student employees in their own Center upon setup in JobX

b) Approvers
4- Center PAF Approver OR Student Employment
5- Budget (no PFT submitted)
6- Compensation

<table>
<thead>
<tr>
<th>Regular Positions</th>
<th>Temp Positions</th>
<th>Student Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Center PAF Approver</td>
<td>Center PAF Approver</td>
<td>Office of Student Employment</td>
</tr>
<tr>
<td>Budget (only when no PFT submitted and current and proposed changes are not 100% 3xxxxx orgs)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compensation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

c) Processors
7- Shared Services (manual or automated)
8- Payroll (audit manual requests and/or retroactive requests)
## Shared Services

<table>
<thead>
<tr>
<th>Manual Transactions:</th>
<th>Automated Transactions:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Change includes account change (i.e. 1010 to 1011)</td>
<td>- All other transactions including Retroactive</td>
</tr>
<tr>
<td>- Employee’s job already has future dated (pending) labor distribution</td>
<td></td>
</tr>
<tr>
<td>- All changes to scheduled hours</td>
<td></td>
</tr>
</tbody>
</table>

## Payroll

<table>
<thead>
<tr>
<th>Manual Audits:</th>
<th>Retroactive Transactions:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Audit manual transactions only</td>
<td>- Retroactive portion of request gets processed after the payroll processes</td>
</tr>
<tr>
<td></td>
<td>- A separate email is sent once processed</td>
</tr>
</tbody>
</table>
### 3) Processing Routing

<table>
<thead>
<tr>
<th>Labor Dist.</th>
<th>Hours</th>
<th>Pay Rate</th>
<th>Scenario</th>
<th>SS Manual task</th>
<th>EPAF Automated Path</th>
<th>Payroll Retroactive?</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Effective Date <strong>Not retro</strong></td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Effective Date <strong>Not retro</strong> with future dated row OR account change</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Effective Date <strong>Is retro</strong> without End Date (ongoing change)</td>
<td>No</td>
<td>Yes, using Current PP Begin Date</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Effective Date <strong>Is retro</strong> without End Date (ongoing change) with future dated row OR account change</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Update then send to Payroll</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Effective Date <strong>Is retro</strong> with End Date after the current pay period</td>
<td>No</td>
<td>Yes, using Current PP Begin Date</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Effective Date <strong>Is retro</strong> with End Date after the current pay period, with future dated row OR account change</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Effective Date <strong>Is retro</strong> with End Date before Current Pay Period</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Effective Date <strong>Is retro</strong> with End Date on Current Pay Period</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Effective Date <strong>Is retro</strong> with End Date before Current Pay Period with future dated row OR account change</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Don’t update employee Record</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Effective Date <strong>Is retro</strong> with End Date on Current Pay Period with future dated row OR account change</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>
4) Personnel Updates Definition
   a) Personnel updates are needed to accurately reflect changes to employee information including: employee title, classification, rate of pay, labor distribution data, etc.
   b) Labor distribution is the process of charging percentages of employees’ salary and fringes to the grant activities and/or specific general ledger org and account codes that fund the expenses when payroll is processed
   c) Scheduled hours are the default hours employees are expected to work on a pay period basis

5) How to access the (Online) Personnel Update Form
   d) Online Form Access
      9 - Select a Browser – Google Chrome (this is the required browser for this form)
      10- Go to http://SharkLink.nova.edu
      11- Type Username, Password and click on Login button
      12- Click on the WEBSTAR icon
      13- Click on Employee tab → click on Electronic Personnel Action Forms → click on Personnel Update Form

14- Type Employee NSU ID [Press Enter or Tab].
15- Select the Position to change (notice the employee can have more than one position)
16- Under Proposed Action(s) section: Check the box next to Labor Distribution Change
17- Enter a New Effective Date
18- Enter the new labor distribution information in the Proposed Changes to Labor Distribution section
19- Also complete any Dynamic sections that appear on the form
20- Click the Submit button to finalize the request
**Remember:** verify the name displayed next to the Employee NSU ID entered to ensure accuracy

**Remember:** select the Position first. Otherwise, you will receive a warning pop-up

- Indicates Required Field

<table>
<thead>
<tr>
<th>Type</th>
<th>Position</th>
<th>Suffix</th>
<th>Title</th>
<th>TS Organization/Department</th>
<th>Start Date</th>
<th>End Date</th>
<th>Last Paid Date</th>
<th>Status</th>
<th>Ts</th>
<th>Gr</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td>995672</td>
<td>00</td>
<td>HR Shared Services Rep</td>
<td>160600 Human Resources Dept 54</td>
<td>Human Resources</td>
<td>02/23/2016</td>
<td>08/24/2018</td>
<td>A</td>
<td>NE</td>
<td>E1</td>
<td></td>
</tr>
</tbody>
</table>

**Proposed Action(s):**
- [ ] Labor Distribution Change
- [ ] Scheduled Hours Change
- [ ] Pay Rate Change
- [ ] Job Reclassification

Enter New Effective Date: [mm/dd/yyyy]

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**webstartest2.nova.edu says**

Please select a Job First.

**OK**

**Remember:** this form only works with active employees/filled positions. If the employee has no current or future positions, you will receive an error message, preventing you to move forward with the request.
**Remember:** as originator you cannot make changes to your own record. For assistance with updates to your own record please contact your backup or your **Strategic Business Partner** if you do not have one.
6) The Personnel Update Form (Labor Distribution Change Option)

![Personnel Update Form Image]

- **Employee NSU ID:** [Masked]
- **Type:** [Masked]
- **Full Name:** [Masked]
- **Title:** [Masked]
- **Organization/Department:** [Masked]
- **Start Date:** [Masked]
- **End Date:** [Masked]
- **Last Paid Date:** [Masked]
- **Status:** [Masked]
- **Job Code:** [Masked]

**Current Labor Distribution (Before N/A/0/0)**

<table>
<thead>
<tr>
<th>Org Code</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>121099</td>
<td>1237</td>
<td>RE</td>
<td>91</td>
<td>CNA</td>
<td>100</td>
</tr>
</tbody>
</table>

**Total Percent:** 100

**Proposed Action(s):**

- Labor Distribution Change

**Enter New Effective Date:** [Masked]

**Labor Distribution Change**

**Proposed Changes to Labor Distribution**

<table>
<thead>
<tr>
<th>Org Code</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total Percent:** [Masked]

**Changes to Home and/or Check Distribution Orgs**

- **Employee Home Org (ShareTalent):** [Masked]
- **Employee's Check Distribution Org (ShareTime):** [Masked]

**Office of Sponsored Programs Policy Acknowledgement**

- I attest that I have documentation on file indicating that Principal Investigator/Project Director reviewed and approved this activity.

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The Personnel Update Form shows the following sections by default:

a) Employee NSU ID and Name

b) Employee Position(s) Grid – displays all active positions held by the employee
   a. Position type
   b. Position Suffix
   c. Title
   d. TS Organization/Department
   e. Start Date
   f. End Date
   g. Last Paid Date
   h. Status
   i. TB, this column displays Exempt or Non-Exempt information
   j. GR, this column displays the Grade.
   k. Select

![Personnel Update Form](image)

Personnel Update Form

<table>
<thead>
<tr>
<th>Type</th>
<th>Position</th>
<th>Suffix</th>
<th>Title</th>
<th>TS Organization/Department</th>
<th>Start Date</th>
<th>End Date</th>
<th>Last Paid Date</th>
<th>Status</th>
<th>TB</th>
<th>GR</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td>994848</td>
<td>00</td>
<td>Assoc Dir, Media &amp; Digital Learning</td>
<td>141642, Media &amp; Digital Learning School</td>
<td>05/12/2017</td>
<td>08/29/2018</td>
<td>00</td>
<td>EX</td>
<td>68</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


c) Current Labor Distribution Grid

This grid displays the current (as of today) labor distribution for the selected position. The information comes from Labor Distribution Tab, in the Employee Jobs Form (NBAJOBS) in Banner:

1. Current Labor Distribution (Banner NBAJOBS)
   i. Current Effective Date, displays the date that the job assignment becomes effective.
   ii. Org. Code, this code is associated with the position from the Organization Code validation Form (FTVORG).
   iii. Account, this code is associated with the position from the Account Code Validation Form (FTVACCT).
   iv. Program, this code is associated with the position from the Program Code Validation Form (FTVPROG).
   v. Activity, this code is associated with the position from the Activity Code Validation Form (FTVACT).
   vi. Location, this code is associated with the position from the Location Code Validation Form (FTVLOCN).
vi. **Percent**, is the percentage of pay to be applied to a specific labor distribution or the percentage of the contract value attributed to this account distribution.

vii. **Total Percent**, is the sum of the percentage of pay applied to each labor distribution. This field must total at 100 percent, the result is automatically displayed.

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**d) Proposed Action(s) Grid**

This grid displays the available options a user can select to request personnel updates for an active employee record. The options are: Labor Distribution Change, Scheduled Hours Change, Pay Rate Change, Job Reclassification, Other.

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**e) Enter New Effective Date Field**

This field is to be populated with the effective date of your request. The effective date can be retroactive (New Effective date is equal or before the employee’s last paid date), current or future date. If a retro date is selected or typed in the field, the form will display the Retroactive Change(s) Details grid.

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**f) Proposed Changes to Labor Distribution**

This grid is to be populated with the following information:

i. **Org Code**
ii. **Account Code**
iii. **Percent**

The following fields will be populated automatically:

iv. **Program**, the information will be prepopulated
v. **Activity**, the information will be prepopulated
vi. **Location**, the information will be prepopulated

<table>
<thead>
<tr>
<th>Org Code</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
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<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: The Proposed Changes to Labor Distribution Grid has 4 rows by default but will allow up to 15 rows excluding total Percent. To add additional rows, click on the Add Row button.

**Remember:**

1. If you type an invalid Org Code, the system will display an error message (see screenshot)
2. Students employees in STUDNT positions cannot be assigned to Org Code starting with 3 and student employees in STDFWS positions cannot only be assigned to Org Code starting with 3
3. If you type an invalid Account code, the system will display an error message (see screenshot)

**g) Changes to Home and/or Check Distribution Org(s) grid**

1. **The Home Org**, controls the employee's location in SharkTalent
2. **Check Distribution Org**, controls the employee’s location in SharkTime

**Remember:** avoid using orgs that start with a 3* as they often expire
h) Submit Button
Click on Submit button when you complete the form.

A confirmation pop-up message will be displayed confirming that a new Personnel Updated Form # has been created.

i) Cancel Button
When you click the cancel the system will take you back to the landing page (See screenshot below).

7) Dynamic Sections

j) Retroactive Change(s) Details Section
This is a Dynamic grid, and only displays when the user (originator) enters a retroactive New Effective Date (new effective date is on or before the employee’s last paid date).

All retroactive distributions are manually handled by the Payroll Department.

Section 1: Enter comments for Payroll field

This is a mandatory field that should include special instructions needed for Payroll to process the request correctly; including pay #s, org #s along with corresponding percentages, etc.
Sample Labor Redistribution spread:

For example, the spread information should look like for the pay period if the changes do not start at the beginning and or does not continue to the end of a pay period.

<table>
<thead>
<tr>
<th>Pay #: 4</th>
<th>Index # &amp; %: 331XXX-50%/333XXX 50%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay #: 5-7</td>
<td>Index # &amp; %: 331XXX-100%</td>
</tr>
</tbody>
</table>

Section 2: For Retroactive Labor Redistribution(s) only

This section allows the originator to attach an excel spread sheet detailing what the spread should be if the effective date of the retroactive request begins and/or ends in the middle of a pay period.

Payroll is unable to set the spread by day, so the spread needs to be calculated for the entire pay period. See sample Labor Redistribution Spread above.

How to attach document:

1- Click on the Attach link (next to Attach redistribution spread instructions for Payroll)
2- Click on the Choose File button
3- Select the file from your computer
4- Click on the Attach File button

5- You also can View or Delete the file(s) attached.

Remember: when you click on the Delete button, a confirmation pop-up will be displayed, confirming this is the document that you want to delete (see screenshot below)
Section 3: Labor Redistribution End Date field

Use the end date field if the retroactive labor distribution request is to end and will not continue through the current and future pay periods.

Retroactive Change(s) Details box for Labor Redistributions:
## Personnel Update Form

**Employee**
- **NSU ID:** 123456
- **Name:** John Doe
- **Title:** Associate Dean for Digital Learning
- **Organization/Department:** 141402, Arts & Digital Learning, 36:650, University Center
- **Start Date:** 09/12/2017
- **Last Paid Date:** 03/04/2018
- **Status:** A, F, 08

### Proposed Actions
- Labor Distribution Changes
- Scheduled Hours Change
- Pay Rate Change
- Job Reconversion
- Other

### Current Labor Distribution (Based on NSUJOBS)

<table>
<thead>
<tr>
<th>Org Code</th>
<th>Account</th>
<th>Program</th>
<th>Account</th>
<th>Location</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>141402</td>
<td>1550</td>
<td>ITE</td>
<td>25</td>
<td>Total</td>
<td>100</td>
</tr>
</tbody>
</table>

### Enter New Effective Date
- **01/15/2018**

### Proposed Changes to Labor Distribution

<table>
<thead>
<tr>
<th>Org Code</th>
<th>Account</th>
<th>Program</th>
<th>Account</th>
<th>Location</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>141402</td>
<td>1550</td>
<td>ITE</td>
<td>25</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Restrict Changes Details
- Based on the Effective Date, a retroactive change is required.
- Restrictive Labor Redistribution Instructions for Payroll
- Attach restrictive spread instructions for Payroll (Include all affected pay periods)
- Direct comments

### Changes in Home Office/Check Distribution Orfe
- **Home Org:** 1550
- **Employee’s Home Office:** 36:650
- **Employee’s Check Distribution Org:** 36:650

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k) Position Funds Transfer (PFT) Approval Information Section

This dynamic section is displayed for any personnel updates unless the current and proposed changes to labor distribution are 100% funded by orgs that start with the number 3.
Initially, the user is asked whether a PFT was submitted: **Was a PFT submitted?**

Then, the user (Originator) should select one of the following answers:

- **If Yes** is selected, the form displays two fields, one of them being mandatory:
  
  o Enter Approved PFT # (Approved thru the PFT Workflow) – information will be automatically validated against the PFT Workflow
  
  o OR, enter Transfer Effective Date of Budget Approved PFT (If approved outside the PFT Workflow)

**Remember:**

1- If the PFT # is not valid or does not exist an error message will be displayed (see screenshot below)

2- For student and temporary employees, always select the option “No” and write a comment in the box to that effect, i.e. student employee OR temporary employee

- **If No** is selected, the form displays a mandatory field and the request is routed to the Budget Office for their approval:
  
  o A PFT was not submitted so this request will be routed to the Budget Office for their review. **Please enter a comment:**

**I) Office of Sponsored Programs Policy Attestation Section**

This dynamic section is displayed in the form, when any Sponsored Program orgs are involved in the request (orgs have “CAG” in their Location field in Banner).
Personnel Update Form

- Indicates Required Field

Employee NSU Id: #01600203  Test Employee

<table>
<thead>
<tr>
<th>Type</th>
<th>Position</th>
<th>Status</th>
<th>Title</th>
<th>Start Date</th>
<th>End Date</th>
<th>End Date Code</th>
<th>Status Code</th>
<th>PI Code</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Assistant Professor</td>
<td>07.5</td>
<td>College of Psychology</td>
<td>02/01/2014</td>
<td>05/30/2014</td>
<td>05/30/2014</td>
<td>A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Proposed Actions:
- Labor Distribution Changes
- Scheduling-Hours Change
- Pay Rate Change
- Job Reclassification
- Other

Labor Distribution Changes

Current Effective Date: 02/21/2015

<table>
<thead>
<tr>
<th>Org Code</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>12400</td>
<td>1019</td>
<td>TE</td>
<td>01</td>
<td>QA</td>
<td>25</td>
</tr>
<tr>
<td>12801</td>
<td>1019</td>
<td>TE</td>
<td>02</td>
<td>QA</td>
<td>5</td>
</tr>
<tr>
<td>12601</td>
<td>1019</td>
<td>TE</td>
<td>01</td>
<td>QA</td>
<td>10</td>
</tr>
<tr>
<td>12602</td>
<td>1019</td>
<td>TE</td>
<td>01</td>
<td>QA</td>
<td>25</td>
</tr>
<tr>
<td>12603</td>
<td>1019</td>
<td>TE</td>
<td>01</td>
<td>QA</td>
<td>5</td>
</tr>
<tr>
<td>12604</td>
<td>1019</td>
<td>TE</td>
<td>01</td>
<td>QA</td>
<td>5</td>
</tr>
<tr>
<td>12605</td>
<td>1019</td>
<td>TE</td>
<td>01</td>
<td>QA</td>
<td>5</td>
</tr>
</tbody>
</table>

Total Percent: 100

Enter New Effective Date: 02/28/2015

Proposed Changes to Labor Distribution:

Enter Proposed Changes Below:

<table>
<thead>
<tr>
<th>Org Code</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>12300</td>
<td>1019</td>
<td>TE</td>
<td>01</td>
<td>QA</td>
<td>100</td>
</tr>
</tbody>
</table>

Total Percent: 100.00

Changes to Home and/or Check Distribution Orgs:

Note: The Home Org controls the employee’s location in SharkTime and the Check Distribution Org Controls the employee’s location in Banner. Please avoid using Orgs that start with a “0” as they often expire.

<table>
<thead>
<tr>
<th>Name</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Home Org (SharkTime)</td>
<td>$200000</td>
<td>$200000</td>
</tr>
<tr>
<td>Employee Check Distribution Org (Banner)</td>
<td>$200000</td>
<td>$200000</td>
</tr>
</tbody>
</table>

Office of Sponsored Programs Policy Statement:

This Labor Distribution affects a Sponsored Program. Per the Office of Sponsored Programs Policy, "It is the responsibility of the College/Center to obtain and maintain documentation of Principal Investigators/Project Director review and approval prior to forwarding to the Office of Human Resources."

I attest that I have documentation on file indicating that Principal Investigator/Project Director has reviewed and approved this activity.
Remember: If you submit the form before checking the box the system will display a warning pop-up and not allow you to submit the Personnel Update form (see screenshot below)

8) The Personnel Update Form (Scheduled Hours Change Option)
The Scheduled Hours Change dynamic section is displayed when the originator checks this box in the Proposed Action(s) section. After entering a New Effective Date, this section is to be populated the new weekly hours value. For faculty and teachers (grade 55 and 56), more information is also required. Please read Proposed Changes to Scheduled Hours for Faculty and Teachers section.

The following fields are prepopulated from Banner (NBAJOBS), Job details tab:
1- Current Number of Pays (read only)  
2- Current Hourly Rate (read only)

a) Proposed Scheduled Hours Change for Regular Employees

**Remember:** The New Effective Date should be entered first

![Image](image1.png)

**Remember:** a new value should be entered in the New Weekly hours section or the pop-up message below will appear

1- Selecting 37.5 will calculate automatically the **New Bi-Weekly Scheduled Hours** and the **New Annual Salary**. This calculation is based on the **Current Number of Pays** and on the **Current Hourly Rate**.

![Image](image2.png)

2- Selecting Other allows the originator to type any value for the **New Weekly Hours**. The form will calculate automatically the **New Bi-Weekly Scheduled Hours** and the **New Annual Salary**. This calculation is based on the **Current Number of Pays** and on the **Current Hourly Rate**.

![Image](image3.png)
b) Proposed Scheduled Hours Change for Faculty and Teachers

For Faculty and Teachers, the form displays a different view of the Scheduled Hours Change section.

1- Selecting 37.5 will calculate automatically the **New Bi-Weekly Scheduled Hours** and the **New Annual Salary**. This calculation is based on the **Current Number of Pays** and on the **Current Hourly Rate**.

2- Selecting Other allows the originator to type any value for the **New Weekly Hours**. The form will calculate automatically the **New Bi-Weekly Scheduled Hours** and the **New Annual Salary**. This calculation is based on the **Current Number of Pays** and on the **Current Hourly Rate**.

3- **Please re-enter Annual Salary (per the contract)**: in this field the originator should enter the Annual Salary as per the faculty or teacher contract. If the Annual Salary their current contract is different to the calculated **New Annual Salary** a pop-up message will be displayed to please contact your Strategic Business Partner, as a new contract may be needed.

**Remember:** you will not be able to submit the form until the Annual Salary per contact and the New Annual Salary are the same amount.
4- **Attach New Contract**: this attachment is mandatory for Faculty and Teachers so that it can be reviewed in OHR to verify the validity of your request.

In order to attach a contract:
- a. Click on Attach link
- b. Click on Choose File
- c. Select the file from your computer
- d. Click on Attach File button
- e. You will receive a pop up message, informing that the File contract is stored in DB
f. The system will display the document attached, and you can View or Delete the document if it is necessary.

Please re-enter Annual Salary (per the contract): 13,142.85

* Attach New Contract Attach
  Contract.pdf

* View—Delete

* Attach Recalc Sheet Attach

Remember: the file should be in PDF format.

If you try to delete the document, you will receive a confirmation Pop up, click on the “Ok” button and the document will be deleted permanently.

5- Attach Recalc Sheet: this attachment is only mandatory for Teachers for Payroll’s review

Remember: If you try to submit the form without the attachment, you will receive a pop up message.
Review screenshot below.
In order to attach the Recalc. Sheet:

h. Click on Attach link
i. Click on Choose File
j. Select the file from your computer
k. Click on Attach File button
l. You will receive a pop up message, informing that the File contract is stored in DB.

*Remember:* the file should be in PDF or Excel format.

*Notice:* you cannot attach the same file under “New Contract” or “Recalc Sheet”. The file names have to be unique since all attachments are stored in the same database.

9) Informational Emails vs. (Task) Notifications Emails

The Personnel Update workflow sends various informational emails to the user (originator) and (task) notifications emails to the approvers in the process.

All emails contain all the information supplied in the Personnel Update form by the originator. (Task) Notification emails also include a Workflow link (see the screenshot below) that takes approvers into Banner Workflow where they can approve, deny or simply complete a task in this process.

*Remember:* if a task is denied by error, the process will be terminated, and the originator will need to submit a new Personnel Update Form to start the process again.
a) Informational Email Sample

Dear [Name],

The LO PAI Update request you submitted has been reviewed and is now pending in the LO PAI Workflow. You will receive notification when the update is complete. If you have any questions about the request, please contact [Contact Information].

Job/Employee Data:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name</td>
<td>[Name]</td>
</tr>
<tr>
<td>Employee ID</td>
<td>[ID]</td>
</tr>
<tr>
<td>Employee Title</td>
<td>[Title]</td>
</tr>
<tr>
<td>Center/Division Name</td>
<td>[Division]</td>
</tr>
<tr>
<td>Department</td>
<td>[Department]</td>
</tr>
<tr>
<td>Paid Base or Related?</td>
<td>[Base/Related]</td>
</tr>
<tr>
<td>Employee Class</td>
<td>[Class]</td>
</tr>
<tr>
<td>Employee Benefit Category</td>
<td>[Benefit]</td>
</tr>
</tbody>
</table>

Other Current or Future Positions:

No more current or future jobs.

Proposed Changes to Labor Distribution:

<table>
<thead>
<tr>
<th>Org Code</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>113245</td>
<td>1016</td>
<td>TE</td>
<td>02M</td>
<td></td>
<td>100.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Percent</td>
<td>100.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Effective Date: 11/09/2018

Current Labor Distribution (Banner NERIJOBS):

<table>
<thead>
<tr>
<th>Org Code</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>14871</td>
<td>1056</td>
<td>TE</td>
<td>40</td>
<td></td>
<td>100.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Percent</td>
<td>100.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Effective Date: 12/12/2014

Future Dated Labor Distribution(s):

Note: previously existing/pending labor distributions will be removed and replaced by this current request.

<table>
<thead>
<tr>
<th>Org Code</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>113240</td>
<td>1016</td>
<td>TE</td>
<td>40</td>
<td></td>
<td>100.00</td>
</tr>
<tr>
<td>140170</td>
<td>1017</td>
<td>TE</td>
<td>40</td>
<td></td>
<td>100.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Percent</td>
<td>200.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Effective Date: 11/30/2018

Changes to Home and/or Clock Distribution Org(s):

N/A

Retroactive Change(s) Details:

N/A

Position Funds Transfer (PFT) Approval Information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Was a PFT submitted?</td>
<td>No</td>
</tr>
<tr>
<td>Approved PFT (Approved through PFT Workflow)</td>
<td>N/A</td>
</tr>
<tr>
<td>OR, Transfer Effective Date of Budget Approved PFT (if approved outside the PFT Workflow)</td>
<td>N/A</td>
</tr>
</tbody>
</table>

A PFT was not submitted so this request will be routed to the Budget Office for their review. Comment for the Budget Office: PFT for [reason].

Office of Sponsored Programs Policy Attestation:

N/A

Thank you,
Office of Human Resources
[Contact Information]
b) (Task) Notification Email Sample

Dear Shared Services Team,

The following update requires you to print all pertinent documentation for imaging processing:

**Workflow Link**

<table>
<thead>
<tr>
<th>Job/Employee Data:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Name</strong></td>
</tr>
<tr>
<td><strong>Employee NSU ID</strong></td>
</tr>
<tr>
<td><strong>Employee Title</strong></td>
</tr>
<tr>
<td><strong>Center/Division Name</strong></td>
</tr>
<tr>
<td><strong>Department</strong></td>
</tr>
<tr>
<td><strong>Paid Hourly or Salaried?</strong></td>
</tr>
<tr>
<td><strong>Employee Class</strong></td>
</tr>
<tr>
<td><strong>Employee Benefit Category</strong></td>
</tr>
</tbody>
</table>

Other Current or Future Positions:
No more current or future jobs.

Proposed Changes to Labor Distribution:

<table>
<thead>
<tr>
<th>New Effective Date:</th>
<th>11/01/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Org Code</strong></td>
<td>120000</td>
</tr>
<tr>
<td><strong>Account</strong></td>
<td>1019</td>
</tr>
<tr>
<td><strong>Program</strong></td>
<td>TE</td>
</tr>
<tr>
<td><strong>Activity</strong></td>
<td>05</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>[Redacted]</td>
</tr>
<tr>
<td><strong>Percent</strong></td>
<td>100</td>
</tr>
</tbody>
</table>
10) (Online) Workflow Report

Originators will have access to track their (Online) Personnel Update Form/Workflows by use of an online workflow report. To access it:

1- Select a Browser – Google Chrome (this is the required browser for this form)
2- Go to [http://SharkLink.nova.edu](http://SharkLink.nova.edu)
3- Type Username, Password and click on Login button.
4- Click on WEBSTAR icon.
5- Click on Employee tab → click on Electronic Personnel Action Forms → click on Workflow Reports

6- Enter a date range based on submission date
7- Click on the report to generate:
   a. Workflow in process Report: to view requests currently in process
   b. Completed Workflow Report: to view completed requests
11) Working with Banner Workflow

Banner Workflow is a workflow solution that automates, simplifies, and directs the flow of information through your enterprise.

Banner Workflow triggers the appropriate logic, rules, and conditions. Activities that once required manual triggers—notifications, approvals, and other processes—now occur automatically, increasing speed, consistency, and accuracy. The results are more efficient operations, better customer service, and better information in the hands of the people who need it.

a) The Worklist

When the user click on the Workflow link located in the Task notification email, it will open the Workflow Worklist.

The Worklist is the first page that is displayed in Banner Workflow. The worklist organizes work items by the role. Work items are routed to workflow users based on role-organization assignment, directed activities, or modeled information. Ex. Office of Student Employment, Payroll, Budget, HR Compensation.

In this list, the approver will see the task, the activity, the priority and the date when the task was created.
b) How to identify Labor Distribution Workflow tasks title

The Labor Distribution Workflow task title will have:

1. PAF Type= PAF LD (LD identify Labor distribution)
2. Act Code # = Activity Code number
3. Employee last name, first name
4. N####### = NSU ID number
5. Effective Date = Labor Distribution effective date
6. Position # = Position number
7. Suffix # = Suffix number.

PAF [TYPE] for [Act Code #] - [employee last name, first name (N#######)] – Effective: [Effective Date] - [Position #]-Suffix #]

c) Worklist Display

The Worklist display the following four columns that can be in sorted ascending or descending order:

1. Organization – displays the organization name.
2. Workflow- displays the workflow instance name.
3. Activity- displays the activity for the workflow selected,
4. Priority – displays the priority of the workflow instance.
5. Created – display the workflow creation date and time.
To sort on a specific column, simply click in the column name. An arrow will appear next to the column indicating whether the sort was performed is ascending or descending order.

d) Show Reserved Items
The Worklist will display all work for the role at the organization that the user is assigned to. At any time you can click **Show All Items** or refresh the worklist to view all work items again.

e) Refresh the Worklist
To see updates and changes to items displayed on the worklist, simply click the refresh button on the toolbar of your browser.

f) Open a Work Item
To launch a work item from your worklist, simply click the link that appears in the Workflow column of the Worklists. When a work item is completed, the workflow will automatically advance to the next activity in the process. This activity will appear on the worklist of a user with the appropriate role to perform the work.