Personnel Action Request (PAR)

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All Paper Form Transaction Processors, PAR Creators and Approvers Should Review

Information Interchange for HR Appointment Transaction Business Processes
May 28, 2014

Presenters:
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Valerie VanHaaften, Information Technology Services

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Download the Q&A Document
# Information Interchange Chapters

[https://maislinc.umich.edu/mais/html/HR_Appt_Trans_Interchange_052814.html](https://maislinc.umich.edu/mais/html/HR_Appt_Trans_Interchange_052814.html)

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Pages</th>
<th>Watch the video</th>
<th>Duration</th>
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<tr>
<td>1.</td>
<td>Introduction (How Do I Initiate A Transaction)</td>
<td>pp. 1 - 8</td>
<td>(08:30)</td>
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<td>2a.</td>
<td>Technology Personnel Action Request (PAR) - A High-Level Overview</td>
<td>pp. 10 - 22</td>
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<td>2b.</td>
<td>Technology Personnel Action Request (PAR) - M-Pathways Security Roles</td>
<td>pp. 24 - 26</td>
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<td>2c.</td>
<td>Technology Personnel Action Request (PAR) - Demonstration</td>
<td>pp. 29 - 42</td>
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<td>3a.</td>
<td>Standards A High-Level Overview</td>
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<td>3b.</td>
<td>Standards General</td>
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<td>3c.</td>
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<tr>
<td>Current Process</td>
<td>Future Process</td>
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<tr>
<td>Today I use</td>
<td>Beginning August 2014 I will use</td>
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<td>Additional Pay Workflow</td>
<td>PAR – Additional Pay</td>
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<td>Appointment Request Form (new hire)</td>
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<td>Appointment Request Form (rehire)</td>
<td>PAR – Submittal Form</td>
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<td>DBE Workflow</td>
<td>PAR – DBE</td>
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<td>eMail to change Administrative Dept</td>
<td>PAR – Submittal Form</td>
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<td>eRecruit</td>
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<td>PeoplePay</td>
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<td>Request for LOA and Layoff Form Part 2a</td>
<td>PAR – Unpaid Leave of Absence</td>
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<td>Request for LOA and Layoff Form Part 6</td>
<td>PAR – RIF Notification</td>
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<td>Request for Leaves Applicable to Faculty Form (new paper form)</td>
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<td>Student Temporary Processing</td>
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<td>Submittal Form</td>
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<td>Temporary Employment Change Form</td>
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<td>Termination Workflow</td>
<td>PAR – Termination</td>
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</table>
What is PAR?

• PAR allows for online single page access to Submittal Forms, Additional Pay, Department Budget Earnings (DBE), Reduction in Force (RIF) notifications, Unpaid Leaves, and Termination transactions.

• What is PAR? {video}
Improvements

• Auto load of RIFs and Leaves of Absences (LOAs)
• Automation of Submittal Form approvals
• Simplified interface for units to attach supporting documentation in Imaging
• Link to transaction checklists
• Increases accuracy with online edits for RIFs and LOAs
• Initiates related transactions (pmods, add pay, dbe)
• Reduces the transaction time
• Confirmation when posted to employee record
Components of PAR

- Create PAR
- Find PAR
- PAR Pending Approvals
- PAR Data Selection Report
Demo of PAR - Process a Leave of Absence

1. If making a change to an employee with multiple appointments, coordinate with the Admin department.
3. Email generated to approver.
4. Approve Workflow Transaction (and view supporting documentation – if applicable).
5. Email sent to creator and approvers notifying them of completed change.
6. Leave posted to employee’s record.
Demo of PAR - Process a RIF Notification

1. Create PAR – RIF Notification Transaction
2. Email generated to approver
3. Approve Workflow Transaction (and view supporting documentation – if applicable)
4. Email sent to creator and approvers notifying them of completed change
5. RIF Notification posted to employee’s record
New Buttons for the Submittal Form

Use this button to place the Submittal Form in the Appointment imaging drawer of the employee's university personnel folder. It also links the imaged document to the PAR Transaction ID.
New Buttons for the Submittal Form

Use the Add button to add pdf or tiff documents to the Submittal Form transaction.

Use the View button to view the imaged document(s) for the transaction. You can also print or save the document(s) from the "View" page.

The PAR Comment field

The Delete Transaction button will delete the transaction and remove the Submittal Form and supporting documents from the Appointment Imaging drawer of the employee's personnel folder.
New Message for the Submittal Form

Save & Submit

Upon pressing the Save & Submit button, the system will add the SSC HR Transaction Processor group as the final approver.

The Org Group and Primary Appointing Department description is displayed for individual approvers.
Approval Groups

• Leave transactions will be automatically routed to:
  – An approval group that will validate the leave dates
  – SSC Human Resources group

• RIF Notification transactions must be approved by Staff HR

• Submittal Form transactions will be automatically routed to the SSC Human Resources group for data entry

• Complex transactions will route to the central office

• All Flint, Dearborn, GME, TSS have additional approvals

• Appropriate Health System approval groups will be assigned
Important Reminders

- The creator does not need to be listed as approver
- Follow your unit’s business process
- Payroll cutoff
- Denying a transaction does not delete it
- The same logic used to end additional pay transactions for terminations will be used for leaves. Creators will receive a message if this applies. Details in training documentation.
- The PAR Data Selection report can be a great tool for units to track PAR transactions
Unit HR PAR Security Roles

- **HR PAR UPDATER**: Unit HR user who creates any of the PAR workflow transactions

- **HR PAR APPROVER**: Unit HR user who approves any of the PAR workflow transactions

- **HR APPT VIEWER**: User who views HR appointment data.
PAR Role Mapping

CURRENT WORKFLOW/Submittal FORM ROLE

HR DBE TRANSACTION VIEWER

HR DBE TRANSACTION UPDATER

HR ADL PAY WORKFLOW VIEWER

HR ADL PAY WORKFLOW UPDATER

HR ADL PAY WORKFLOW APPROVER

HR TERM WORKFLOW VIEWER

HR TERM WORKFLOW UPDATER

HR TERM WORKFLOW APPROVER

HR TOTAL APPOINTMENT VIEW USER

HR ADDITIONAL PAY USER

FUTURE PAR ROLE

HR APPT VIEWER

HR PAR APPROVER

HR PAR UPDATER
### Security Conversion Process

<table>
<thead>
<tr>
<th>User ID</th>
<th>Name</th>
<th>Role Name</th>
<th>Action (Add/Delete)</th>
<th>Appointing Dept</th>
<th>Description</th>
<th>VP Area</th>
<th>Org Group Code</th>
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<td>Aaron Smith</td>
<td>HR TERM WRKFLOW VIEWER</td>
<td>Delete</td>
<td>710000</td>
<td>University Audits Office</td>
<td>OFFICE_PRESIDENT</td>
<td>UNIVERSITY_AUDITS</td>
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<tr>
<td>AABBBCC</td>
<td>Aaron Smith</td>
<td>HR APPT VIEWER</td>
<td></td>
<td>710000</td>
<td>University Audits Office</td>
<td>OFFICE_PRESIDENT</td>
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</tbody>
</table>

- **If a different role is needed**, update the purple “Add” row with the desired role in the **Role Name** column.
- **The suggested PAR roles** are listed with an action of “Add” and are highlighted in purple.
- **The existing workflow roles** are listed with an action of “Delete.” Please do not make changes to these rows.

If an additional role is needed, insert a new row and include, at a minimum, **User ID**, **Name**, **Role Name**, and **Action**.
Security Conversion process

- 6/23/14: Security Role Worksheets are sent to HR UL’s
- 7/23/14: Security Role Mappings are due to jlcroy@umich.edu
- 7/23/14 – 8/3/14: ITS Access and Accounts will not process any outstanding OARS requests for the security roles that will be deleted
Training
MyLINC e-Learning Courses
Available 6/18/2014

• HRE107: Unit: Processing Personnel Action Request (PAR) Transactions
  – (Mandatory training for HR PAR UPDATER)

• HRE104: Unit: Approving Personnel Action Request (PAR) Transactions
  – (Mandatory training for HR PAR APPROVER)

• HRE103: Unit: Viewing Employee Data in Workforce Administration
  – (Recommended training for HR APPT VIEWER)
Training

Customer Focus Practice Labs (HRL308)

Practice Labs will be offered in July

• Complete eLearning courses prior to practice labs.

• Users can register for one hour sessions in MyLINC, maximum allowable users per session are 12.

  – 7/23 8-12 (WoTo Training Room 1)
  – 7/24 1-5  (WoTo Training Room 1)
  – 7/28 8-12 (WoTo Training Room 1)
  – 7/29 8-5  (WoTo Training Room 1)
Key Activity Dates
June 2014 thru August 2014

- 6/23/14: Security Role Worksheets are sent to HR UL’s
- 6/26/14: Customer Information Exchange at MCHC Auditorium
- 7/23/14: Security Role Mappings are due to ITS
- 7/23/14: ITS Access and Accounts will not process any outstanding OARS requests for the security roles that will be deleted
- June and July - HRRIS will contact a representative of an organizational group to help define the PAR Department Final Approver Job Aid
- 8/1/14: All transactions that do not have an approved status by end of business will be deleted from the system
- 8/4/14: M-Pathways PAR is available
Q & A