

Changing Reports To and Location Status

Overview:

Understanding the Process for Changing Reports To and Location Code for a Filled Position

This guide outlines the basic steps for changing a Position's Reports To and Location Code using the electronic Personnel Action Form Plus (ePAF+).

NOTE: Multiple transactions effective on the same date require only one ePAF+. Do not submit multiple ePAFs for the same effective date. An originator will not be able to originate a transaction on themselves. For this, please have another employee in the department with access to ePAF+ submit the transaction. You cannot enter another ePAF+ if one has been pushed back or saved as a draft. The pushed back or saved as a draft ePAF+ must be processed or denied.

The ePAF+ cannot be used for retroactive reappointments/funding changes unless the employee has not received a paycheck from ANY job on campus during the reappointment/funding change period. If the employee has received a paycheck during the reappointment/funding change period, the paper Personnel Action Form (pPAF) must be used for the reappointment/funding change.

Only indicate what needs to be changed in the Proposed Changes Column.

Procedure

Scenario:

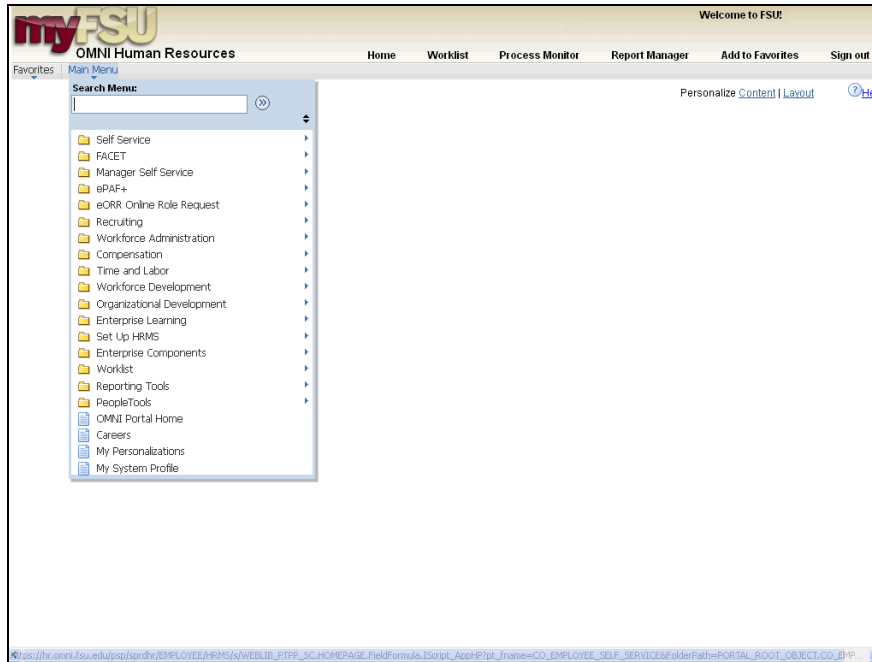
In this topic, you will learn the steps to change the Reports To and the Location Code for an employee's position using the electronic Personnel Action Form Plus (ePAF+).


Key Information:

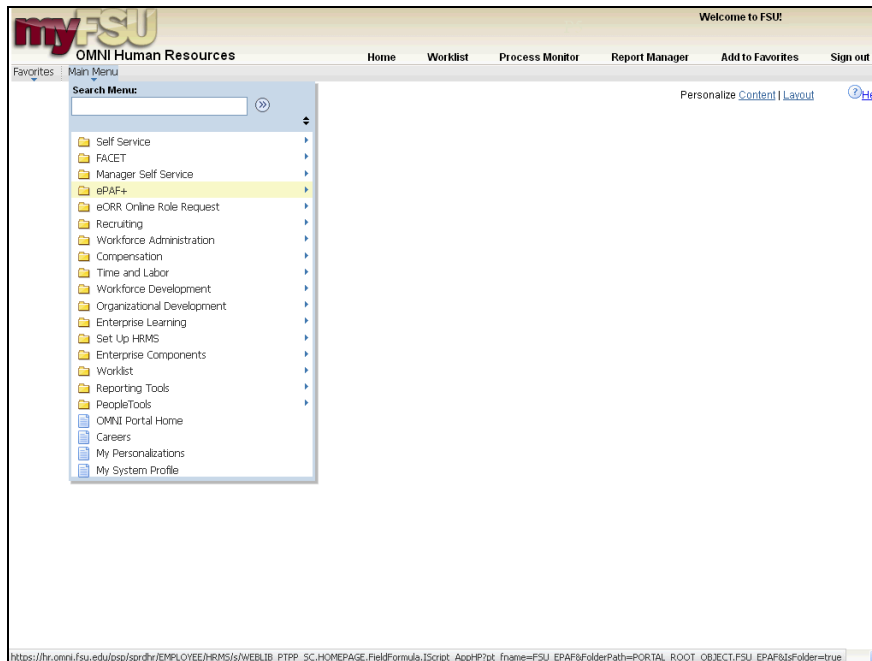
Employee ID/Name
Position Number
New Reports To
New Location Code


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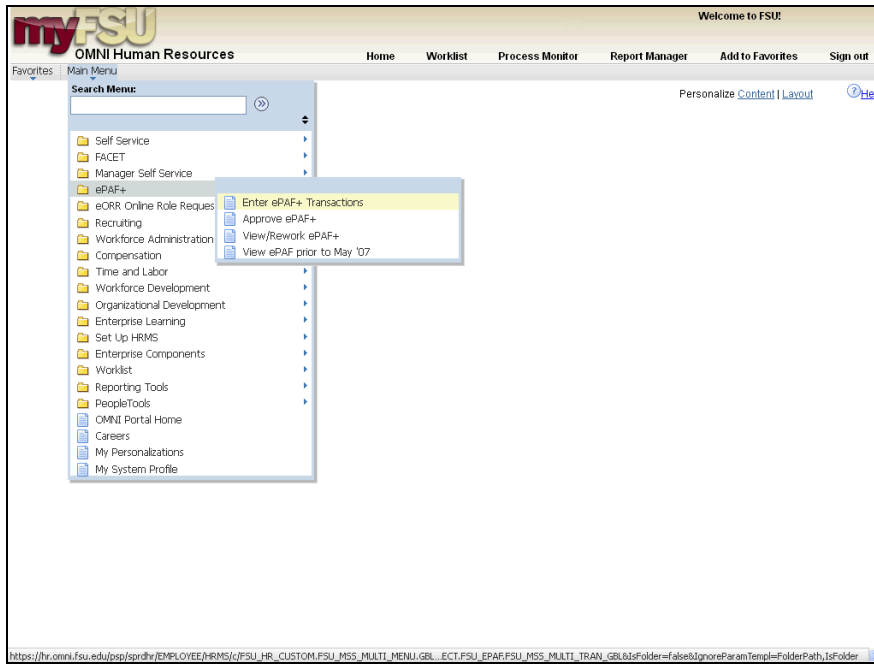
Step	Action
1.	Click in the Main Menu field. 



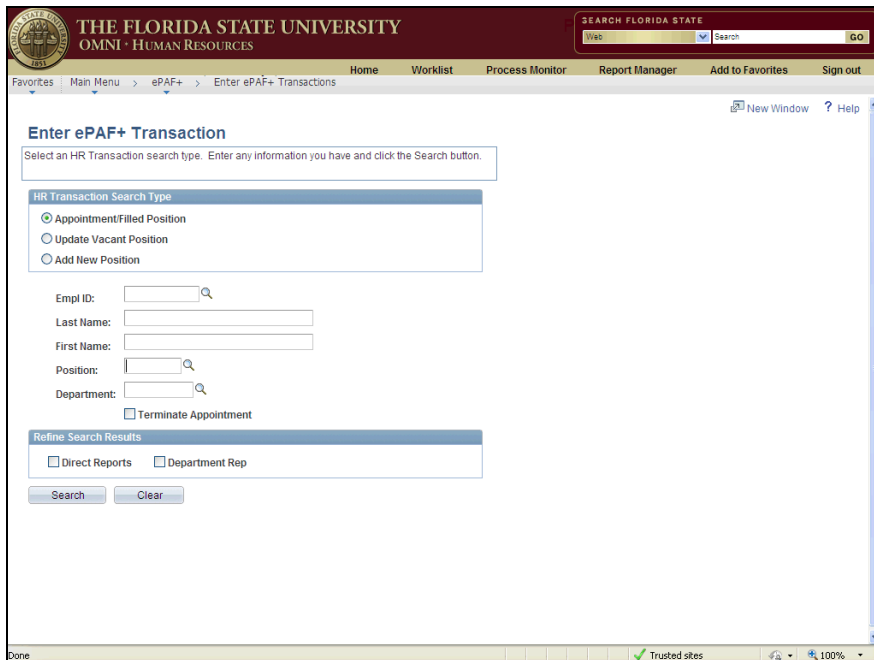
Step	Action
2.	Click in the ePAF+ field. 

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Step	Action
3.	Click the Enter ePAF+ Transactions menu. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Enter ePAF+ Transactions</div>



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Step	Action
4.	Make sure that the Appointment/Filled Position search type is checked. You may search for a filled position using any of these fields. For the purpose of this example, enter "00080620" into the Position field.

Step	Action
5.	Click the Search button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Search</div>

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Enter ePAF+ Transaction

Select an HR Transaction search type. Enter any information you have and click the Search button.

HR Transaction Search Type

Appointment/Filled Position
 Update Vacant Position
 Add New Position

Empl ID:
 Last Name:
 First Name:
 Position: 00080620 Technical Support Analyst
 Department:
 Terminate Appointment

Refine Search Results

Direct Reports Department Rep

Name	Empl ID	Empl Rcd#	Job Code	Job Title	DeptID	Department Name	Originator Name	Current Approval St
Suzie Seminole	000012345	1	2033	Sr Technical Support Analyst	131000	DRS Administration		

Step	Action
6.	Select the desired employee's Name link. For the purpose of this example, click the Suzie Seminole link.

Transaction Effective Date

Enter transaction Effective Date. Current Information section will reflect data as of this date. The date may be changed prior to submission and while working in Draft mode, though changes will reset data previously entered into the form. The Effective Date cannot be changed if the ePAF+ is pushed back.

*Requested Transaction Date: 05/07/2012

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Step	Action
7.	Check the transaction effective date. The requested transaction effective date defaults to the current date. Please enter your desired transaction effective date or the first day of the next available payroll cycle into the Requested Transaction Date field. For the purpose of this example, enter " 05112012 ".



Step	Action
8.	Click the Submit button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Submit</div>


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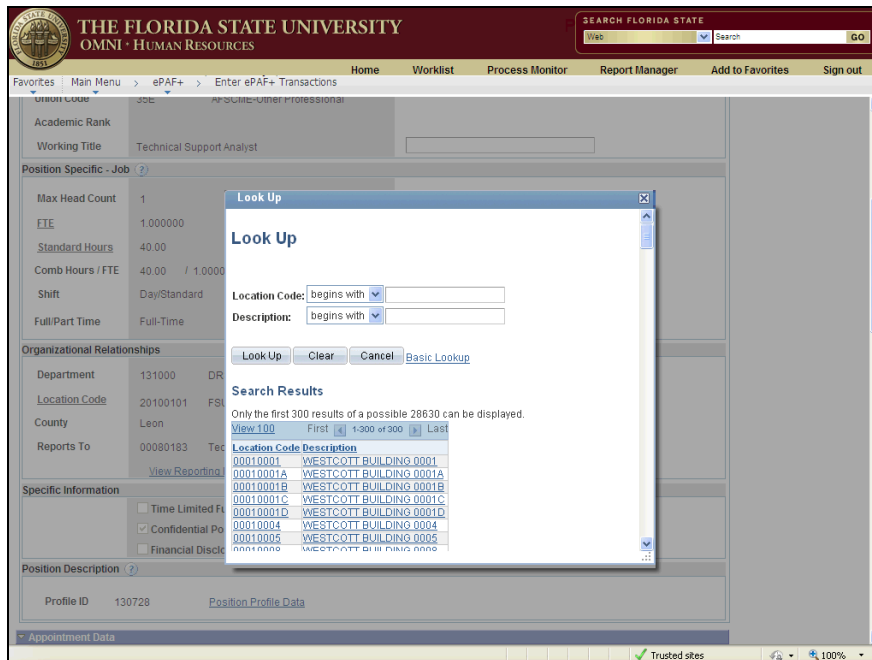
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Step	Action
9.	NOTE: The Reports To and Location information are located under the Organizational Relationships section of the ePAF+.

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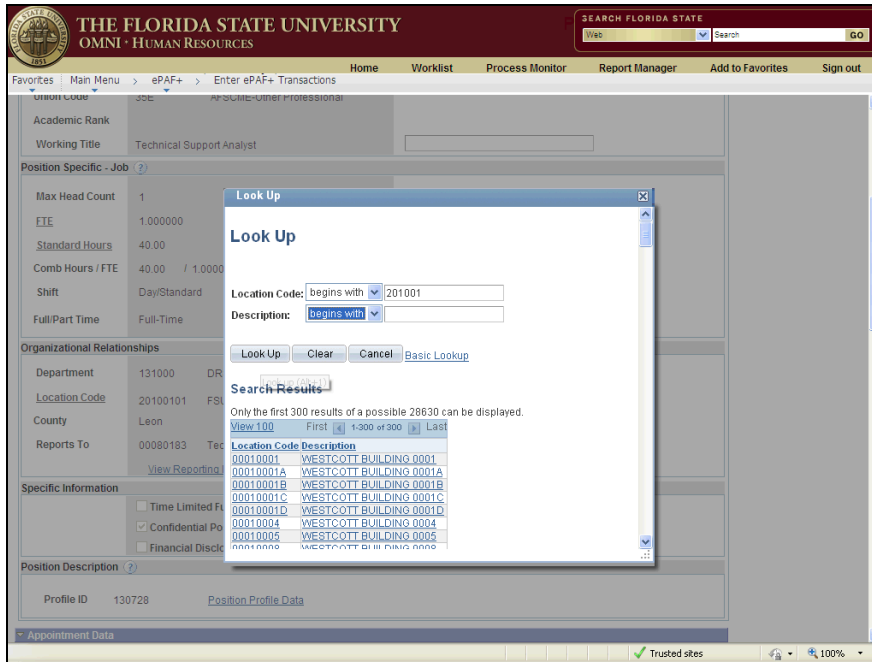
Step	Action
10.	<p>Either type in the location code or click the Look Up button to search for the location code. For the purpose of this example, click the Look Up Location Code button.</p> 



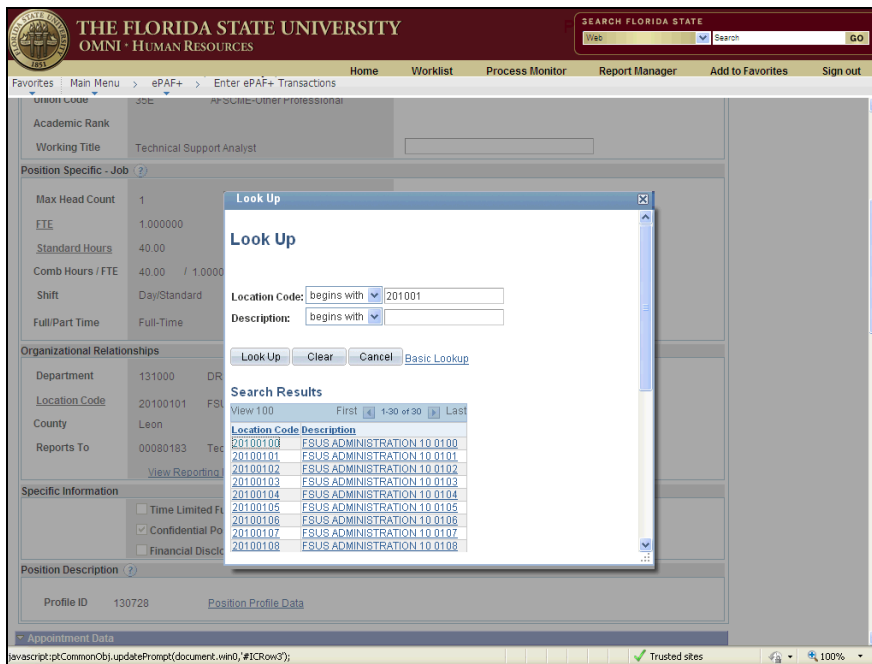
Step	Action
11.	<p>Enter the desired information into the Location Code field. For the purpose of this example, enter "201001".</p>

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Step	Action
12.	Click the Look Up button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Look Up</div>



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Step	Action
13.	The search pulled a list of all of location codes that begin with 201001. Select the appropriate location code. For the purpose of this example, click the 20100103 link. <u>20100103</u>

The screenshot shows the 'Organizational Relationships' section of the HR system. The 'Location Code' field is currently set to '20100101' and is being searched for '20100103'. The search results show '20100103' as a selectable option. Other fields include Department (131000), County (Leon), and Reports To (00080183).

Step	Action
14.	Either type in the new supervisor's position number or click the Look Up button to search for the supervisor. For the purpose of this example, enter " 00051090 ".

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Step	Action
15.	NOTE: Once you enter the new position number and then tab out, the supervisor's title will automatically populate.

Step	Action
16.	Enter the appropriate VP Approver into the VP Approver field. For the purpose of this example, enter " TFULCHER ".

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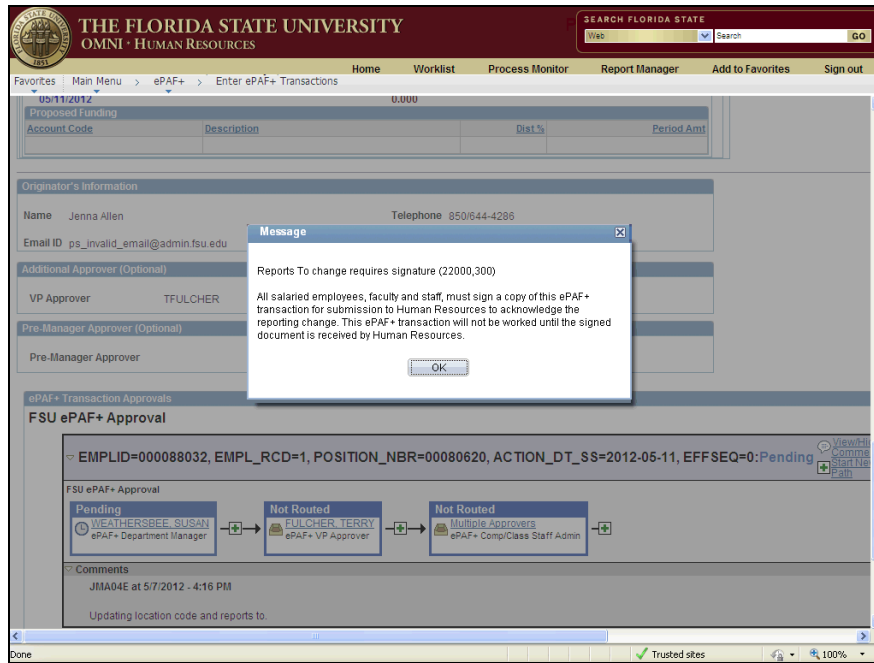
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Step	Action
17.	<p>Comments are required by the originator. Any information an approver may need to know prior to approving the ePAF+ should be entered into the Comments field.</p> <p>For the purpose of this example, enter "Updating location code and reports to.".</p>

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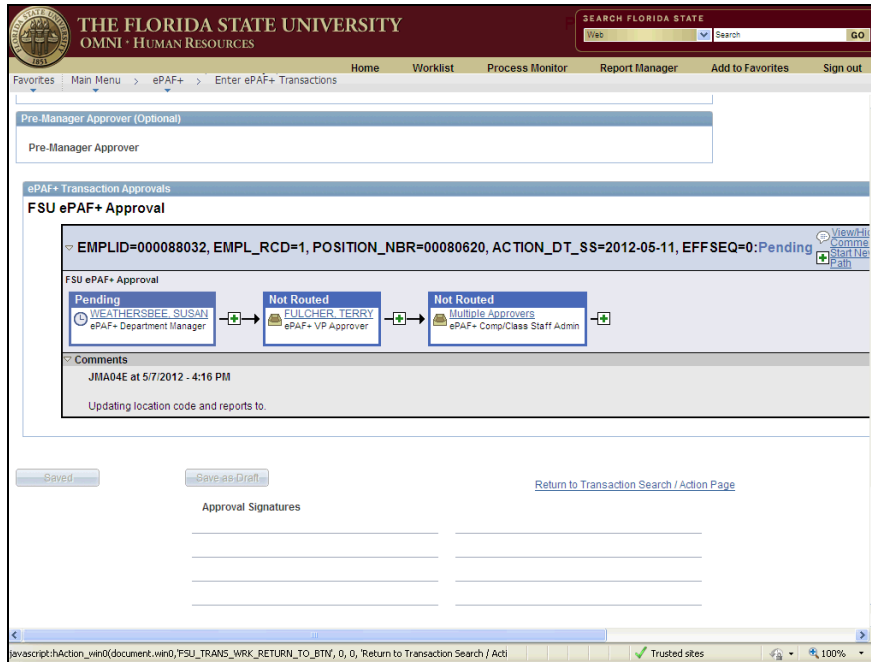
Step	Action
18.	Click the Submit button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Submit</div>



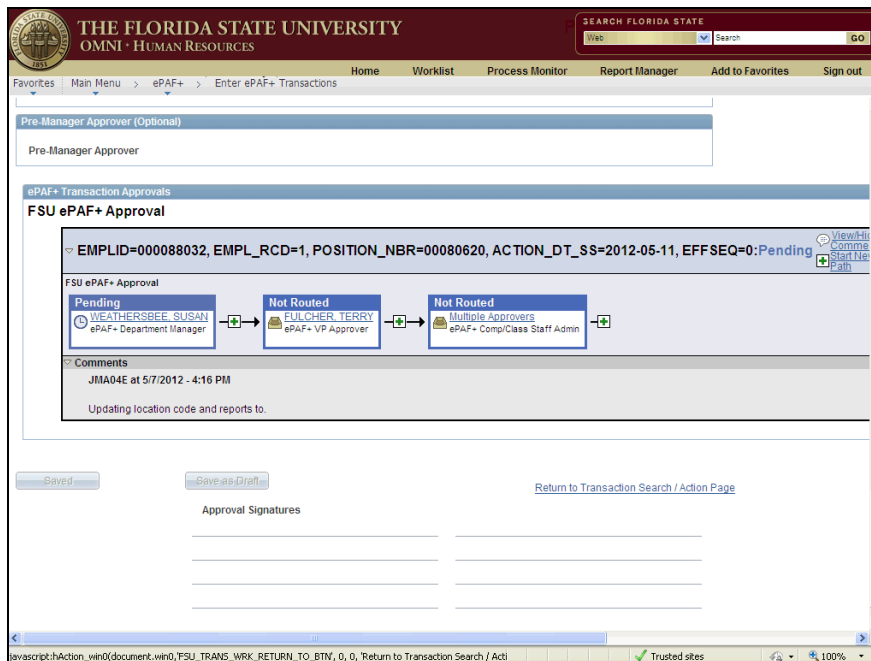
Step	Action
19.	NOTE: Reports to changes for filled positions require the employee's signature. Click the OK button to acknowledge the message. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">OK</div>

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Step	Action
20.	Review Approval Routing here. To insert an approver, select the "+" at the desired step. The inserted approver must have appropriate approval authority.



Step	Action
21.	Click the Return to Transaction Search / Action Page link. Return to Transaction Search / Action Page

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Enter ePAF+ Transaction

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HR Transaction Search Type

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 Update Vacant Position
 Add New Position

Empl ID:
 Last Name:
 First Name:
 Position:
 Department:

Terminate Appointment

Refine Search Results

Direct Reports Department Rep

Name	Empl ID	Empl Rcd#	Position Number	Position Title	Job Code	Job Title	DeptID	Department Name	Gr
Suzie Seminole	000012345	1	00080620	Technical Support Analyst	2033	Sr Technical Support Analyst	131000	DRS Administration	Je

Step	Action
22.	Click the Home link. Home

myFSU Welcome to FSU!

OMNI Human Resources

Home Worklist Process Monitor Report Manager Add to Favorites Sign out

Personalize Content | Layout Help

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Step	Action
23.	Congratulations! You have completed this topic. End of Procedure.