

# 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

Labor Distribution  
Schedule Hours

## 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

- j) Originator will receive a notification email after the request has been processed by Shared Services manually or by the automatically by Banner Electronic Personnel Action Form process (EPAF), HPD finance will be copied on this email for any transactions that involve HPD orgs
- k) Originator will receive a notification email after Payroll approves/processes or denies the retroactive portion of the transaction

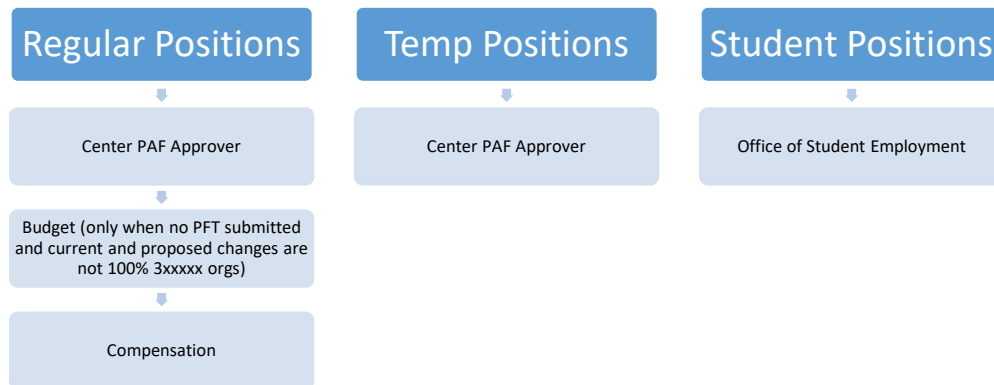
## 2) Process Actors

### 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

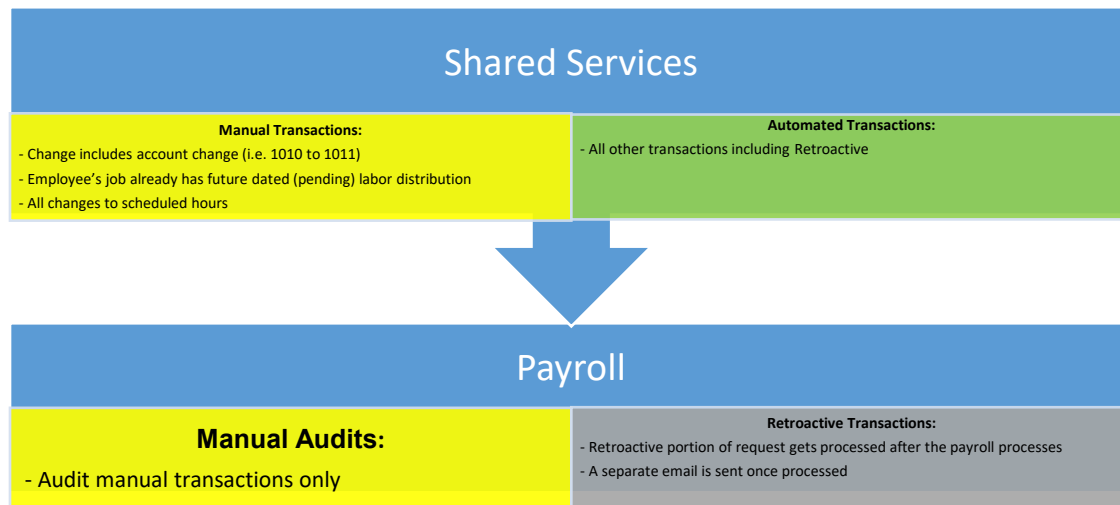
### b) Approvers

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



### c) Processors

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



### 3) Processing Routing

Labor Dist.	Hours	Pay Rate	Scenario	SS Manual task	EPAF Automated Path	Payroll Retroactive task?	Comment
<b>Labor Distribution ONLY</b>							<b>PFT required</b>
Yes	No	No	Effective Date <b>Not retro</b>	No	Yes	No	
Yes	No	No	Effective Date <b>Not retro</b> with future dated row OR account change	Yes	No	No	
Yes	No	No	Effective Date <b>is retro</b> without End Date (ongoing change)	No	Yes, using Current PP Begin Date	Yes	
Yes	No	No	Effective Date <b>is retro</b> without End Date (ongoing change) with future dated row OR account change	Yes	No	Yes	<b>Update then send to Payroll</b>
Yes	No	No	Effective Date <b>is retro</b> with End Date after the current pay period	No	Yes, using Current PP Begin Date	Yes	
Yes	No	No	Effective Date <b>is retro</b> with End Date after the current pay period, with future dated row OR account change	Yes	No	Yes	
Yes	No	No	Effective Date <b>is retro</b> with End Date before Current Pay Period	No	No	Yes	<b>Don't update employee Record</b>
Yes	No	No	Effective Date <b>is retro</b> with End Date on Current Pay Period	No	No	Yes	
Yes	No	No	Effective Date <b>is retro</b> with End Date before Current Pay Period with future dated row OR account change	No	No	Yes	
Yes	No	No	Effective Date <b>is retro</b> with End Date on Current Pay Period with future dated row OR account change	No	No	Yes	

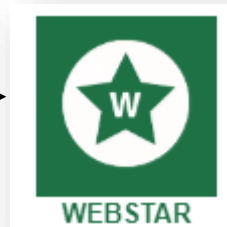
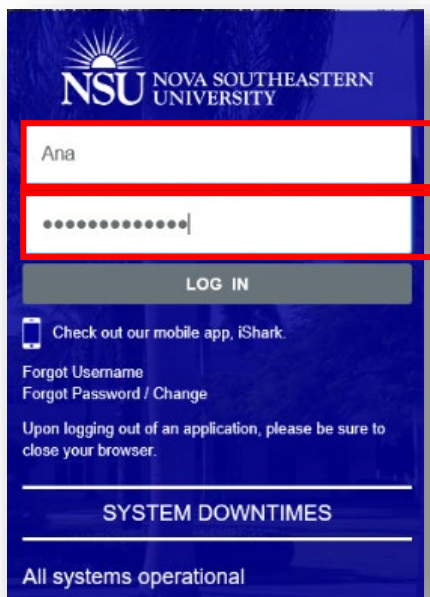
#### 4) Personnel Updates Definition

- 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

**Personnel Update Form**

\* - Indicates Required Field

Employee NSU ID: \*

Type	Position	Suffix	Title	TS Organization/Department	Start Date	End Date	Last Paid Date	Status	Tb	Gr	Select *
Primary	996072	00	HR Shared Services Rep	160600,Human Resources Dept 64-Human Resources	02/29/2016		08/24/2018	A	NE	81	<input type="radio"/>

Proposed Action(s):\*

☐ Labor Distribution Change
 ☐ Scheduled Hours Change
 ☐ Pay Rate Change
 ☐ Job Reclassification

Enter New Effective Date: \*

webstartest2.nova.edu says

Please select a Job First.

**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.

**NSU** | NOVA SOUTHEASTERN  
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Personal Information | Financial Aid | **Employee**

Home > Personnel Update Form

**Personnel Update Form**

\* - Indicates Required Field

Employee NSU ID: \*

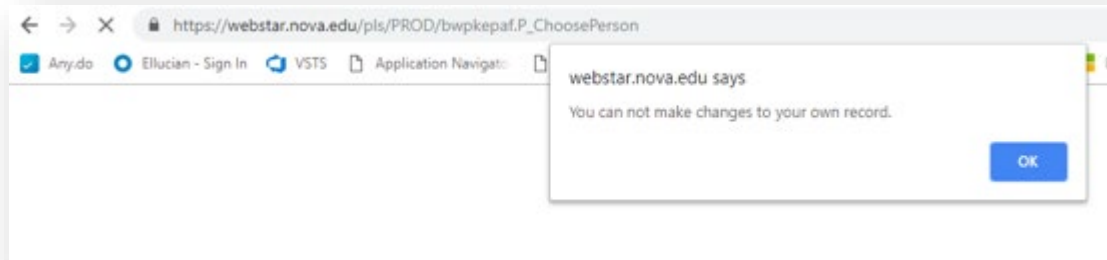
Proposed Action(s):\*

☐ Labor Distribution Changes
 ☐ Scheduled Hours Change
 ☐ Pay Rate Change
 ☐ Job Reclassification
 ☐ Other

webstartest2.nova.edu says

Employee N00004751 has no Current or Future Jobs.

**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)

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Employee

Home > Personnel Update Form

N00792712 Ana A. Lozano  
10/24/2018 03:27 pm

Personnel Update Form

\* - Indicates Required Field

Employee NSU Id: \*

Type	Position	Suffix	Title	TS Organization/Department	Start Date	End Date	Last Paid Date	Status	Tb	Gr	Select *
Primary	STDBWK	00	(B101)(GA-O)-Graduate As	155050, Student Affairs-Administration 58-Stdnt Affrs & Coll of UG Studies	07/14/2018	07/26/2019	08/24/2018	A	EX	57	

Current Labor Distribution (Banner NBAJOBS)

Current Effective Date: 20-OCT-2018

Org Code	Account	Program	Activity	Location	Percent
331090	1017	RE	01	CAG	100
Total Percent					100

Proposed Action(s) \*

☒ Labor Distribution Change
 ☐ Scheduled Hours Change
 ☐ Pay Rate Change
 ☐ Job Reclassification

Enter New Effective Date: \* mm/dd/yyyy

Labor Distribution Change

Proposed Changes to Labor Distribution

Enter Proposed Changes below:

Org Code *	Account *	Program	Activity	Location	Percent *
					0
					0
					0
					0
Add Row					
Total Percent					0

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

Note: The Home Org controls the employee's location in SharkTalent and the Check Distribution Org Controls the employee's location in SharkTime. Please avoid using orgs that start with a 3\* as they often expire.

Item	Current value	New Value
Employee's Home Org (SharkTalent)	111245	
Employee's Check Distribution Org (SharkTime)	155050	

Office of Sponsored Programs Policy Attestation.

This change 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 Investigator/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.

Submit

Cancel

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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**

\* - Indicates Required Field

Employee NSU Id: \*

Type	Position	Suffix	Title	TS Organization/Department	Start Date	End Date	Last Paid Date	Status	Tb	Gr	Select *
Primary	994848	00	Assoc Dir, Media/Digital Lrng	141642,Media & Digital Learning 35-NSU University School	06/12/2017		08/24/2018	A	EX	88	<input type="radio"/>

### 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.
  - i. Org. Code, this code is associated with the position from the Organization Code validation Form (FTVORGN)
  - ii. Account, this code is associated with the position from the Account Code Validation Form (FTVACCT).
  - iii. Program, this code is associated with the position from the Program Code Validation Form (FTVPROG).
  - iv. Activity, this code is associated with the position from the Activity Code Validation Form (FTVACTV).
  - v. 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.

Current Labor Distribution (Banner NBAJOBS)					
Current Effective Date: 12-JUN-2017					
Org Code	Account	Program	Activity	Location	Percent
141642	1010	TE	35		100
Total Percent					100

#### 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.

Proposed Action(s):\*

☒ Labor Distribution Changes ☐ Scheduled Hours Change ☐ Pay Rate Change ☐ Job Reclassification ☐ Other

#### 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.

#### 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

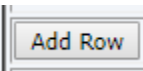
vi. Location, the information will be prepopulated

Enter New Effective Date:\*

Proposed Changes to Labor Distribution

Enter Proposed Changes below:

Org Code *	Account *	Program	Activity	Location	Percent *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>
Add Row					
Total Percent					<input type="text" value="0"/>



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)

webstartest2.nova.edu says  
Org Code: 33188 is invalid. Try again.

OK

webstartest2.nova.edu says  
Account: 1231231231231231 is invalid. Try again.

OK

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

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

**Note:** The Home Org controls the employee's location in SharkTalent and the Check Distribution Org Controls the employee's location in SharkTime. Please avoid using orgs that start with a 3\* as they often expire.

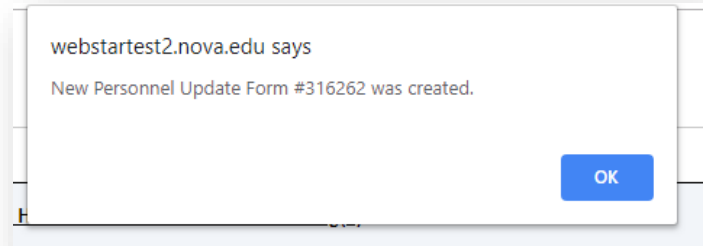
Item	Current value	New Value
Employee's Home Org (SharkTalent)	<input type="text" value="141642"/>	<input type="text"/>
Employee's Check Distribution Org (SharkTime)	<input type="text" value="141642"/>	<input type="text"/>

#### h) Submit Button

Click on Submit button when you complete the form.

**Submit**

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).

**Cancel**



## 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.

**Pay #: 4**

**Index # & %:** 331XXX-50%/333XXX 50%

**Pay #: 5-7**

**Index # & %:** 331XXX-100%

**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.

**For Retroactive Labor Redistribution(s) only:**

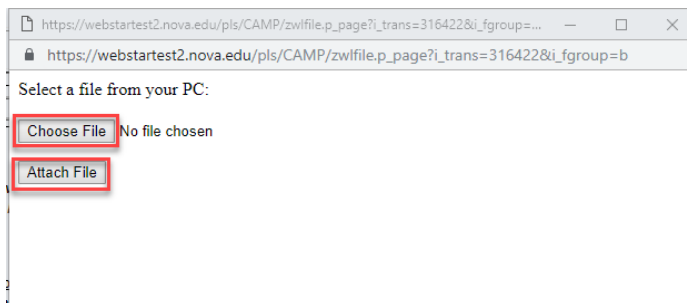
**Attach redistribution spread instructions for Payroll** (include all affected pay periods) [Attach](#)

[bannershortcutkeysquickreference.pdf](#)

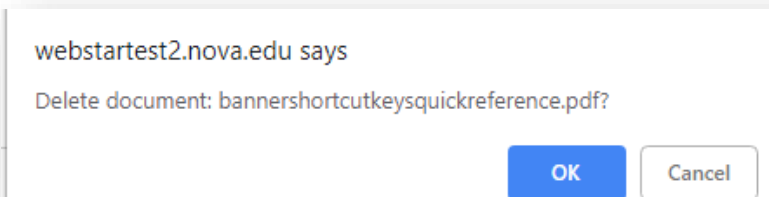
[View](#) [Delete](#)

**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:***

Retroactive Change(s) Details

*Based on the Effective Date you entered, a retroactive change is required.*

Enter comments for Payroll:\*

For Retroactive Labor Redistribution(s) only:

Attach redistribution spread instructions for Payroll (include all affected pay periods): [Attach](#)

[bannershortcutkeysquickreference.pdf](#) [View](#) [Delete](#)

Enter End Date:(Only if the retroactive labor redistribution ends before or within the current pay period)

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Personal Information Financial Aid **Employee**

Home > Personnel Update Form

N00792712 Ana A. Lozano  
10/19/2018 12:20 pm

## Personnel Update Form

\* - Indicates Required Field

Employee NSU Id: \*

Type	Position	Suffix	Title	TS Organization/Department	Start Date	End Date	Last Paid Date	Status	Tb	Gr	Select
Primary	994848	00	Assoc Dir, Media/Digital Lrng	141642 Media & Digital Learning 35-NSU University School	06/12/2017		08/24/2018	A	EX	88	

Proposed Action(s): \*

☒ Labor Distribution Changes ☐ Scheduled Hours Change ☐ Pay Rate Change ☐ Job Reclassification ☐ Other

### Labor Distribution Changes

#### Current Labor Distribution (Banner NBAJOBS)

Current Effective Date: 12-JUN-2017

Org Code	Account	Program	Activity	Location	Percent
141642	1010	TE	35		100
Total Percent					100

Enter New Effective Date: \* 07/03/2018

#### Proposed Changes to Labor Distribution

Enter Proposed Changes below:

Org Code *	Account *	Program	Activity	Location	Percent *
					0
					0
					0
					0
Add Row					
Total Percent					0

#### Retroactive Change(s) Details

Based on the Effective Date you entered, a retroactive change is required.

Retroactive Labor Redistribution(s) Instructions for Payroll:

Attach redistribution spread instructions for Payroll (include all affected pay periods): [Attach](#)

Enter comments: \*

Retroactive Labor Redistribution End Date: (Only if the retroactive labor redistribution ends before or within the current pay period)

Enter End Date: mm/dd/yyyy

#### Changes to Home and/or Check Distribution Org(s)

Note: The Home Org controls the employee's location in SharkTalent and the Check Distribution Org Controls the employee's location in SharkTime. Please avoid using orgs that start with a 3\* as they often expire.

Item	Current value	New Value
Employee's Home Org (SharkTalent)	141642	
Employee's Check Distribution Org (SharkTime)	141642	

Submit Cancel

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RELEASE: 8.1.1

SITE MAP



### 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.

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\* - Indicates Required Field

Employee NSU Id: \*

Type	Position	Suffix	Title	TS Organization/Department	Start Date	End Date	Last Paid Date	Status	Tb	Gr	Select
Primary	STDFWS	02	(779)- Facility Attendant	155055.Campus Recreation & Wellness 58-Stdnt Affrs & Coll of UG Studies	08/22/2017	05/03/2019	08/24/2018	A	NE	57	Ⓢ

Proposed Action(s):\*

☒ Labor Distribution Changes
 ☐ Scheduled Hours Change
 ☐ Pay Rate Change
 ☐ Job Reclassification
 ☐ Other

Labor Distribution Changes

Current Labor Distribution (Banner NBAJOBS)

Current Effective Date:14-JUL-2018

Org Code	Account	Program	Activity	Location	Percent
331888	1016	SF	57		100
Total Percent					100

Enter New Effective Date:\*

10/31/2018

Proposed Changes to Labor Distribution

Enter Proposed Changes below:

Org Code *	Account *	Program	Activity	Location	Percent *
110000	1010	TE	01		100
					0
					0
					0
Total Percent					100.00

Add Row

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

Note: The Home Org controls the employee's location in SharkTalent and the Check Distribution Org Controls the employee's location in SharkTime. Please avoid using orgs that start with a 3\* as they often expire.

Item	Current value	New Value
Employee's Home Org (SharkTalent)	155055	
Employee's Check Distribution Org (SharkTime)	155055	

Position Funds Transfer (PFT) Approval Information

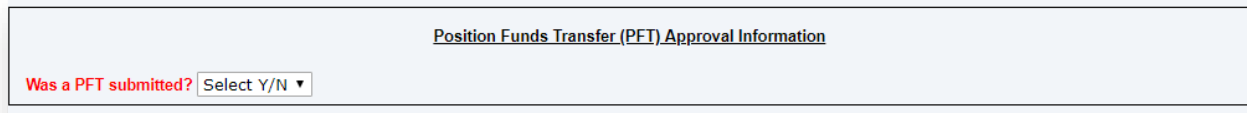
Was a PFT submitted? Select Y/N

Submit Cancel

RELEASE: 8.1.1

SITE MAP

Initially, the user is asked whether a PFT was submitted: **Was a PFT submitted?**

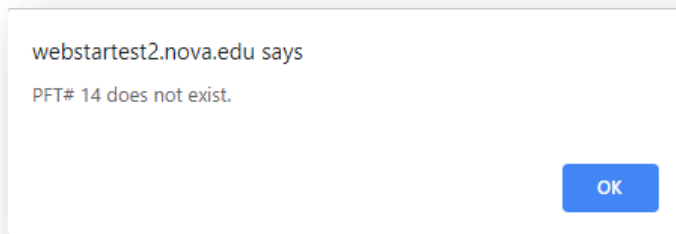


Position Funds Transfer (PFT) Approval Information

Was a PFT submitted? Select Y/N ▼

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:
  - Enter Approved PFT # (Approved thru the PFT Workflow) – information will be automatically validated against the PFT Workflow
  - OR, enter Transfer Effective Date of Budget Approved PFT (If approved outside the PFT Workflow)



webstartest2.nova.edu says  
PFT# 14 does not exist.

OK

**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:
  - 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).

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Find a page...

Personal Information | Financial Aid | **Employee**

Home > Personnel Update Form

N00792712 Ana A. Lozano  
10/19/2018 04:33 pm

## Personnel Update Form

\* - Indicates Required Field

Employee NSU Id: \* N01602303 Test Employee

Type	Position	Suffix	Title	TS Organization/Department	Start Date	End Date	Last Paid Date	Status	Tb	Gr	Select *
Primary	993401	00	Assistant Professor	120009, Counseling Admin 05-College of Psychology	02/15/2014		08/24/2018	A	EX	55	

Proposed Action(s) \*

☒ Labor Distribution Changes ☐ Scheduled Hours Change ☐ Pay Rate Change ☐ Job Reclassification ☐ Other

### Labor Distribution Changes

#### Current Labor Distribution (Banner NBAJOBS)

Current Effective Date: 04-JUL-2015

Org Code	Account	Program	Activity	Location	Percent
120000	1019	TE	05		25
120014	1019	TE	05		5
120015	1019	TE	05		10
120011	1019	TE	05		10
126775	1019	TE	05		25
120852	1019	TE	05		5
120853	1019	TE	05		5
120854	1019	TE	05		5
120855	1019	TE	05		5
120851	1019	TE	05		5
Total Percent					100

#### Proposed Changes to Labor Distribution

Enter New Effective Date: \* 10/26/2018

Enter Proposed Changes below:

Org Code *	Account *	Program	Activity	Location	Percent *
331090	1010	RE	01	CAG	100
					0
					0
					0
Add Row					
Total Percent					100.00

#### Changes to Home and/or Check Distribution Org(s)

Note: The Home Org controls the employee's location in SharkTalent and the Check Distribution Org Controls the employee's location in SharkTime. Please avoid using orgs that start with a 3\* as they often expire.

Item	Current value	New Value
Employee's Home Org (SharkTalent)	120009	
Employee's Check Distribution Org (SharkTime)	120009	

#### Office of Sponsored Programs Policy Attestation.

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 Investigator/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.

Submit Cancel

**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)

webstartest2.nova.edu says

User attestation is required before submission.

OK

## 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.

Proposed Action(s):\*

☐ Labor Distribution Change ☒ Scheduled Hours Change ☐ Pay Rate Change ☐ Job Reclassification

Enter New Effective Date:\* 11/26/2018

**Scheduled Hours Change**

Proposed Changes to Scheduled Hours

Current Number of Pays: 26

Enter Proposed Changes below:

New Weekly Hours: ☐ 37.5 ☐ Other:

New Bi-Weekly Scheduled Hours:

Current Hourly Rate: 20 New Annual Salary:

The following fields are prepopulated from Banner (NBAJOBS), Job details tab:

Pay Plan

Group \* 2004 ...

Table \* NE ...

Grade \* 81 ...

Step \* 0 ...

Compensation

Rate 20.000000

Hours per Pay \* 78.40

Assign Salary 1,568.00

Factor \* 26.0

Pays \* 26.0

Annual Salary \* 40,768.00

- 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

Enter New Effective Date: \* 11/28/2018

webstartest2.nova.edu says

Enter New Weekly Hours.

OK

**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**.

**Scheduled Hours Change**

Proposed Changes to Scheduled Hours

Current Number of Pays: 26

Enter Proposed Changes below:

New Weekly Hours: ☒ 37.5 ☐ Other:

New Bi-Weekly Scheduled Hours: 75

Current Hourly Rate: 20 New Annual Salary: 39,000.00

- 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**.

**Scheduled Hours Change**

Proposed Changes to Scheduled Hours

Current Number of Pays: 26

Enter Proposed Changes below:

New Weekly Hours: ☐ 37.5 ☒ Other: 10.00

New Bi-Weekly Scheduled Hours: 20

Current Hourly Rate: 20 New Annual Salary: 10,400.00

## 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.

Browse

\* - Indicates Required Field

Employee NSU Id: \*

Type	Position	Suffix	Title	TS Organization/Department	Start Date	End Date	Last Paid Date	Status	Tb	Gr	Select *
Primary	988364	00	Teacher - MS Social Studies	141640,USD Middle Gr 6-8 35-NSU University School	07/29/2017		08/24/2018	A	EX	55	

Current Labor Distribution (Banner NBAJOBS)

Current Effective Date: 29-JUL-2017

Org Code	Account	Program	Activity	Location	Percent
141640	1015	TE	35		100.00
Total Percent					100.00

Proposed Action(s):\*

☐ Labor Distribution Change ☒ Scheduled Hours Change ☐ Pay Rate Change ☐ Job Reclassification

Enter New Effective Date: \* mm/dd/yyyy

**Scheduled Hours Change**

Proposed Changes to Scheduled Hours

Current Number of Pays: 26

Enter Proposed Changes below:

New Weekly Hours: ☐ 37.5 ☐ Other:

New Bi-Weekly Scheduled Hours:

Current Hourly Rate: 25.274725 New Annual Salary:

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

\* Attach New Contract [Attach](#)

\* Attach Recalc Sheet [Attach](#)

- 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 contract and the New Annual Salary are the same amount.

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Florida UNIVERSITY

Browse

**Scheduled Hours Change**

**Proposed Changes to Scheduled Hours**

Current Number of Pays: 26

Enter Proposed Changes below:

New Weekly Hours: ☐ 37.5 ☒ Other: 10.00

New Bi-Weekly Scheduled Hours: 20

Current Hourly Rate: 25.274725

New Annual Salary: 13,142.86

Please re-enter Annual Salary (per the contract): 15142.86

\* Attach New Contract [Attach](#)

\* Attach Recalc. Sheet [Attach](#)

webstartest2.nova.edu says  
The new calculated annual salary does not match the contract salary.  
Please consult with your Strategic Business Partner

OK

- 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.

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Florida UNIVERSITY

Browse

\* Attach Recalc. Sheet [Attach](#)

webstartest2.nova.edu says  
Please attach new Contract.

OK

**In order to attach a contract:**

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

https://webstartest2.nova.edu/pls/CAMP/zwlfile.p\_upload - Google Chrome

https://webstartest2.nova.edu/pls/CAMP/zwlfile.p\_upload

webstartest2.nova.edu says  
File Contract.pdf stored in DB.

OK

Waiting for webstartest2.nova.edu...

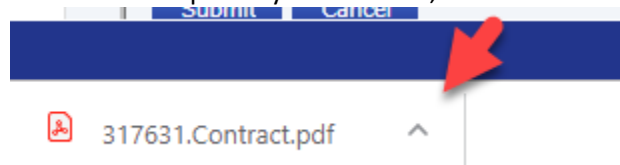
- f. The system will display the document attached, and you can View or Delete the document if it is necessary.

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

\* Attach New Contract [Attach](#)  
 [View](#) [Delete](#)

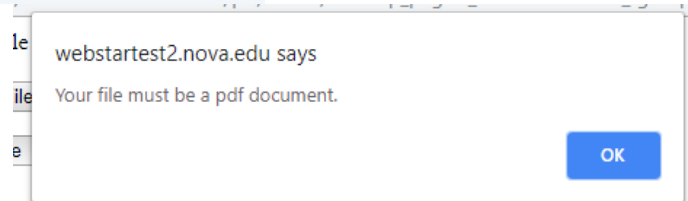
\* Attach Recalc Sheet [Attach](#)

- g. If you click on View link, you will receive the document at the bottom of your screen. Click on the document and it will open in your browser, in a different tab



- h. 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.

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



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.

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Florida UNIVERSITY

Browse

New Weekly Hours: ☐ 37.5 ☒ Other:

New Bi-Weekly Scheduled Hours:

Current Hourly Rate:  New Annual Salary:

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

\* Attach New Contract [Attach](#)  
 [View](#) [Delete](#)

\* Attach Recalc Sheet [Attach](#)

webstartest2.nova.edu says  
Please attach Recalc Sheet. [OK](#)



**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

hr4u@nova.edu

Test\*Submitted: LD PAF Update for 40 -

Effective 11/09/2018 - TEMPOR-00

12:58

Dear [Name],

The LD PAF Update request you submitted has been initiated and update notifications will follow. Please review the summary below. If you have any questions about the information in the summary, please immediately contact [hr4u@nova.edu](mailto:hr4u@nova.edu):

**Job/Employee Data:**

Employee Name	[Name]
Employee NSU ID	[ID]
Employee Title	TEMPOR-00-Temp- Teacher Aide, ESE(Primary)
Center /Division Name	Mailman Segal Center-Human Devel
Department	141871 Fam-Baudhuin Preschl
Paid Hourly or Salaried?	Non-Exempt
Employee Class	83-Hourly Temp - NSU
Employee Benefit Category	NE-Not Eligible/Taxes Only

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

**Proposed Changes to Labor Distribution:**

New Effective Date:	11/09/2018
---------------------	------------

Org Code	Account	Program	Activity	Location	Percent
111245	1016	TE	02M		100.00
Total Percent					100.00

**Current Labor Distribution (Banner NBAJOBS):**

Effective Date:	02/12/2018
-----------------	------------

Org Code	Account	Program	Activity	Location	Percent
141871	1036	TE	40		100.00
Total Percent					100.00

**Future Dated Labor Distribution(s):**  
*Note: previously existing/pending labor distributions will be removed and replaced by this current request*

Effective Date:	11/30/2018
-----------------	------------

Org Code	Account	Program	Activity	Location	Percent
111245	1016	TE	40		100.00
140170	1017	TE	40		100.00
Total Percent					200.00

**Changes to Home and/or Check Distribution Org(s):**  
N/A

**Retroactive Change(s) Details:**  
N/A

**Position Funds Transfer (PFT) Approval Information:**


Was a PFT submitted?	No
Approved PFT# (Approved thru the PFT Workflow)	N/A
OR, Transfer Effective Date of Budget Approved PFT (If approved outside the PFT Workflow)	N/A
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 me

**Office of Sponsored Programs Policy Attestation:**  
N/A

Thank you,  
Office of Human Resources  
[hr4u@nova.edu](mailto:hr4u@nova.edu)

11/09/2018 12:58 PM [Name]


b) (Task) Notification Email Sample


hr4u@nova.edu
Thu 4:47 PM

**\*Test\*Printing Required: Labor Distribution Change for Center - PAF LD for 05 - Employee, Test(...**

Dear Shared Services Team,

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

[Workflow Link](#) 

**Job/Employee Data:**

<b>Employee Name</b>	Test Employee
<b>Employee NSU ID</b>	
<b>Employee Title</b>	993401-00-Assistant Professor(Primary)
<b>Center /Division Name</b>	College of Psychology
<b>Department</b>	120009 Counseling Admin
<b>Paid Hourly or Salaried?</b>	Exempt
<b>Employee Class</b>	04-Faculty 9/10 Month-F/T
<b>Employee Benefit Catagory</b>	01-Benefits Eligible (28+ Hrs/Wk)

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

**Proposed Changes to Labor Distribution:**

<b>New Effective Date:</b>	11/01/2018
----------------------------	------------

Org Code	Account	Program	Activity	Location	Percent
120000	1019	TE	05		100

## 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>
- 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

The screenshot shows the NSU SharkLink.nova.edu interface. The top navigation bar includes 'Personal Information', 'Financial Aid', and 'Employee' (selected). The breadcrumb trail is 'Home > Employee > Electronic Personnel Action Forms > Workflow Reports'. Below the breadcrumb, there is a date range selector set to '10/01/2018' to '11/05/2018'. Two links are provided: 'Workflow in process Report' and 'Completed Workflow Report'. A table displays the workflow data:

Workflow Name	Originator Email	Center / College	Attachments	Activity Name	Performer	Activity Start Date   Time	Activity End Date   Time	Duration (Hours)	WF Start Date   Time	WF End Date   Time	WF Duration (Days)
LD PAF Update for 64 - Lozano, Ana A (N00792712) - Effective 01/01/2018 - 994704-00	kc1178@nova.edu	160600 Human Resources Dept 64 Human Resources		SS_Final_Print	Iiseth Watkins	11/02/18 12:33 PM		74.38	11/02/18 11:31 AM		

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## 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.

The image shows the Banner Workflow login interface. At the top, there is a header with the text "BANNER WORKFLOW". Below this, on the left, is the "ellucian" logo. The main area contains a login form with the following elements: a "Username:" label and input field, a "Password:" label and input field, a checkbox labeled "Remember my Username", and two buttons: "Submit" and "Reset". Red arrows with text annotations point to these elements: "Type Username" points to the username input field, "Type Password" points to the password input field, and "Click on Submit" points to the Submit button. In the bottom right corner, there is a small copyright notice: "© 1999-2015 Ellucian Company L.P. and its affiliates. This software contains confidential and proprietary information of Ellucian or its subsidiaries. Use of this software is limited to Ellucian licensees, and is subject to the terms and conditions of one or more written license agreements between Ellucian and such licensees. Banner Workflow (Version: 8.4.0.0 Build: 3294)".

### 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.

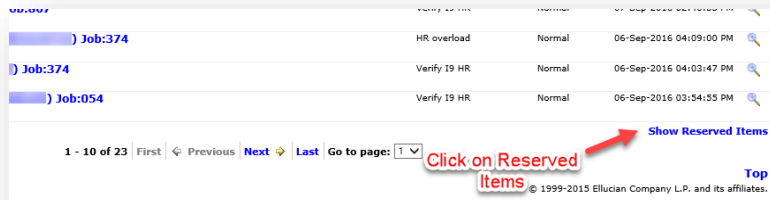
Organization	Workflow Specifics Name	Business Process Name	Status	Created	Completed
NSU	PAF LD for 35 - <a href="#">Personnel Salary, Compensation</a> - <a href="#">(Workflow Name)</a> - Effective 10/02/2018 - 993940-00	Personnel Update Form - Labor Dist. Cha	Ready	15-Oct-2018 08:52:37 AM	

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 changed 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 you 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.

