

HRMS: Personnel Action Forms

Questions? From within BS&A, go to **Help>Contact Customer Support** and select **Request Support Phone Call** or **Email Support**. Or, you may call us at (855) 272-7638 and ask for the appropriate support team. Questions for our I.T. team may be submitted by phone (same number), or by emailing itsupport@bsasoftware.com.

PR Customers Only

- Minimal changes have taken place under the Employee Information section and the HR Information section. All other areas of the Payroll program remain unchanged, and tasks should be performed as before. Some fields have been moved to different locations and a few new fields that were only found in the HR program have been added.
- Fields for Termination Date, Termination Reason, and Re-hire Date have been added to the General tab under Employee Information.
- Descriptions for Department, Bargaining Unit 1 and 2, Job Class, and Primary Position have been added under the Employee Information section.
- A tab for Personal Info has been added to the Employee Information screen. Employee Name, Social Security Number, Date of Birth, and Contact Information can be added or changed here, rather than in the HR Information section.
- An HR Info tab under the Employee Information section has been added. This section includes EEOC Information, Email Address, Last Raise Date, Promotion Date, Union Date, etc.
- The HR Information section under Application Views for each employee now contains only the Emergency Contact and Alternate Check Address information.
- The rest of the Payroll program remains unchanged and should perform as before.

PR/HR Customers

- Customers will see the same changes listed above in PR, in addition to the new functionality for Personnel Action Forms.
- A Personnel Action Form (PAF) is a document that is used to standardize the process of changing various employee information. A PAF is created in order to request a change to be made to the employee's information. Once all necessary approvals have been granted, the change is made to the employee (either at the point that the approval is received, or as a pending change to be made at a later time). Additionally, once all necessary approvals have been granted, other employees may need to be notified of the change, in order to ensure that they have up-to-date information, or to allow them to make necessary changes themselves. The PAF process in the Human Resources program is intended to allow for this process to be performed within the program – from the entry of the request, to the approvals, to the notification of the appropriate parties, to entry of the requested changes on the employee record. Allowing these processes to be performed in the HR program provides for better record-keeping. The need for duplicate entry is eliminated, as the request and approval will now create the pending change to the employee information.
- The option to create PAFs can be found under Program Setup>Database Setup>PAF Form Types. In this section, PAF Form Type templates can be created by adding in different actions and setting different approval levels, with different approvers associated based on PAF Type and approval level. Email notification texts for each form can be created, and different users can be set up to be notified when a PAF is submitted as well as applied. Users can also be set up to only see certain PAF Form Types.
- Once the different PAF Form Types have been set up, you can use these in the Employment section, under Employee Information. A new tab called Personnel Action Forms will show. On this tab, new PAFs can be added or previous PAFs can be viewed.
- To create a new PAF, click Add, select the Form Type, and fill in the Effective Date for the PAF. Click Ok. Enter in a reason for this PAF, add any attachments, and then click Actions under the Summary tab to enter in the different actions that are needed for this PAF. Once complete, click Submit. This will notify any users that are set up under the Approvals tab in the PAF Form Type that they have a PAF that requires their attention.

- Another feature added to HR is the Employee History button. This is located in the Tool bar on Employee Information. Click the button to display a log of any changes that are performed on each employee. This screen can be filtered by a date range, by different record types, as well as by a select date/time.
- The My Notifications pane, below Application Views, now contains a link for Personnel Action Forms. A counter will show the number of PAFs that pertain to the currently-logged in user. Clicking on the provided link will take the user to the Personnel Action Forms tab on the Task Management screen.
- Finally, under Task Management there is a new tab for Personnel Action Forms. Here the different PAFs can be viewed, approved, and applied, all subject to the user's security rights. PAFs can be further filtered by status, date range, or user.