LOUIE ePAR Navigation - Approver's Guide

Contents

After reviewing this user guide, if you have any questions about this process, please contact Human Resources at HR.Contact@nau.edu or 928-523-2223. If you would like more detailed knowledge about the Initiator actions, please review the *Initiator's Guide* found on the ePAR web page.

Introduction

Overview

ePAR (electronic Personnel Action Request) is a function in LOUIE that supports paperless employment transactions such as hiring an employee, job or pay changes, and end of employment. The ePAR is usually initiated in the employee's home department, and then it is routed for appropriate approvals and notifications and finally entered into LOUIE.

Objective

To use these paperless transactions to collect and record required employment information and to track the information through the process.

Employee transactions done by ePAR

The ePAR will be used for all the following employee groups: faculty, administrative faculty, academic professionals, administrators, service professionals, classified staff, temporaries, graduate assistants, and student workers. **Note**: summer faculty and part-time, non-benefit eligible faculty are considered salaried temporary employees.

Workflow

When a business decision is made that requires a hire or a change to an employee's job or pay, the department initiator enters the required information on the ePAR. For many transactions, the employee's current information will populate automatically on the form. The initiator is prompted for only the information required to complete the specific requested transaction. After the ePAR is submitted by the initiator, it follows a prescribed approval path based on the type of employee and the transaction being processed. After final approval, the information is automatically loaded into LOUIE.

Types of forms

The type of form used is based on the type of transaction.

- **Hiring form**: used for hires, rehires, and transfers
- **Change an employee's existing job (Job change) form**: used for all changes to an employee's existing job (funding changes, FTE changes, pay rate changes, etc.)
- **Employment status change form**: used to terminate employment (whether from resignation, retirement, involuntary termination, etc.), to place an employee on a leave of absence or return them from a leave of absence.

Approving forms

Please remember that clicking **Approve** in a transaction is the equivalent of your signature and indicates that you attest, to the best of your knowledge, that the information is correct and you approve the transaction moving forward in the process.

Approval roles

Decisions about what approvals are necessary are dependent on a variety of factors (type of employee, type of transaction, funding sources, dollar amounts, administrative role, etc.). Approvers will receive an email notification that there is a form that they must take action on. In other transactions, an approver may simply be notified that the transaction is happening, but no approval is required. Departmental approval roles are determined in consultation with Human Resources.

Viewing the status of a form

All those involved in processing a particular transaction can view the progress of the form and know its status at any point in time during the process. They can also view the completed form when the process is finished.

Access a form

You may access the forms that need your review and approval either through a link in the email notification sent to you when the Initiator submits the form, or by accessing your Worklist in LOUIE.

Accessing the form from a notification email

You will receive a notification email that contains a link to the form that needs your review and approval. The subject line of the email notification will say action required. Select the Evaluate link in the email to open the form. You may be prompted to sign into LOUIE with your regular user ID and password.

[eForms] Worklist Item: ACTION REQUIRED. Request to Hire Jill Lumberjack

P psdv@phdv2.ucc.nau.edu
To [redacted]
3:54 PM

You have a pending worklist item to evaluate the following request. You may follow the link below to work this item.

Form ID: 948155 Status: Pending
Request: Hire Jill Lumberjack, EmplID [redacted] Requested by [redacted] on Mon, Sep 14 20, 03:53:58 PM
Deptid: 30418

Last Action: This form was Submitted by [redacted]

Last Comment:
Background check has been initiated.

Previous Comments:

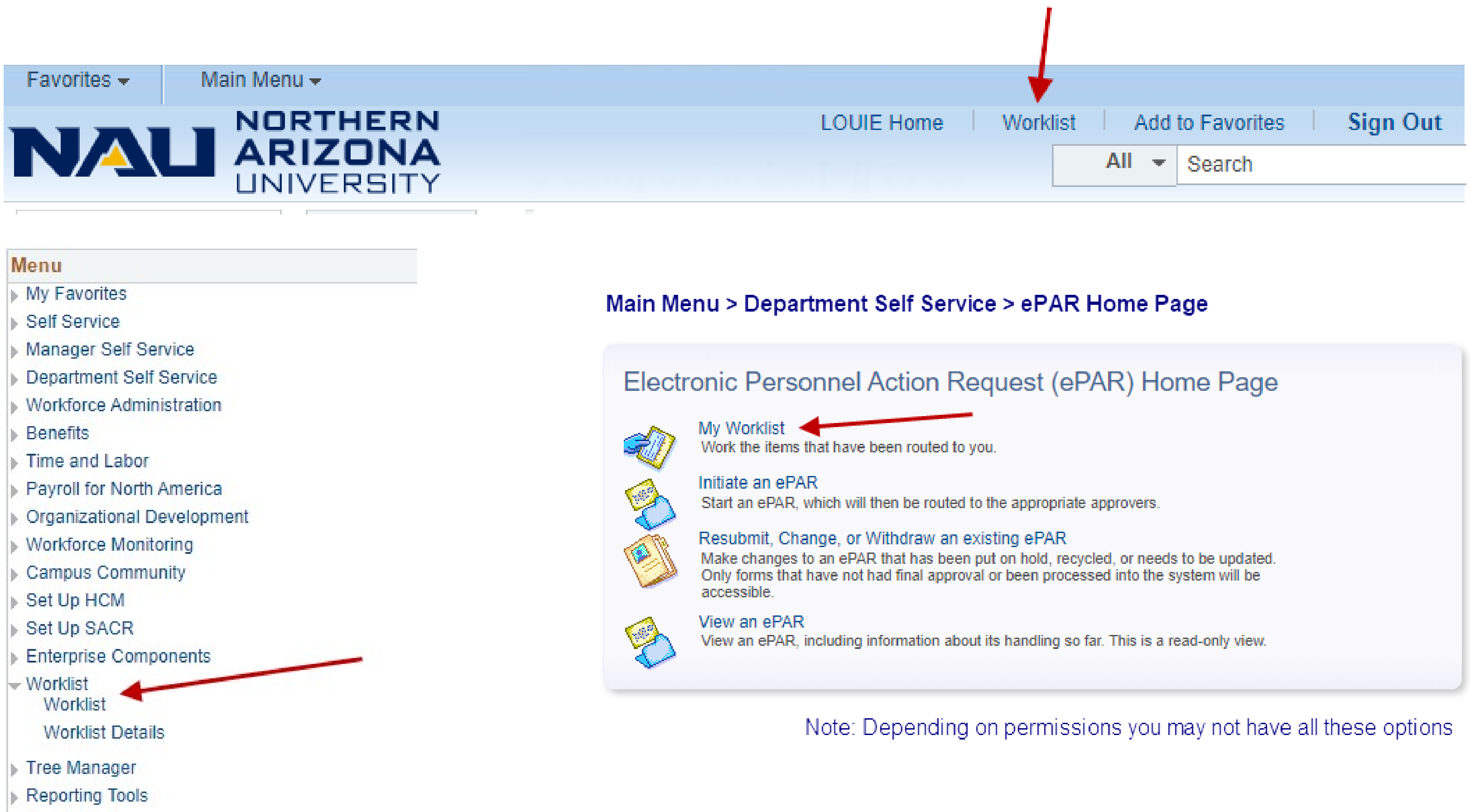
Link To Evaluate Form:
https://phdv2.ucc.nau.edu:8444/psp/ph9206nc/EMPLOYEE/HRMS/c/G_FORMS.G_FORM_HIRE_E.GBL?Page=G_FORM_HIRE_A&Action=U&&G_FORM_ID=948155&G_FORM_TASK=EVL

Link to View Form:
https://phdv2.ucc.nau.edu:8444/psp/ph9206nc/EMPLOYEE/HRMS/c/G_FORMS.G_FORM_HIRE_V.GBL?Page=G_FORM_HIRE_A&Action=U&&G_FORM_ID=948155&G_FORM_TASK=VWS

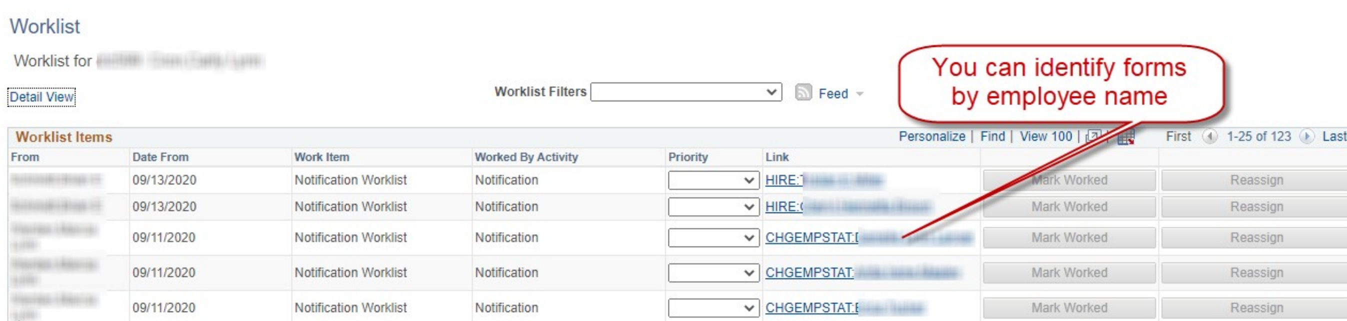
You may also receive notification emails that just alert you that a transaction is occuring, but it doesn't require any action on your part. Those emails will have 'FYI' in the subject line. You'll be able to view those forms in read-only mode by clicking the link in the email or through the view function explained later.

Accessing the form from your worklist

You can also choose to access forms you need to approve by logging into LOUIE and navigating to your worklist. The worklist is your personal list of items that require an action on your part. Choose **Worklist** in the top bar, the menu navigation, or expand **Main Menu > Department Self Service > ePAR Home Page**.



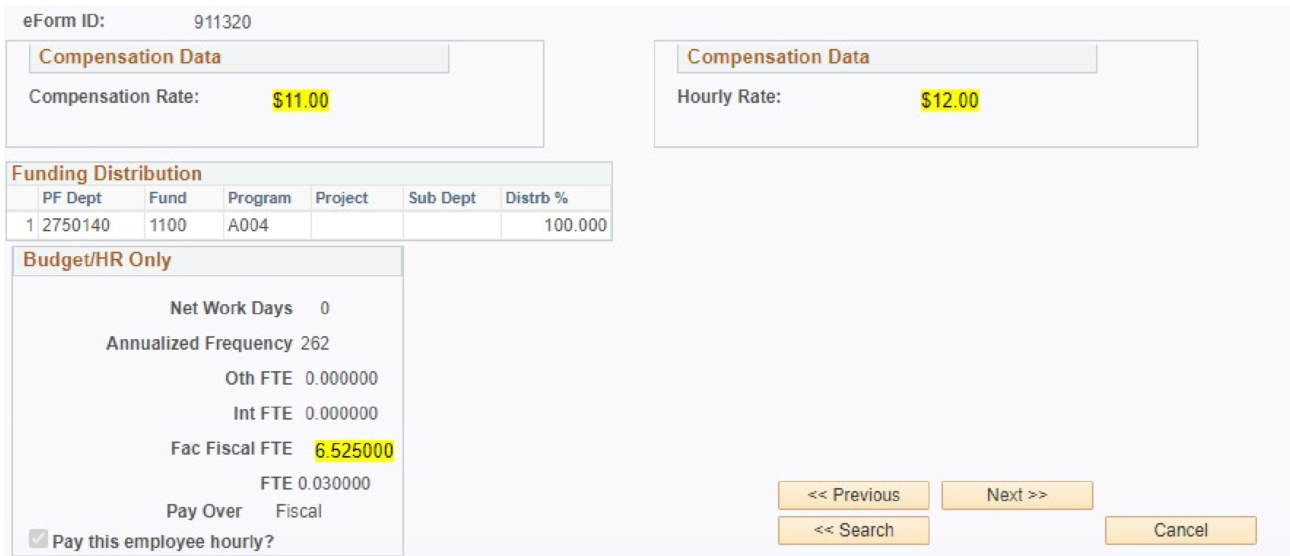
When your worklist opens, you can select the form you need to approve.



Review a form

Please remember selecting **Approve** in a transaction is the equivalent of your signature and indicates that you attest, to the best of your knowledge, that the information is correct and you approve the transaction moving forward in the process.

When reviewing a Hire form or a Change Employment Status form, they will simply show new information. However, a Change an Employee's Existing Job form that has been submitted to you for approval will actually show you what has been changed by giving a side-by-side comparison with the key change highlighted in yellow. In this case, the hourly rate changed.



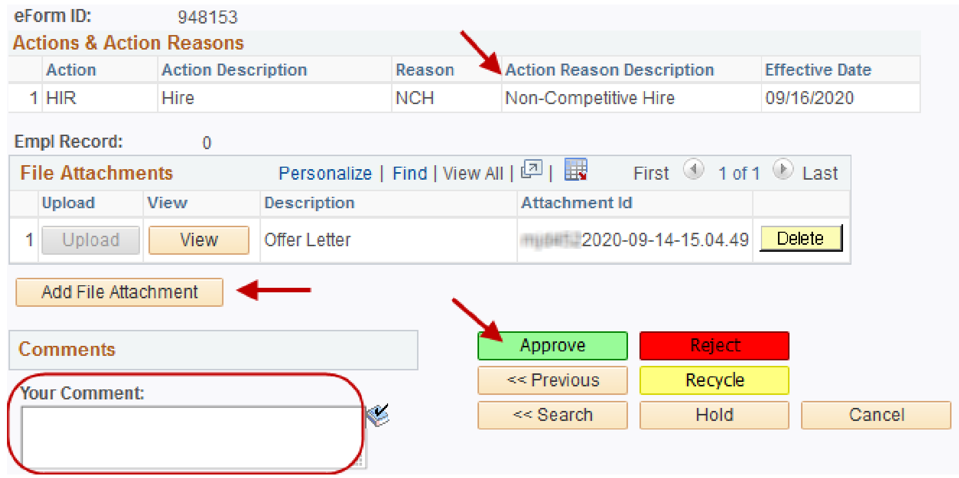
After you have opened a form to review it, you have several options available to you. These are explained in detail in upcoming pages:

- **Approve** the form if all the information is correct and complete.
- **Recycle** the form – send it back to the Initiator if there is a change or correction you need them to make.
- **Hold** the form to come back to it and approve it later.
- **Cancel** the form to end your review of the form without changing it – but not changing the work your initiator did.
- **Reject** the form to completely remove it. ***NOTE: Rejecting a form will require your Initiator to completely start over – please do not use this unless you are sure the form needs to be started from a blank slate! You may want to contact your Initiator first.***

Approve a form

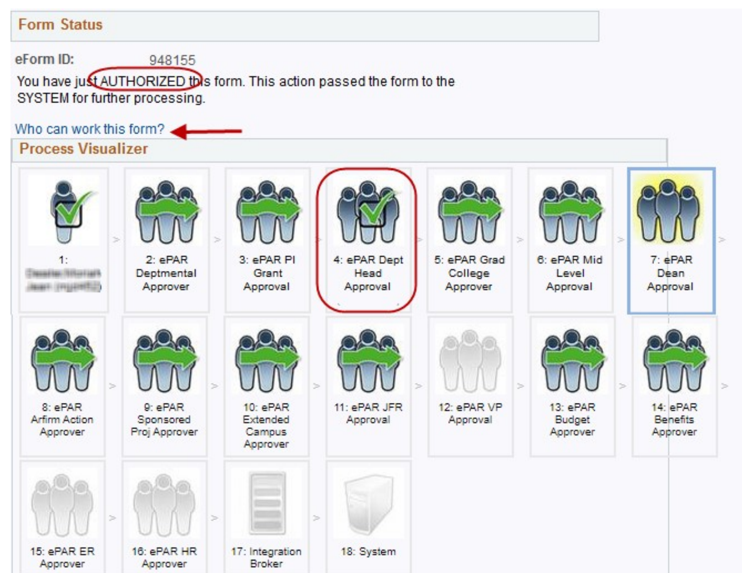
If all the information in the form is correct, you have finished reviewing all the pages, and you are ready to send the information to the next step in the process, add any comments that are applicable and select **Approve**.

After you have approved the form, the Result Page will show you the status of the form as AUTHORIZED. The **Process Visualizer** will show your part of the task as completed (the green check mark) and that the form has been passed on to the next level Approver (the blue outline). The green, wavy arrow indicates that this step in the process is being skipped - there is no Approver at that step for this transaction. The items in color are completed steps and the grayed-out items are approvals that still need to happen.



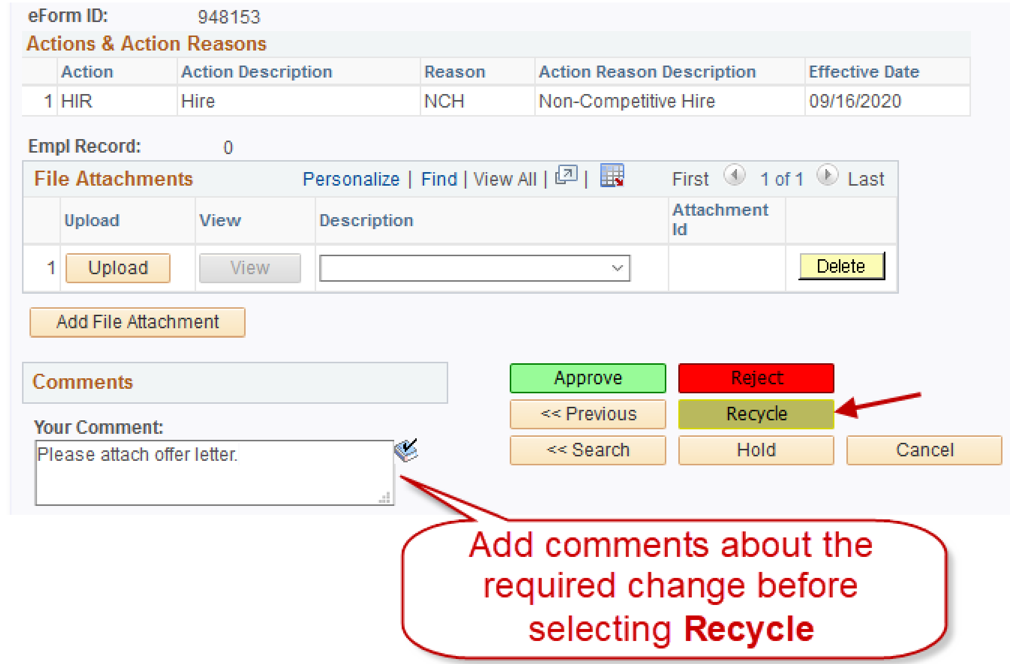
Review all pages, action reason codes, and attachments. Add comments as appropriate, then Approve the form.

The name of all approval roles begins with NAU_HR ePAR, even though the approvers are not in HR. For example, role 4 is NAU_HR ePAR Dept. Head Apprv – this is generally a department director or chair. Also, the approval routing can change for different transactions and employee groups. See the [Routing Approvals Worksheet] for a description of the different approval routings.



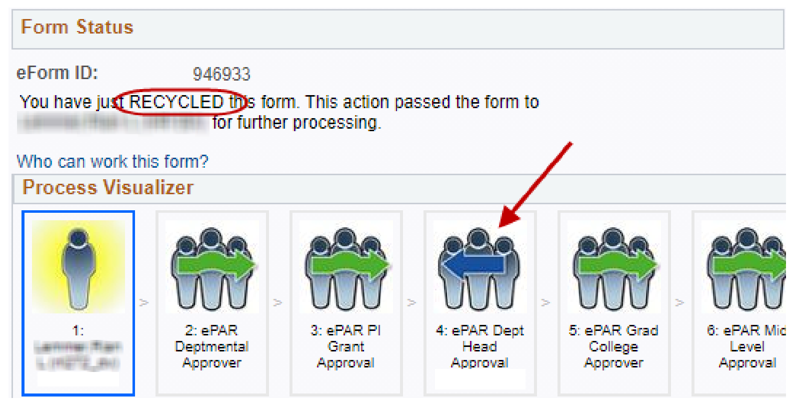
Recycle a form

If you find something in the form that needs to be changed, you should **Recycle** the form. This returns the form to the Initiator to make the change. Inserting comments helps the Initiator know what you need them to change.



After you have recycled the form, the Result Page will show you the status of the form. The **Process Visualizer** will show your task as recycled (the blue arrow) and that the form has been returned to the Initiator (the blue outline).

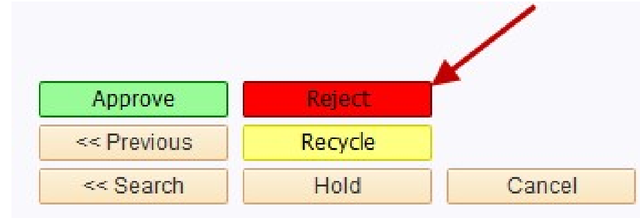
The Initiator receives an email that notifies them that the form has been recycled and needs their attention. After the Initiator makes the requested changes and resubmits the form, it is forwarded to you for review and approval again. You will get a new email notification when the form is returned for your review. Again, you will access the form either from the email or from your worklist.



After you verify that the change has been made, you can review any comments the Initiator sent back to you about the changes. When you select **Approve,** the form is routed to the next level Approver.

Reject a form

Rejecting a form stops the process completely and requires that a new form be started from the beginning at the Initiator level. This may occur if a transaction is no longer necessary or something changed to make the transaction irrelevant. Just to be sure, you probably want to talk with your Initiator before rejecting a form.

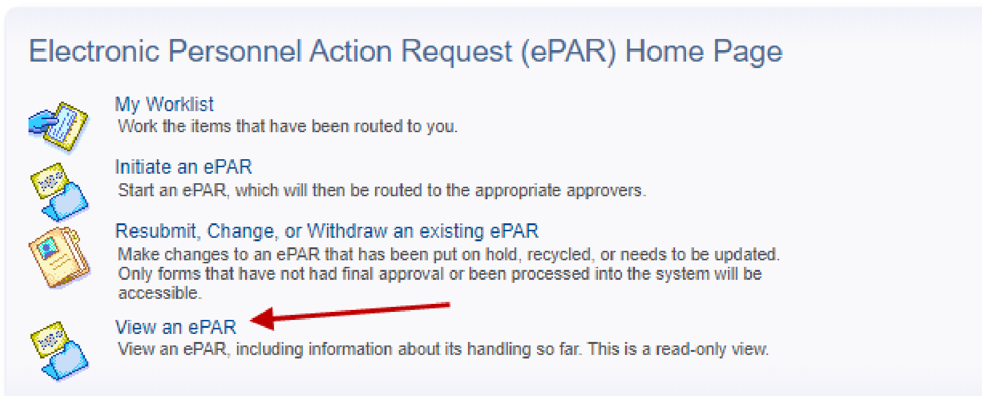


Review and approve a form that was on hold or cancel

To go back to a form that you put on **Hold** or **Cancel**, you can either use the link from your original email or access the form through your worklist. Once you have reviewed the form, select the appropriate action (approve, recycle, etc.).

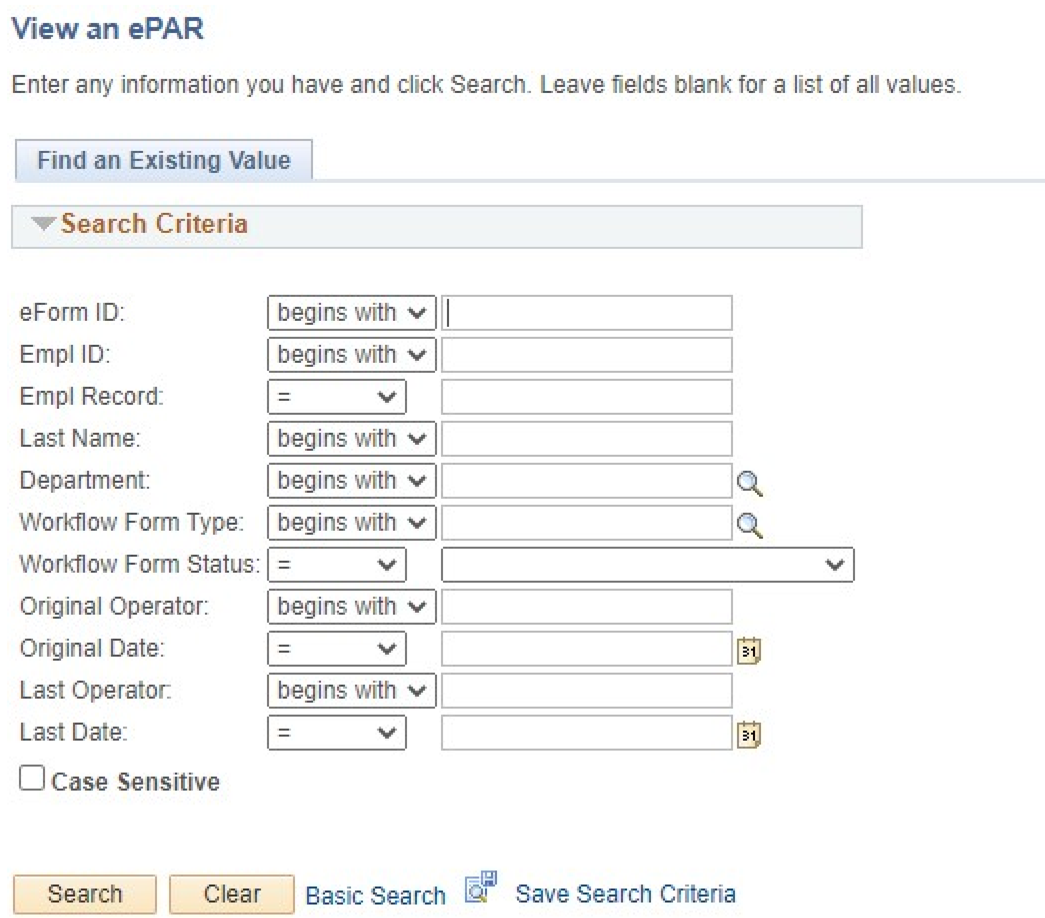
View forms

You can view forms that are in process or have been finalized by navigating in LOUIE to **Department Self Service > ePAR Home Page > View an ePAR**. In this read-only mode, you will not be able to edit any forms.



Note: Depending on permissions you may not have all these options

A search menu will enable you to search for all forms you have access to view. Enter any information you have that will narrow the search. Most of the time you will search by EmplID (Employee ID) or last name and it will return a single form. However, you can search by other criteria like Workflow Form Type (Hire, Job Change, etc.).



A list of all forms meeting your search criteria will appear. Select the form you would like to view. The form will open, but you will not be able to make changes.

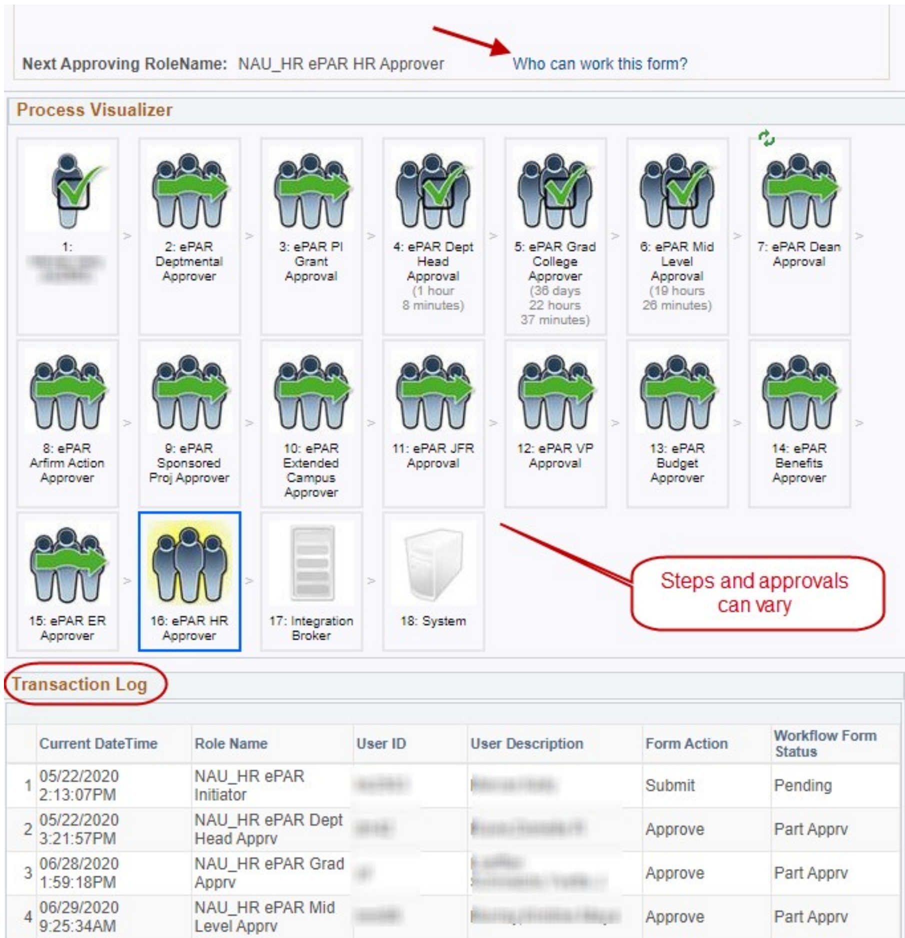
Search Results

View All — First 1-3 of 3 Last

eForm ID	Empl ID	Empl Record	Name	Last Name	Department	Workflow Form Type	Workflow Form Status	Original Operator	Original Date	Last Operator	Last Date
946152	[redacted]	0	[redacted]	[redacted]	30600	HIRE	Executed	[redacted]	09/01/2020	[redacted]	09/01/2020
946154	[redacted]	0	[redacted]	[redacted]	30600	HIRE	Executed	[redacted]	09/01/2020	[redacted]	09/01/2020
946164	[redacted]	0	Lumberjack,Louie	LUMBERJACK	40100	HIRE	On Hold	[redacted]	09/01/2020	[redacted]	09/01/2020

View form history/status

Continue through the form selecting **Next** to get to the **Form History** screen. The **Process Visualizer** will show where the form currently is in the approval process. The **Transaction Log** will provide details of who has taken different actions on the form throughout the process.



	Current DateTime	Role Name	User ID	User Description	Form Action	Workflow Form Status
1	05/22/2020 2:13:07PM	NAU_HR ePAR Initiator	[illegible]	[illegible]	Submit	Pending
2	05/22/2020 3:21:57PM	NAU_HR ePAR Dept Head Apprv	[illegible]	[illegible]	Approve	Part Apprv
3	06/28/2020 1:59:18PM	NAU_HR ePAR Grad Apprv	[illegible]	[illegible]	Approve	Part Apprv
4	06/29/2020 9:25:34AM	NAU_HR ePAR Mid Level Apprv	[illegible]	[illegible]	Approve	Part Apprv

By selecting **Who can work this form?** you will be able to see a list of those who are authorized to take the next action (if any) on the form. It will also provide an active link to their email address and may display their phone number.