ePARs (Electronic Personnel Action Requests):

Overview:

ePAR's within Infinite Visions will be replacing the current PAR process in Frontline.

Within this document you will find a table showing which ePAR to use for common PAR changes. You will also find directions for filling out each specific ePAR.

We recommend starting with the table to determine which PAR you will need to fill out. Then following the "Directions for all ePAR's" section and finally using each ePAR section for specific directions for the individual PARs. Additional pages at the end of this document pertaining to Attaching Documents and Filtering Help are included as well for supervisors.

Table of Common PARs:

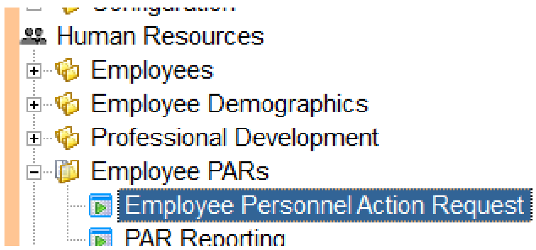
I need to:	**ePAR to use:**	**Documents Required:**
Post a job	Position Request	
Hire a new Employee to fill an open position	New Hire Assignment	Opening Calendar
Recall an Employee from layoff	New Hire Assignment	Opening Calendar
Rehire an Employee that has retired but will continue to work	New Hire Assignment (filled out with a Staff Termination to reflect retirement status)	Opening Calendar
Hire a student intern	New Hire Assignment	Opening Calendar
Terminate an Employee	Staff Termination	Closing Calendar
Reflect an Employee retiring but continuing to work	Staff Termination (filled out with New Hire Assignment to reflect continuing to work status)	Closing Calendar
Hire a current Employee into a new position	Current Employee Assignment	Closing Calendar (from old position) AND Opening Calendar (for new position)

Create a Stipend for a current Employee	Supplemental Pay	
Approve Extra Duty for a current Employee	Supplemental Pay	
Increase (or decrease) the number of calendar days a current Employee will have in the current fiscal year only	Supplemental Pay (if this is a permanent change to the position please use Pay Change instead)	New Calendar
Change the supervisor for a current Employee	Demographics	
Change the Start Date for a new Employee after New Hire Assignment has already been completed	Demographics	
Change the primary work location a current Employee	Demographics	
Change the FTE of a current Employee	Pay Change	New Calendar
Change the number of calendar days permanently to a current Employee's position	Pay Change (if only for current fiscal year please use Supplemental Pay instead)	New Calendar
Change an existing Stipend for a current Employee	Pay Change	
Change the Funding (Account Code) for a current Employee	Pay Change	

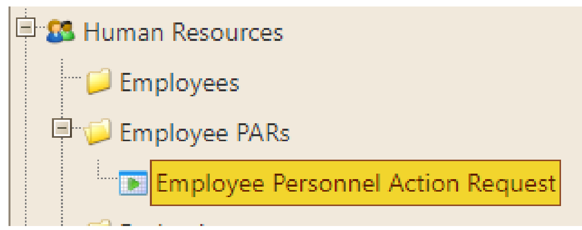
Directions for All ePAR's:

1. Navigate to the ePAR's menu titled "Employee Personnel Action Request" under Human Resources, then Employee PAR's (this will open the iVisions version of IV if launching out of Citrix):

View of Menu via Citrix:



View of Menu via iVisions:

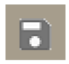


2. To begin a new PAR select the Add Button: 
3. Choose the PAR type from the drop down menu (review the Table of Common PARs for help choosing the correct type):

4. Use the Next button in the bottom right corner to begin the PAR (these buttons also will help you navigate through pages of the PAR):

*Notes: Many of the fields are required to be filled in before the PAR will let you continue on. Please fill out each PAR with as much detail as possible, **PARs without enough information will be returned**.*

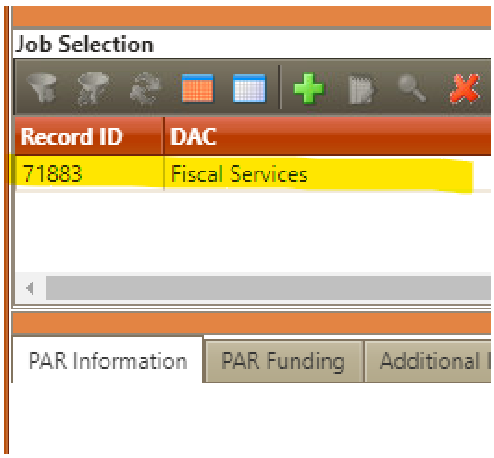
Position Request:

5. Fill out as much information as possible on the PAR Information page
    a. **Note: Start Date and End Date are the requested dates for job listing.**
6. On the PAR Funding page, please enter the Account, Percent (this must total to 100%) and Amount then use the save button next to the line to save your selection (if needed enter additional funding lines) 
7. On the Additional Information page fill out as much information that is applicable to the new position, this information could be included by Human Resources in the job listing and/or during setup of the job listing. Remember to be as thorough as possible to ensure accurate job posting.
8. On the Review page please double check for accurate information
    a. If ready to be processed check the “Submit for Approval” box before hitting Finish 

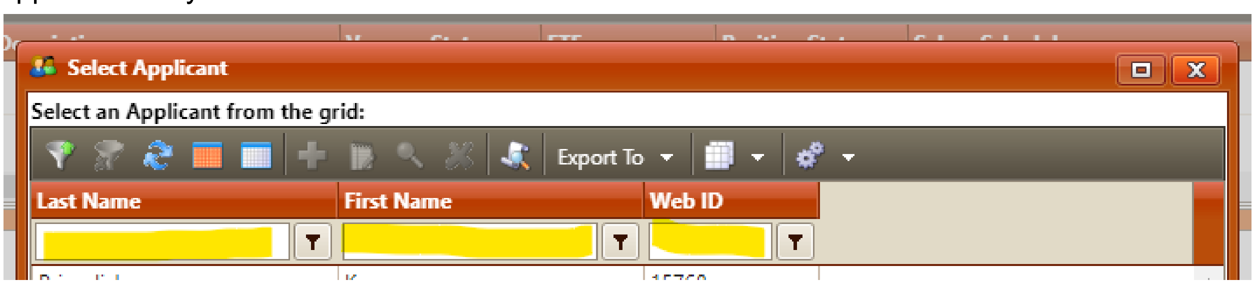
    b. If you would like to save your work but return later to complete, only click the Finish button. This will save the form but not submit so be sure to return later to complete the form and submit for approval.
    c. Note: Attachments can be included using the Actions > Manage Documents button. The form needs to be saved to be able to attach documents.

New Hire Assignment:

5. Use the Add Button to select the Job/position to be filled by the new employee 
   a. This will fill in the Job Selection portion of the form found above the page tabs (a job has been selected in this photo)



6. To fill in some new Employee information, use Actions > Get Applicant. This feature integrates with Frontline to pull in data entered by applicants. Use the filters to find your applicant easily.



   a. **Note: Effective Date is a supervisor's "Anticipated Start Date" after HR has communicated with the applicant this date will be updated to reflect actual start date. Please be mindful when inputting this information.**
7. On the PAR Funding page the Current Active Funding is reflected, if changes need to be made to the funding please enter and include in the Notes section (on the Additional Information page) your comments as to why the funding needs to be changed.
8. The additional information page will be used to setup additional services for new hires, please fill out as completely as possible.
9. On the Review page please double check for accurate information
   a. If ready to be processed check the "Submit for Approval" box before hitting Finish

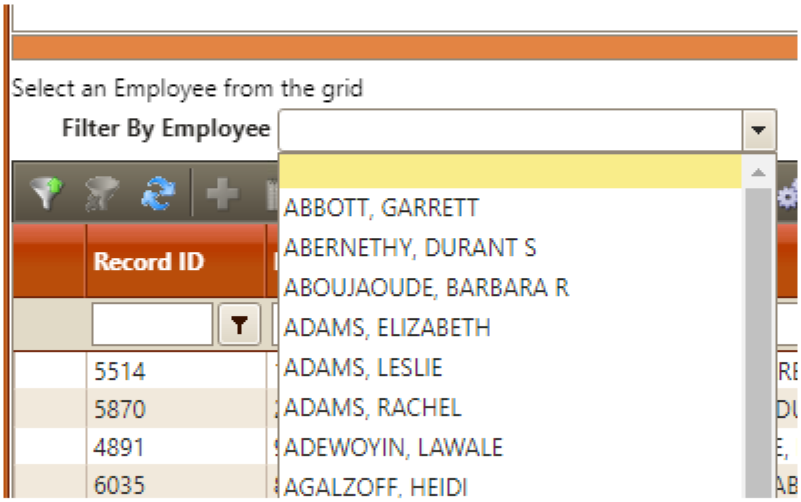
   b. If you would like to save your work but return later to complete, only click the Finish button. This will save the form but not submit so be sure to return later to complete the form and submit for approval.

c. Note: Attachments can be included using the Actions > Manage Documents button. The form needs to be saved to be able to attach documents.

Required for New Hire PAR - Attach an opening calendar

Staff Termination:

5. Select the employee from the grid:



6. Complete the PAR Information and Additional Information pages.
7. On the Review page please double check for accurate information
    a. If ready to be processed check the “Submit for Approval” box before hitting Finish

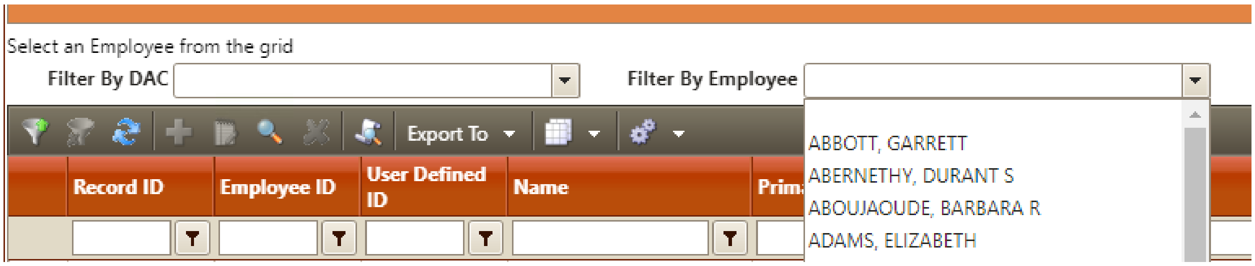
    b. If you would like to save your work but return later to complete, only click the Finish button. This will save the form but not submit so be sure to return later to complete the form and submit for approval.
    c. Note: Attachments can be included using the Actions > Manage Documents button. The form needs to be saved to be able to attach documents.

Required for Staff Termination PAR - Attach a closing calendar

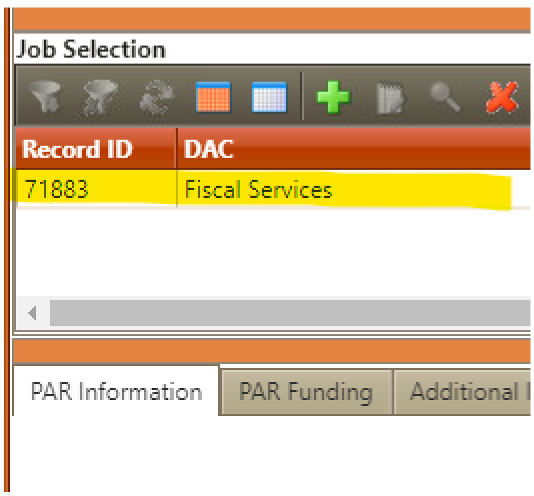
WHEN LESS THAN 1 WEEK NOTICE OF TERMINATION - Send an email to Payroll, HR and Tech with Employee Name, Termination Date and PAR ID number

Current Employee Assignment:

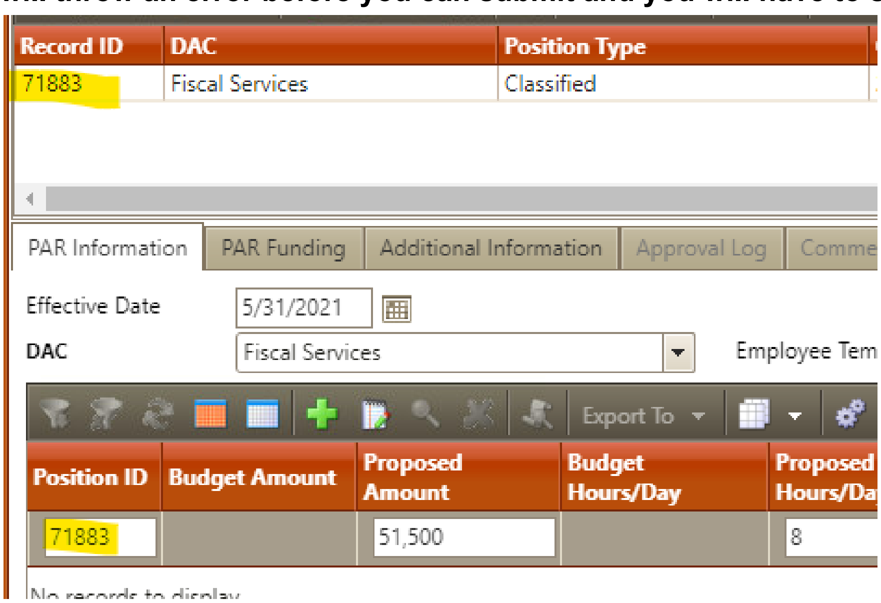
5. Select the employee from the grid:



6. Select the position they will be moving into using the Add button 



Note: When entering in the PAR Information tab, the Position ID must match the Record ID from the Job Selected. If you do not enter the Position ID the system will throw an error before you can submit and you will have to start over again.



7. On the PAR Funding page the Current Active Funding is reflected, if changes need to be made to the funding please enter and include in the Notes section (on the Additional Information page) your comments as to why the funding needs to be changed.
8. The additional information page will be used to setup additional services for employees changing positions, please fill out as completely as possible.
9. On the Review page please double check for accurate information
    a. If ready to be processed check the “Submit for Approval” box before hitting Finish

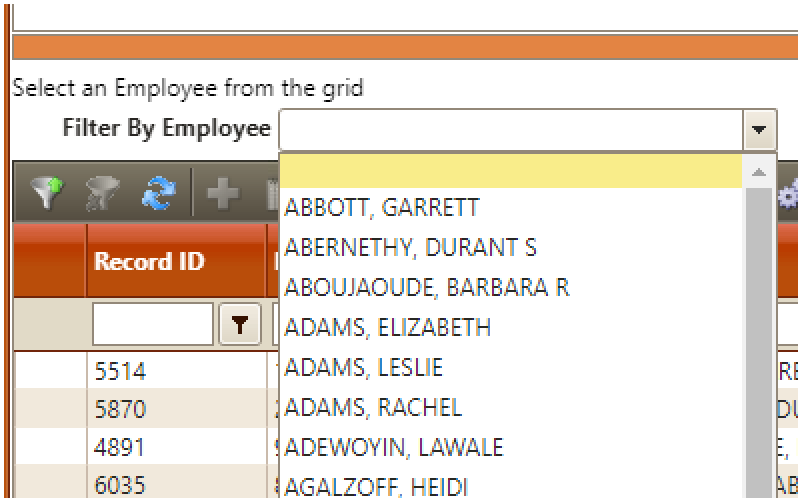
    

    b. If you would like to save your work but return later to complete, only click the Finish button. This will save the form but not submit so be sure to return later to complete the form and submit for approval.
    c. Note: Attachments can be included using the Actions > Manage Documents button. The form needs to be saved to be able to attach documents.

Required for Current Employee Assignment - Attach a closing calendar for employee’s previous position and an opening calendar for employee’s new position

Pay Change:

5. Select the employee from the grid:

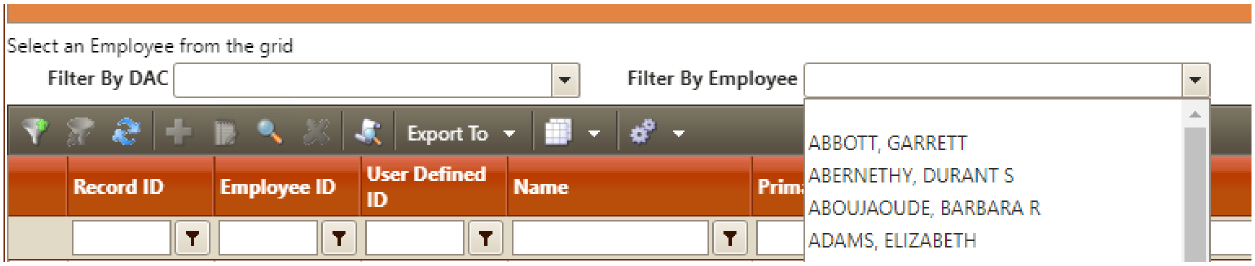


6. Select the employee's position (if for a change to a Stipend be sure to pick that line in the Position drop down menu)
7. Enter the new proposed amounts
    a. *Note: Please enter the same information from the Current section if no change to pay amounts.*
8. On the PAR Funding page the Current Active Funding is reflected, if changes need to be made to the funding please enter and include in the Notes section (on the Additional Information page) your comments as to why the funding needs to be changed.
9. Answer any questions on the Additional Information page related to the change to be made
10. On the Review page please double check for accurate information
    a. If ready to be processed check the "Submit for Approval" box before hitting Finish

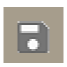
    b. If you would like to save your work but return later to complete, only click the Finish button. This will save the form but not submit so be sure to return later to complete the form and submit for approval.
    c. Note: Attachments can be included using the Actions > Manage Documents button. The form needs to be saved to be able to attach documents.

Supplemental Pay:

5. Select the employee from the grid:



6. Answer any questions on the PAR Information page relating to the change to be made.
7. On the PAR Funding page, please enter the Account, Percent (this must total to 100%) and Amount (see directions on how to determine Amount at the end of this document) then use the save button next to the line to save your selection (if needed enter additional funding lines)

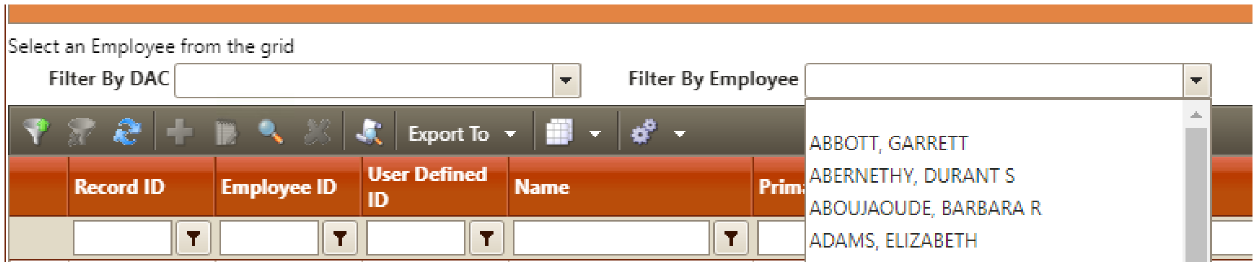


8. On the Review page please double check for accurate information
   a. If ready to be processed check the “Submit for Approval” box before hitting Finish

   b. If you would like to save your work but return later to complete, only click the Finish button. This will save the form but not submit so be sure to return later to complete the form and submit for approval.
   c. Note: Attachments can be included using the Actions > Manage Documents button. The form needs to be saved to be able to attach documents.

Demographics:

5. Select the employee from the grid:



6. On the PAR Funding page, please enter the Account, Percent (this must total to 100%) and Amount (can be zero) then use the save button next to the line to save your selection 

   Note: All PAR's route based on account code, this PAR will not change account codes for your employees but it is necessary to route the PAR. Please enter the correct account code for your program so the form routes appropriately.

7. Answer any questions on the PAR Information page relating to the change to be made.
8. On the Review page please double check for accurate information
   a. If ready to be processed check the "Submit for Approval" box before hitting Finish

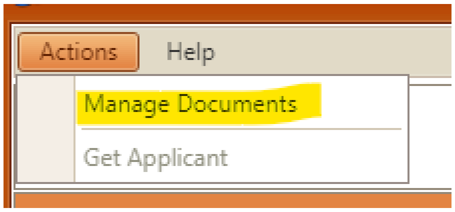
      

   b. If you would like to save your work but return later to complete, only click the Finish button. This will save the form but not submit so be sure to return later to complete the form and submit for approval.
   c. Note: Attachments can be included using the Actions > Manage Documents button. The form needs to be saved to be able to attach documents.

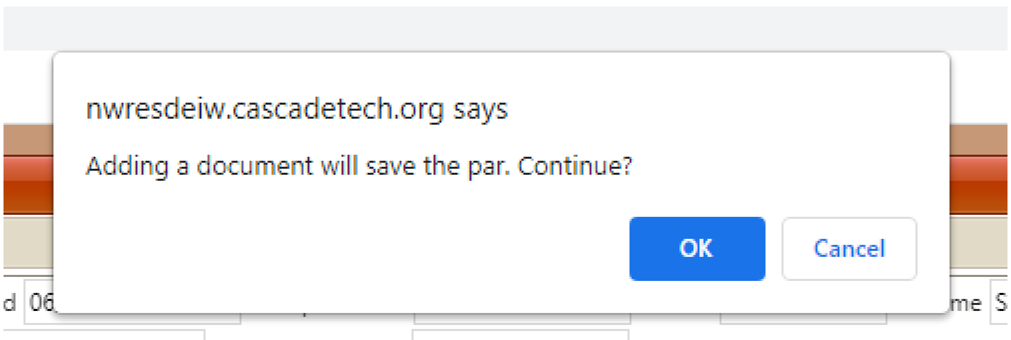
Attaching Documents to ePARs:

Fill out all required information for the ePAR, once on the review page you can attach documents:

1. In the top left corner click the Actions button, then select Manage Documents

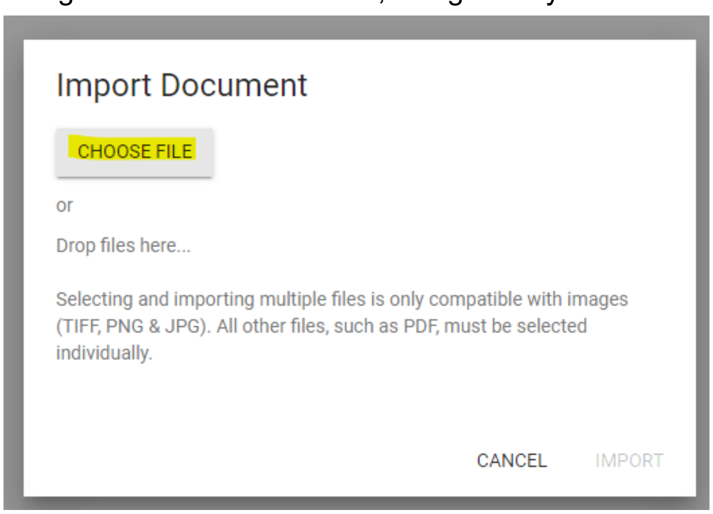


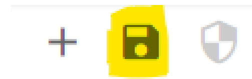
2. The following pop-up will remind you that the ePAR will be saved when you attach documents, hit Ok to continue, this will launch a new window for TCM



3. Select the Import Attachment button to import your file (or the scan button if you have a desktop scanner)

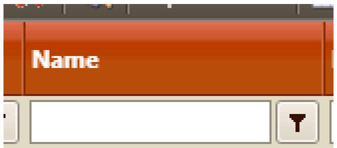
4. Using the Choose File button, navigate to your file to import



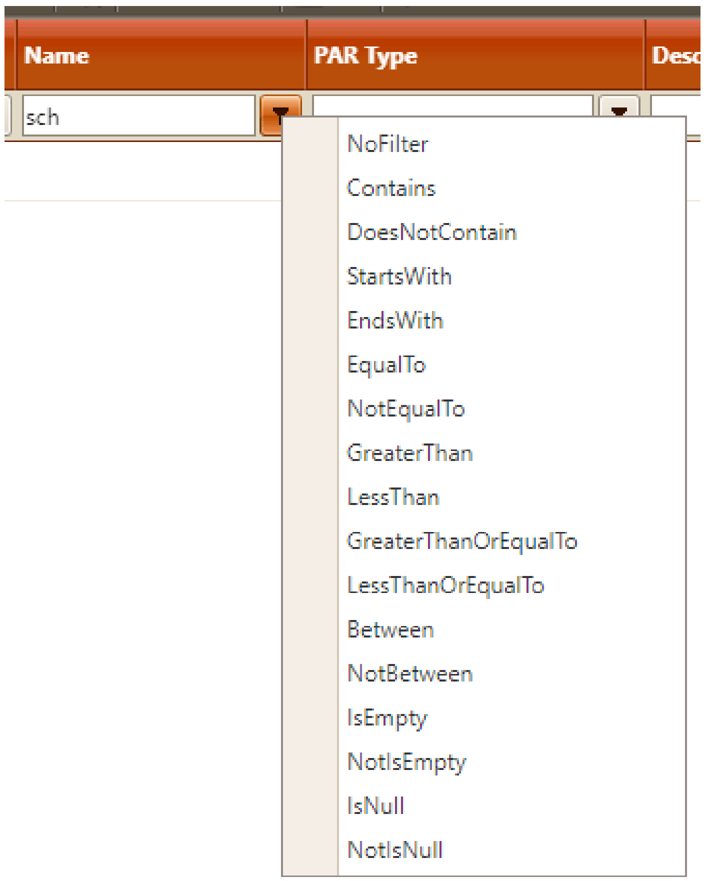
5. After importing, be sure to use the save button 
6. If another document is needed, after saving the first document use the plus button to add another and return to step 3 to attach another document.
7. Once all files are saved you can close the TCM window, as your documents are now attached.

Filtering Help - iVisions:

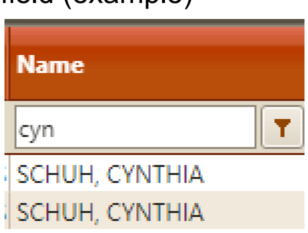
For Filters that have an Filter Icon next to the field:



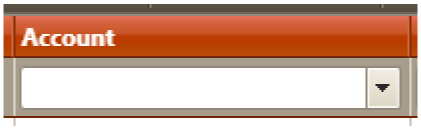
- On filters such as the example above, click into the box and begin typing
- Click the filter button next to the field, this will open the filtering options box:



- In most cases, you can use the “StartsWith” filter to find your selection (in this example the last few letters of the last name)
- Alternatively you could use the “Contains” filter to find information in the middle of the field (example)

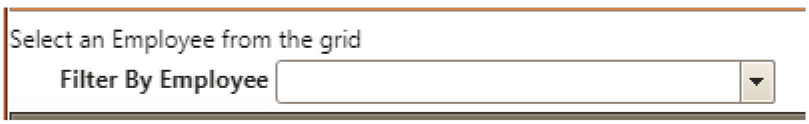


For Account Code Filters:



- On filters such as the example above, click into the account code box, then begin typing your account code
- Only so many account codes will show until you begin typing into the box, by beginning to type it will narrow down the options shown, you can either finish typing in the account or select from the drop down once you see the correct account code

For DropDown Filters:

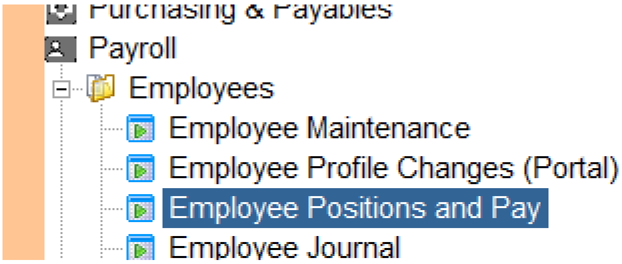


- On filters such as the examples above, click into the box then begin typing the information needed. Employee names are sorted last name, first name.
- Only so many options/employees will show until you begin typing into the box to narrow down to your selection

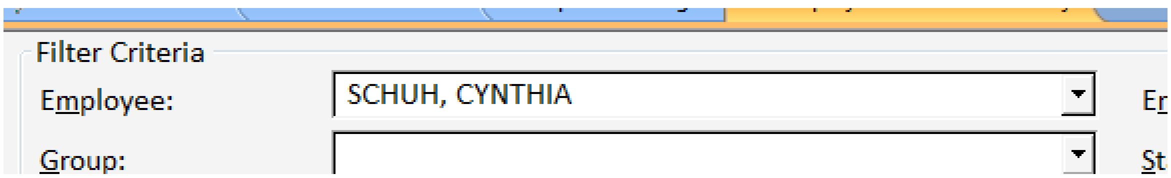
Determining Amount Field for Supplemental Pay:

For Extra Duty:

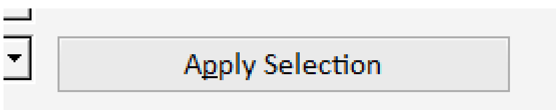
- From Infinite Visions, select Payroll > Employees > Employee Positions and Pay



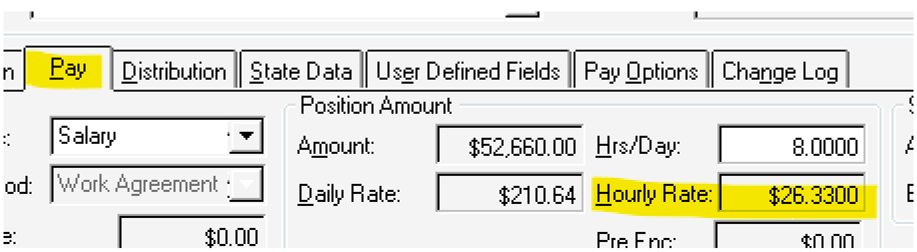
- From the menu, you will want to put in the employee (Last Name, First Name)



- Then hit the Apply Selection button



- This should show positions and supplementals for the employee selected, if you double click into the position, then select the Pay tab the employees hourly rate section is shown



- Using the Hourly Rate shown, please multiply by the number of hours requested for Extra Duty this number should be entered into the Amount field on the PAR Funding tab of the ePAR

For Calendar Day Changes:

- Please follow the above directions, except use the Daily Rate from the Pay tab to calculate the amount times the additional days added to be entered into the Amount field on the PAR Funding tab of the ePAR

For Stipends:

- In the Amount field on the ePAR please enter the amount of the stipend (example: if $300 entered as Stipend amount on Additional Information tab, then 300 should be entered into the Amount field on the PAR Funding tab.