

NCSHA 2015 Annual Awards Entry Form

(Complete one form for each entry)

Deadline: Wednesday, June 10, 2015

Visit ncsha.org/awards to view the Annual Awards Call for Entries.

Instructions: Type entry information into the form and save it as a PDF. Do not write on or scan the form. If you have any questions contact Matt Cunningham at mcunningham@ncsha.org or 202-624-5424.

Fill out the entry name *exactly* as you want it listed in the program.

Entry Name: _____

HFA: _____

Submission Contact: (Must be HFA Staff Member) _____ **Email:** _____

Please provide a 15-word (maximum) description of your nomination to appear on the NCSHA website.

Use this header on the upper right corner of each page:

HFA: _____

Entry Name: _____

Select the appropriate subcategory of your entry and indicate if you are providing visual aids.

Communications	Homeownership	Legislative Advocacy	Management Innovation
Annual Report	Empowering New Buyers	Federal Advocacy	Financial
Creative Media	Encouraging New Production	State Advocacy	Human Resources
Promotional Materials and Newsletters	Home Improvement and Rehabilitation		Operations
			Technology
Rental Housing	Special Needs Housing	Special Achievement	Are you providing visual aids?
Encouraging New Production	Combating Homelessness	Special Achievement	Yes
Multifamily Management	Housing for Persons with Special Needs		No
Preservation and Rehabilitation			

OUR CHALLENGE

Idaho Housing and Finance Association is a highly technical and sophisticated organization that serves diverse audiences in every corner of our state. In addition to staff scattered among five offices throughout the state, we are also a master servicer of single-family mortgages for sister HFAs in other states. Our organization has received the Best Places to Work in Idaho designation for five consecutive years.

Like most HFAs with a rapidly growing workforce and a small Human Resources staff, we needed to get creative with how to make what is normally a paper-heavy department more streamlined. We went from pushing paper to automated paperless processes that take advantage of electronic signatures, automatic archiving, and electronic document retrieval.

OUR INNOVATIVE SOLUTION

Human Resources functions require a variety of forms. Complicating matters, most of them need multiple levels of approval, especially in the case of payroll. Most processes also require staff members to fill out and sign forms, which are used within the company or by our vendors (e.g. health insurance enrollment, retirement plans, and workers’ compensation). To save on postage, time, and paper we explored ways to efficiently manage these mountains of forms. We also needed a way to easily compile employee data, process payroll, and perform statistical analysis.

Like many departments, we already used OnBase for electronic document storage. What we discovered is that by converting all of our forms to OnBase and storing them on our companywide intranet we could turn this simple, widely used program into a powerful tool for digital workflows. The result: A cost-effective, elegant, and accessible solution to a problem that plagues many businesses.

HOW WE DID IT

For example, for open enrollment of benefits we took all the related forms and made them electronically fillable. Once filled out and electronically signed, the system sends a copy to payroll (which enters our data-collection system for payroll deduction), another copy goes to the insurance carrier, and another copy is sent to the employee’s computer. Voila – the enrollment process is complete.

This paperless workflow is used to process payroll and benefits – from medical, dental, flexible spending account, vision, and retirement. It’s also adapted for the hiring process, performance evaluations, salary increases, promotions, and workers’ compensation.

Here’s an example of how the process works for the normally labor-intensive hiring process. (For more, please see Appendix A.)

- 1) Managers select a position request document from the company intranet when they plan to recruit for a position. Managers list all the job details — title, skills and education necessary, who will train, where the new hire will sit, what date they need the job filled, and what electronic equipment and software is required. Once submitted, the information is routed to HR.
- 2) HR fills in the salary range and where job will be advertised. This produces an electronic job advertisement that will be submitted to our company website and online recruiting sites. When

applicants click a link within the ad they are asked to electronically fill out an application and attach a resume.

- 3) Job applications are directed to each department’s designated recruiter. Once an application is read by the recruiter, an email is automatically sent to the applicant to let him or her know the application has been received. This eliminates the staff time it takes to answer phone calls from applicants asking if we’ve received their information. Electronic applications automatically enter into HR’s data collection system.
- 4) If the recruiter decides the applicant is not a fit for the job, a push of a button sends an electronic letter thanking him or her for applying. A variety of form letters are pre-programmed and available depending on the recruiter’s needs.
- 5) If the application is worth further consideration, a push of a button sends it to the manager, who will decide if an interview should take place.
- 6) If a candidate continues past the initial interview, a push of a button starts a workflow in which background checks are completed. If those are satisfactory, the system pushes out a “personnel action form” (see Appendix B) that contains the start date, job title, salary and other details necessary for an offer to be made. If the offer is accepted, another push of a button sends this information to the manager to designate a training plan, assign a mentor, and determine the technology needs. This automatically alerts our IT and facilities departments what they will need to do for the new hire — from assigning a phone number and email address to providing permission for software required by the job.
- 7) Once an applicant accepts the job, the system generates an offer letter with all the pertinent information: salary, job title, supervisor, trainer, date of their first performance review, links to company benefit information, and a link to our employee orientation video. The video explains what the new hire can expect on the first day, what to bring, and what to expect for training. Again, no paper.
- 8) On the first day, the new hire signs up for benefits online. He or she gets an explanation of our company policies and procedures and electronically signs an acknowledgement form that is placed in a digital personnel file that has been generated using the information from the hiring process.
- 9) After the hire, supervisors get automatic reminders for when to provide feedback, when performance evaluations are due, and when the employee is eligible for a salary increase. The system automatically pushes out employee forms and supervisor reminders. Start dates, benefit eligibility dates, etc., are programmed in, so future deadlines are automatically sent as an alert. HR no longer sends out reminders when employee forms are due from either the supervisor or the employee. The system does it all. Also, the system automatically sends out a new employee feedback form after 90 days of employment. When the new employee submits the form, the completed response is sent to the supervisor and HR to take any action required to ensure success for all our new hires.

- 10) The system automatically collects EEO data from all submitted electronic applications (e.g. gender, nationality, age, veteran status, and disability) and compiles these statistics into quarterly EEO reports that automatically compile our Affirmative Action Plan. This used to be a time-intensive process that was done by hand.
- 11) When a legal signature is required on a contract or a federal form, such as a W-4 or an I-9, we use DocuSign, which fits all the legal requirements of an approved signature. Contracts are sent electronically and the vendor electronically signs and emails it back. We both get a copy of the signed copy, including all necessary signatures. If a notary is required, it is scanned onto the document.
- 12) All of our payroll and timesheets are done electronically through direct deposit and automated signatures when necessary (authorized signatures for ACH transfers, deposits into retirement plans, payment of benefits billings, timesheet approvals by supervisors, etc.).

The system is programmed with record retention schedules, so archiving information is automatic. Once archived – you can still get to it if you want – or you can program to have it deleted from the system on a certain date and it’s taken care of when that time comes.

SIMPLE TO REPLICATE

The paperless processes we developed save us time and postage costs — not to mention a lot of trees. The automation has helped us make the best use of our staff because they’re able to focus on bigger-picture initiatives rather than routine paperwork.

It’s simple for any HFA to replicate. Any form, process, or anything that requires documents or documentation can be paperless and follow a workflow. The best part is that through programming all processes and deadlines are automated with timelines so no one has to keep track of when something is due. We no longer forward paperwork for signatures or keep paper copies of documents in folders. And, we no longer send out letters. It’s all done electronically in a timely fashion. Employees love that they can keep an electronic folder of their paperwork and benefit choices. HR loves that it can easily access any document and quickly and accurately run reports.

All HFAs have scanning equipment and document management programs that they can utilize more fully. It can be integrated with other systems so you don’t have to manually update data. Utilize the workflow features and get creative on what processes and forms can be streamlined. Our locking metal filing cabinets have slowly disappeared and our staff time is used much more efficiently.

Appendix A: An example of recruitment process workflow

The Human Resource Recruitment process encompasses the application submission through the hiring process. The intended audience is Human Resources recruiters and the content is detailed instructions for processing applications.

Applications and resumes can be filled out electronically through the publically available websites. This document contains a FAQ section at the end that may be used to help applicants that contact Human Resources for assistance.

- IHFA: <http://www.idahohousing.com/employment/online-application.aspx>
- THC: <http://www.thehousingcompany.org/job-opportunities/online-application.aspx>

Workflow Interface Overview

Open the Workflow interface by clicking the Workflow button in the Ribbon on the Home tab.



Workflow will open with a list of Lifecycles and Queues in the left pane of the window. You will only see the lifecycles and queues which you have permissions to. Next to the name of each queue you will see a number in parentheses. This is the number of documents in the queue.

In the ribbon at the top of the screen you will see a section for 'Tasks' with one or more buttons. The label for each button indicates the action that will occur on the active document when clicked.

Directly below the ribbon is a list of all the documents in the queue. The active document is highlighted and viewable in the bottom pane.

Between the document list and the active document are 3 tabs.

- Inbox – The list of documents in the active queue
- Related Items – Documents that are related to the active document, but are not actually in the queue
- User Interaction – Actions that require user input, or display messages, will automatically show up in this tab.

Appendix A: An example of recruitment process workflow

The screenshot displays the OnBase (IHFA onbase-test-PROD) interface. The top navigation bar includes 'Home', 'Workflow', 'Document', and 'Queue Administration'. A toolbar contains various actions such as 'Take Ownership', 'Release Ownership', 'Route Item', 'Execute Script Task', 'Send Email - Applied/Interview Others', 'Route applicant to HR Interview', and 'Remove from workflow'. A blue callout box labeled 'Workflow tasks' points to this toolbar.

On the left, a tree view shows 'Lifecycles and Queues' with categories like 'GP-Draw', 'HOL-AD', 'HOL-Lo', 'HOL-Loan', 'HPF', 'HR-Forms', 'HR-New Employment Application', 'HR-Personnel History Forms Conversion', and 'HR-Recruitment Processing'. A blue callout box labeled 'Lifecycles and Queues' points to this tree view.

The main window shows an 'Inbox - Katie Shamy' with a table of recruitment checklists. A blue callout box labeled 'Document list' points to this table. The table has columns for 'Icon', 'Name', and 'Entry Date'. The first row is highlighted in orange and contains the text: 'HR-Recruitment Checklist - 12/10/2013 For CUSTOMER SERVICE Position: CUSTOMER SERVICE'. The 'Inbox - Katie Shamy' link at the bottom of the table is circled in red.

The 'Primary views' pane shows a detailed view of the selected document: 'HR-Recruitment Checklist - 12/10/2013 For CUSTOMER SERVICE Position: CUSTOMER SERVICE'. This view includes sections for 'Applicant Information', 'Contact Log', 'Interview Log', 'Background Check', and 'Attach Supporting Documents'. A blue callout box labeled 'Active Document' points to this pane.

Icon	Name	Entry Date
	HR-Recruitment Checklist - 12/10/2013 For CUSTOMER SERVICE Position: CUSTOMER SERVICE	12/10/2013 10:46 AM
	HR-Recruitment Checklist - 12/9/2013 For DIENA HESS Position: CUSTOMER SERVICE	12/9/2013 11:02 AM
	HR-Recruitment Checklist - 12/9/2013 For ROBIN HOOD	12/9/2013 11:17 AM
	HR Screening	
	Inbox - Katie Shamy	

HR-Recruitment Checklist

Applicant Information

First Name	Last Name	Email
CUSTOMER	SERVICE	KATIES@IHFA.ORG
HR-Recruitment Status	Date	Job Title
HR SCREENING	12/10/2013	CUSTOMER SERVICE
Company	THC Property	HR-Dept
IHFA		HOMEOWNERSHIP LEN

Contact Log [Add]

Interview Log [Add]

Background Check [Add]

Check Type	Completed On	Completed By	Passed?
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Attach Supporting Documents

HR-Applicant Resume

Attach HR-Applicant Resume...

Appendix A: An example of recruitment process workflow

HR-New Employment Application

Lifecycle Overview

All applications and voluntary information forms are held in this lifecycle for processing into the Human Resources system (Abra). For each new application, a recruitment checklist is generated and entered into the **HR-Recruitment Processing** lifecycle (details below)

Document Types

HR-Applicant Submissions –Applications received for IHFA positions.

HR-Applicant Submissions (THC) – Applications received for THC positions.

HR-Applicant Voluntary Information – Voluntary information forms for all positions. A process runs to tally the information on these forms and add it to the HR-EEO report, which can be retrieved from

Workflow Queues & Tasks

Processing: A holding queue until information has been entered into Abra.



Remove from Workflow: Information from the application should be processed into Abra before running this task. The item is removed from this lifecycle.

Appendix A: An example of recruitment process workflow

HR-Recruitment Processing

Lifecycle Overview

The **HR-Recruitment Processing** lifecycle holds a checklist and its related application and resumes throughout the recruitment process. The checklist is intended to track contact, interviews, and the background check. The Recruitment Checklist consists of 5 sections, and can be updated in any queue.

Recruitment Checklist

Applicant Information:

Applicant details are inherited when the Recruitment Checklist is generated.

Applicant Information		
First Name DEENA	Last Name HESS	Email D
HR-Recruitment Status HR SCREENING	Date 12/09/2013	Job Title CUSTOMER SERVICE
Company	THC Property	HR-Dept HOMEOWNERSHIP LEN

LOVE THE SUBMIT BUTTON AND HIT IT OFTEN TO SAVE YOUR CHANGES! (at the bottom of the page)

Any changes made to this form must be saved by hitting the submit button, otherwise, they will be lost.

Submit

Contact Log:

A record of each contact can be logged by clicking 'Add' in the top right corner of this section. If a workflow task is run that generates an email it will be added to the log automatically.

- **Initiated By:** The name of the person that initiated contact (applicant or HR staff member)
- **Method:** Phone, Email, Mail, and Other
- **Reason:** Reject Offer, Withdraw, Set Interview, Accepted Offer, Made Offer, Other
- **Date:** Click this box to open a calendar control and select a date
- **Comments/Notes:** Further details about the contact can be recorded here

Contact Log		Add
Initiated By [Text Box]	Comments/Notes [Text Area]	Remove
Method [Dropdown]		
Reason [Dropdown]		
Date [Text Box]		
[Empty Field]		

Interview Log:

Each interview can be logged in this section by clicking 'Add' in the top right corner of the section.

Appendix A: An example of recruitment process workflow

- **Date:** The scheduled date of the interview
- **Interview Type:** HR or Follow up
- **Interviewer:** The name of the person(s) conducting the interview
- **Other attendees:** Additional staff that attended an interview
- **Interview Result:** Yes, No, Hold

Interview Log Add

Date

Interview Type

Interviewer

Other Attendees

Interview Result

Interview Notes

Remove

Background Check

Each type of background check can be recorded in this section by clicking 'Add' in the top right corner. Once the **Check Type** has been selected, **Completed On** and **Completed By** will populate automatically, but can be modified if necessary.

- **Check Type:** Criminal, Education, Reference, Drug Screening, Sex Offender Registry, Worker's Comp
- **Completed On:** The date that the check was completed
- **Completed By:** The person completing the check
- **Passed:** Yes or No

Background Check Add

Check Type	Completed On	Completed By	Passed?
<input type="text" value="▼"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="▼"/>

Remove

Attach Supporting Documents

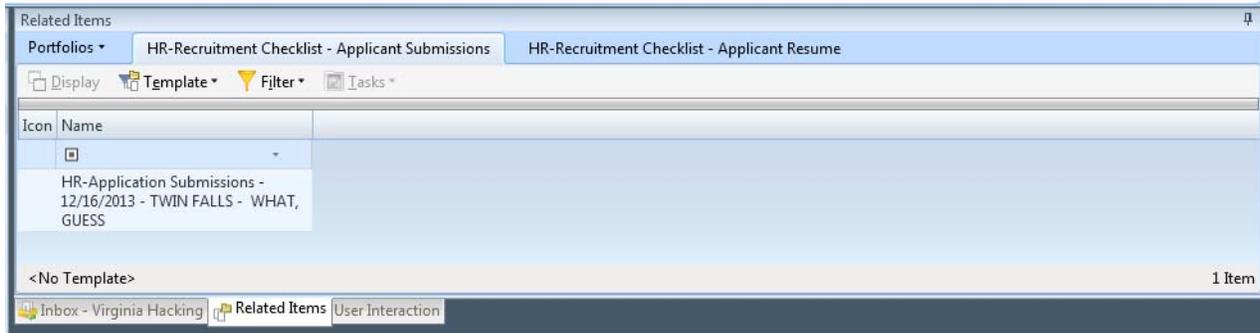
HR-Applicant Resume
Attach HR-Applicant Resume...

HR-Application Submissions
Attach HR-Application Submissions...

HR-Interview Notes
Attach HR-Interview Notes...

Appendix A: An example of recruitment process workflow

Related Items Tabs



In 'Related Items' there are 2 tabs, **HR-Recruitment Checklist – Applicant Submissions** and **HR-Recruitment Checklist – Applicant Resume**. These will be available in all queues for this lifecycle.

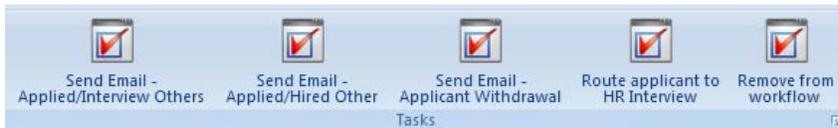
Workflow Queues & Tasks

HR-Screening

HR-Recruitment Status is set to HR Screening.

This is the first stop for a new recruitment checklist. To access the related application, resume, and cover letter, click the 'Related Items' tab below the document list, and then select the appropriate tab above the document list to view either the application or supporting documents (ie resume and/or cover letter).

****Be sure to return to the Inbox to perform any workflow tasks or update the Checklist***



- **Send Email – Applied/Interview Others**
This action will add an entry to the contact log and generate and email to the applicant that their application has been reviewed, but that other applicants will be interviewed instead.
- **Send Email – Applied/Hired Other**
This action will add an entry to the contact log and generate and email to the applicant that their application has been reviewed, but that another applicant was hired.
- **Send Email – Applicant Withdrawal**
This action will add an entry to the contact log and generate an email to the applicant confirming that they have been withdrawn by their request
- **Route applicant to HR Interview**
This action moves the checklist to the HR Interview queue with the expectation that the applicant will be interviewed. This should result in a contact log entry for the setting the interview and an interview log entry for the actual interview
- **Remove from workflow**

Appendix A: An example of recruitment process workflow

This action removes the checklist from the workflow with the expectation that the applicant is not proceeding any further in the recruitment process.

HR-Interview

HR-Recruitment Status is set to HR Interview.

Applicants that have successfully passed the HR Screening process are advanced to this queue. To access the related application, resume, and cover letter, click the 'Related Items' tab below the document list, and then select the appropriate tab above the document list to view either the application or supporting documents (ie resume and/or cover letter).

****Be sure to return to the Inbox to perform any workflow tasks or update the Checklist***



- **Send Email – Interview/Interview Others**
This action will add an entry to the contact log and generate and email to the applicant that, after their interview, others are being interviewed and they are not being considered
- **Send Email – Interview/Hired Other**
This action will add an entry to the contact log and generate an email to the applicant that after their interview, another applicant was hired
- **Send Email – Applicant Withdrawal**
This action will add an entry to the contact log and generate an email to the applicant confirming that they have been withdrawn by their request
- **Send Email – Applicant No Show**
This action will add an entry to the contact log and generate an email to the applicant informing them that they are no longer being considered for employment after missing an interview
- **Route applicant to Follow-up Interviews**
This action moves the checklist to the Follow-up Interview queue with the expectation that the applicant will be interviewed at a department level. This should result in one or more contact log entries for the setting the interview(s) and interview log entries for the each additional interview
- **Remove from workflow**
This action removes the checklist from the workflow with the expectation that the applicant is not proceeding any further in the recruitment process

Follow-up Interviews

HR-Recruitment Status is set to Follow-up Interview

After the HR Interview, likely candidates are forwarded to the Follow-up Interviews for supplemental interviews with managers and/or departments. To access the related application, resume, and cover letter, click the 'Related Items' tab below the document list, and then select the appropriate tab above

Appendix A: An example of recruitment process workflow

the document list to view either the application or supporting documents (ie resume and/or cover letter).

***Be sure to return to the Inbox to perform any workflow tasks or update the Checklist**



- **Send Email – Interview/Interview Others**
This action will add an entry to the contact log and generate and email to the applicant that, after their interview, others are being interviewed and they are not being considered
- **Send Email – Interview/Hired Other**
This action will add an entry to the contact log and generate an email to the applicant that after their interview, another applicant was hired
- **Send Email – Applicant Withdrawal**
This action will add an entry to the contact log and generate an email to the applicant confirming that they have been withdrawn by their request
- **Send Email – Applicant No Show**
This action will add an entry to the contact log and generate an email to the applicant informing them that they are no longer being considered for employment after missing an interview
- **Route applicant to Background Check**
This action moves the checklist to the Background Check queue to finalize details before an offer can be made. This should result in one or more contact log entries for the setting the interview(s) and interview log entries for the each additional interview
- **Remove from workflow**
This action removes the checklist from the workflow with the expectation that the applicant is not proceeding any further in the recruitment process

Background Check

Most work in the Background Check queue will be completed on the form. As described in the [Recruitment Checklist overview](#). In addition to completing the background check section, a degree verification document can be attached in the **Attach Supporting Documents** section.



- **Generate PAF**
Creates an HR-Personnel Action Form pre-populated with the applicant information and opens the form in the **User Interaction** tab.
- **Route to Employed**

Appendix A: An example of recruitment process workflow

This action moves the checklist to the Employed folder with the expectation that an offer will be extended to the applicant

- **Send Email – Applicant Withdrawal**

This action will add an entry to the contact log and generate an email to the applicant confirming that they have been withdrawn by their request

- **Reject applicant – no email**

This action sets the HR Recruitment Status to 'Rejected – HR' and removes the checklist from workflow

- **Remove from workflow**

- This action removes the checklist from the workflow with the expectation that the applicant is not proceeding any further in the recruitment process.

Employed

Once the applicant has gotten through all interviews and background checks the checklist can be held in the Employed queue until the applicants first day. Once the applicant has officially started work the only task available in this queue can be run.



- **Complete hiring process**

This action will allow the user to re-index all applicant docs as hired docs. While the Re-Index panel will show up and indicate the document type of the document that will be affected, you will not be able to see the actual document. It is necessary to watch the document type and keywords to Re-index properly.

- **Remove from workflow**

This action removes the checklist from the workflow with the expectation that the applicant is not proceeding any further in the recruitment process.

- **Send Email – Applicant Withdrawal**

This action will add an entry to the contact log and generate an email to the applicant confirming that they have been withdrawn by their request

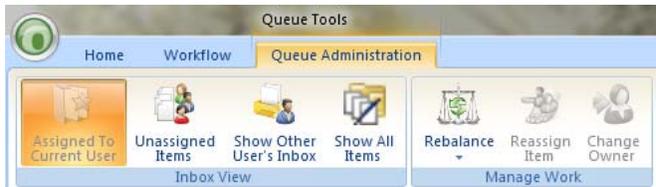
- **Send Email – Applicant No Show**

This action will add an entry to the contact log and generate an email to the applicant informing them that they are no longer being considered for employment after missing an interview

Appendix A: An example of recruitment process workflow

Queue Administration

Documents are automatically assigned to a recruiter when they enter the **HR Screening** queue and maintain that assignment through the rest of the lifecycle. However, if documents need to be reassigned it can be done in Queue Administration.



- **Inbox View**
 - **Assigned to Current User**

Shows all documents currently assigned to you.
 - **Unassigned Items**

If any documents are not properly assigned in the Load-balancing work they will be viewable here. However, for this lifecycle this should not happen. There is a default user (HR Manager) that gets all documents that are not assigned to either of the other recruiters.
 - **Show Other User's Inbox**

Selecting this option will open a list of the users that *might* have documents. Select any user to see the work currently assigned to them.
 - **Show All Items**

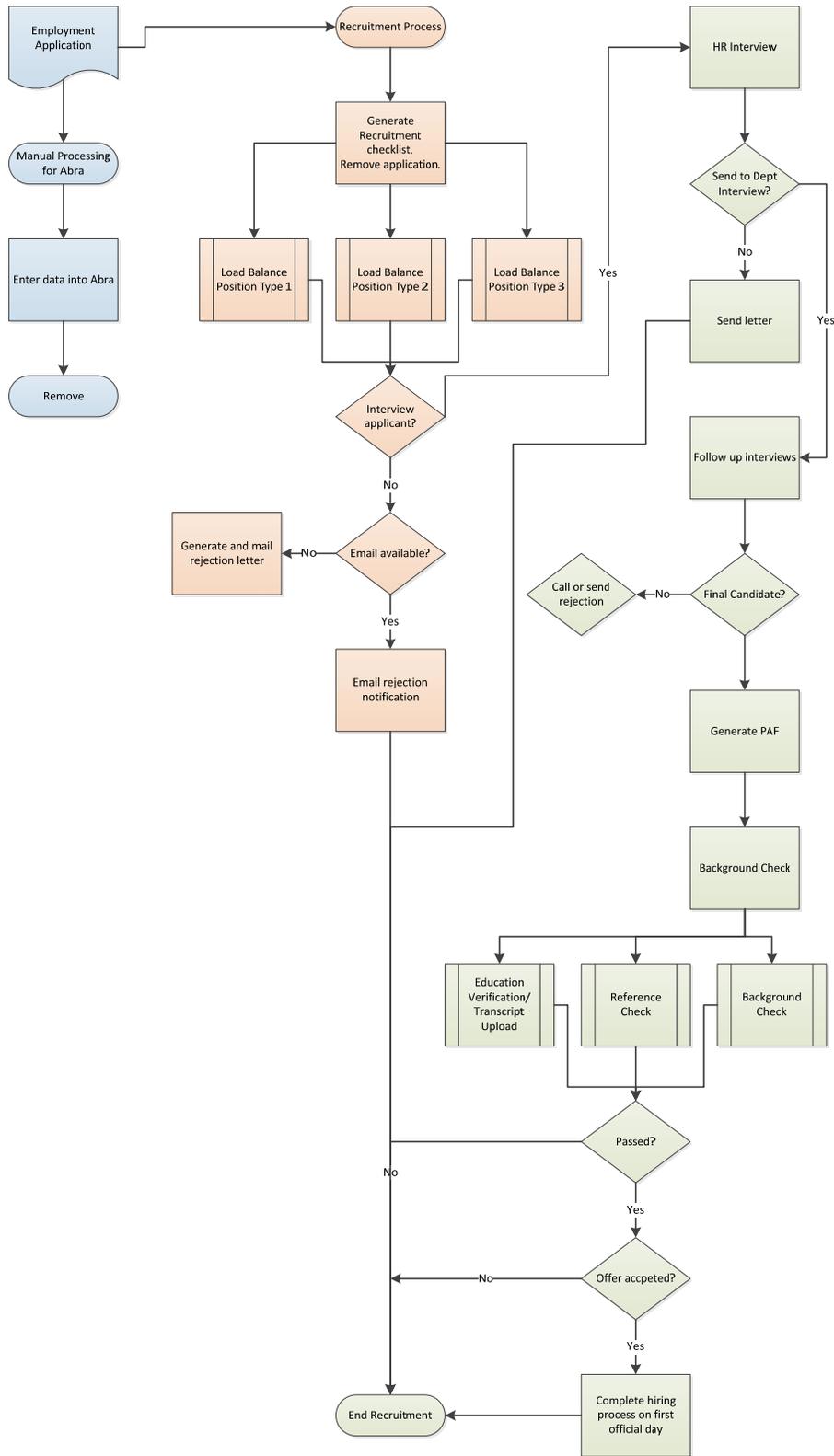
Shows all documents regardless of the assigned user.
- **Manage Work**
 - **Rebalance**

Clicking rebalance will re-run the load-balancing work and set all the assignments back to the original recruiters.
 - **Reassign Item**

Select the document to be reassigned from the list and click *Reassign Item*. A list of available recruiters will show up. Select the new recruiter and click 'Remove all existing assignments'. Then hit 'Assign'.

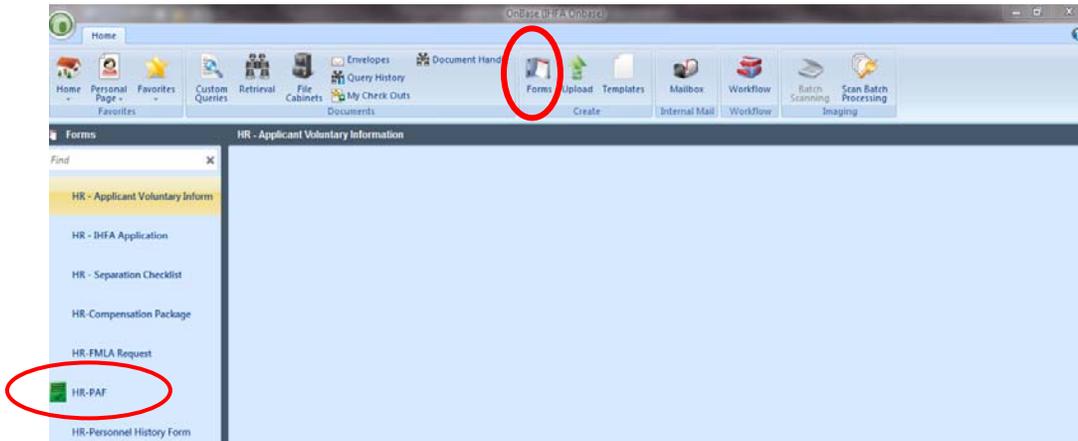
Appendix A: An example of recruitment process workflow

Process Flow



Appendix B: An example of Personnel Action Form workflow

Manager, supervisor, or HR may access a PAF from Frontporch (under Forms) or Unity (Forms).



NEW HIRE

- Select Action – New Hire/Re-Hire
- Section I :
 - Check either New Hire or Re-Hire
 - Approving MGR Dept: this is the department that the new hire will be working in – If department is Homeownership Lending, use Dept – Supervisor. These fields determine the routing of the form (queue it will go to).
 - Dept –Supervisor: Only use this field if Homeownership Lending
 - Complete the rest of the fields in Section I
- Click Submit/Save

A screenshot of the 'HR-PAF' form. The form is titled 'HR-PAF' and has a 'Select Action' section with four radio button options: 'New Hire/Re-Hire (Section I)', 'Promotion/Transfer/Title Change (Section III)', 'Salary Change (Section II)', and 'Termination (Section IV)'. Below this are 'Created By' and 'Created Date' fields. The 'SECTION I - NEW HIRE / RE-HIRE' section contains several fields: 'New Hire' and 'Re-Hire' radio buttons, 'First Name', 'Last Name', 'Job Title', 'Supervisor', 'For Department', 'Hire Date', 'Dept-Supervisor (THC/HOL Only)', and 'Pay Rate'. Below this is an 'HR USE ONLY' section with 'Offer Extended By' and 'Orientation By' fields. At the bottom, there is a 'Comments' text area and a 'Submit/Save' button.

SALARY CHANGE

- Select Action – Salary Change
- Employee Lookup – Check IHFA employee, use drop-down for employee number. This will auto-populate employee information on the form
- Section II :
 - Complete all fields
- Click Submit/Save

OnBase (IHFA Onbase)

Retrieval File Cabinets Envelopes Query History My Check Outs Document Handle Forms Upload Templates Mailbox Workflow Batch Scanning Scan Batch Processing Internal Mail Workflow Imaging

HR-PAF

HR-PAF Personnel Action Form

Select Action

New Hire/Re-Hire (Section I) Salary Change (Section II)

Promotion/Transfer/Title Change (Section III) Termination (Section IV)

Created By: _____ Created Date: _____

Employee Lookup (For Use With Section II, III, IV Only)

IHFA Employee* Dept-Supervisor (THC/HOL Depts Only): _____

IHFA-Employee#* _____ The value must be an Alphanumeric value. The value must be less than 40 characters.

358 ALICIA BUCHAN
425 AMY WOODLAND
440 AMY SISNEROS
313 ANDREA SANTERO
396 ANGELA AHLBOM
420 ANGIE FRENCH
346 ANNA HOHNRAIIM

Last Name: _____ Supervisor: _____

New Salary: _____ Percentage Change: _____

Effective Date: _____

Reason: _____

SECTION III - PROMOTION / TRANSFER / TITLE CHANGE

Submit/Save

PROMOTION/TRANSFER/TITLE CHANGE

- Select Action – Promotion/Transfer/Title Change
- Employee Lookup – Check IHFA, use drop-down for employee number. This will auto-populate employee information on the form
- Section III :
 - Complete all fields
- Section II:
 - If promotion or transfer includes a salary change, complete section II
- Click Submit/Save

HR–Personnel Action Form

Select Action

- New Hire/Re–Hire (Section I) Salary Change (Section II)
 Promotion/Transfer/Title Change (Section III) Termination (Section IV)

Created By:

Created Date:

Employee Lookup (For Use With Section II, III, IV Only)

- IHFA Employee * Dept–Supervisor (THC/HOL Depts Only)

IHFA–Employee#* The value must be an Alphanumeric value, no more than 40 characters.

- 358 ALICIA BUCHAN
- 425 AMY WOODLAND
- 440 AMY SISNEROS
- 313 ANDREA SANTERO
- 396 ANGELA AHLBOM
- 420 ANGIE FRENCH
- 346 ANNA HOHNRAUM

Last Name:

Supervisor:

Promotion / Transfer / Title Change

- Promotion Transfer Title Change

Old Position:

New Position:

Supervisor:

Effective Date:

Reason:

Submit/Save

TERMINATION

- Select Action – Termination
- Employee Lookup – Check IHFA employee, use drop-down for employee number. This will auto-populate employee information on the form
- Section IV :
 - Complete all fields
- Click Submit/Save

The screenshot displays the HR-Personnel Action Form (HR-PAF) interface. The form is titled "HR-Personnel Action Form" and is divided into several sections. The "Select Action" section includes checkboxes for "New Hire/Re-Hire (Section I)", "Promotion/Transfer/Title Change (Section III)", "Salary Change (Section II)", and "Termination (Section IV)". The "Termination (Section IV)" checkbox is checked. Below this section are fields for "Created By" and "Created Date". The "Employee Lookup (For Use With Section II, III, IV Only)" section includes a checked checkbox for "IHFA Employee*", a dropdown for "IHFA-Employee#*", and a dropdown for "Dept-Supervisor (THC/HOL Depts Only)". Below these are fields for "First Name", "Last Name", and "Supervisor". The "SECTION IV - TERMINATION" section includes an "Effective Date:" field, a "Reason:" dropdown, a "Checklist Completed" checkbox, and a "Comments:" text area. At the bottom of the form is a "Submit/Save" button.

HR-PAF

HR-Personnel Action Form

Select Action

New Hire/Re-Hire (Section I) Salary Change (Section II)

Promotion/Transfer/Title Change (Section III) Termination (Section IV)

Created By: Created Date:

Employee Lookup (For Use With Section II, III, IV Only)

IHFA Employee* Dept-Supervisor (THC/HOL Depts Only)

IHFA-Employee#* First Name

Last Name

Supervisor

SECTION IV - TERMINATION

Effective Date: Reason:

Checklist Completed

Comments:

Submit/Save

Once submitted, form will route to Manager or Supervisor – go to workflow queue



- Select document
- Approve or Deny using buttons at top
- Route to appropriate person for next approval (next level manager or HR)

Appendix B: An example of Personnel Action Form workflow

Once Personnel Action Form has necessary approvals, HR director will receive the PAF in her HR Manager queue.

- Approved by HR Director:
 - Click Approve, route to Payroll
 - Payroll
 - Processes PAF for payroll purposes
 - Route to Processing
 - Processing
 - New Hire
 - Hold in Processing queue until new hire starts
 - Add employee to HR Autofill –
 - <http://jupiter/OnBaseUpdate/Account/Login.aspx?ReturnUrl=%2fOnBaseUpdate%2fAccount%2fLogout.aspx>
 - Username and password comes from IT
 - Fill in all keywords in Autofill table
 - Go back to workflow in Unity – autofill keywords for PAF
 - Select “add record to Personnel History Form” button – this will generate a Personnel History form for the new hire and add the first line with salary information
 - Remove from workflow
 - Salary Change or Promotion/Transfer/Title Change
 - Select “Add Record to Personnel History Form” button – adds a line to the personnel history form with new title/new salary
 - Termination
 - Wait until employee’s last day to complete
 - Change employee keywords in HR Autofill –
 - <http://jupiter/OnBaseUpdate/Account/Login.aspx?ReturnUrl=%2fOnBaseUpdate%2fAccount%2fLogout.aspx>
 - Change from ACTIVE to TERMINATED, add term date
 - Go back to workflow in Unity – click “Assign Keywords” button
 - Use employee ID autofill – this will change the keywords to terminated and add the term date
 - Click “Set Status to TERMINATED” button – changes all doc types associated with the employee to terminated
 - Remove from Workflow
- Denied by HR Director:
 - HR Director needs to contact the submitting manager and let them know that the PAF has not been approved – a new PAF must be submitted