Personal Information Change Request

MSS QUICK REFERENCE GUIDE

THE UNIVERSITY OF ARIZONA

SYSTEMS CONTROL | University Services Building, Rm. 401
LAST UPDATE: MARCH 16, 2016

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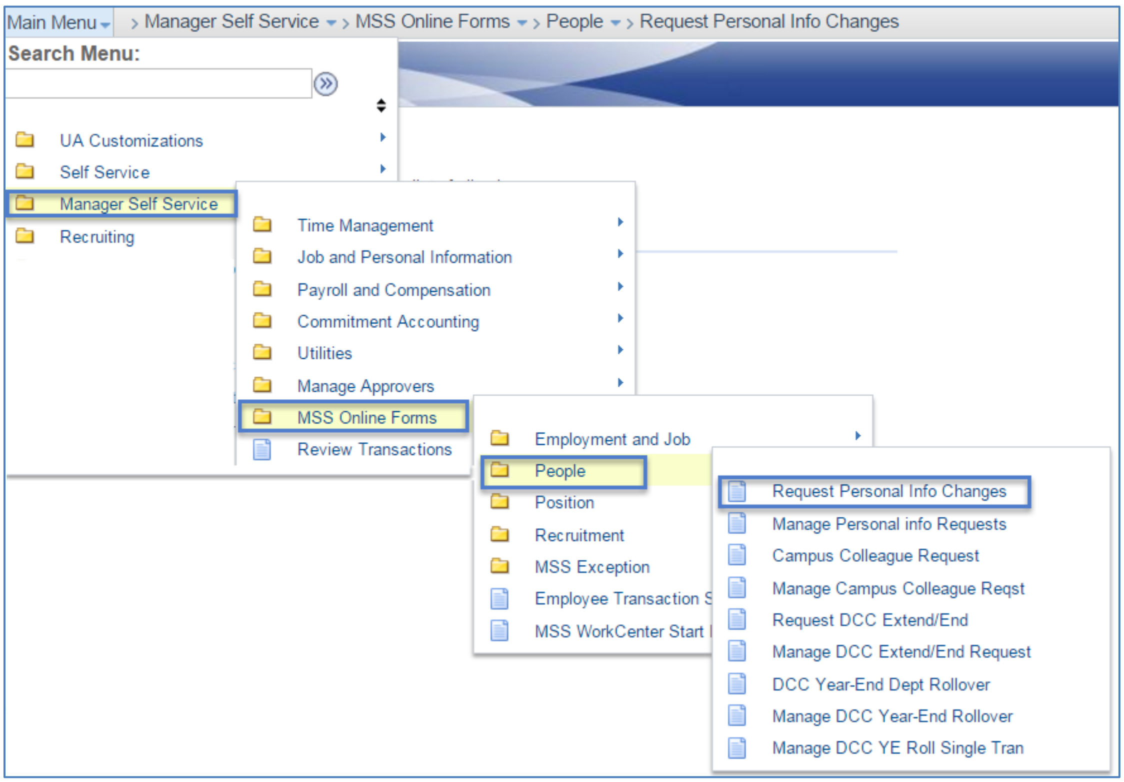
GUIDE OVERVIEW

This guide provides an overview of the UAccess Employee – MSS Personal Information Change process for updating person contact and biographical data.

NAVIGATING THE MANAGER SELF SERVICE MENU

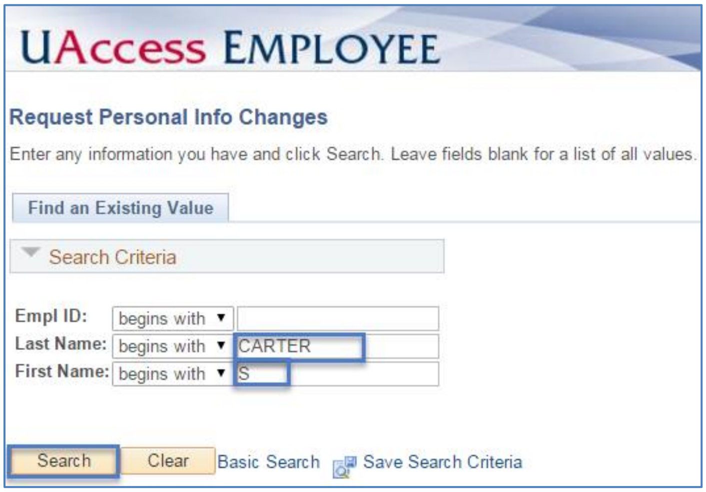
To access the Personal Information Change option, click on the UAccess Employee link or follow the instructions below.

1. Select ***Manager Self Service*** from the Main Menu
2. Click on ***MSS Online Forms***
3. Click on ***People***
4. Click on ***Request Personal Info Changes***

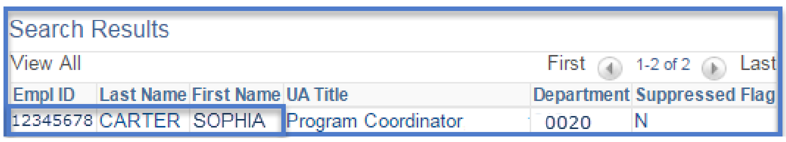


The ***Request Personal Info*** page provides (3) three field search options for selecting the appropriate employee record for the ***Personal Information Change*** Request.

1. Enter the Employee ID or other search criteria in the search template
2. Click on the ***Search*** button



3. Select the appropriate record listed in the Search Results to initiate changes



INITIATING REQUESTS

The ***Request Personal Information Changes*** page allows the user to:

- **Create a New Request**
  - The form is populated with existing Personal Information that may be updated to initiate changes.
- **Clone from Denied Request**
  - This option is only available for previously denied requests. The clone feature duplicates the information stored on the denied request and allows updates for resubmittal within 30 calendar days of the denial.
- **Clone from Withdrawn Request**
  - This option is only available for previously withdrawn requests. The clone feature duplicates the information stored on the withdrawn request and allows updates for resubmittal within 30 calendar days of the withdrawal.
- **Return to Work in Progress**
  - This option is only available if a user previously saved a request. Users have up to 30 calendar days to return to, modify and submit a saved request.

Note: This replaces changes to personal information completed on the PAF. MSS Personal Information changes can only be submitted for "Active" and "Retired" employees. Terminated employees may continue to submit changes through Employee Self Service.

CREATING A NEW REQUEST

- Click on the ***Create a New Request*** radio button to access the personal information change form for the employee selected in the search criteria.

EFFECTIVE DATE

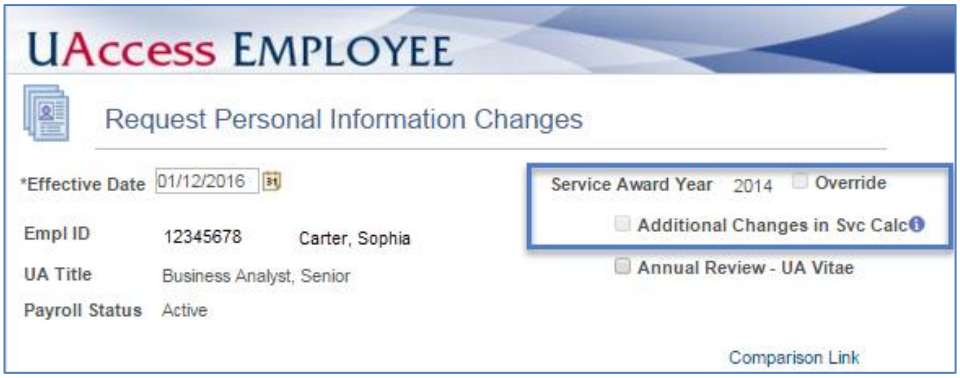
The effective date on the ***Request Personal Information Changes*** page automatically defaults to the current date and may be updated to reflect a past date within the current fiscal year or a future date up to 90 days in advance.

SERVICE AWARD YEAR (COLLEGE AND DEPARTMENT ROLES)

The Service Award Year Field is READ ONLY.

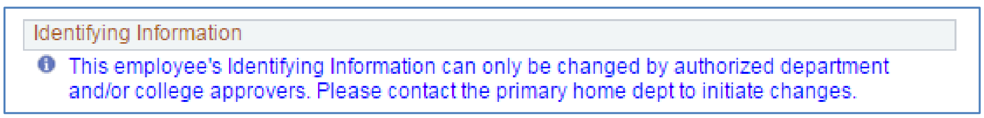
SERVICE AWARD YEAR (CENTRAL HR ROLE)

- Central HR has the ability to change the Service Award Year by selecting the ***Override*** box. Once activated, the Service Award Year field ***Override*** allows a new value to be entered.
- Central HR may update the *Break in Service Calculation Criteria* by selecting the ***Additional Changes in Svc Calc*** box and specifying the requested change in the comments section by indicating one of the following fields along with the new values: Termination Year, Rehire Year, Old Pay Group and New Pay Group.
- Changes to the Service Award Year field will be routed to Systems Control for review and final approval.

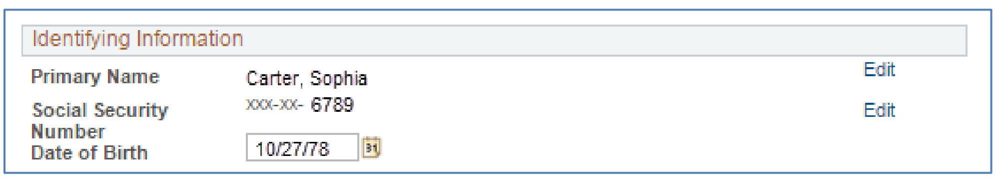


Identifying Information

An employee's identifying information consists of the following: Primary Name, Social Security Number and Date of Birth. This information is sensitive and can only be changed by an employee's primary home department/college approver.



An employee's identifying information will appear if the individual accessing the record is an approver for the person's department/college.



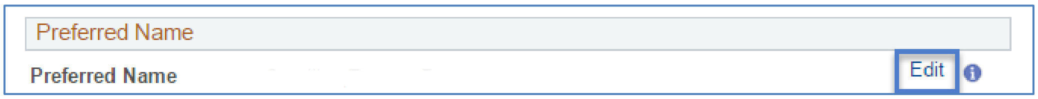
1. **Primary Name**
   a. Click the ***Edit*** link to update the Primary Name
   b. Attach a word document that says: "Copy of Social Security Card sent to Systems Control"
   c. Send a copy of the Social Security Card to Systems Control via courier
2. **Social Security Number**
   a. Click the ***Edit*** link to update the Social Security Number
   b. Attach a word document that includes the following statement: "Copy of Social Security Card sent to Systems Control"
   c. Send a copy of the Social Security Card to Systems Control via courier
3. **Date of Birth**
   a. Enter the Date of Birth in mm/dd/yy format or select the Month, Day and Year from the calendar icon to update the ***Date of Birth*** field
   b. Attach a word document that includes the following statement: "Copy of Birth Certificate sent to Systems Control"
   c. Send a copy of the Birth Certificate to Systems Control via courier

Preferred Name

The ***Preferred Name*** field allows University of Arizona employees identify themselves within the University community using a preferred name that differs from their official/legal name. An employee's preferred name will appear instead of the person's official/legal name in select University-related systems and documents, provided that the preferred first name is not being used for the purpose of misrepresentation. The official/legal name will continue to be used in all University-related systems and documents that require a verified legal name. The ***Preferred Name*** displays in the following areas:

- CatCard
- Online Phone Directory in parenthesis
- Personnel Action Form (PAF)
- UAConnect Name (Email Address Book)

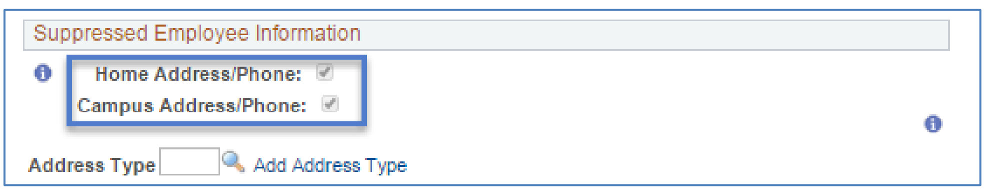
Click the ***Edit*** link to initiate a change to the Preferred Name



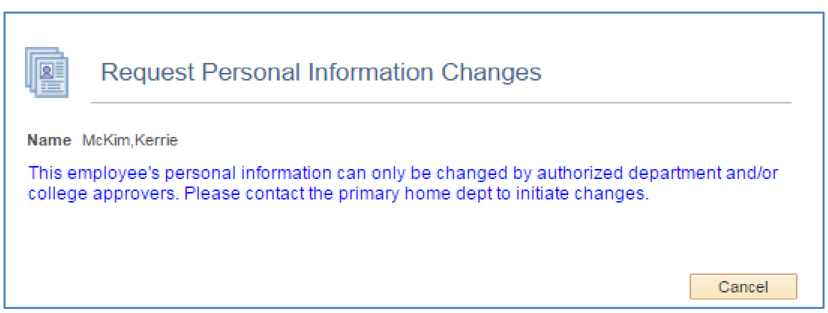
Suppressed Employee Information

The ***Suppressed Employee Information*** section displays whether flags are set to prevent names and address information from appearing in the UA Electronic Phone Book and the Employee Profile in Analytics. Department representatives may under limited circumstances request the suppression of the following employee information from Human Resources Information & Technology Solutions:

- **The *Home Address/Phone*** (box checked) prevents an employee's home address and phone number from appearing in the UA Analytics Employee Profile report.
- **The *Campus Address/Phone*** (box checked) blocks all information about the employee including his or her name from appearing in the electronic UA phone book.



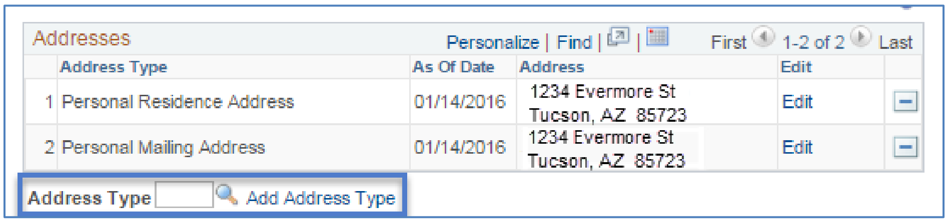
If either one of the suppress flags is checked, access to initiate a personal information change for the employee is limited to primary/home department/college approvers.



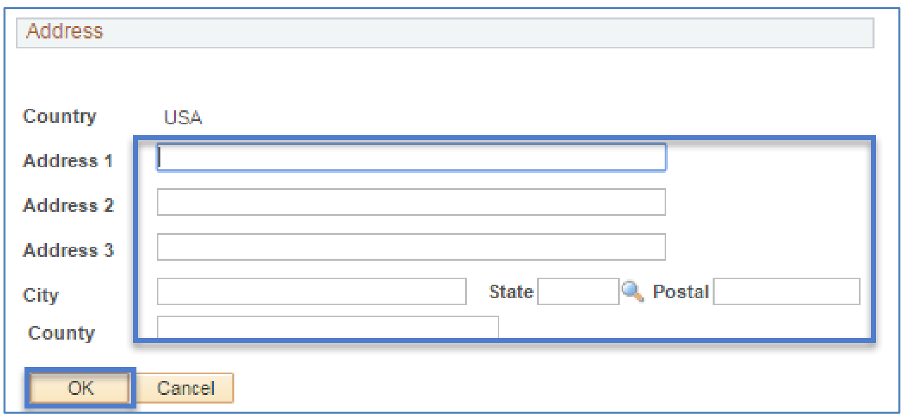
ADDRESSES

The ***Address*** section allows users to add, update or remove an employee's Out of State Business, Personal Residence and Personal Mailing Address.

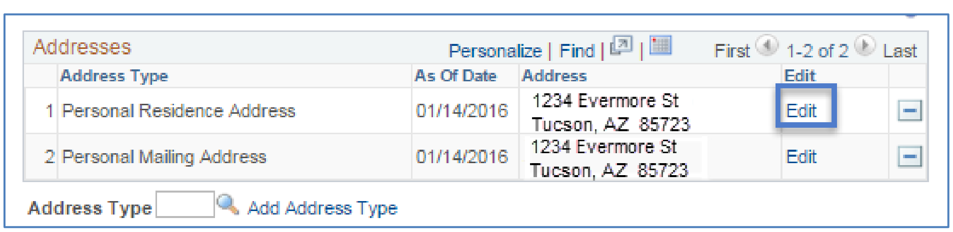
1. **Add Address Type**
   a. Click on the magnifying glass by the ***Address Type*** field
   b. Select the Address Type to be added to the employee's record
   c. Click on the ***Add Address Type*** link to activate the Address update page



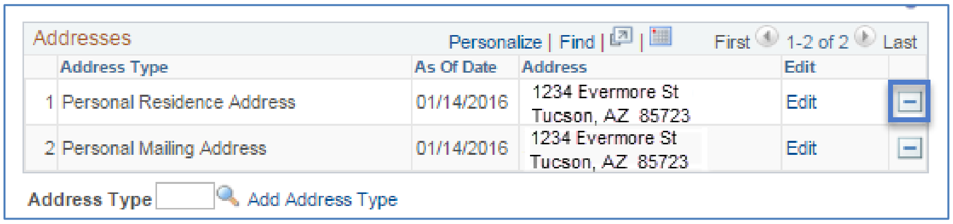
   d. Update the address information and click on the ***OK*** button



2. **Update Address Type**
   a. Click the ***Edit*** link to activate the Address entry page (See above)
   b. Update the address information and click on the ***OK*** button



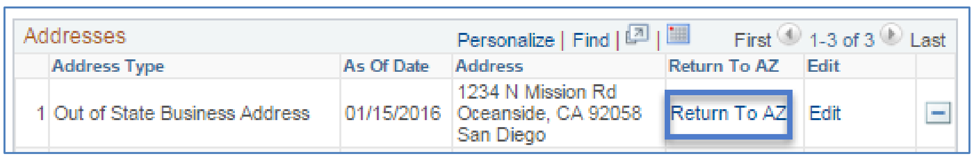
3. **Remove Address Type**
   a. Click the ⊟ box to remove an address type



Out of State Business Address

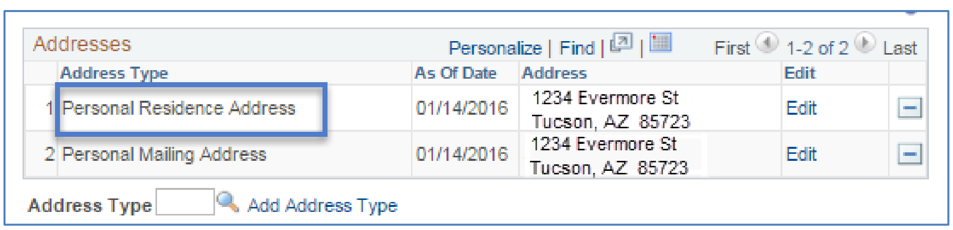
This address type is specifically used for capturing out of state business addresses for employees performing work at locations outside the State of Arizona.

1. **Employee Returning to Work in Arizona**
   a. Complete a new Personal Information request for employee's whose records contain out of state business addresses and are returning to work in Arizona
      - Click the ***Return to AZ*** link to activate the ***Address*** entry page
      - Enter the Arizona Address and click on the ***OK*** button



Personal Residence Address

The ***Personal Residence*** or home address must be maintained for all employees. It is used for mailing benefits information and is referred to as the ***Home*** address type in Employee Self Service (ESS).



Note: Foreign addresses may be added, updated or deleted in ESS. Manager Self Service entries are limited to USA addresses.

Personal Mailing Address

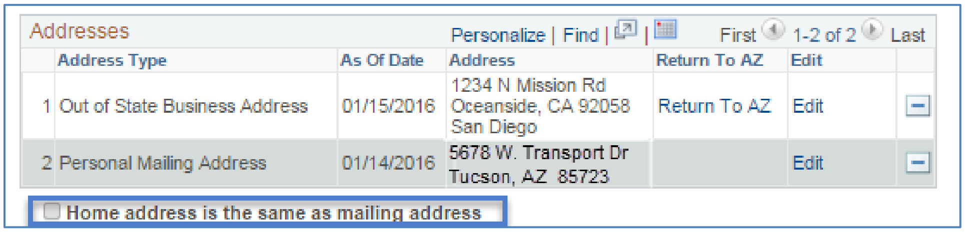
An employee's ***Personal Mailing Address*** is used for mailing W2s and state tax forms; therefore, the information is required for all employees.

- Enter the following Payroll Services address if an employee does not have an US address or the address field is blank:

  1303 E University Blvd, Box #4
  Tucson, AZ 85719

Home and Mailing Address Flag

The Personal Residence and Mailing Addresses are required for benefits, W2 and state tax information; therefore, a check box appearing at the bottom of the ***Address*** section (when selected) duplicates the existing values within an address type if either the ***Home*** (***Personal Residence***) or ***Mailing*** (***Personal Mailing***) address are missing. (See example below)



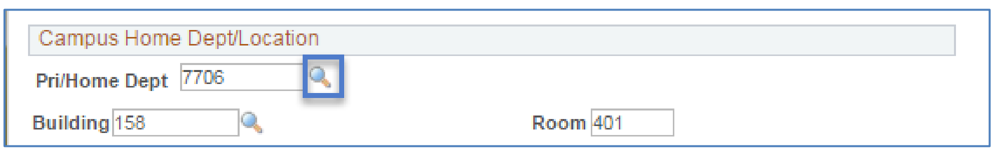
Campus Home Dept/Location

The ***Campus Home Dept/Location*** section allows users to update an employee's Primary/Home Dept, Building and Room Number.

1. **Update Campus Dept/Location**
   a. Click on the magnifying glass to the right of the Primary/Home and Building fields to select the numbers from a list or highlight the department and/or building number and type in the new value(s)
   b. To update the Room number, highlight and type over the displayed value

The approver from the original home dept is included in the workflow if an employee changes primary home depts.

- The system will notify the ***Old HR Dept Approver*** of the upcoming change and requires him or her to approve the transaction.

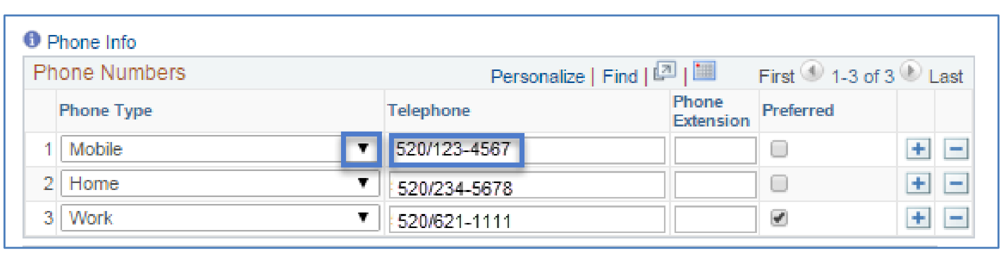


Note: The HR department approval step is skipped if an employee is not provisioned with the HR Dept Approver role with the department the person is leaving. We recommend using the HR Department Approver in lieu of the College Division role to ensure proper notification and approval of primary/home department changes.

Phone Numbers

The ***Phone Numbers*** section allows users to update, remove or add Home, Work, Campus and Mobile ***Telephone*** numbers and ***Phone Types***.

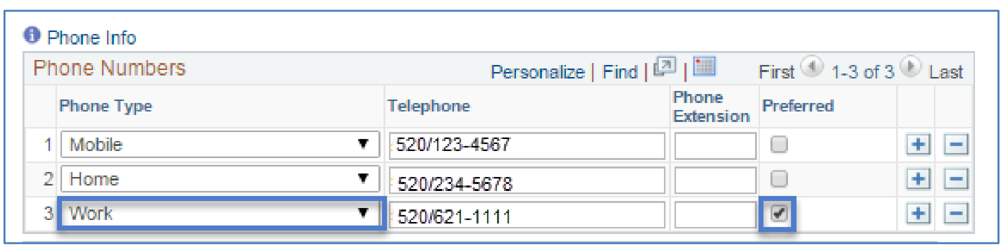
1. **Update Phone Numbers**
   a. To modify a phone number, highlight the value in the ***Telephone*** field and type over the number displayed
   b. Click on the down arrow to select and update the ***Phone Type*** if the ***Telephone*** number listed is not consistent with the phone type displayed



2. **Remove or Delete Phone Numbers**
   a. Click on the box to remove a ***Telephone*** number and ***Phone Type***

3. **Add a Phone Number**
   a. Click on the box to add a ***Telephone*** number and ***Phone Type***
   b. Click on the down arrow to select the additional ***Phone Type*** and type the corresponding ***Telephone*** number

   c. The ***Work*** phone type will appear in the UA Electronic Phone Book
   d. A ***Preferred*** phone number may be selected and is accessible in Analytics for developing custom reports

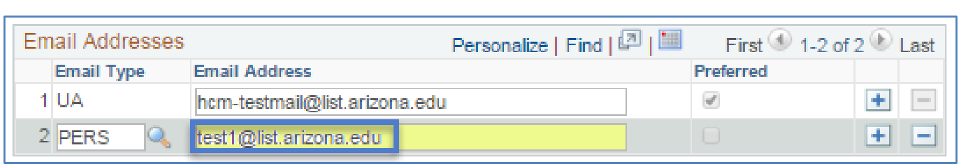


EMAIL ADDRESSES

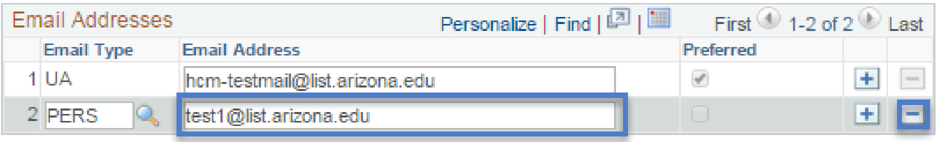
The ***Email Address*** section allows users to update, remove or add UA Official and/or Personal emails.

- The **UA** Official ***Email Type*** is hardcoded to only allow an **arizona.edu *Email Address.***
- The ***Preferred*** flag is limited to viewing.
- Retired Employees may request a change to their ***Preferred*** email flag to correspond with a personal **(PERS) Email and Type**.

1. **Update Email Address**
   a. To modify an email, highlight and type over the ***Email Address*** displayed

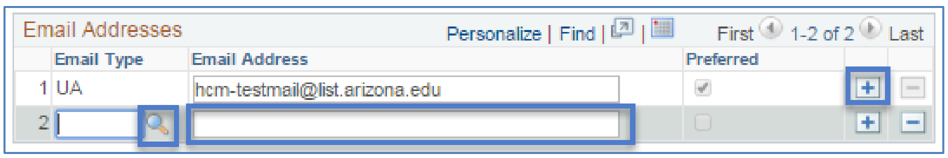


2. **Remove Email Address**
   a. Click the box to remove an ***Email Type*** and ***Email Address***



Note: The UA official always defaults as the preferred and this email type cannot be deleted.

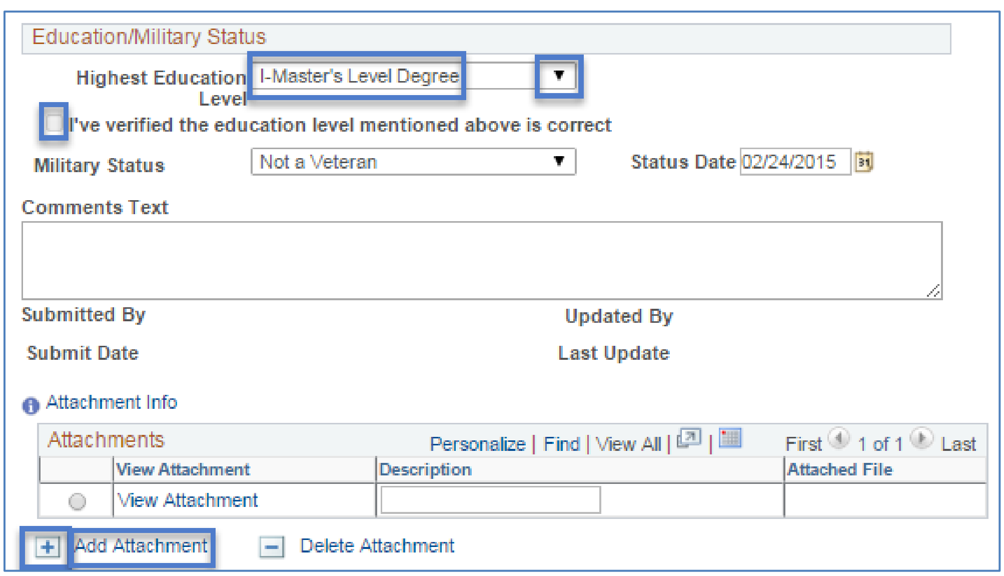
3. **Add Email Address**
   a. Click on the box to add an ***Email Type*** and ***Email Address***
   b. Click on the magnifying glass to view the possible ***Email Types***
   c. Select the ***Email Type*** and enter the additional ***Email Address***



Education/Military Status

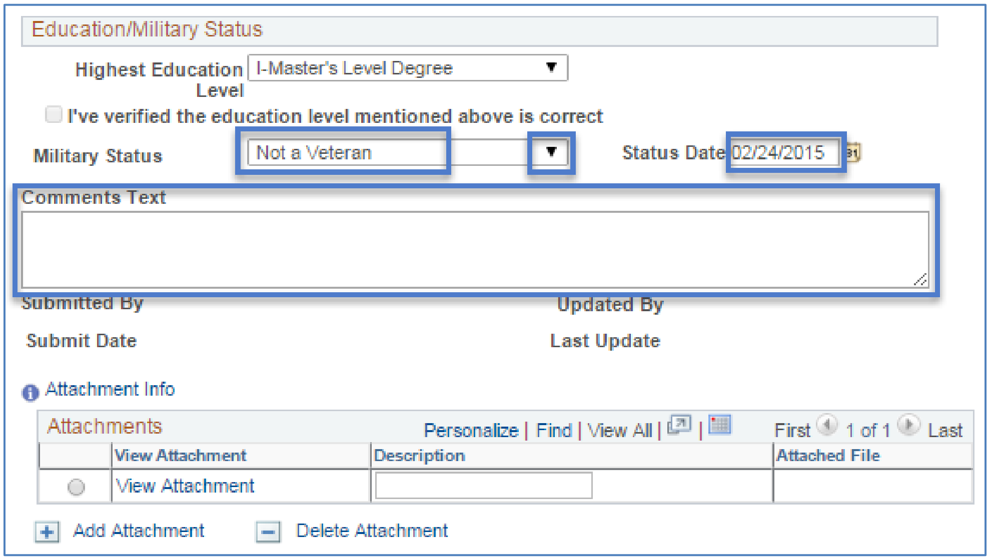
The ***Education/Military Status*** section may be updated to reflect the highest education level an employee has completed and/or her or his military status.

1. **Update Highest Education Level**
   a. Click on the down arrow and select the appropriate ***Education Level***
   b. Check the box to verify that the updated education level is correct
   c. Attach a copy of the degree, diploma and/or certificate (See Attachments section)



2. **Update Military Status**
   The ***Status Date*** and ***Comments*** are required to submit Military Status changes.

a. Click on the down arrow and select the appropriate ***Military Status***
b. Enter the current date in the ***Status Date*** field
c. Add ***Comments*** to describe the change

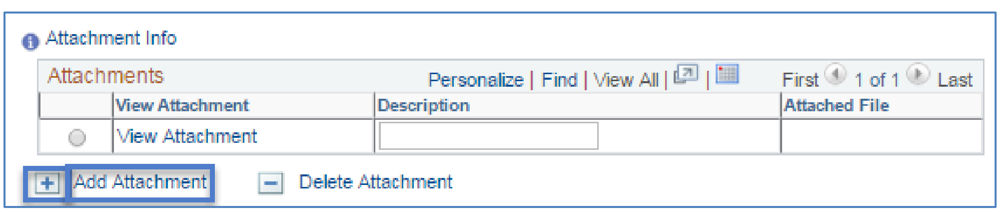


ATTACHMENTS

Initiators and Approvers included in the workflow may upload and remove attachments while the request's transaction status is pending. Sensitive data such as copies of Social Security Cards and Birth Certificates may be attached by Systems Control during the final approval; therefore, attachments are not available for viewing after transactions are completely approved.

1. **Add Attachment**

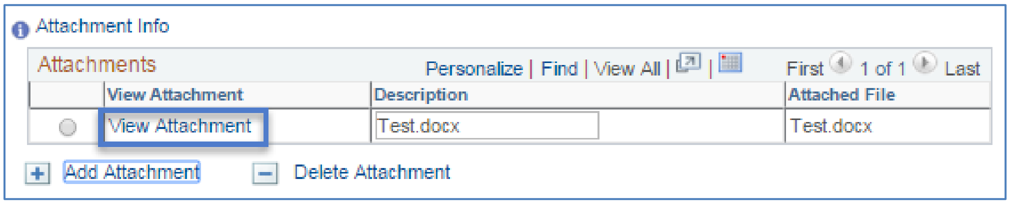
   a. Click the  or ***Add Attachment*** link
   b. Click the ***Choose File*** button and navigate to your saved document
   c. Select the document and click on the ***Open*** button
   d. Click ***Upload*** after the file name you attached appears next to the ***Choose File*** button
   e. The attached document will appear in the ***Description and Attached File*** fields



Note: Copies of Social Security Cards and Birth Certificates should be sent to Systems Control via courier—do not attach or save them to your computer.

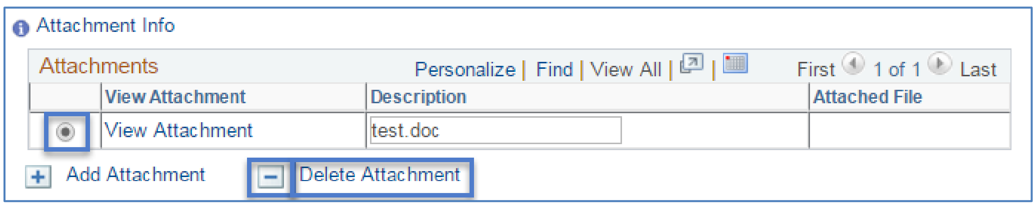
2. **View Attachment**

   a. Click the ***View Attachment*** link in the row that includes the document you wish to view
   b. The document will open in a separate window



Note: Attachments are not available for viewing after transactions are completely approved.

3. **Delete Attachment**
   a. Select the radio button on the far left side of the document you want to remove
   b. Click on the button or the ***Delete Attachment*** link
   c. The following confirmation appears upon completion: "***Attachment Deleted Successfully***"



ADDING AD-HOC APPROVERS AND REVIEWERS

HR Department, College Reviewers and College Approvers may add Ad Hoc approvers and/or reviewers prior to exiting the page for the transaction she or he approves.

AD HOC REVIEWERS

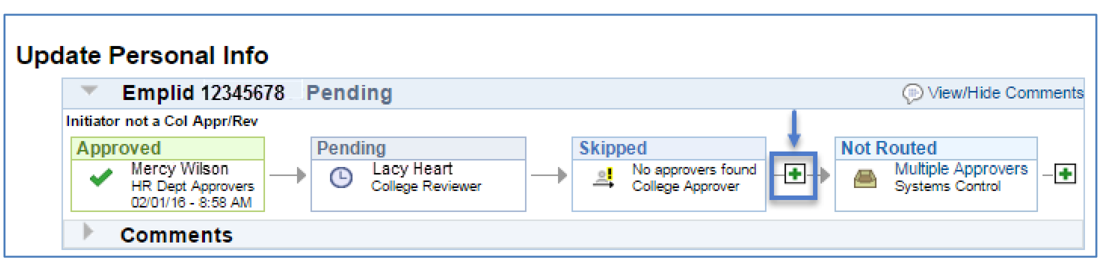
The addition of an Ad Hoc reviewer may be added by HR Department and College approvers.

- An email notification is sent to the Ad Hoc ***Reviewer*** selected.
- The request does not require the person's approval in order for the transaction to advance to the next step in the workflow.
- Ad Hoc Reviewers may be added after the Systems Control step—this is not the case with Ad Hoc ***Approvers***.
- Note: In some instances, you may add an Ad Hoc ***Reviewer*** step before you approve the transaction-- it is important to check the workflow status at the bottom of the page to ensure your step displays the green ***Approved*** box prior to exiting the request.

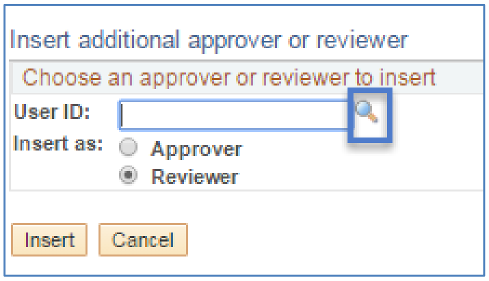
1. **Adding Ad Hoc Reviewer**

User ID Unknown

   a. Click on the first (plus sign) encountered to the right of your ***Approved*** step
   b. This activates the ***Insert additional approver or reviewer*** window

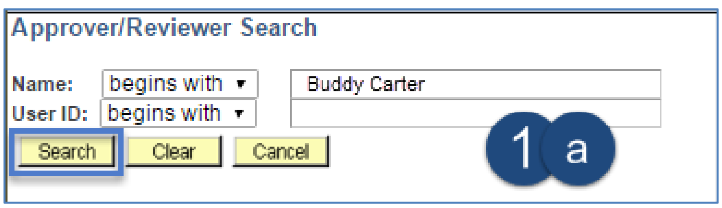


c. Select the Ad Hoc reviewer
d. Click on the ***Reviewer*** radio button
e. Enter characters that limit the search criteria or simply click on the magnifying glass to perform a name based search (1a)

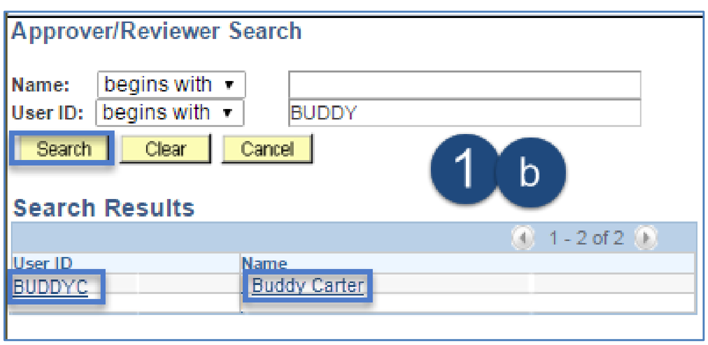


Note: The User ID must be typed in Caps

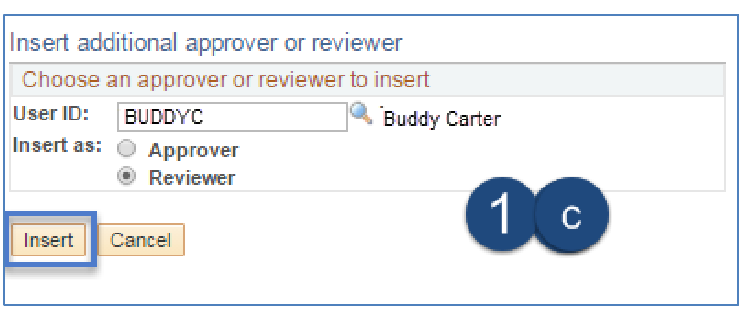
f. Enter the First and Last Name to perform a name based search (1a)
g. Click on the ***Search*** button



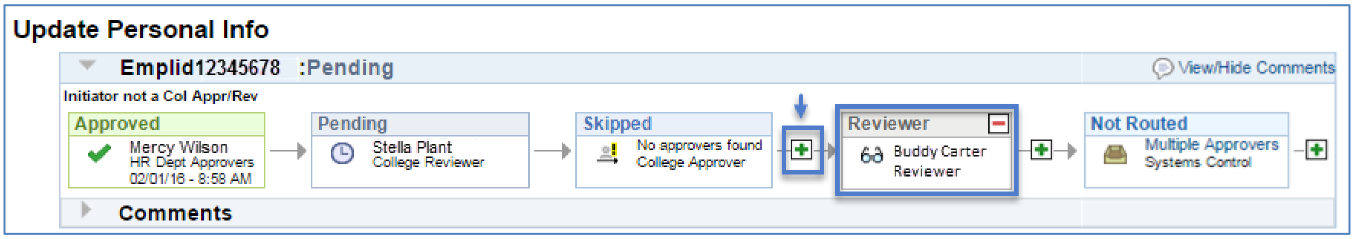
h. Click on the ***User ID*** or ***Name*** in the Search Results (1b) to select the Ad Hoc Reviewer



i. Click on ***Insert*** button

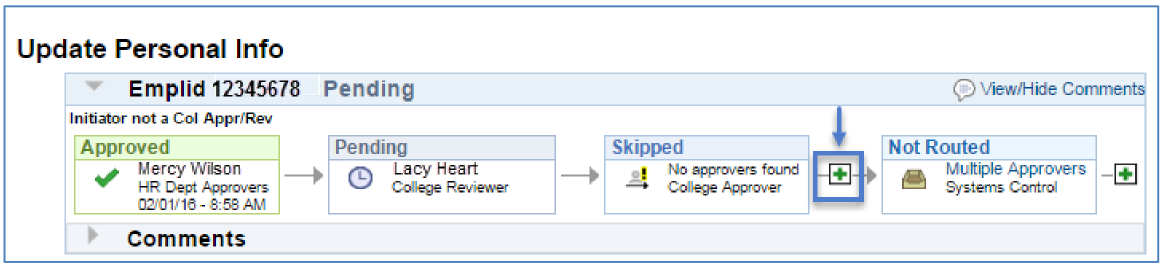


j. The Ad-Hoc Reviewer will appear in the workflow path at the bottom of the request page

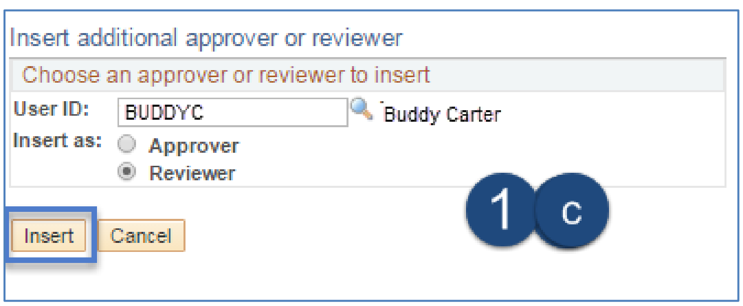


User ID Known

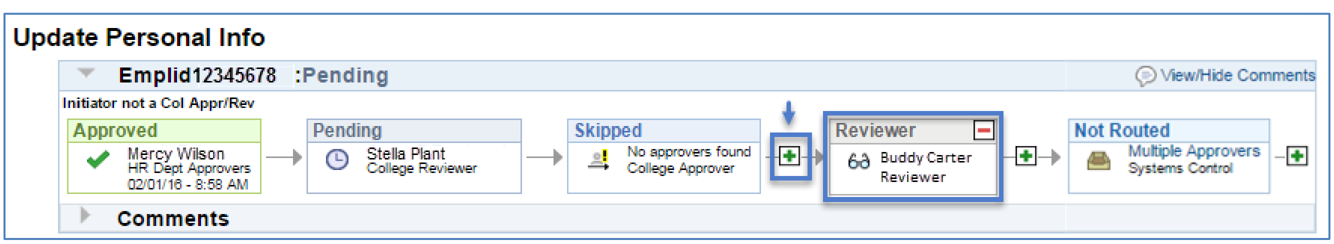
a. Click on the (plus sign) to the right of your ***Pending*** or ***Approved*** step
b. This activates the ***Insert additional approver or reviewer*** window



c. Click on the ***Reviewer*** radio button
d. Enter the Ad Hoc Reviewer's ***User ID***
e. Click on the ***Insert*** button



f. The Ad-hoc Reviewer will appear in the workflow path at the bottom of the request page



AD HOC APPROVERS

An Ad Hoc Approver may be added by HR Department and College approvers prior to the final Systems Control Approval step.

- The request requires action from the Ad Hoc Approver in order for the transaction to advance to the next step in the workflow.
- The transaction appears on the Ad Hoc Approver's pagelet and an email is sent notifying the person that a Personal Information transaction is awaiting her or his approval.

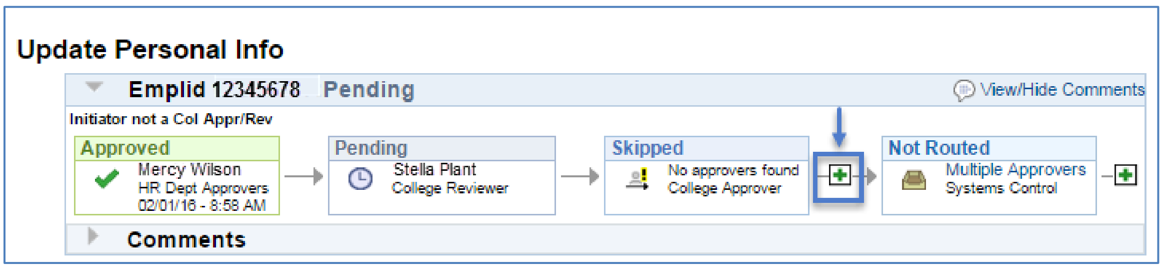
*Note: In some cases, you may add an Ad Hoc Approver step before you approve the transaction-- it is important to check the workflow status at the bottom of the page to ensure your step displays the green **Approved** box prior to exiting the request.*

IMPORTANT: PLEASE DO NOT ADD AD HOC APPROVERS AFTER THE SYSTEMS CONTROL STEP.

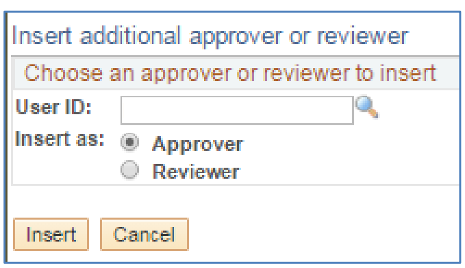
1. Adding Ad Hoc Approver

User ID Unknown

a. Click on the (plus sign) to the right of your ***Pending*** or ***Approved*** step
b. This activates the ***Insert additional approver or reviewer*** window

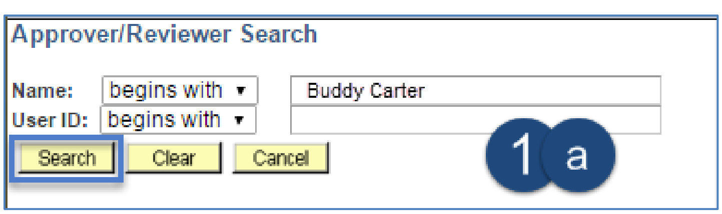


c. Select the Ad Hoc Approver
d. Click on the ***Approver*** radio button
e. Enter characters that limit the User ID search criteria or simply click on the magnifying glass to perform a name based search (1a)

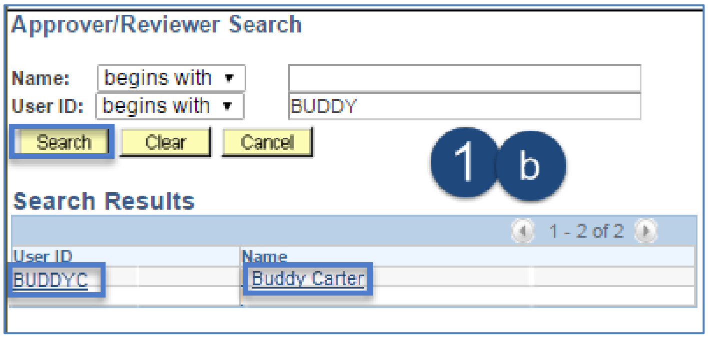


Note: The User ID must be typed in Caps

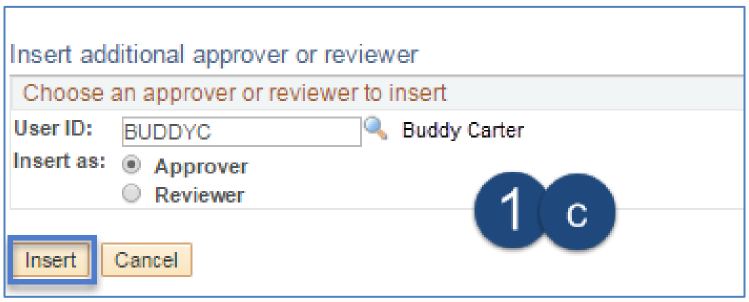
f. Enter the First and Last Name to perform a name based search (1a)
g. Click on the ***Search*** button



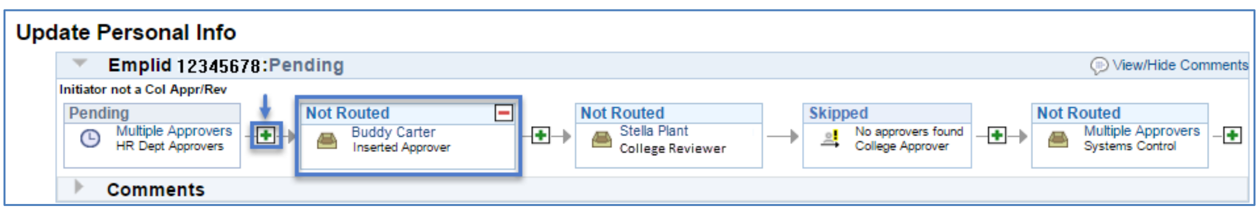
h. Click on the ***User ID*** or ***Name*** in the Search Results (1b) to select the Ad Hoc Approver



i. Click on ***Insert*** button



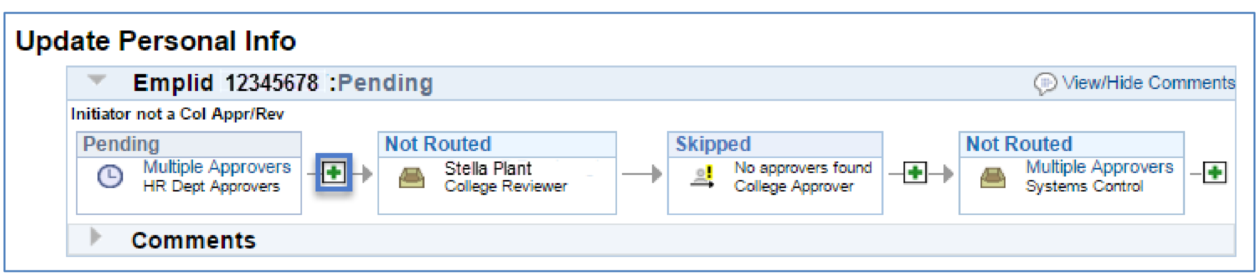
j. The Ad-hoc Approver will appear in the workflow path at the bottom of the request page



User ID Known

a. Click on the (plus sign) to the right of your ***Pending*** or ***Approved*** step

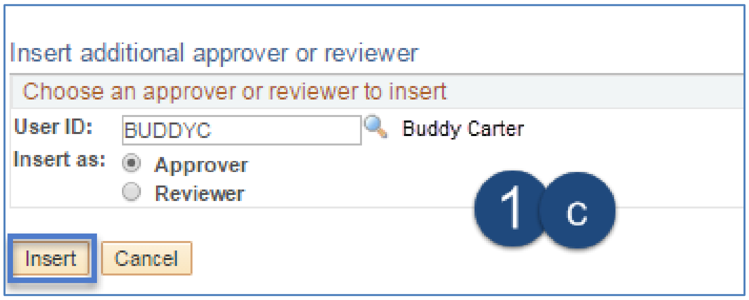
b. This activates the ***Insert additional approver or reviewer*** window



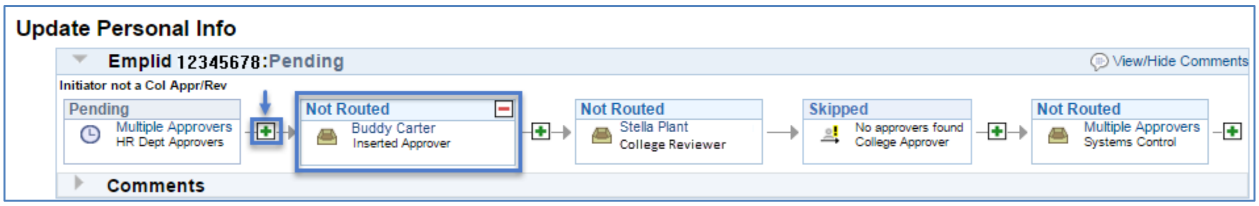
c. Click on the ***Approver*** radio button

d. Enter the Ad Hoc Approver's ***User ID***

e. Click on the ***Insert*** button



f. The Ad-hoc Approver will appear in the workflow path at the bottom of the request page

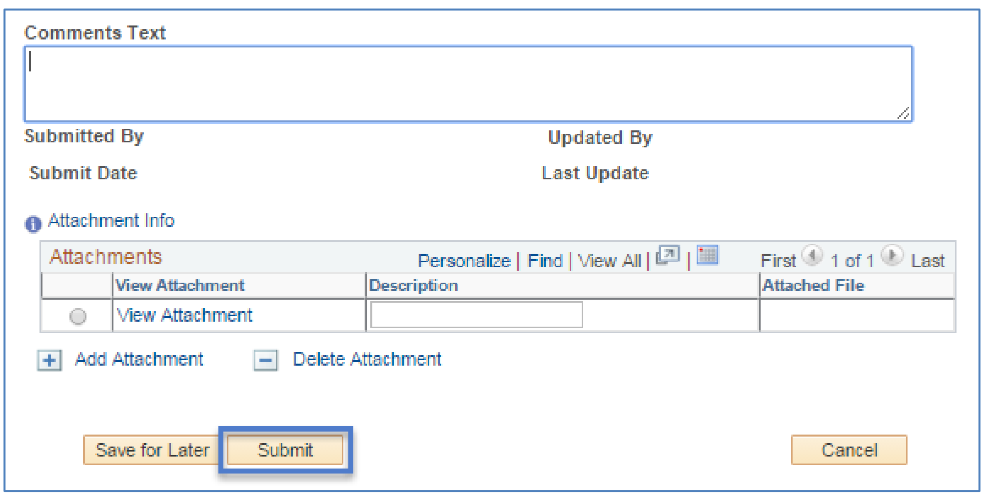


In the example above, the request will route to the College Reviewer step after the Inserted/Ad Hoc Approver approves the transaction.

SUBMITTING REQUESTS

To submit the Personal Information Change requests for approval:

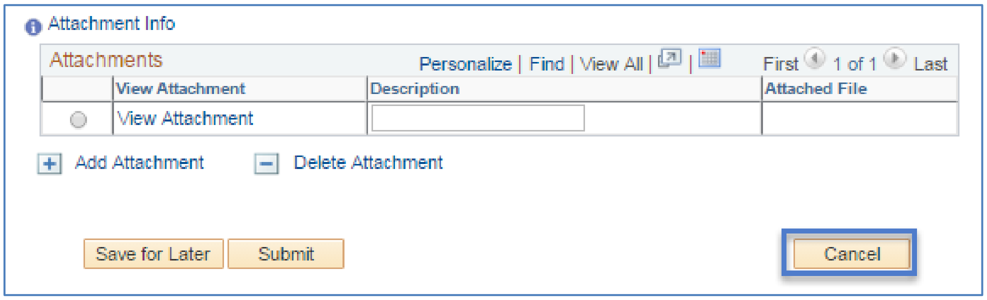
1. Click on the ***Submit*** button



CANCELLING REQUESTS

Requests may be cancelled by the request initiator. The request will not be saved if the ***Cancel*** option is selected.

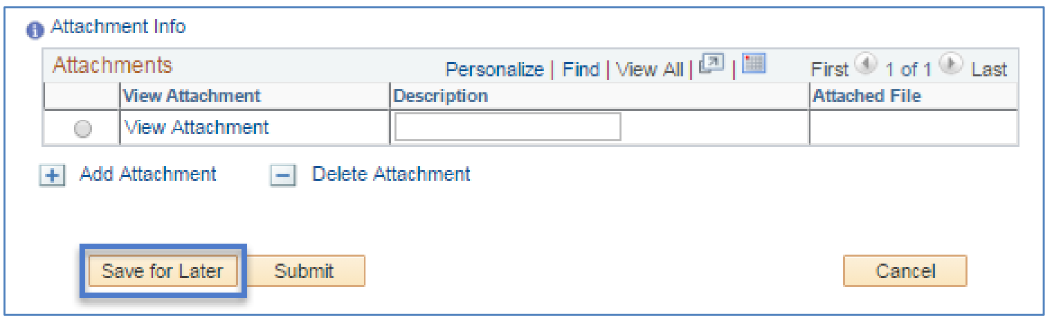
1. Click on the ***Cancel*** button



SAVING REQUESTS FOR LATER

Request initiators may save the request by clicking on the ***Save for Later*** button.

1. Click on the ***Save for Later*** button



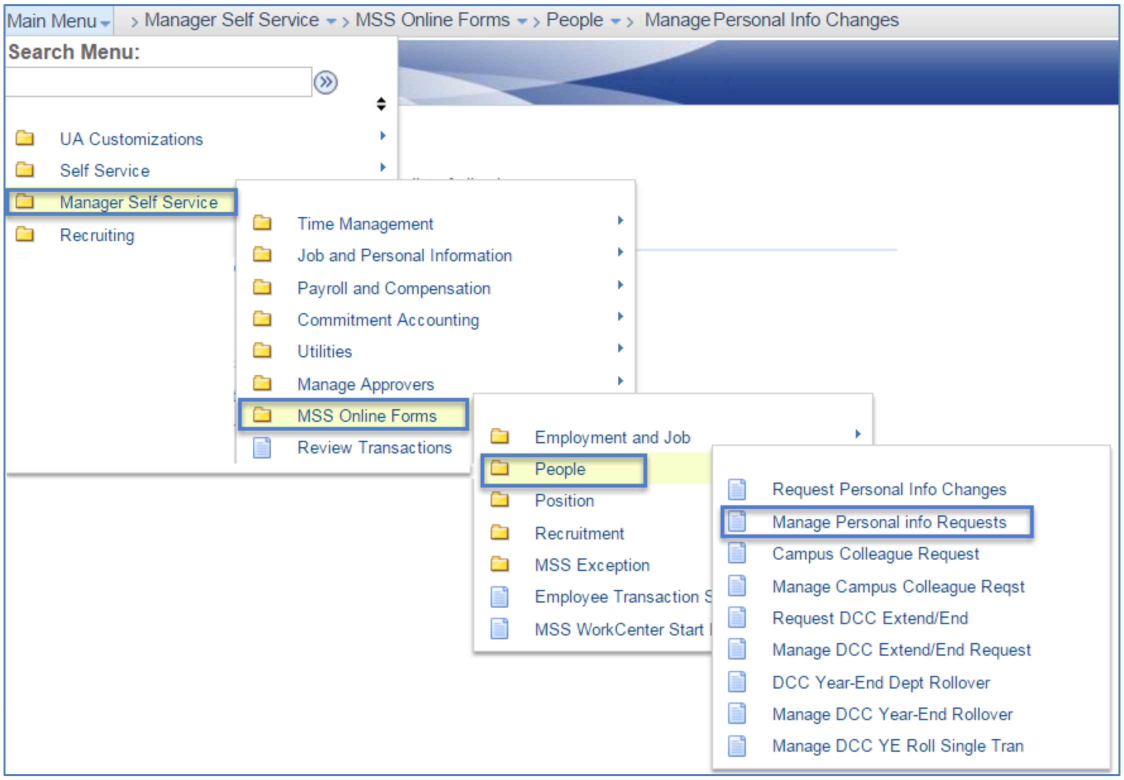
The saved transaction will remain in the ***Save for Later*** status until action is taken to either submit or withdraw the request or 30-days from the request creation—whichever comes last.

MANAGING REQUEST NAVIGATION OPTION

The **Manage Personal Info Requests** navigation option is used to access transactions for approving, denying, withdrawing or viewing submitted requests.

To navigate to the Manage Personal Info Requests Search Page:

1. Select ***Manager Self Service*** from the Main Menu
2. Click on ***MSS Online Forms***
3. Click on ***People***
4. Click on ***Manage Personal Info Changes***
5. Enter the search criteria and click on the ***Search*** button to access and retrieve the desired transaction



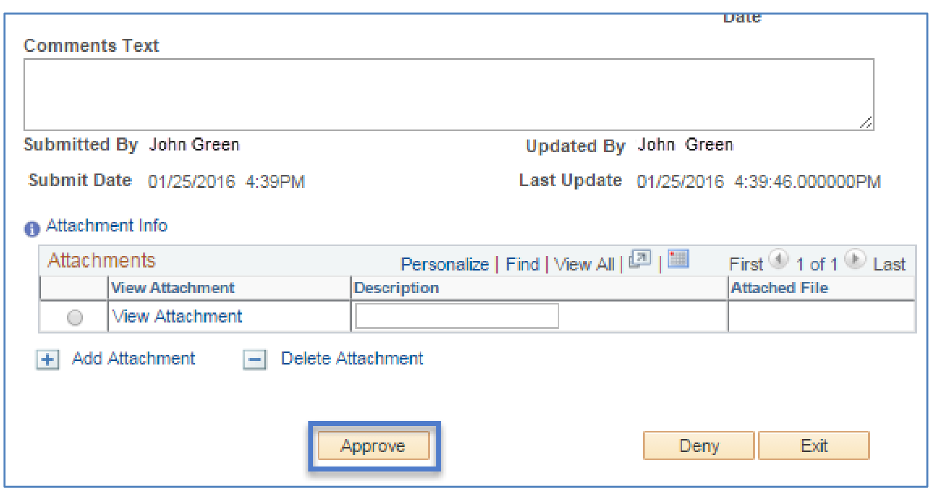
APPROVING REQUESTS

Personal Information Change requests pending approval can either be accessed through the pagelet or the ***Manage Personal Info Requests*** page.

Note: The option to approve a request will only appear if the user has both the appropriate approval role and is the next step in the approval chain.

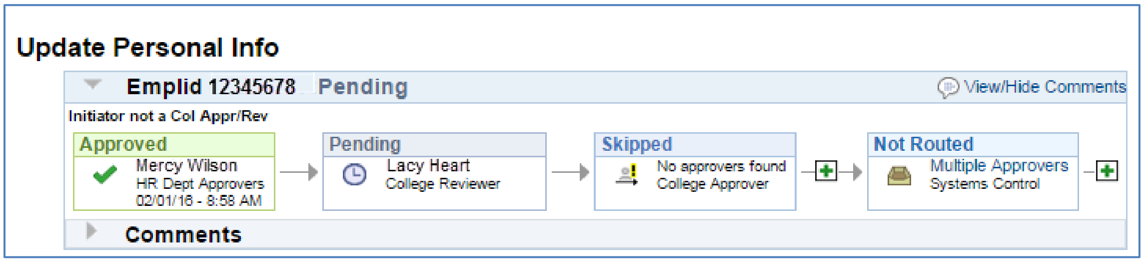
To approve a Personal Information request:

1. Click on the ***Approve*** button



CONFIRMING APPROVED REQUESTS

Once the Personal Information request is approved, the workflow routing displays the transaction status at the bottom of the page with the approved step highlighted in green.

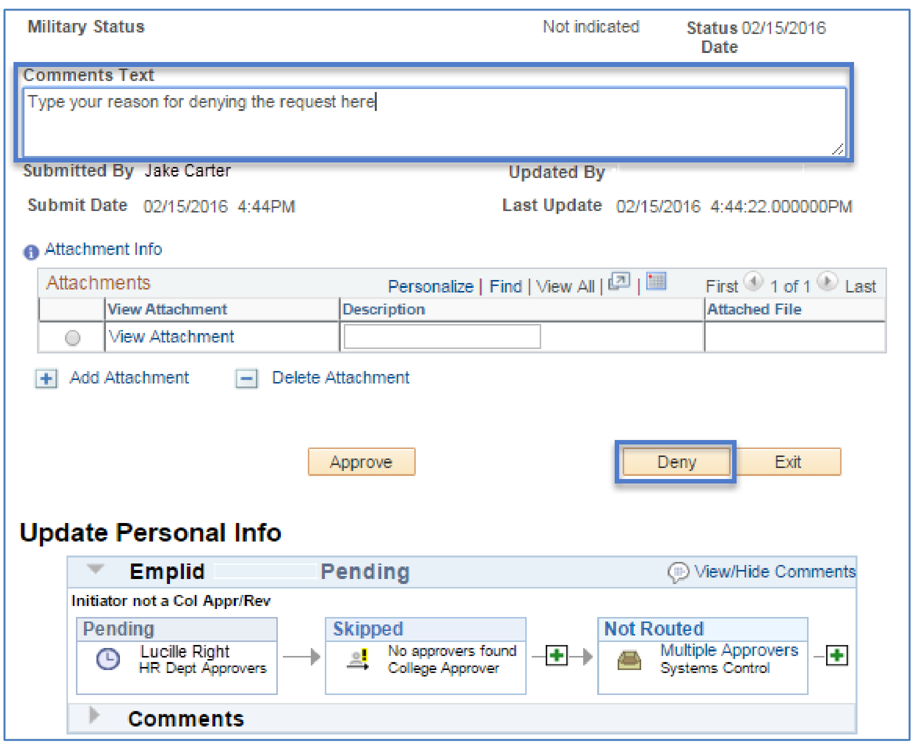


DENYING REQUESTS

Personal Information requests may be denied by individuals with approval roles once the transaction routes to their step in the approval chain. The pending requests can either be accessed through the pagelet or the ***Manage Personal Info Requests*** page (see Managing Personal Information Request Navigation section for navigation – pg.21).

To deny a personal information request:

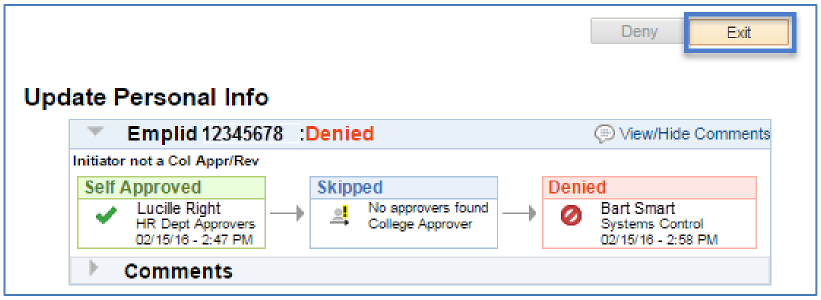
1. Type the reason for denial in the ***Comments*** section
2. Click on the ***Deny*** button



CONFIRMING DENIED REQUESTS

- A confirmation page displays the request and denied status in view only mode.
- The process monitor at the bottom of the page also indicates the request has been denied.
- An email is sent to the initiator notifying him/her of the denied request.

1. Click on the ***Exit*** button to return to the search menu



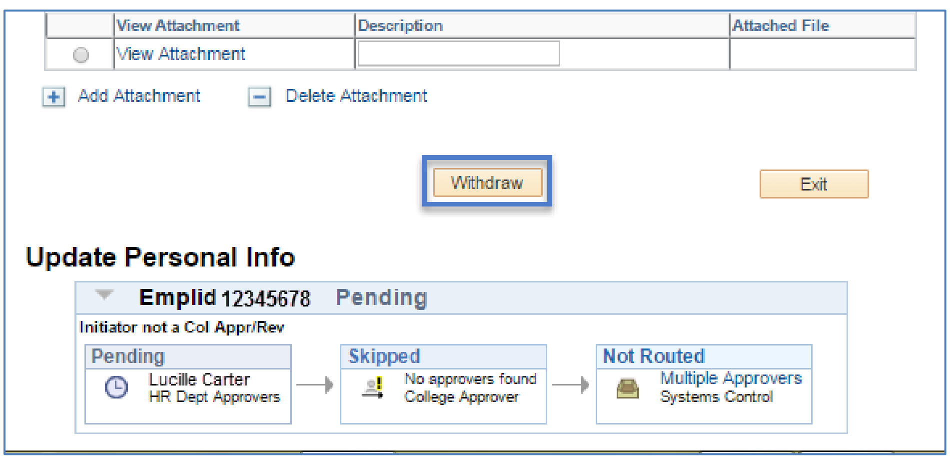
WITHDRAWING REQUESTS

Initiators have the ability to withdraw Personal Information requests by accessing the specific transaction in the ***Manage Personal Info Requests*** page (see Managing Personal Information Request Navigation section for navigation – pg.21).

- Withdrawing the request cancels the transaction and stops it from routing to pending approvers.
- Initiators may withdraw a request at any step prior to the final approval.
- The transactions are stored for 30 days and may be cloned to create a new request.

To withdraw a request:

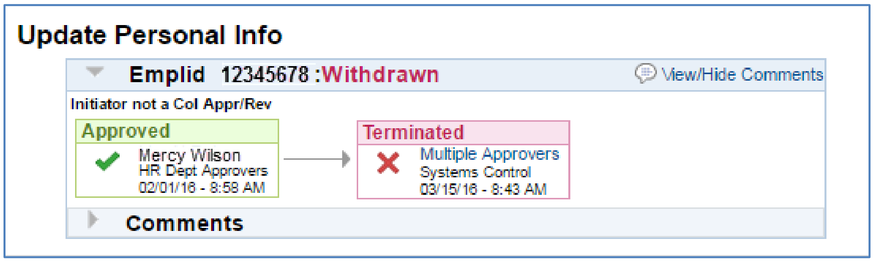
1. Access the transaction by entering the search criteria
2. Click on the ***Pending*** transaction you wish to withdraw
3. Click on the ***Withdraw*** button



CONFIRMING WITHDRAWN REQUESTS

- A confirmation page displays the request and withdrawn status in view only mode.
- The process monitor at the bottom of the page also indicates the request has been withdrawn.
- An email is sent to the initiator notifying him/her of the denied request.

1. Click on the ***Exit*** button to return to the search menu



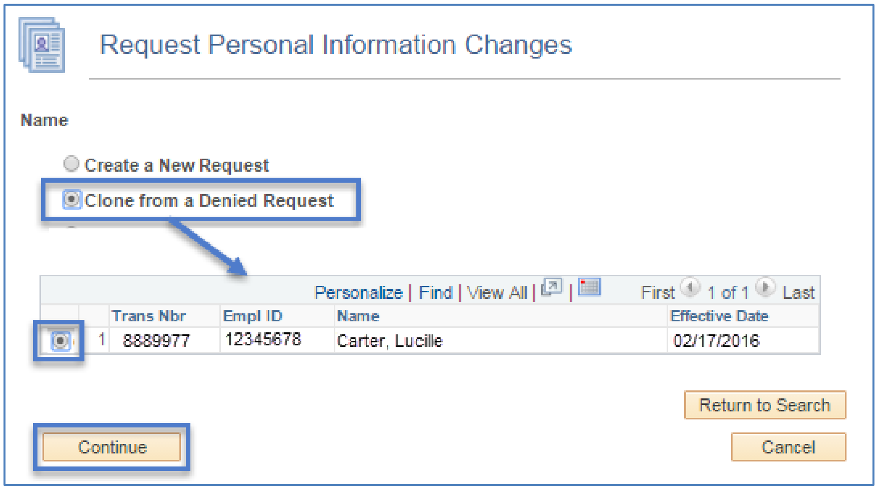
CLONING DENIED REQUESTS

Initiators may clone denied Personal Information requests by accessing transactions in the ***Request Personal Info Changes*** page (see Navigating the Manager Self Service Menu – pg. 4).

- The option to clone a request is available up to 30 days after it was initially denied.

To clone a denied Personal Information request:

1. Access the denied request by entering either the EmplID or Last/First Names
2. Click on the ***Search*** button
3. Click on the radio buttons to both ***Clone from a Denied Request*** and select the person's withdrawn transaction
4. Click on the ***Continue*** button



- Cloning COPIES the previous fields and information to a NEW request form where the information may be completed or modified.
- A new transaction ID will be assigned to the cloned transaction.

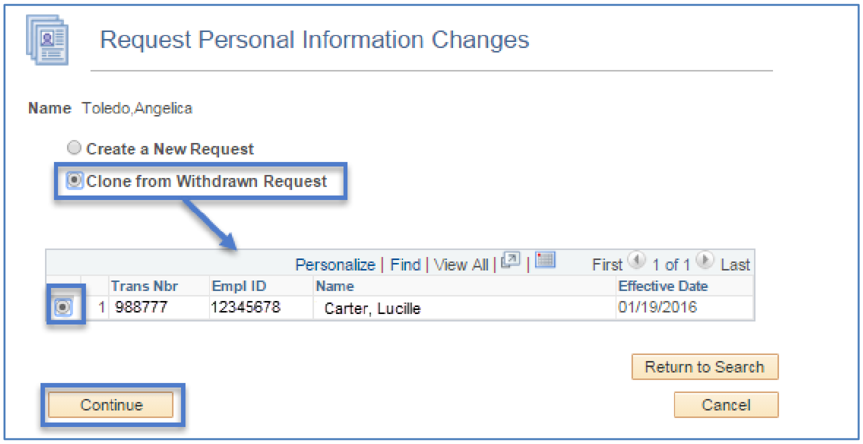
CLONING WITHDRAWN REQUESTS

Initiators have the ability to clone withdrawn Personal Information requests by accessing the employee transaction in the ***Request Personal Info Changes*** page (see Navigating the Manager Self Service Menu – pg. 4).

- The option to clone a request is available up to 30 days after it was initially withdrawn.

To clone a withdrawn Personal Information request:

1. Access the withdrawn request by entering either the EmplID or Last/First Names in the search criteria
2. Click on the ***Search*** button
3. Click on the radio buttons to both ***Clone from a Withdrawn Request*** and select the withdrawn transaction
4. Click on the ***Continue*** button



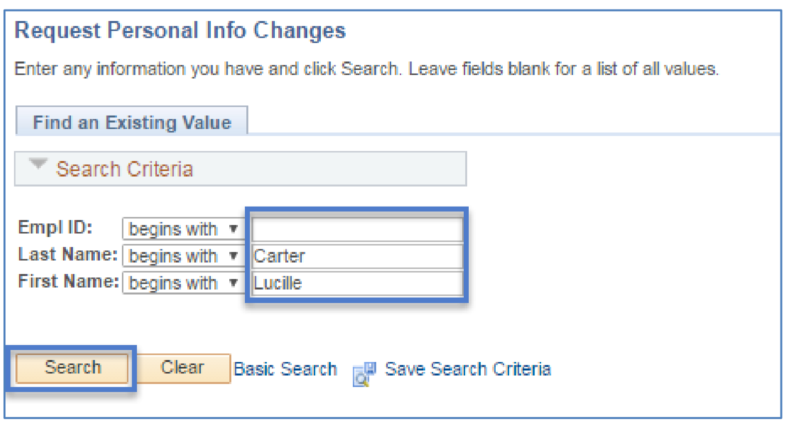
- Cloning COPIES the previous fields and information to a NEW request form where the information may be completed or modified.
- A new transaction ID will be assigned to the cloned transaction.

ACCESSING SAVE FOR LATER REQUESTS

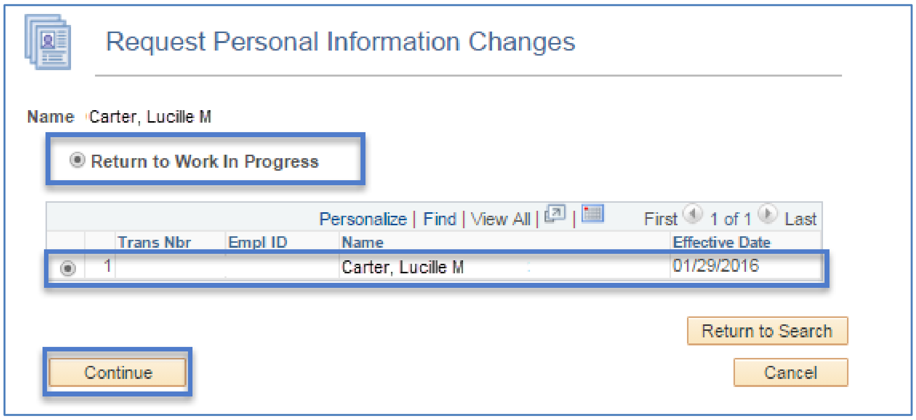
Initiators can return to saved Personal Information requests by accessing the employee's transaction in the ***Request Personal Info Changes*** page (see Navigating the Manager Self Service Menu – pg. 4).

- A radio button will appear with description ***Return to Work in Progress***.
- The user has the option to select a saved request for cloning up to 30 days after it was initially saved.

a. Enter the Empl ID, or Last Name and/or First Name
b. Click on the ***Search*** button



c. Click on the radio buttons for both the ***Return to Work in Progress*** and the person's saved transaction
d. Click on the ***Continue*** button



REVIEWING REQUESTS PENDING APPROVAL

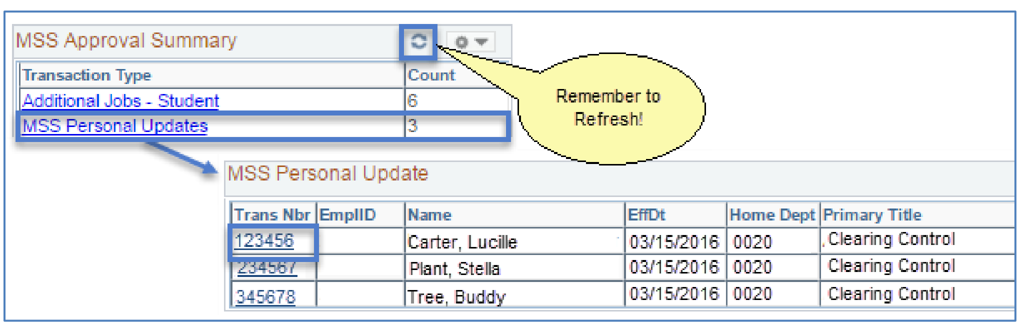
Request pending approval may be viewed in two formats:

- Pagelet
- Manage Personal Info Requests page

PAGELET

The UAccess Employee main page displays a ***Pagelet*** summary listing the transactions pending the individual approver's action.

- The ***Pagelet*** provides a ***Transaction*** link directly to requests awaiting the user's approval.
- Each transaction type displays a total count of pending requests in the approver's queue.
- The approver is directed to the list of pending transactions based on the ***Transaction Type*** selected on the MSS Approval Summary pagelet.
- The ***Trans Nbr*** link navigates directly to the transaction selected for review and/or approval.



- The ***Home*** link to the right of the UAccess Employee branding will return the user to the MSS approval Summary Pagelet from any page.

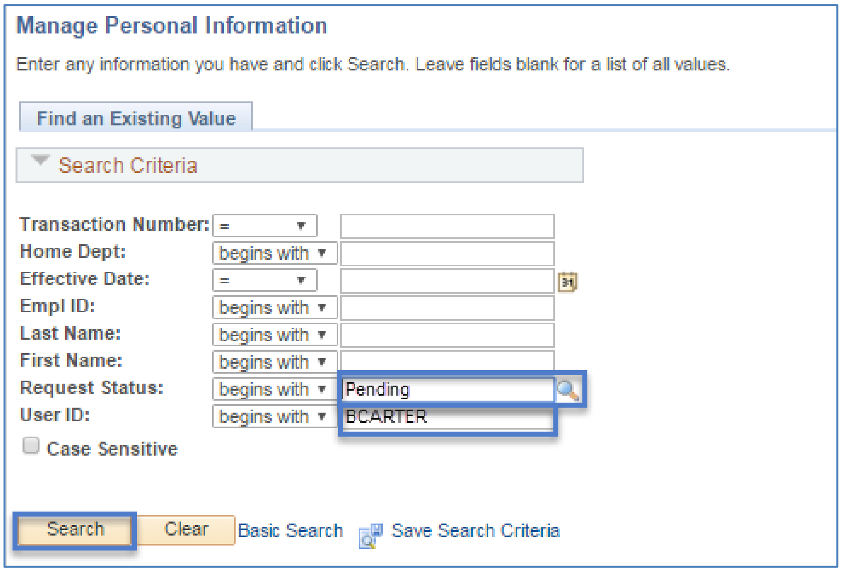
Note: The Transaction Type link will not appear if there are no requests awaiting the user's approval.

MANAGE PERSONAL INFORMATION PAGE

The ***Manage Personal Info Requests*** page provides an option for viewing transactions in any status including approved, denied, pending or withdrawn requests.

- The search function limits the listed results based on the criteria entered or selected.

- An approver may choose to use the search feature rather than the pagelet to access requests that are awaiting his/her approval by selecting the ***Pending Request Status*** and entering his/her UserID.



Note: Save for Later transactions may only be accessed from the Request Personal Information Changes page and are not available through Manage Personal Information Requests.

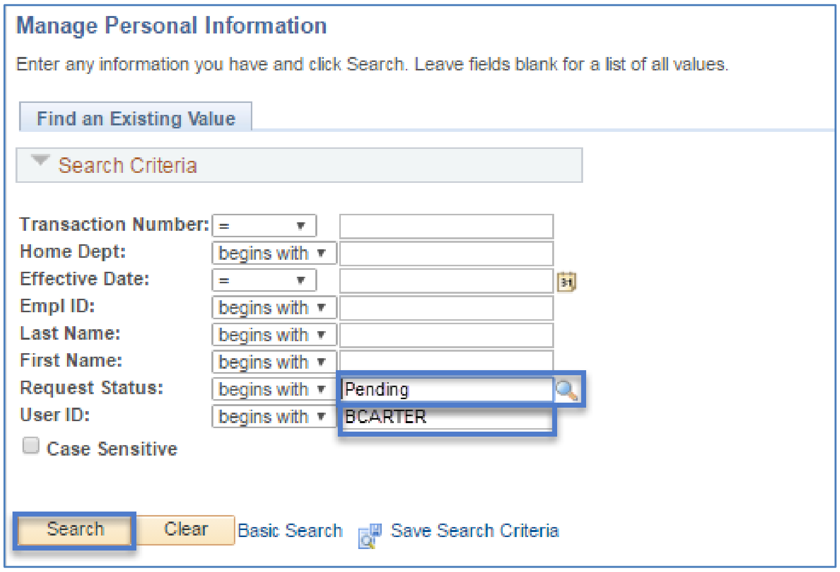
DETERMINING REQUEST STATUS

The ***Manage Personal Info Requests*** page allows users with the UAccess Employee Position Cross-Reference role to search for approved, denied, pending or withdrawn personal information transactions.

- The search function limits the listed results based on the criteria entered or selected and may be used track the status of transactions submitted by an initiator.
- The user's role and current approval step will determine whether the record is view only or available for change or approval.

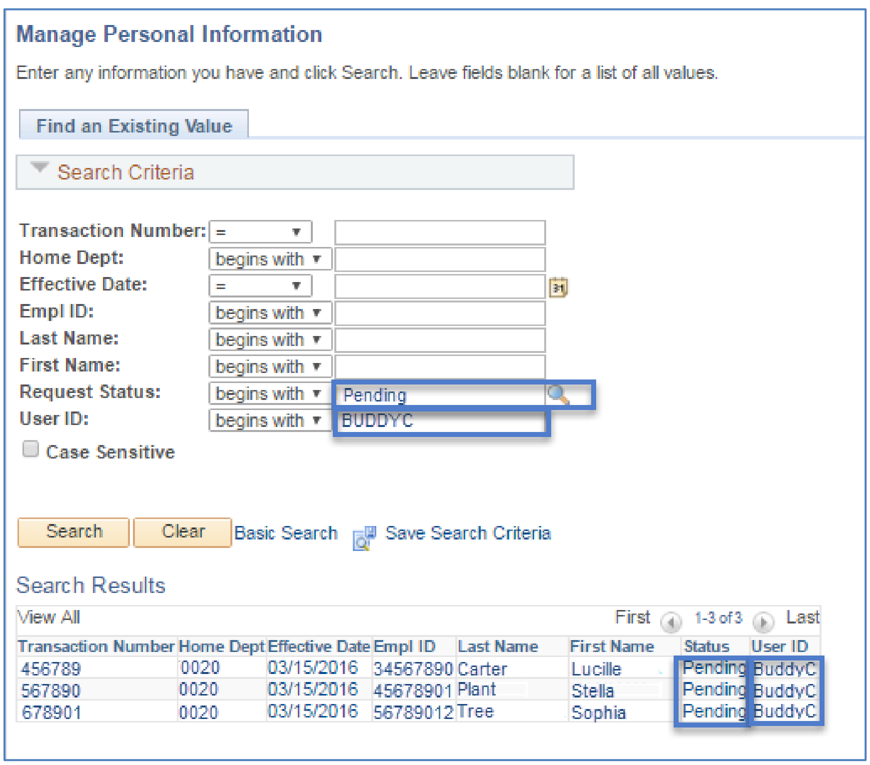
To search and retrieve Personal Information Change requests:

1. Enter the initiator's NetID or other criteria listed in the Search dialog box
2. Click on the ***Search*** button



A list of values meeting the search criteria is displayed

1. Click on any of the values listed to access specific transactions

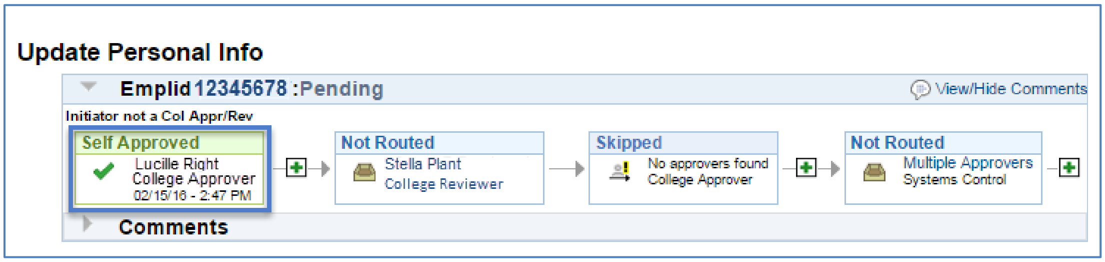


WORKFLOW

Workflow steps are determined by the roles provisioned within a college, division or department and may be ***Self*** or ***Auto Approved*** or ***Skipped*** based on business rules established for personal information change requests.

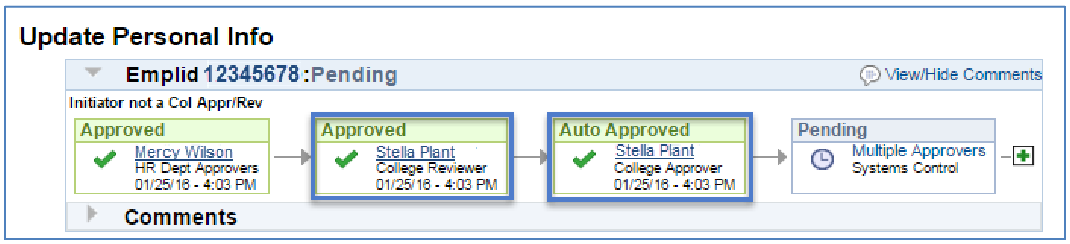
SELF APPROVAL

Transactions initiated by HR Dept, College Reviewer or College approvers self-approve [the initiator's approval step(s)] upon submittal.



AUTO APPROVAL

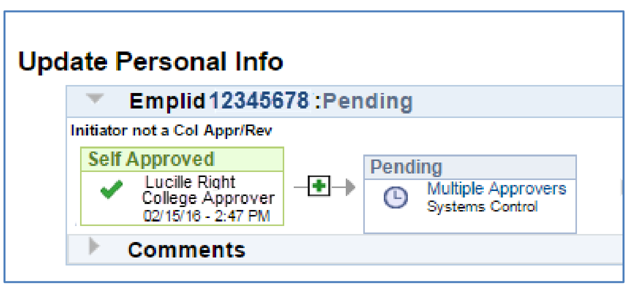
Approvers with more than one provisioned role within a workflow routing simply approve transactions once—the second step ***Auto Approves***.



COLLEGE APPROVER INITIATED REQUEST

Requests initiated by College Approvers

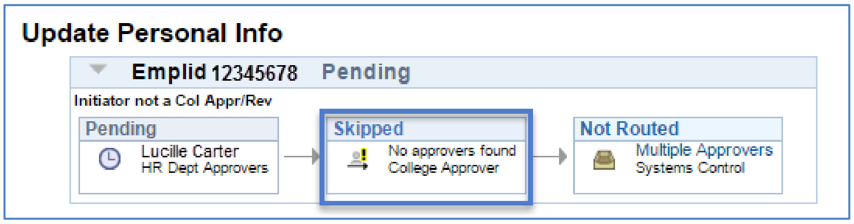
- Generate an email notification to the HR Department Approvers.
- Automatically route to Systems Control upon submission.



SKIPPED STEPS

Steps are skipped when users are not provisioned with approver roles included in the workflow routing.

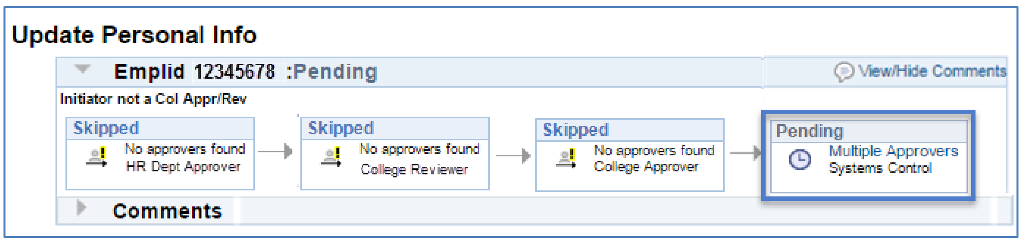
- At least one ***HR Dept*** or ***College*** approver is required to successfully load a transaction.



NO APPROVERS FOUND

An Error Step occurs when users are not provisioned for any of the roles in the workflow path.

- All steps are skipped if no approvers are assigned.
- A Systems Control Approver will assist with the transaction routing.



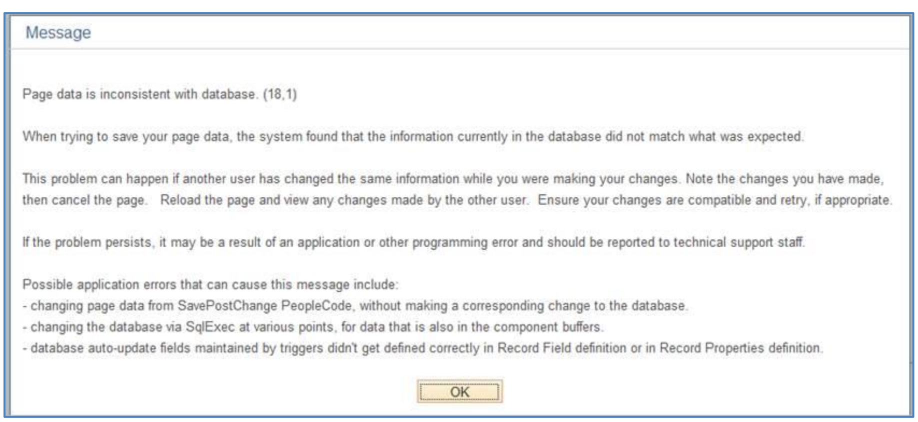
ERROR/WARNING MESSAGES

Error or warning messages may occur when users initiate or approve documents that conflict with other pending actions or requests.

ANOTHER APPROVER HAS TAKEN ACTION

A single step may have multiple approvers who may simultaneously review a transaction; however, only ONE can take action to approve or deny the request.

The following message displays when two approvers view a transaction simultaneously and attempt to approve or deny the request at the same time—the first approval/denial is processed.


Message

Page data is inconsistent with database. (18,1)

When trying to save your page data, the system found that the information currently in the database did not match what was expected.

This problem can happen if another user has changed the same information while you were making your changes. Note the changes you have made, then cancel the page. Reload the page and view any changes made by the other user. Ensure your changes are compatible and retry, if appropriate.

If the problem persists, it may be a result of an application or other programming error and should be reported to technical support staff.

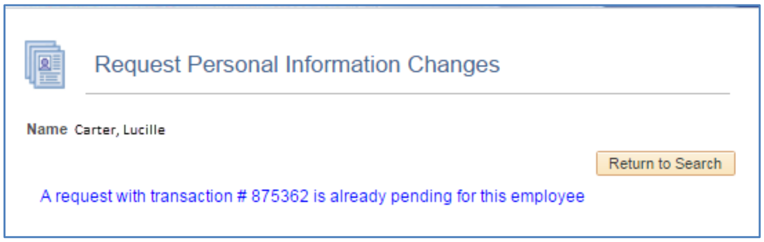
Possible application errors that can cause this message include:
- changing page data from SavePostChange PeopleCode, without making a corresponding change to the database.
- changing the database via SqlExec at various points, for data that is also in the component buffers.
- database auto-update fields maintained by triggers didn't get defined correctly in Record Field definition or in Record Properties definition.

OK

PENDING REQUEST

Requests are limited to one Personal Information Change transaction per employee at a time. An error message appears if an initiator attempts to submit a Personal Information Change request where another document is pending for same employee and transaction type.

- The transaction # is listed to assist users look up the transaction in ***Manage Personal Info Requests*** to determine who initiated the request.
- The initiator of the first request has the option of withdrawing the pending transaction if he/she considers it appropriate.



CONTACT INFORMATION

If you are experiencing problems or just have questions about the Manager Self Service Personal Information Request, please contact the Workflow Administrators.

WHO TO CALL???

E-mail is the best communication method for contacting the Workflow Administrators. Please include both administrators when emailing. Their contact information is:

1. Tamara Castillon – tbc1@email.arizona.edu
   - Phone: (520)621-0141
2. Esperanza Gallagher– espieg@email.arizona.edu
   - Phone: (520)621-7360

REVISION HISTORY

Document Contributors

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Change Control Log

Version	Date	Description of Change	Contributor
1.0.0	04/28/2015	Initial Draft	Esperanza Gallagher
2.0.0	03/16/2016	Revision	PRis Cantu