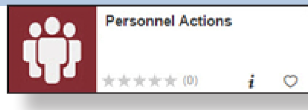
PERSONNEL ACTIONS—QUICK REFERENCE GUIDE

Access Personnel Actions



- Go to insideND.
- In the ***Search*** field, enter **Personnel.**
- Click **Personnel Actions.**
- You will be taken to the *Personnel Actions* home screen showing Actions that you have submitted.

Main Dashboard

Action Required:

Returned for Correction

Actions that were returned to submitter for correction

To correct:

1. Click on the **Action** to open.
2. Make necessary edits.
3. Click **Review Form** to check for errors.
4. Click **Submit** when it is ready for submission.

Your Approvals

Actions that require your approval before they can be completed.

To approve:

1. Click on the **Action** to open.
2. Click **Approve** to approve the action.

If the information is not correct:

- Edit the Action by clicking **Edit** or
- Return the form for correction to the submitter by clicking **Return for Correction**.

Unsubmitted

Actions that were saved but not yet submitted

To submit:

1. Click on the **Action** to open.
2. Click **Review Form** to check for errors.
3. Click **Submit** when it is ready for submission.

In Process:

Pending Approval

Submitted Actions that are pending approval from other non-HR approvers before they can be completed

Pending HR

Actions awaiting review by HR

Locked by HR

Actions locked by HR

Completed:

Submitted to Payroll

Actions submitted to Payroll

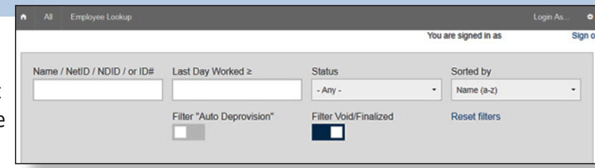
Pending Banner

Actions that have been successfully submitted and are awaiting Banner to load with the updates

Finalized Actions

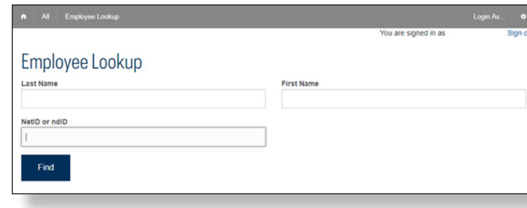
Actions that have been finalized

All Actions



The **All** page provides search options for Actions in your organization. Enter data or select from any of the filters to view the results.

Employee Lookup



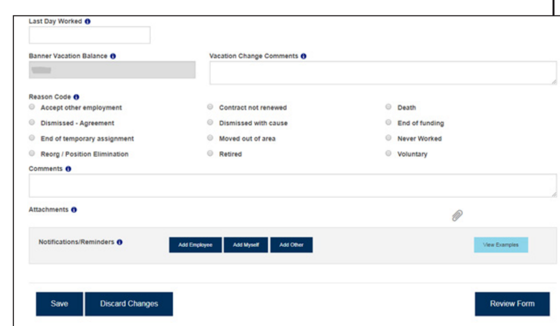
NOTE: In order to perform *any* Action, first look up the employee on the ***Employee Lookup*** page.

1. Enter the employee's **Last Name**, **First Name** and **NetID** or **ndID**.
2. If ***NetID*** or ***ndID*** is left blank:
   - Employee info will still be displayed.
   - If there are multiple employees with the same name, you will be asked to choose between them to proceed.
3. Click **Find**.

Beginning Separation Actions

Fields may vary depending on employee type (staff, temp, postdoc, faculty).

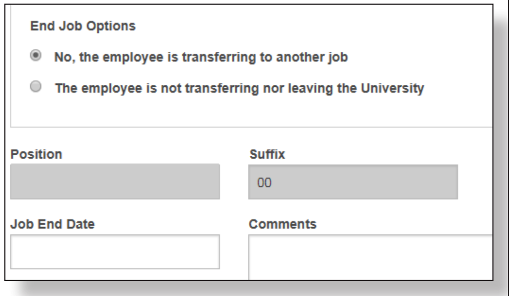
1. In ***Employee info*** screen, click on **Separation**.
2. Enter **Last Day Worked**.
3. If the ***Vacation Balance*** is incorrect, enter a comment to explain what it should be and why.
4. Choose a ***Reason Code*** and add a comment if appropriate.
5. If a resignation letter is tendered, attach a PDF of it by clicking on the paper clip.
6. If someone needs to be notified of the separation, click **Add Notification** and enter needed information. *These notifications will be sent as soon as the form is submitted.*
7. To send a dated reminder with information related to the collection of the employee's assets, choose **Add Employee**, **Add Myself** or **Add Other**.
   - Reminders can be sent to employees or to others such as managers. Click on **View Examples** to see what would be sent.
   - You can send to multiple people.
   - You can set the date the reminder will be sent.
8. To Review and Submit:
   - Click **Review Form** to check for errors.
   - Click **Submit** when it is ready for submission.
   - Click **Save** to save the changes without submitting. This does ***not*** move the job Action on to HR.



Beginning End Job Actions

Fields may vary depending on employee type (staff, temp, postdoc).

1. Select the **Jobs** tab.
2. In the ***Employee info*** screen, click the **x** icon to end a job.
3. Respond to the question: ***Is the employee leaving the University?***
4. Enter the **Job End Date**.
5. Enter a comment in the ***Comments*** field, if necessary, to explain why the job is ending.
6. To Review and Submit:
   - Click **Review Form** to check for errors.
   - Click **Submit** when it is ready for submission.
   - Click **Save** to save the changes without submitting. This does ***not*** move the job Action on to HR.
   - Click **Discard Change**s to discard any changes that have been made.



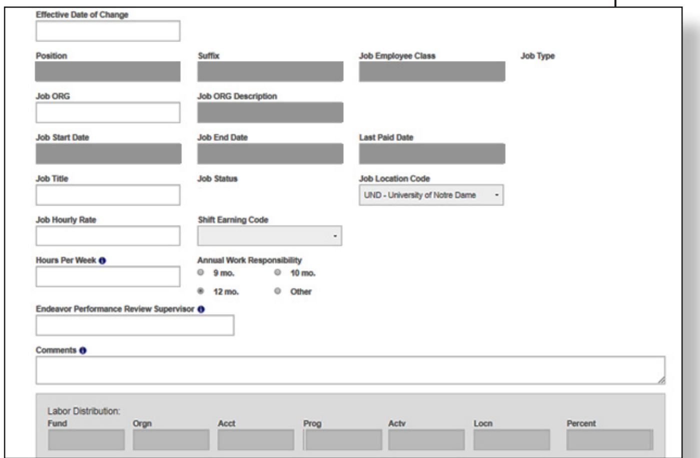
When to use the End Job functionality:

If the current position is ending, but the employee is not separating because the employee has other position(s) at the University.

Beginning Job Change Actions

Fields may vary depending on employee type (staff, temp, postdoc).

1. Select the **Jobs** tab.
2. In the ***Employee info*** screen, click the pencil icon to change a job.
3. Enter the **Effective Date of Change**.
4. Make any other necessary updates by changing the value that is in the editable field(s).
5. Enter a comment in the ***Comments*** field, if necessary, to explain why the job is changing.
6. Add additional **Notifiers**, if necessary, in the ***Notifications*** section.
7. Add additional **Approvers**, if necessary, in the ***Approvers*** section.
8. To Review and Submit:
   - Click **Review Form** to check for errors.
   - Click **Submit** when it is ready for submission.
   - Click **Save** to save the changes without submitting. This does ***not*** move the job Action on to HR.
   - Click **Discard Changes** to discard any changes that have been made.



When to use the Job Change functionality:

- If an employee's *Job Title* changes
- If an employee's Annual Work Responsibility changes

Beginning Add Job Actions

Fields may vary depending on employee type (staff, temp, postdoc).

1. Select the **Jobs** tab.
2. In the ***Employee info*** screen, click the **+** icon to add a job.
3. Select the appropriate **Job Category**.
4. Select the **Job Org**, **Position**, and **Suffix** and click on **Add Job**.
5. Respond to: ***Is this a transfer?***
6. Respond to the address question.
7. Enter the **Effective Date of New Job**.
8. Enter the **Job Title**, **Job Location**, **Job Hourly Rate/Job Salary**, **Shift Earning Code**, **Hours Per Week**, **Annual Work Responsibility**, and **Endeavor Performance Review Supervisor**.
9. Enter a comment in the ***Comments*** field, if necessary, to explain why the job is being added.
10. Enter or Edit the FOAPAL information in the ***Labor Distribution*** section.
11. Add additional **Notifiers**, if necessary, in the ***Notifications*** section.
12. Add additional **Approvers**, if necessary, in the ***Approvers*** section.
13. To Review and Submit:
    - Click **Review Form** to check for errors.
    - Click **Submit** when it is ready for submission.
    - Click **Save** to save the changes without submitting. This does ***not*** move the job Action on to HR.
    - Click **Discard Change**s to discard any changes that have been made.