

Create PAF Transactions



Create PAF Transactions

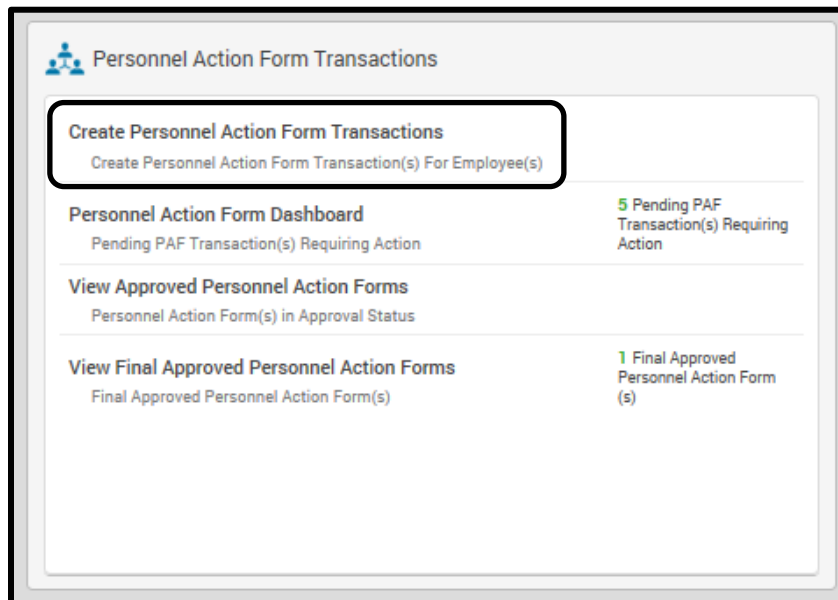
Table of Contents:

Create Personnel Action Form Transactions	3
Generate a COBRA Notice after Terminating an Employee	8
Send a Personnel Action Form to Employee Self-Service	9

Create Personnel Action Form Transactions

After you have set up company locations, position families, salary grades and positions and assigned position titles to employees, you are ready to start creating Personnel Action Form Transactions.

To begin, select “Create Personnel Action Form Transactions.”



Select the employee(s) for whom the PAF is being created.

Using the Search Method allows you to change how the employees are displayed. The Search Method box defaults to all employees, but you can change the search method to Employee Search Box for All, Active or Non-Active employees to reduce the employee count. You can also choose the Employee Advanced Search to filter to specific employees. The Employee Advanced Search option allows you to search for employees by multiple fields at once such as Employee, Pay Type, Schedule Group, Employee Status and Pay Classes. Once you have selected your Search Method, you can select “Save” to make this your default search method.

The Quick Search filter is beneficial if you have a specific employee for whom you are searching as it allows you to filter by employee. Type in the name of the employee and the employee list will populate with any employees who match that search criteria. To return to the full list of employees, select “Clear Search.”

To learn more about the Search Method and Quick Search filters, refer to the “Filtering within the Paycom System” manual on the Help Menu.

Create PAF Transactions



You can choose to create a PAF for one employee at a time by selecting the employee's name. If you want to create a PAF for more than one employee at a time, select the box next to each employee you would like and then select "Batch PAF Menu."

Select	Employee Name	Pending PAF Exists	Position Title	Department	Position Status	Hire Date
<input type="checkbox"/>	ADAMS, FRANK (ADAF)			Clerical		07/17/2014
<input checked="" type="checkbox"/>	AFLAC, AMANDA (AFLA)	Yes		Sales		07/17/2014
<input checked="" type="checkbox"/>	ANDERSEN, ERIKA (ANDE)	Yes	Sales Representative	Clerical	Full Time	07/17/2014
<input type="checkbox"/>	ANDERSEN, JOHN (8359)			Clerical		03/26/2014
<input checked="" type="checkbox"/>	ANISTON, MELODY (ANIM)	Yes	Marketing Specialist	Clerical		00/00/0000
<input type="checkbox"/>	BLACK, TIFF (BLAT)			Marketing	Part Time	00/00/0000
<input type="checkbox"/>	BOTTOM, SHINES (BOTS)			Clerical		00/00/0000
<input type="checkbox"/>	BRADBURY, LARA (BRAL)		Marketing Specialist	Clerical	Full Time	04/01/2013

The employee(s) you selected will be displayed under the "Employee" header. Select a Personnel Action Type for your employee(s) from the drop-down menu.

Create Batch Personnel Action Form Transactions - 3 Employees Selected

* Select a personnel action type for your employee

* Effective Date

Comments

Upload Supporting Documentation

* Submit to

Employee

- ABRAMS, PAUL (ABRP)
- ACKERSON, MELODY (ACKM)
- ADAMS, FRANK (ADAF)

Create PAF Transactions



You must choose an effective date. Remember that any payrolls on or after this date will include any pay rate changes, and will be in effect for the whole pay period.

When changing an employee's pay rate through a PAF, the estimated annualized amount will show beneath that new rate. Enter the new rate as per hour or per pay period and the system will calculate the estimate based on 2,080 hours annually.

Employee Information				
Employee Name	Position Title	Department	Position Status	Hire Date
AFLAC, AMANDA	Marketing Specialist	Accounting		00/00/00

* Select a personnel action type for your employee
Change Employee Position and Compensation Information

* Select a position and compensation change type
Promotion

* Effective Date
06/29/2015 (**Any payroll processed on or after this date will include these changes)

Department
From Accounting To

Position Family
From Marketing To

Position Title
From Marketing Specialist To

Position Status
From To

Primary Supervisor
From FREEMAN, ROGER () To

Secondary Supervisor
From HARRIS, LINDSEY () To

Tertiary Supervisor
From To

Quaternary Supervisor
From To

PTO Approval Supervisor
From To

Talent Management Supervisor
From CHELSEA JENSEN To

New Pay Rate
Current Estimated Annual Salary \$20800.00

Reason for Position/Compensation Change

Depending on the Personnel Action Type that is chosen, you might be prompted to clarify what type of change it is.

In the drop-down for "Reason for Position/Compensation Change," the change reasons that were created during the setup process will appear.

Create PAF Transactions



Each drop-down option includes information set up previously and will be updated in the appropriate location throughout the Paycom system. *Note: If you create a PAF for an employee's transfer and you have Paycom's Labor Allocation feature, you are able to update the employee's Labor Allocation fields.*

Employee Information						
Employee Name	Position Title	Department	Position Status	Hire Date	Salary Grade	Salary/Hourly Rate
AFLAC, AMANDA	Marketing Specialist	Accounting		00/00/0000	Marketing	\$10.00/Hr.

* Select a personnel action type for your employee:

* Effective Date: (**Any payroll processed on or after this date will include these changes)

Department: From Accounting To

Location: From To

Position Family: From Marketing To

Position Title: From Marketing Specialist To

Hire Date:

Rehire Date:

Termination Date:

Workers Comp Rate: From OK008810 To

Tax Profile: From 1 - OK/OK/OK To

Primary Supervisor: From FREEMAN, ROGER () To

Comments:

Upload Supporting Documentation: Browse...

* Submit to:

Also on this page, you can:

- Add any comments that should be attached to the PAF.
- Browse and upload any supporting documentation.
- Choose the next user who will review the PAF from the drop-down.

“Submit” will send the PAF forward to the next reviewer you choose in the “Submit to:” drop-down and a notification will appear on their Paycom home menu.

“Submit & Email” sends an email notification that a PAF has been received to the next reviewer and a notification will appear on their Paycom home menu.

Create PAF Transactions



You can create a PAF to make an employee's status Active (for example, re-hire or an employee returns from leave). You can create a PAF for a Terminated or On Leave employee with the "Change Employment Status of Employee" PAF change type, with a more specific "Make Active" Employment Status type.

The PAF form will show you what the employee's current Form 1: Demographics, Pay Rates and Taxes status is (Active Terminated, On Leave).

The Effective Date that is entered will be the date that flows through as the Rehire or On Leave End date on Form 3: Dates and HR on the effective date. Once the effective date takes place, the employee's status will change on Form 1.

Home > Personnel Action Forms > Create Personnel Action Form Transactions > Create Personnel Action Form Transaction

Create Batch Personnel Action Form Transactions - 1 Employees Selected

* Select a PAF action type for your employee: Termination

* PAF Reason: Involuntary Termination

* Effective Date: 04/26/2017 (**Any payroll processed on or after this date will include these changes)

* Employee Status: TERMINATED

Termination Type: (none)

Termination Reason: Relocation

* ESS Enable/Disable: Disabled (cannot login)

Terminal Access Group:

Benefits Eligibility Profile:

* Termination Reason:

Comments:

Upload Supporting Documentation: Browse...

* Submit to:

Cancel

Submit

Submit and Email Notification
Save as Draft

Employee
ADAMS, MOLLY (1000)

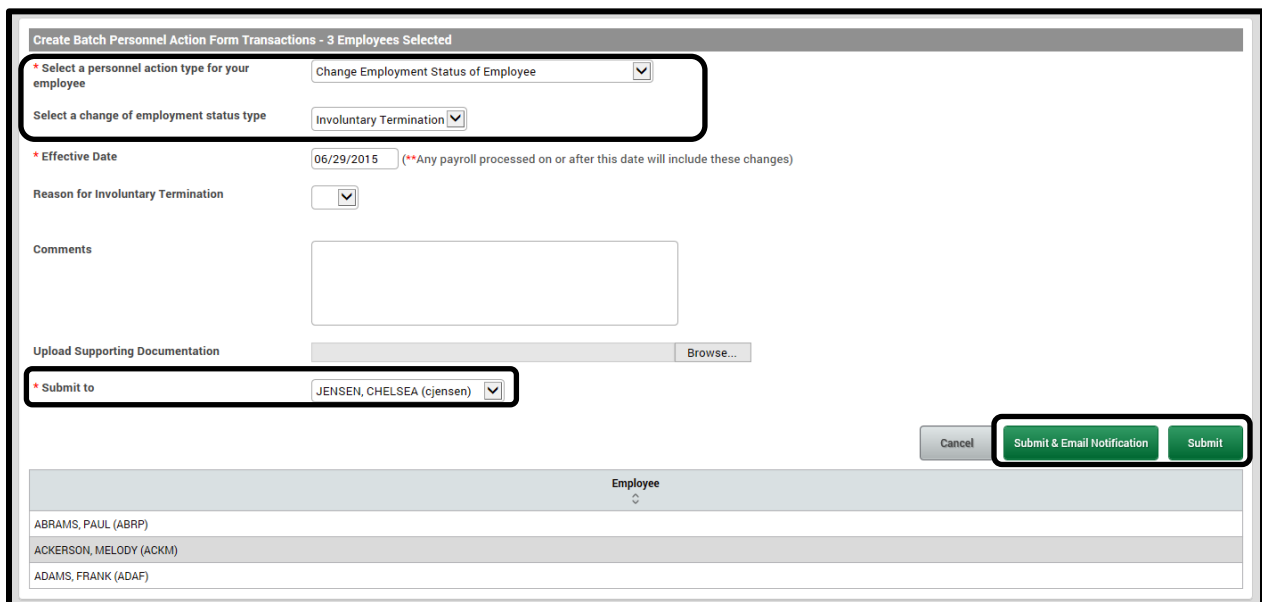
If you're not ready to submit the PAF, you have the option to "Save as Draft." If a manager doesn't have all the necessary information but still wants to get the process started, this option can be useful.

Any saved forms will be stored in your Personnel Action Form Dashboard. When looking at the dashboard, the status will show as a draft. The PAF creator will be the only person who can see the draft version and will be able to filter results by "draft."

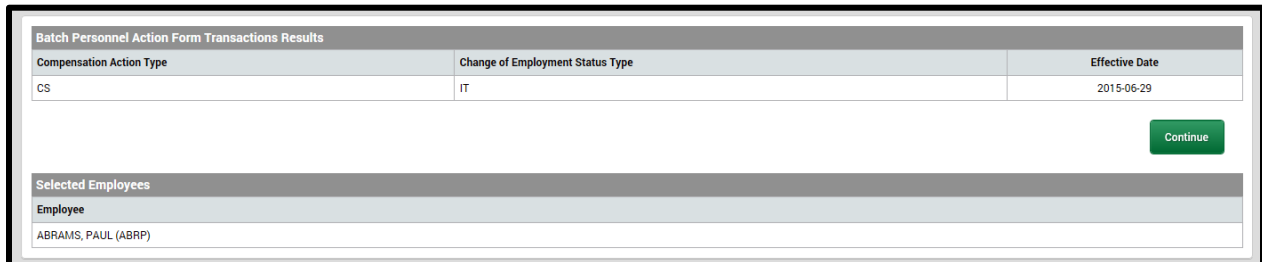
Generate a COBRA Notice after Terminating an Employee

The different features of the Paycom system work together to make it easier for HR professionals to complete all of their needed tasks. If you have Paycom's COBRA feature, you can terminate an employee through a PAF and once submitted, have the option to generate a COBRA notice.

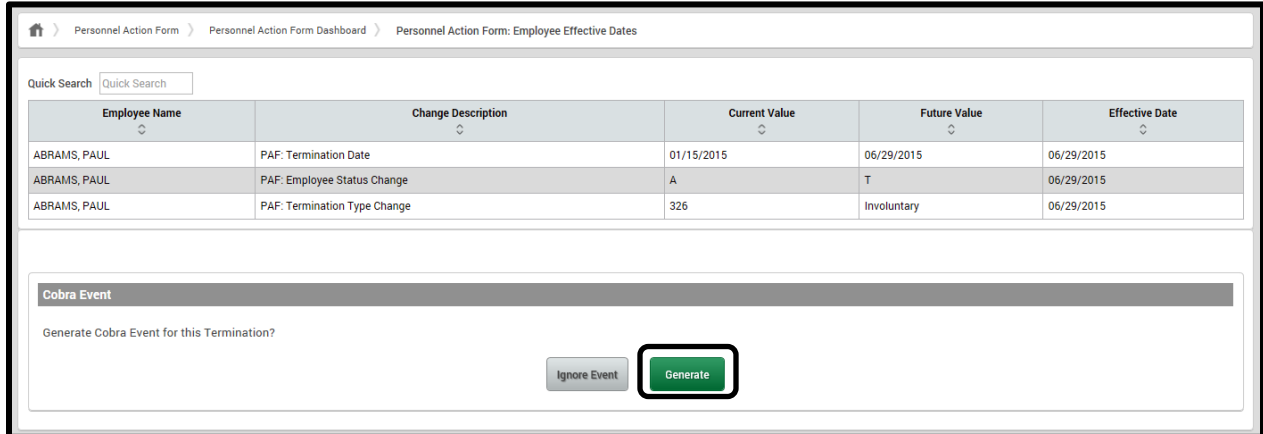
Select a personnel action type for the employee and then select a change of employment status type from the drop-down menus. Then, enter the effective date and reason for the termination. Also, select the manager who will receive and approve the PAF changes. Select "Submit" to continue.



When the reviewing manager approves the PAF, a COBRA notice will be generated automatically.



The final approver will select “Generate” to generate the COBRA notice.



Employee Name	Change Description	Current Value	Future Value	Effective Date
ABRAMS, PAUL	PAF: Termination Date	01/15/2015	06/29/2015	06/29/2015
ABRAMS, PAUL	PAF: Employee Status Change	A	T	06/29/2015
ABRAMS, PAUL	PAF: Termination Type Change	326	Involuntary	06/29/2015

Cobra Event

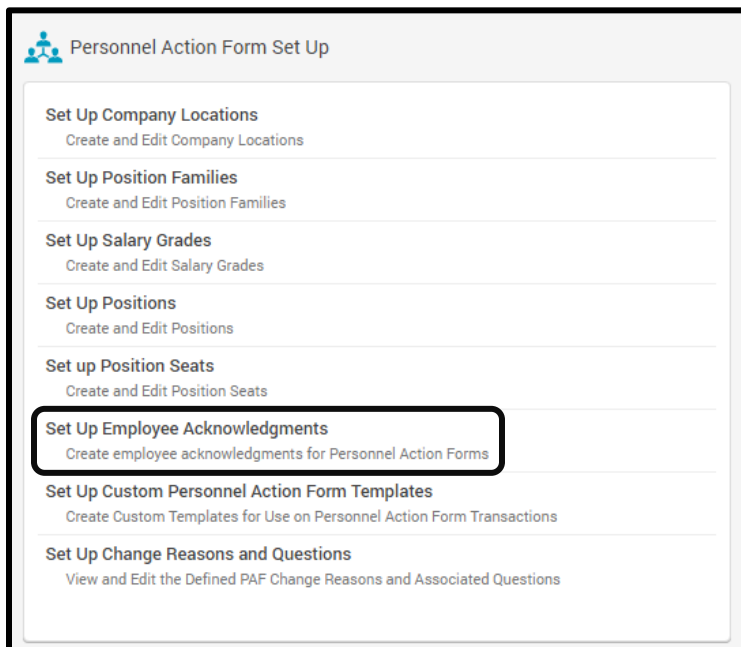
Generate Cobra Event for this Termination?

Ignore Event **Generate**

Send a Personnel Action Form to Employee Self-Service

To begin, edit the applicable ESS Access Profile setup to turn “My Personnel Action Forms” on within the Personnel Action Forms section. By doing so, employees can view a new section for their Personnel Action Forms.

Next, from the Personnel Action Form menu, select to “Set Up Employee Acknowledgments.”



Personnel Action Form Set Up

- Set Up Company Locations**
Create and Edit Company Locations
- Set Up Position Families**
Create and Edit Position Families
- Set Up Salary Grades**
Create and Edit Salary Grades
- Set Up Positions**
Create and Edit Positions
- Set up Position Seats**
Create and Edit Position Seats
- Set Up Employee Acknowledgments**
Create employee acknowledgments for Personnel Action Forms
- Set Up Custom Personnel Action Form Templates**
Create Custom Templates for Use on Personnel Action Form Transactions
- Set Up Change Reasons and Questions**
View and Edit the Defined PAF Change Reasons and Associated Questions

Create PAF Transactions



From here, enter the acknowledgement the employee will confirm when viewing the review. When finished, select “Add New Acknowledgement.”

Personnel Action Form > Set Up Employee Acknowledgments

Add Acknowledgment

* Indicates Required Field

* Acknowledgment Name

Acknowledgement 2016

* Acknowledgment Text

I verify that I have read and accept the terms of the Personnel Action Form.

body p

Add New Acknowledgment

Once the acknowledgment is setup, you will create a Custom Personnel Action Form Template and attach the employee acknowledgment. The option for “Employee Acknowledgment” will display on the Custom Personnel Action Form Template setup screen. When “Yes” is selected, you will be able to use the drop-down menu to select the desired acknowledgment. You can also mark the acknowledgment as required. This will be a user privilege in Permission Profiles and will also apply to users with Setup and Final Approvals access to personnel action forms.

Personnel Action Form > Set Up Custom Personnel Action Form Templates > Personnel Action Form Questions Group

Add/Edit Custom Personnel Action Form Templates

* Indicates Required Field

* PAF Action Type

Transfer

* PAF Reason

Moving to another state

Employee Acknowledgment

☐ No ☒ Yes

Choose Employee Acknowledgment

☐ Is this a required field?

Form

- Employee Form 1
- Employee Form 2
- Employee Form 3
- Employee Form 9
- Employee Form 10

Fields (double-click to add)

- Earning Code
- Labor Allocation Profile
- Department
- Tax Profile

Question #1

Question Type

Yes/No

Delete

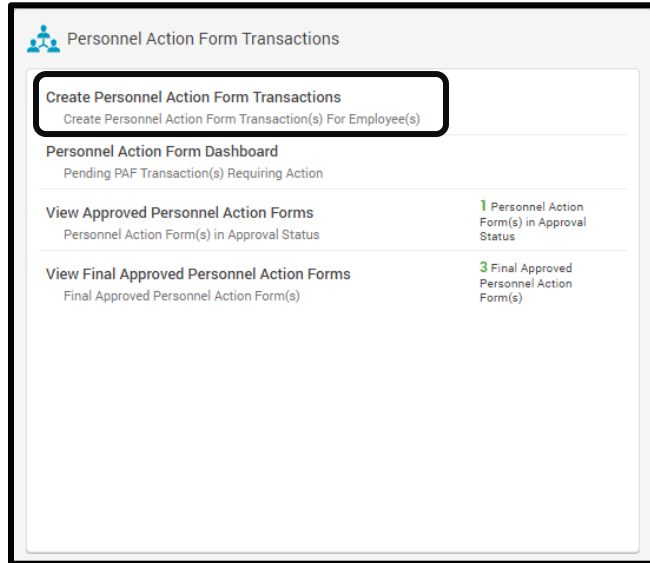
Question Sort Order

0

Create PAF Transactions



Once complete, you have the ability to create a personnel action form and send the form to the employee. To do this, select “Create Personnel Action Form Transactions” from the main menu.



Next, select which employee to generate the personnel action form transaction for.

Select Employee(s) For Personnel Action Form Transactions

Search

Previous

1

Next

Batch PAF Menu

100

Select	Employee Name	Status	Pending PAF Exists	Position Title	Department	Position Status	Hire Date
<input checked="" type="checkbox"/>	ADAMS, BEN (BAFF)	Active	Yes	PSD Specialist	Human Resources	Part Time	07/17/2015
<input checked="" type="checkbox"/>	ADAMS, DYLAN (A016)	Active	Yes	Accounting Admin	Production 1	Part Time	06/08/2006
<input type="checkbox"/>	ADAMS, FRANK (FADA)	Active		HR Administrator	Human Resources		09/20/2016
<input checked="" type="checkbox"/>	ADAMS, STEVEN (SADA)	Active	Yes	Accounting Admin	IT	Full Time	10/16/2015
<input checked="" type="checkbox"/>	ALLEN, KARA (A036)	Active	Yes	Accounting Admin	Accounting	Part Time	03/02/2013

Create PAF Transactions



Using the Custom Personnel Action Form Template, you can then make the applicable changes and send to the next approver. The next approver will have the ability to then make changes to the personnel action form, send to another approver and then send to the employee.

The screenshot shows the 'Personnel Action Form' interface. At the top, there are navigation links: 'Personnel Action Form', 'Personnel Action Form Dashboard', and 'Personnel Action Form Questions Group'. Below these, there are fields for 'Requested By', 'Last Modified/Approved By', and a 'Make Changes' button. The 'Employee Information' section contains a table with the following data:

Description	Information	Description	Current	Proposed
Employee Name	ADAMS, FRANK	Earning Code		No Change
Hire-Date	09/20/2016 23 days	Department	Human Resources[600]	No Change
Effective-Date	10/13/2016	Tax Profile	OK/OK/OK	No Change
Comments				
PAF Action Type	Transfer			
PAF Reason	Moving to another state			

Below the table, there is a 'Supporting Documentation' section with a 'Choose File' button and 'No file chosen' text. There is also a 'Send Back to (Requester)' section with a 'Send Back' button. On the right, there is a 'Forward to' dropdown menu showing 'MCCORMICK, VICKY (VickyM)' and an 'Approve and Forward' button. Below these, there is an 'Approval Notes' section with a text area.

To send the personnel action form to the employee, select the Approve and Forward drop-down menu, then choose “Send to Employee.”

This screenshot is identical to the one above, but with the 'Approve and Forward' dropdown menu open. The menu options are:

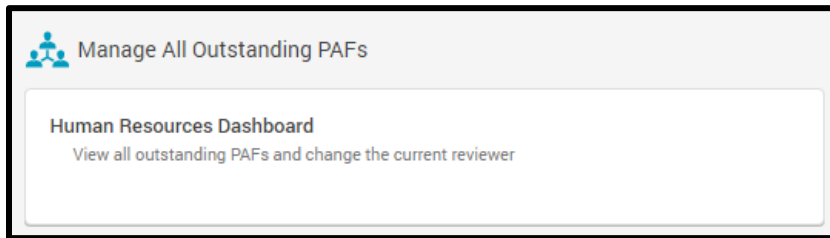
- Approve, Forward and Email Notification
- Final Approve and Send to Payroll
- Final Approve, Send to Payroll and Email Notification
- Send to Employee

The 'Send to Employee' option is highlighted with a black box.

Create PAF Transactions



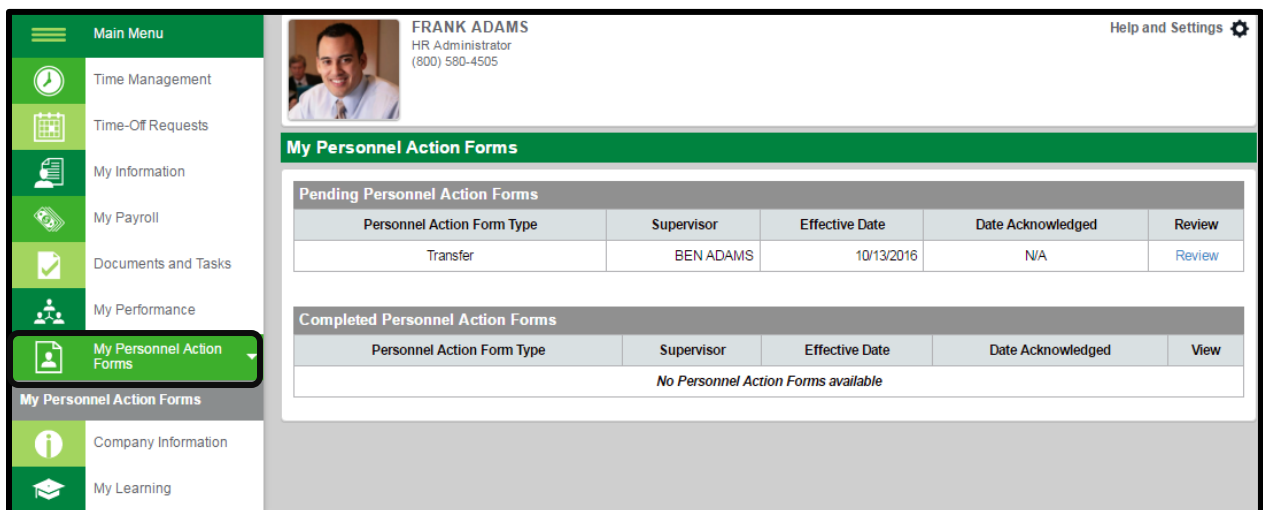
Once “Send to Employee” is selected, you can validate whether the personnel action form was sent to the employee in the Human Resources Dashboard.




To verify the personnel action form was sent, view the PAF Status column.

Batch Edit	Employee Name	EE Code	Current Department	Personnel Action Type	Requested By	Last Modified By	Last Action Date	PAF Status	Waiting On	View/Review	Effective Date
<input type="checkbox"/>	ADAMS, BEN	BAFF	Human Resources	Department Move	Sheerine Baucum	Sheerine Baucum	06/28/2016	Pending	SHEERINE BAUCUM	Review	06/29/2016
<input type="checkbox"/>	ADAMS, DYLAN	A016	Production 1	Change Employee Position Status	Sheerine Baucum	SHEERINE BAUCUM	09/29/2016	Approval	VICKY MCCORMICK	View	09/30/2016
<input type="checkbox"/>	ADAMS, FRANK	FADA	Human Resources	Transfer	Sheerine Baucum	Sheerine Baucum	10/13/2016	Sent to Employee	SHEERINE BAUCUM	Review	10/13/2016


Now, in Employee Self-Service, the employee will have a new tab called “My Personnel Action Forms.” From here, they can review any pending or view completed personnel action forms.



The employee will select “Review” to see the PAF form details, current employment information and proposed changes. The employee will have the opportunity to enter employee comments to track any notes about the change, which will flow to the personnel action form. The employee will be able to either decline and sign the change or acknowledge and sign the change.



FRANK ADAMS
 HR Administrator
 (800) 580-4505

Help and Settings 

My Personnel Action Forms

Personnel Action Form Details

Personnel Action Form Type	Discipline	Effective Date	10/17/2016
Requested By	BAUCUM, SHEERINE	Approved By	N/A
Final Approved By	N/A	Acknowledgment Required	No

Employee Information




Employee Name	FRANK ADAMS	Position Title	HR Administrator
Hire Date	09/20/2016	Position Status	
Supervisor	BEN ADAMS	Department	Human Resources

Discipline Details

Description	Current Value	Proposed Value
Employee Status	ACTIVE	No Change
Pay Type and Pay Rate	Hourly, \$25.00	Hourly, \$24.00
Pay Frequency	Bi-Weekly	No Change
Rate 1	\$25.00/Hr.	No Change
Annualized Estimate ?	\$52,000.00	No Change
Termination Type		No Change

Employee Comments

Employee Comments

B *I* U   

Acknowledgment Required

☒ I acknowledge


Decline Sign

Sign


Create PAF Transactions



Once signed, the employee will be able to access the personnel action form in the Completed Personnel Action Forms section.



FRANK ADAMS
HR Administrator
(800) 580-4505

Help and Settings 

My Personnel Action Forms

Pending Personnel Action Forms

Personnel Action Form Type	Supervisor	Effective Date	Date Acknowledged	Review
No Personnel Action Forms available				

Completed Personnel Action Forms

Personnel Action Form Type	Supervisor	Effective Date	Date Acknowledged	View
Discipline	BEN ADAMS	10/17/2016	10/14/2016	View

When an employee signs the personnel action form, the approving supervisor will receive an email notification.

From: qasystemmessage@paycomonline.com
[\[mailto:qasystemmessage@paycomonline.com\]](mailto:qasystemmessage@paycomonline.com)
Sent: Monday, October 17, 2016 10:42 AM
To: Monica Le <monica.le@paycomonline.com>
Subject: [PaycomOnline] PAF Signed by Employee ADAMS, FRANK (FADA)

Personnel Action Form

Employee:ADAMS, FRANK (FADA)

Employee has signed a Personnel Action Form. Please log in to Paycom to continue the approval process.

Submitted Time: October 17, 2016, 10:42 am

Deadline Date: No date set

Create PAF Transactions



Once action has been taken by the employee, you will be able to see the transaction data in the actual personnel action form. You can return to the personnel action form through the Personnel Action Form Dashboard and view a list of employee actions and any proposed changes. For example, if you made a change to a field on the personnel action form, that change would make the employee's acknowledgment invalid and would thus need to be re-acknowledged by the employee.

Personnel Action Form > View Final Approved Personnel Action Forms > Personnel Action Form Questions Group

Organization Name

ABC TRAINER DEMO

Requested By

SHEERINE BAUCUM

Employee Information

Description	Information	Description	Current	Proposed
Employee Name	ADAMS, FRANK	Employee Status	ACTIVE	No Change
Hire-Date	09/20/2016 24 days	Pay Type and Pay Rate	Hourly, \$25.00	Hourly, \$24.00
Effective-Date	10/17/2016	Pay Frequency	Bi-Weekly	No Change
Comments		Rate 1		No Change
PAF Action Type	Discipline	Annualized Estimate	\$0.00	No Change
PAF Reason	Not following Procedures	Termination Type		No Change

Supporting Documentation

No Document Uploaded

Employee Action List

Name	Action	Employee Comment	Action Time
SHEERINE BAUCUM	Sent to Employee		10/14/2016 08:48:06 AM
FRANK ADAMS	Employee Approved		10/14/2016 08:48:35 AM
SHEERINE BAUCUM	Acknowledgment Voided		10/14/2016 08:49:18 AM
SHEERINE BAUCUM	Sent to Employee		10/14/2016 11:24:28 AM
FRANK ADAMS	Employee Approved	Approved.	10/14/2016 11:29:00 AM

Review History

Manager Name	Decision	Time Reviewed	Note	Approval Note
Sheerine Baucum	Final Approval	10/14/2016 02:07:42 PM		

Proposed Fields Change History

Field Changed	Old Value	New Value	Changed By	Time Changed
Pay Type and Pay Rate	Hourly, \$23.00	Hourly, \$24.00	SHEERINE BAUCUM	10/14/2016 08:49:18 AM

Revoke Approved PAF

Print Approved Personnel Action Form

Once final approved, the personnel action form can be accessible through the employee's Form 20, Final Approved Personnel Action Forms and through the Personnel Action Form Activity report. Personnel action forms can be revoked as long as the effective date has not occurred yet. They can also be printed as a hard-copy.