E-PAR Instruction Manual

Enterprise Personnel Action Requests

pennsylvania
OFFICE OF ADMINISTRATION

Table of Contents

INTRODUCTION **3**

Accessing the E-PAR System 4
Getting Started 5
Common E-PAR Elements 7
Selecting E-PAR Recipients 9
Submitting an E-PAR 10
Viewing E-PAR Status 10

COMPLETING SPECIFIC E-PARS **12**

Change Supervisor Position 12
Create a Position 13
Delimit a Position 15
Fill a Vacant Position 16
Reclassify/Reallocate a Vacant Position 26
Request to Fill (Post Vacancy) 28
Update Roles 29
Other – Please Explain 30
Financial Disclosure Override/Update (Fin Disclosure Ovrd/Update) 32
Commercial Drivers License Coding Update (EE CDL Update) 33
Position Extension (pos Extension) 34
Work Schedule Change 35
Separation 36
Working Out of Class 37
Reclassify/Reallocate a Filled Position 39

SUPERVISOR/MANAGER REVIEW AND APPROVAL **40**

AGENCY HR OFFICE REVIEW AND APPROVAL **42**

E-PARS AND THE OA CLASSIFICATION & PAY DIVISION **44**

SENDING E-PARS TO THE HR SERVICE CENTER **45**

UNIQUE FEATURES FOR SPECIFIC E-PAR ACTIONS **49**

E-PAR REPORTING TOOL (DEPARTMENT) **50**

E-PAR Reporting Tool Home Page 51
Open E-PAR Search 53
Delete Open E-PARs 53
Closed and Disapproved E-PAR Search 54
Reopen E-PAR 55
Maintain Passwords 57

E-PAR REPORTING TOOL (ORG) **58**

E-PAR Reporting Tool Home Page (Org) 58
Open E-PAR Search 59
Closed & Disapproved E-PAR Search 59

ADDITIONAL HELP **60**

INTRODUCTION

E-PAR stands for Enterprise Personnel Action Request. It is an online system that allows personnel and position action requests to be initiated, routed, documented and completed using a paperless process. A request submitted through the system is also referred to as an E-PAR.

The E-PAR system is designed to assist supervisors in requesting HR services, as well as to facilitate the processing of SAP transactions within the HR office. Agency HR offices will use the E-PAR system to request tasks to be performed by the HR Service Center. It also allows individuals involved throughout the process, such as the individual initiating the request or anyone who must provide approvals and/or the agency HR office, to know when an action is completed.

This user guide provides a general overview of the E-PAR system, as well as detailed instructions for completing various types of requests.

Training and Resources
In addition to this guide, the Office of Administration offers training for agency E-PAR coordinators and provides additional resources, including simulations and presentation materials, at http://www.hrm.state.pa.us/par.

E-PAR classroom training is also offered throughout the year based on user demand. To locate an available class, access Employee Self Service and click on "My Training" in the left navigation. Conduct a search on "Getting on Par with E-PAR" to enroll in an available course.

Protecting Personal Information
Some of the information entered or pre-populated on the E-PAR form may be considered sensitive. Several checks have been built into the system to ensure that this information is secure.

Information which is not considered to be public information will not pre-populate. This includes the employee's Social Security number, bank key, bank account number and bank control key. This information is only displayed in Requester, HR Resource Account, and HR Office statuses and not in Supervisor/Manager status.

Misuse of HR data violates the provisions of Management Directive 505.18, *Maintenance, Access, and Release of Employee Information*, and may result in disciplinary action.

ACCESSING THE E-PAR SYSTEM

Logging On
The E-PAR system can be found at http://oaiss.state.pa.us/PAR. In most cases, users do not need to log into the system.

If you are asked to log in, please do so using the following information:

Domain: CWOPA
User Name: your user name (your email address without "@state.pa.us")
Password: your password (the same one used to logon to your computer at work)

Windows XP users should use the following:

User Name: CWOPA\your user name. For example: CWOPA\jsmith
Password: your password.

Contact your agency's IT staff regarding log-on errors. Agency IT staff may call 1-877-242-6007 and select option 4, "Reporting, Security, Workflow, and HR Application Support" with additional questions.

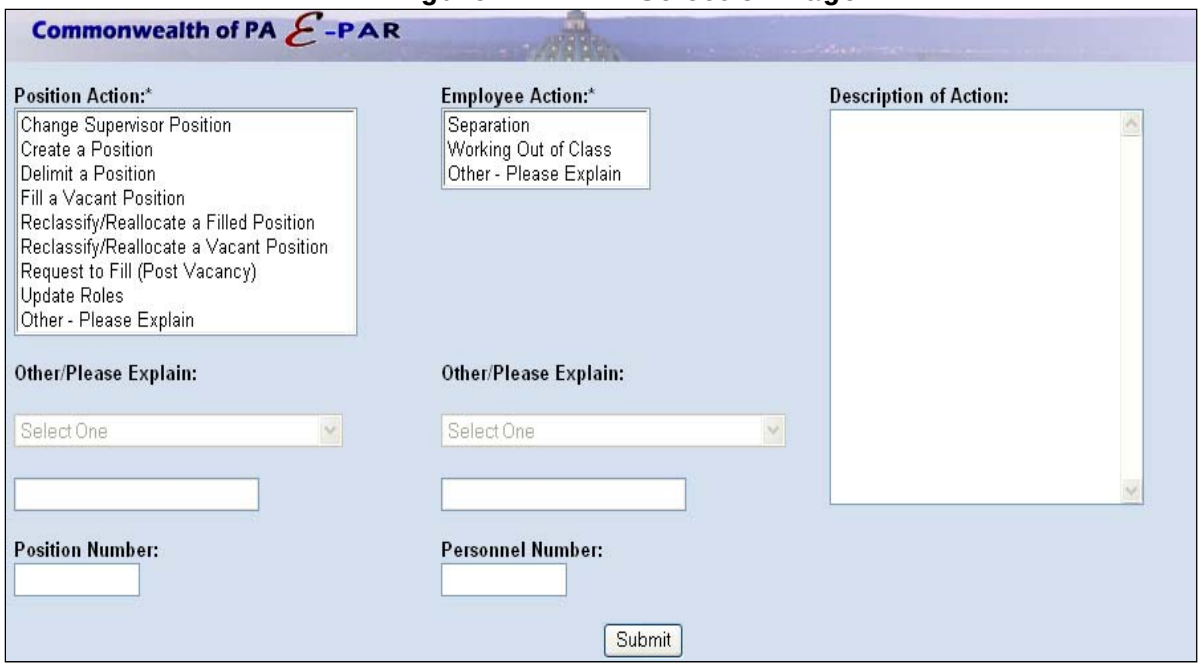
GETTING STARTED

Every E-PAR session begins on the E-PAR Selection Page, which is used to select the type of Position Action or Employee Action being requested.

In most cases, a supervisor will initiate the E-PAR, which is then reviewed by the agency HR office for quality assurance and additional details. The agency HR office then approves the E-PAR and forwards it to the HR Service Center for completion. An E-PAR may also be initiated by an agency HR office. Agencies may select who initiates E-PARs based on what best suits their business needs.

The most commonly used actions are displayed on the selection page, while other, less commonly used E-PARs can be accessed by selecting "Other – Please Explain" from either the "Position Action" or "Employee Action" windows and then selecting an appropriate option from the "Other – Please Explain" drop down menu below them.

Figure 1: E-PAR Selection Page



Quick Tips

- When you click on a specific position action or employee action, its definition will appear in the "Description of Action" area of the page.
- The Reclassify/Reallocate a Filled Position E-PAR is the only option that combines both Position and Employee actions.
- The E-PAR Selection page also includes fields for position and personnel numbers. In addition to being required for certain actions, the information entered into these fields will be used to automatically populate other parts of the form. Some E-PAR actions require both numbers, while others need only one or the other.

The following E-PARs require either a position <u>OR</u> personnel number:

- Change Supervisor Position
- Delimit a Position
- Reclassify/Reallocate a Filled Position
- Reclassify/Reallocate a Vacant Position
- Update roles
- Separation
- Working Out of Class

The following E-PARs require a position number <u>ONLY</u>

- Fill a Vacant Position
- Request to Fill (Post Vacancy)

<u>NO</u> numbers required

- Create a Position
- Other – Please Explain

Although a position or personnel number is not required for all actions, they can used to pre-populate information into other parts of the form.

COMMON E-PAR ELEMENTS

The following elements apply to most E-PAR actions.

Required Fields – A red asterisk indicates that information must be entered into a field in order to submit the form.

E-PAR ID - Every E-PAR is automatically assigned an identification number, which includes the name of the action, followed by an 8-digit organization ID, the abbreviated job name, and an 8-digit position number. If your agency uses a different naming convention to track E-PARs, the ID may be edited by reviewers in Requester, HR Resource Account, and HR Office status of the E-PAR workflow. Reviewers in the Supervisor/Manager status are unable to edit the E-PAR ID.

Workflow Status- The current status of an E-PAR is displayed in bold, red text under the "Comments" section on each form. The process begins with a user with an HR request. The requester may be a supervisor, support staff member or HR representative for a work unit.

Description or Comments – This area allows users to provide more detailed information about the E-PAR. Many E-PARs require specific information to be entered into this section in order to be processed. All entries can to be read by ALL past and present reviewers in the workflow of the E-PAR, including the requester.

Links for Additional Information – Some E-PAR forms contain links to additional information that is relevant to the request. Although they may be displayed differently, they can usually be found near the bottom of the form. See Figures 2 and 3 for examples. Types of additional information include:

- **Attach Documents** – To attach a document, click on the "Attach Documents" link, which is usually located near the bottom of the E-PAR form. This will open a new window. Select "Browse" to search for and select the desired document. Once the file name appears in the "File" field, select "Submit" to attach the document. The requester may include multiple attachments to the E-PAR, and can delete them if uploaded in error. The list of attached files appears at the top of the page. Once all necessary documents are attached, the window can be closed.

- **View Position Description** – Displays the current position description available. It is recommended that an up-to-date, active position description be in place prior to submitting any E-PAR associated with that position.

- **View Role Summary** – Displays a list of the roles currently assigned to the position. Also displayed as "Current Role Summary."

Figure 2: Links for Additional Information on an E-PAR Form

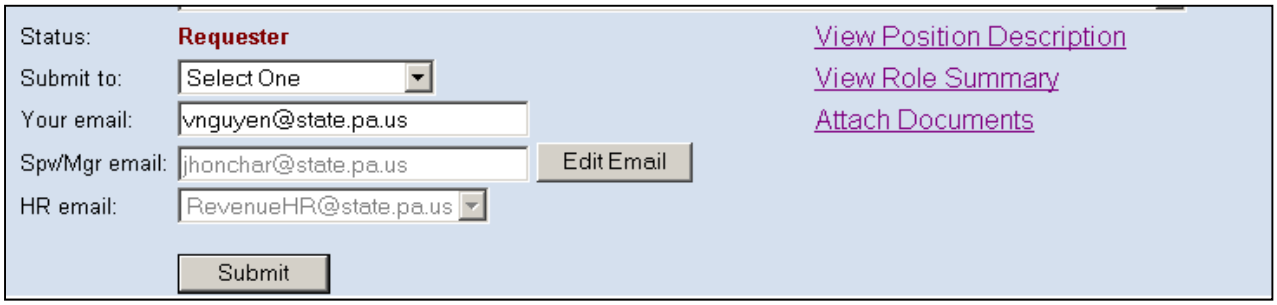
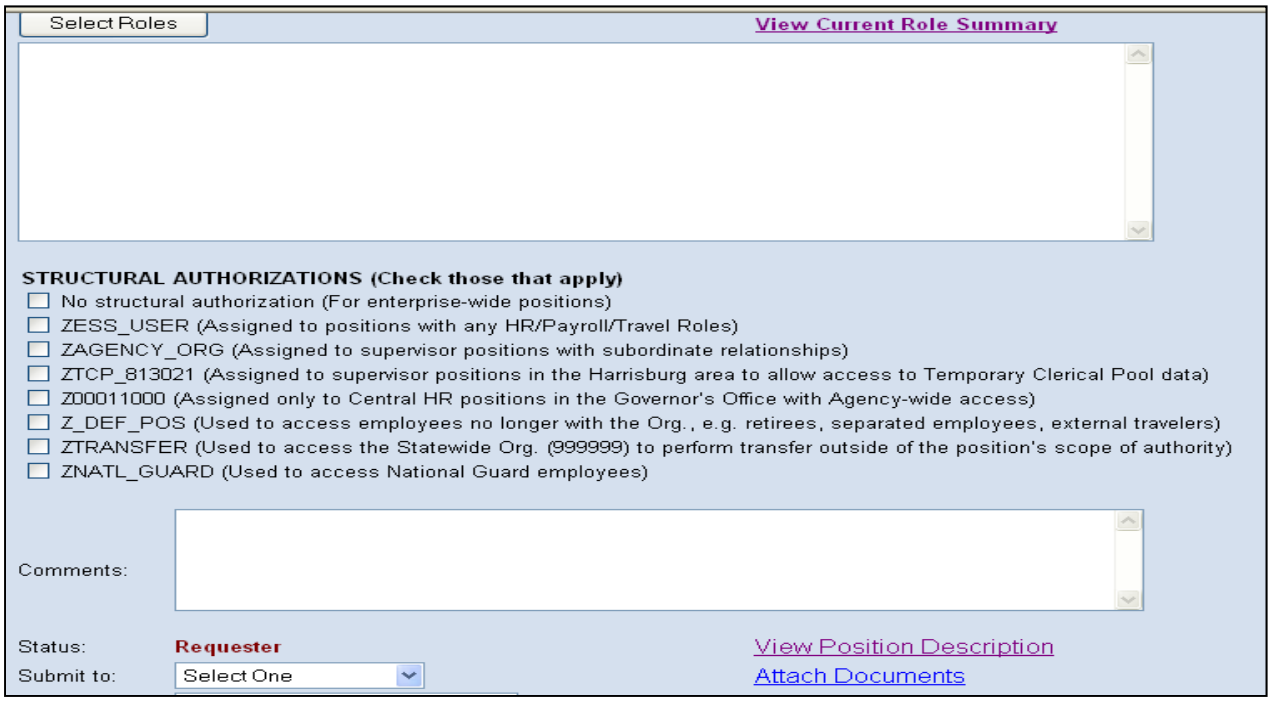


Figure 3: Links for Additional Information (alternate display)



SELECTING E-PAR RECIPIENTS

Once the E-PAR form is complete, the next step is to submit it to either the requester's supervisor (if applicable) or agency HR Office.

To change the default Supervisor/Manager email address to which the E-PAR will be routed, select the "Edit Email" button located next to the "Spv/Mgr" email field. This will open a search window with fields for a last name and first name (these fields are not case-sensitive).

The user must enter at least part of the last name to conduct a search. The user can then select the appropriate email address from the results page (see Figure 4). The selected email address will replace the default address in the "Spv/Mgr" email field on the E-PAR form.

Figure 4: E-mail- Search Results

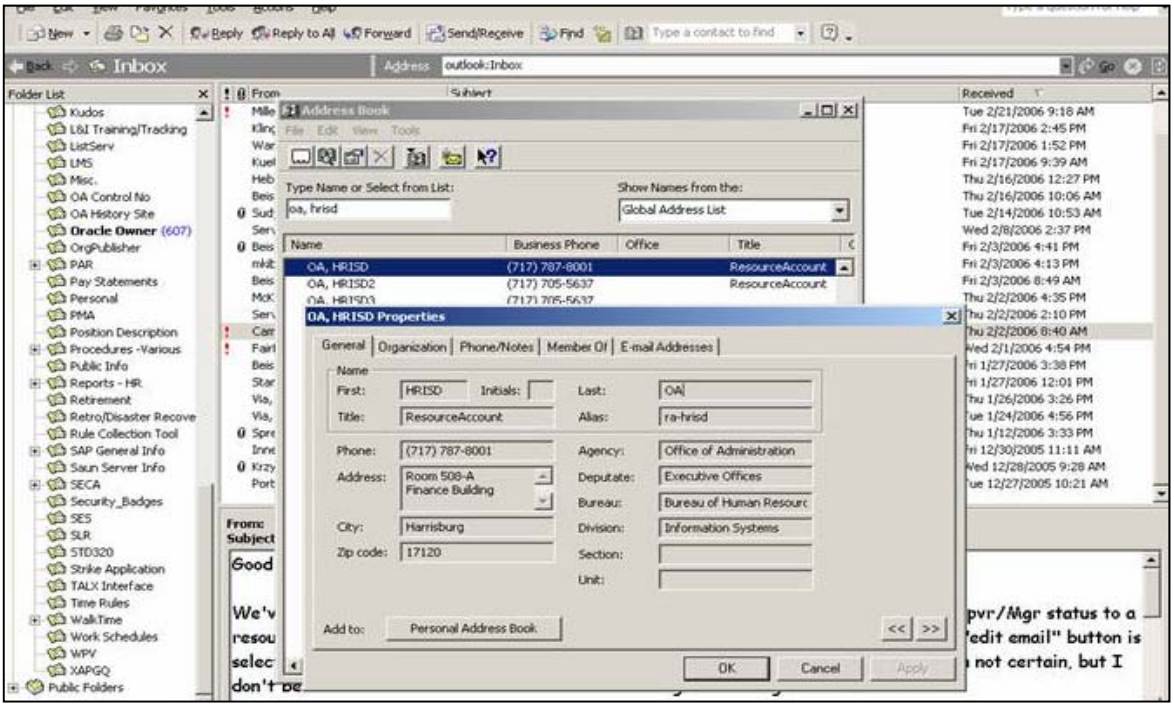
67 records have been found:

Select	Last	First	Agency	Bureau
jamasmith@pa.lcl	Smith	James	Corrections	CR SCI Smithfield
jamessm@state.pa.us	Smith	James	Cnsvn & Natrl Resrcs	CN Fors Dstr #2
jamessmi@state.pa.us	Smith	James	Revenue	RV Admv Srvs Mtrls Mgmt
jamessmit@state.pa.us	Smith	James	Fish And Boat	FB Mntnc Area 5

Selecting a Resource Account

In order to locate an agency resource account using the email search, users need to first determine the first and last names assigned to the account. These names can be found by viewing the properties of the account in Microsoft Outlook. See Figure 5.

Figure 5: Outlook Address Book Properties



SUBMITTING AN E-PAR

Before submitting an E-PAR, please make sure that:

1. All appropriate fields are completed.
2. Any necessary attachments are inserted.
3. The appropriate Supervisor/Manager or HR email address is selected.

When you are finished, select "Submit." The requester will receive a confirmation message in the browser window.

Confirmation Email
After submitting an E-PAR, a confirmation email is automatically sent to the requester's commonwealth email account. This email contains comments, the E-PAR access code and a direct link to view the E-PAR status. This email should be kept until the E-PAR is completed.

E-PAR Access Code
Each E-PAR is assigned a unique access code which can be used by the requester to access and review the status of each submitted E-PAR. This code is included in the confirmation email.

VIEWING E-PAR STATUS

The E-PAR Status Login can be found at:
http://oaiss.state.pa.us/par/par_reports/StatusLogin.asp

Enter the E-PAR access code provided in the confirmation email and select "Login."

The E-PAR Status page shows the workflow of the E-PAR, including what actions have been taken, who performed them, action date, current status, who is handling the next action and all comments made on the E-PAR.

Disapproved E-PARs
When an E-PAR is disapproved the requester and any supervisor/manager reviewer(s) will receive an email notification. Only the comments of the requester and the reviewer who disapproved the E-PAR will be included in the notification.

Completed E-PARs
Most E-PARs must be submitted to the HR Service Center for completion. The only exceptions are the Request to Fill (Post Vacancy) and Working out of Class E-PARs.

Whenever the agency HR office completes an E-PAR, a summary email with all included comments is sent to the HR staff member under whose account the E-PAR was completed. This individual has the following three options for sending a copy of the E-PAR summary to other users:

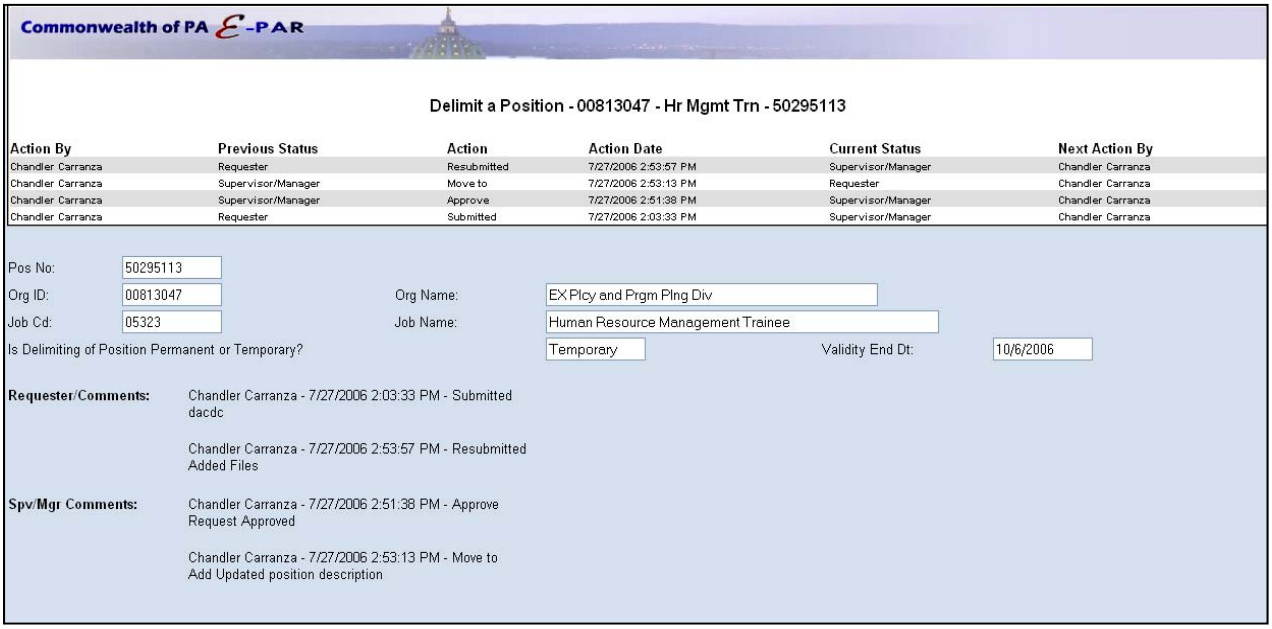
N/A – Only the person completing the E-PAR will receive a summary.

Requester – In addition to the person completing the E-PAR, only the requester will receive a copy of the summary.

Requester and All Spv/Mgr Reviewers – In addition to the person completing the E-PAR, the requester and all users having reviewed the E-PAR in the Supervisor/Manager status will receive a copy of the summary.

For most E-PAR actions, the completion summary is the same for both the HR Office and the other chosen recipients.

Figure 6: E-PAR Status Page



COMPLETING SPECIFIC E-PARS

The follow sections contain detailed instructions on how to complete specific E-PARs.

CHANGE SUPERVISOR POSITION

This E-PAR is used to change the supervisory reporting relationship for a subordinate.

The position or personnel number of the subordinate must be entered on the E-PAR Selection page before proceeding. In addition, the requester must also enter the 8-digit position number of the proposed supervisor (the position number this subordinate position will now report to). You cannot use the supervisor's employee number.

Required Information
Please complete the following information on the E-PAR form to ensure proper processing.

- **Proposed Effective Date**

Additional notes

- There may be necessary supervisory role changes (for the supervisor being removed, as well as for the new supervisor).
- Any additional changes to the position will have to be submitted on a separate E-PAR. For example, to add or remove roles if necessary, submit an Update Roles E-PAR.
- When a position's supervisor is changed, it will affect ESS workflow for the subordinate position, as well as any positions that report to the subordinate position.

CREATE A POSITION

This E-PAR is used to create a position that is not currently on your complement. This action should not be combined with any other action; however, role updates may also be requested in tandem with a Create a Position request. For instructions on how to utilize the "Select Roles" button on the Create a Position request form, see the section on the Update Roles action.

Verify that you are not at max complement in the appropriation in which the position will be created. If you are at max complement, take appropriate action to correct before submitting the E-PAR.

Helpful Tip: Enter an existing position number (with similar characteristics to the position you are intending to create) in the "Position Number" field on the E-PAR Selection Page to pre-populate information on the Create a Position form. This can serve as a shortcut for data entry. Only elements for the new position that differ from the position entered on the E-PAR Selection page need to be modified.

Required Information
Please complete the following information on the E-PAR form to ensure proper processing.

- **Effective Date**
- **Work Contract:** Wage, salary or recruitment only.
- **Supervisor Position Number:** Position number to which the newly created position will report. This cannot be the supervisor's employee number.
- **Org - Organization Code/Organization Name:** Select from the drop down list which organization in your agency this position is to belong to.
- **Job/Classification:** Select the proper classification based on job duties
- **Employee Group:** Defines duration of position: permanent, non-permanent, annuitant, board member, etc. If a position is anything other than permanent, provide a position expiration date in the "Comments" section of E-PAR.
- **Employee Subgroup**: Defines position's work status: full-time, part-time, also defines standard biweekly work hours: 75 hours per pay, 80 hours per pay, etc.
- **Personnel Subarea:** Defines position's Bargaining Unit and Fair Labor Standards Act (FLSA) coding for overtime purposes. This information is obtained by reviewing the job/classification's detailed attributes.
- **Budget Fund, Fund Center, &/or Cost Center:** This information should be provided or reviewed by your agency's budget office.
- **Internal Order:** See your agency instructions for proper use of these fields.
- **Local Code:** If the position is bargaining unit covered, this is the bargaining unit local code that designates where the employee's union dues or fair share fees are

paid. This is usually based on the bargaining unit and county of the position's work location; however, there are some bargaining units where the local code is determined by the employee's home address county of residence. (EX: A4, G1, G2, G4, G5, Z1, Z4) If the position is management covered, this field does not need completed.

- **Budget Impasse Indicator:** Select from drop down list the appropriate indicator for criticality of position in the event of a budget impasse.

- **Overtime FTE:** This field is used only by agencies with full time evaluation.

- **Promotion Unit:** For bargaining unit-covered positions, this field is to indicate the appropriate promotion unit designated in the collective bargaining contract for seniority purposes.

- **Furlough Unit:** For bargaining unit-covered positions, this field is to indicate the appropriate furlough unit designated in the collective bargaining contract for seniority purposes. For civil service management positions, this field is used to designate the appropriate furlough unit in the event of an agency furlough.

- **Hdq County, Hdq Municipality, and Zip Code:** These three position work location fields are necessary for taxing purposes and for continuity of agency operations.

Comments

Please include the following in the "Comments/Justification" field:

- **Position Expiration Date:** If the position is not permanent, provide the date it is to end.

- **Confidential Status:** Indicate if the position is to be designated as confidential.

- **Position Type Status:** Indicate if the position is to be designated as CS/NCS/SMS/Unclassified.

- **EPR Performance Cycle**: Enter the EPR performance cycle code to be used for this position.

- **OA Control#:** If the position is a centralized classification, the E-PAR must be routed to the Office of Administration's Classification and Pay Division for approval.

- **Position's Physical Work Location:** If the physical work location of the position is not the same as the physical address for the organization it belongs to, please include on the E-PAR: the exact physical street address, building name & number, floor, suite or office number, city, state & proper ZIP code for the physical location. This is used for emergency and continuity of agency operations.

- **PD Profile**: Select the appropriate PD Profile(s) based on the position's access needs.

- **Personnel Area:** If the position is in an agency with multiple personnel areas (Public Welfare, Labor & Industry or Transportation), indicate which personnel area the position is assigned to.

DELIMIT A POSITION

This E-PAR is used to delimit a position currently on your complement. This action cannot be combined with any other action.

Note: The position must be vacant before submitting an E-PAR to delimit the position!

Required Information

Please complete the following information on the E-PAR form to ensure proper processing.

- **Position Validity End Date:** The date the position will end.
- **Duration:** Temporary or permanent. This indicates whether the position will be used again in the future (internship programs, temporary wage, etc.) or will be permanently delimited and not used again.

Comments

Please include the following in the "Comments/Description" field:

- **Duration:** Please verify your duration selection (temporary or permanent).
- **Recruitment Pool:** Indicate if the agency wishes to have position placed into the Recruitment Pool. The position will still show for reporting purposes, but will not count on your authorized wage or salary complement.

FILL A VACANT POSITION

This E-PAR is used to fill a vacant position currently on your complement. This action can be linked to the Request to Fill action. Once a Request to Fill (Post Vacancy) action is completed and after a candidate has been selected to fill the vacant position, requesters may initiate the Fill a Vacant Position action for the same position.

To begin, select "Fill a Vacant Position" from the E-PAR Selection page, enter the position number and select "Submit. "

Once a Fill a Vacant Position E-PAR is initiated, any approved Request to Fill (Post Vacancy) actions for the same position will be displayed (see Figure 7). The requester may then click the "Select Candidate" link to attach the new Fill a Vacant Position request to the corresponding Request to Fill (Post Vacancy) E-PAR. Each request will now reference the other.

Figure 7: Request to Fill (Post Vacancy) Reference Page

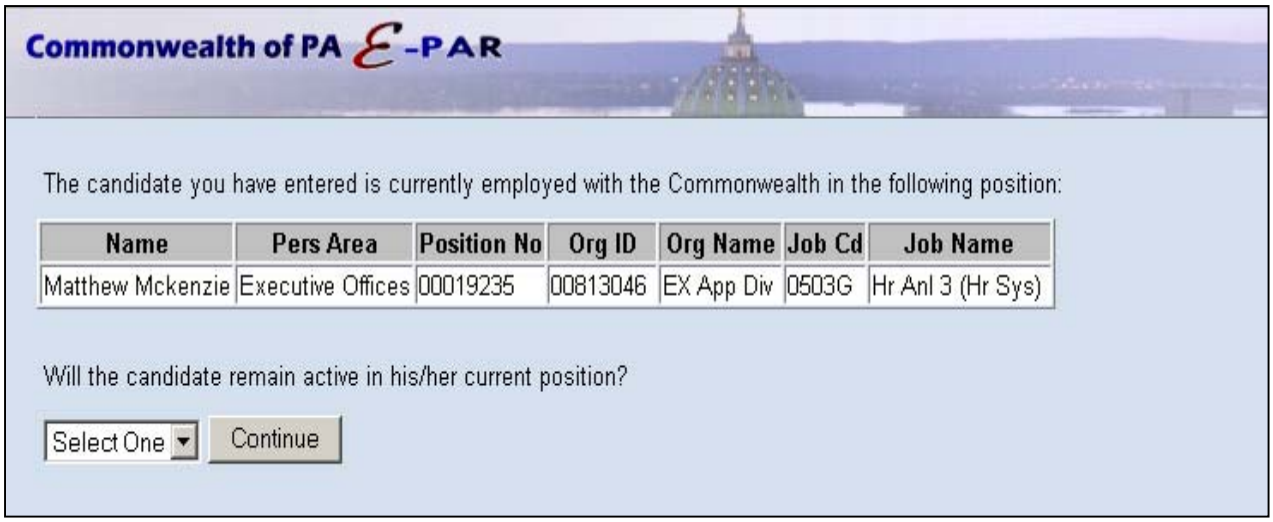
Next, enter the Social Security or Personnel number of the candidate on the following screen (see Figure 8). The application will now determine whether the candidate is currently or has ever been employed with the commonwealth (see Figure 9).

Figure 8: SSN or Personnel Number Request Page

If the candidate is currently a commonwealth employee, the user will be asked "Will the candidate remain active in his/her current position?" Based on the response, the "Employee Action" field on the resulting form will be pre-populated with one of the following actions:

- **Dual Hire –** A request will be submitted to hire an employee into a second position. This employee is currently and will remain employed by the commonwealth in another position (this is not a transfer.)
- **Promotion** – A request will be submitted to promote the employee from his/her current position to a position in a higher pay range.
- **Demotion** – A request will be submitted to demote the employee from his/her current position to a position in a lower pay range.
- **Reassignment** – A request will be submitted to reassign an employee from his/her current position to a position in the same pay range for which he/she qualifies.

Figure 9: Recent Employee Information (current employee)



If the candidate was previously an employee of the commonwealth, the "Employee Action" field on the next page will be pre-populated as "Rehire," but can be changed to "Return from Furlough."

- **Rehire –** A request will be submitted to hire an individual who has been employed previously by the commonwealth.
- **Return from Furlough** – A request will be submitted to return a furloughed employee to a position.

If the candidate was never employed with the commonwealth, the "Employee Action" field on the next page will be pre-populated as a New Hire.

Once the system has determined the type of associated employee action, the Fill a Vacant Position form will be displayed.

Required Information – All 'Fill a Vacant Position' Actions (Figs. 10a, 10b and 11)
Please complete the following information on the E-PAR form to ensure proper processing:

- **Employee Name**
- **Personnel Number**
- **Effective Date:** The date employment is to begin.
- **Position Number to be Filled:** Information should pre-populate from the E-PAR front screen. If this is not the correct position number that this employee is to fill, or the position information that has pre-populated is incorrect, do not go any further until checking with your recruitment/placement office in your human resource office to verify that the position is vacant.
- **Position's Org and Job:** Information will pre-populate based upon the position selected. Verify that it is correct.
- **Personnel SubArea:** Defines position's bargaining unit and Fair Labor Standards Act (FLSA) coding for overtime purposes. This information is obtained by reviewing the job/classification's detailed attributes.
- **Contract Type:** Select the appropriate Employee Status from the drop-down menu: civil service, non-civil service, SMS, unclassified and also the appropriate emergency, probationary, interim, regular status, etc.
- **Employee Group:** Defines the duration of the position: permanent, non-permanent, annuitant, board member, etc. If the position is anything other than permanent, provide an estimated end date in the field provided at the top of the form
- **Employee Subgroup:** Defines the position's work status: full-time or part-time. Also defines standard biweekly work hours: 75 hours per pay, 80 hours per pay, etc.
- **Pay Group:** This information will pre-populate based on the classification of the position
- **Pay Level:** Indicates proper/approved pay level.

The "HR Office Use Only" link provides the HR office with additional fields that are revealed on the form when clicked. Although the link is available to all requesters, the fields should only be completed by the HR office. To hide HR office fields, click the "Hide HR Fields" link.

Additional Required Information – New Hire, Rehire, Dual Hire, and Return from Furlough Actions (Figs. 10a and 10b)

- **Work Address:** An accurate work location for the position must be provided and verified.

- **Birth Date, Social Security Number, and Gender**

- **Permanent Residence:** Provide the employee's permanent residence information from the employment forms. Select the county of residence from the drop down list and provide all Municipality information.

- **Home Phone Number**

Included in HRSC Online Orientation only (Fig. 10a)

- **I-9 Verifier:** Supervisor or HR representative who will complete and approve Section 2 of the I-9 Form online at new hire's start of employment.

- **Home E-mail Address:** Provide a personal email address for the new hire to receive the Welcome email notification to complete the HRSC Online Orientation tours prior to start of employment.

Excluded from HRSC Online Orientation (Fig. 10b)

Certain positions are excluded from the HRSC Online Orientation and will be indicated in red at the top of the E-PAR.

Positions in the following groups are excluded:

Employee Groups:
- C – PA Conservation Corps
- G – PA National Guard
- R – Health Registrar
- X – External Person

Employee Subgroups:
- E9 – External
- U9 - Volunteer

Agencies
- 14 – Attorney General
- 17 – Public Utility Commission
- 26 – Liquor Control Board
- 65 – Gaming Control Board
- 8801 – Philadelphia Port Authority

As such, I-9 Verifier and home email address fields are not required for these positions; race field is available.

Required Information – HR Office Status

Please complete the following information on the E-PAR form to ensure proper processing. The E-PAR will contain most, but not all, of the fields listed below, depending on whether the vacancy is being filled by promotion, demotion or a new hire.

- **Action Type:** Choose appropriate type of action from drop down selections.
- **Action Reason:** Choose appropriate reason for action from drop down selections.
- **EPR Date:** Indicate date of next annual performance evaluation due – if an anniversary performance cycle.
- **Longevity Date:** Indicate date of next eligible longevity pay increase.
- **CS Cert:** Provide appropriate Civil Service certification number if CS action.
- **BSE No:** Provide appropriate Bureau of State Employment number if NCS action, or appropriate code if Senior Level approval is required.
- **QHOL Hours:** Indicate number of entitled holiday hours until end of calendar year.
- **OPT/EMS Paid?:** Indicate if OPT/EMS-Local Services Tax was paid for current year. If yes, proof of payment must be attached to the E-PAR.
- **W4 Allowances:** Select number of allowances employee indicated on W4 withholding form.
- **W4 Filing Status:** Select Filing Status employee indicated on W4 withholding form.
- **Time Administrator:** Provide appropriate 3-digit timekeeper code for access to new employee's time records.
- **Work Schedule:** Provide appropriate work schedule rule for this employee.

Comments

Please include the following in the "Comments/Description" field. The E-PAR will contain most, but not all, of the fields listed below, depending on whether the vacancy is being filled by promotion, demotion or a new hire.

- **Action Type:** Indicate if the action is a voluntary demotion or involuntary demotion.
- **Employee Records:** Indicate if any necessary changes are needed (additions or deletions) to the employee's records due to the requested action.
- **Time Management Status:** 1 = positive reporting (reports hours worked), 9 = negative reporting (reporting not necessary), 7 = quasi positive reporting (used by Fish & Boat, LCB, and PennDOT).
- **For Pay Scale Groups CO, ED, CP, CS, GO, LS and SP:** Include annual increment date.

- **Supervisor Number:** The position number of the supervisor to which the position will report. This cannot be the supervisor's employee number.

- **Length of Probationary Period**

- If non-permanent**, indicate if the employee is anticipated to work more than 750 hours in the calendar year.**

Attachments

The following attachments may be necessary ***for*** the E-PAR, depending on whether the vacancy is being filled by promotion, demotion or a new hire.

- If voluntary demotion:
    - **Employee's written statement**

- If pay rate exception:
    - **OA approval**

- If an annuitant:
    - **OA approval**

- If an appointment above the minimum:
    - **OA approval**
    - **Copy of the documentation provided to support the above minimum appointment**

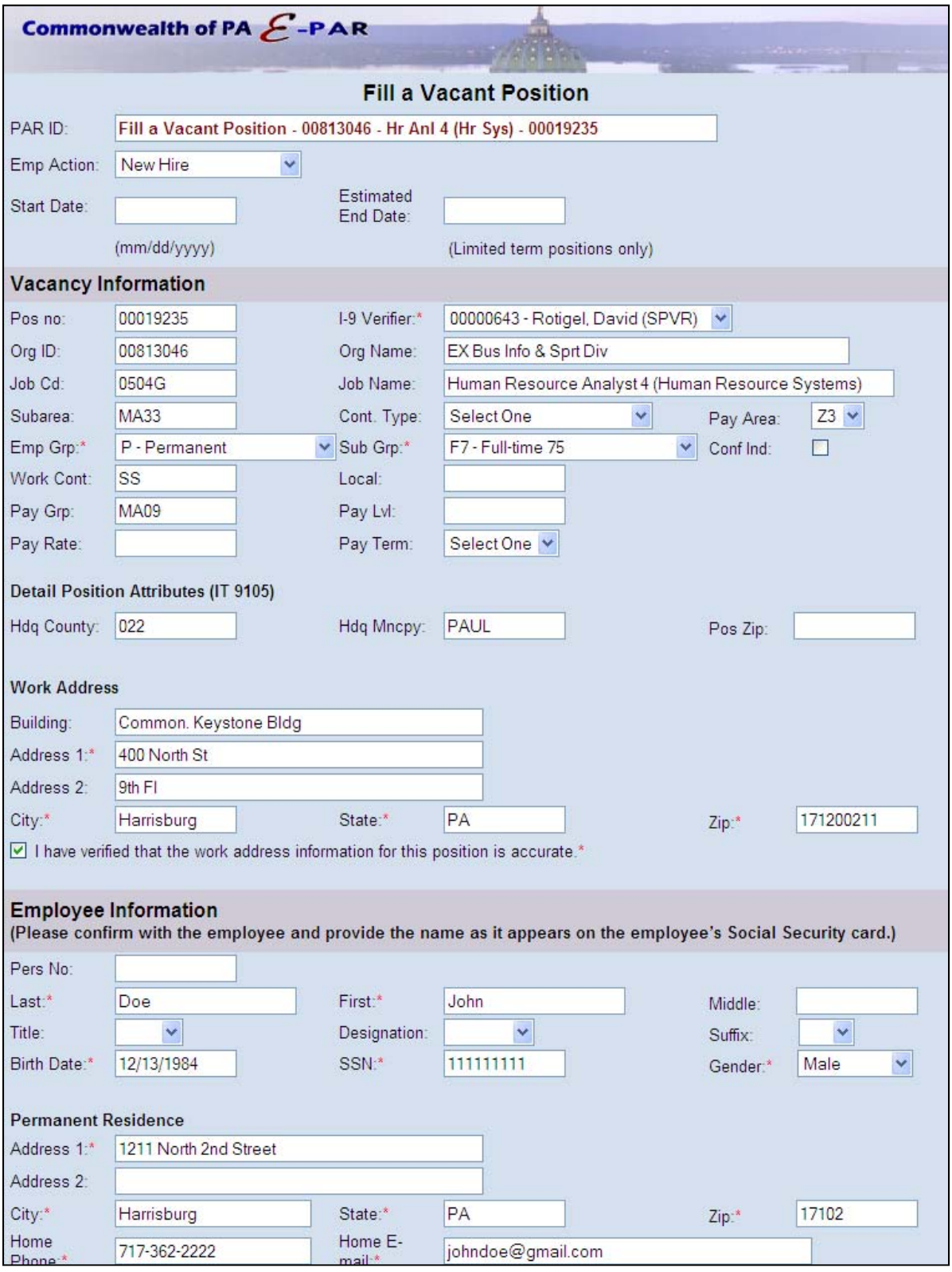
-
- If senior level:
    - **Copy of the approval memo**

- **CDL verification**

- **Completed I-9 Employment Eligibility Verification Form***: may also be sent to HR Service Center within 3 days of start of employment

*Only for candidates excluded from Online Orientation

Figure 10a: Fill a Vacant Position for New Hire, Rehire, Dual Hire, and Return from Furlough (Included in Online Orientation)



(screenshot continued from previous page)

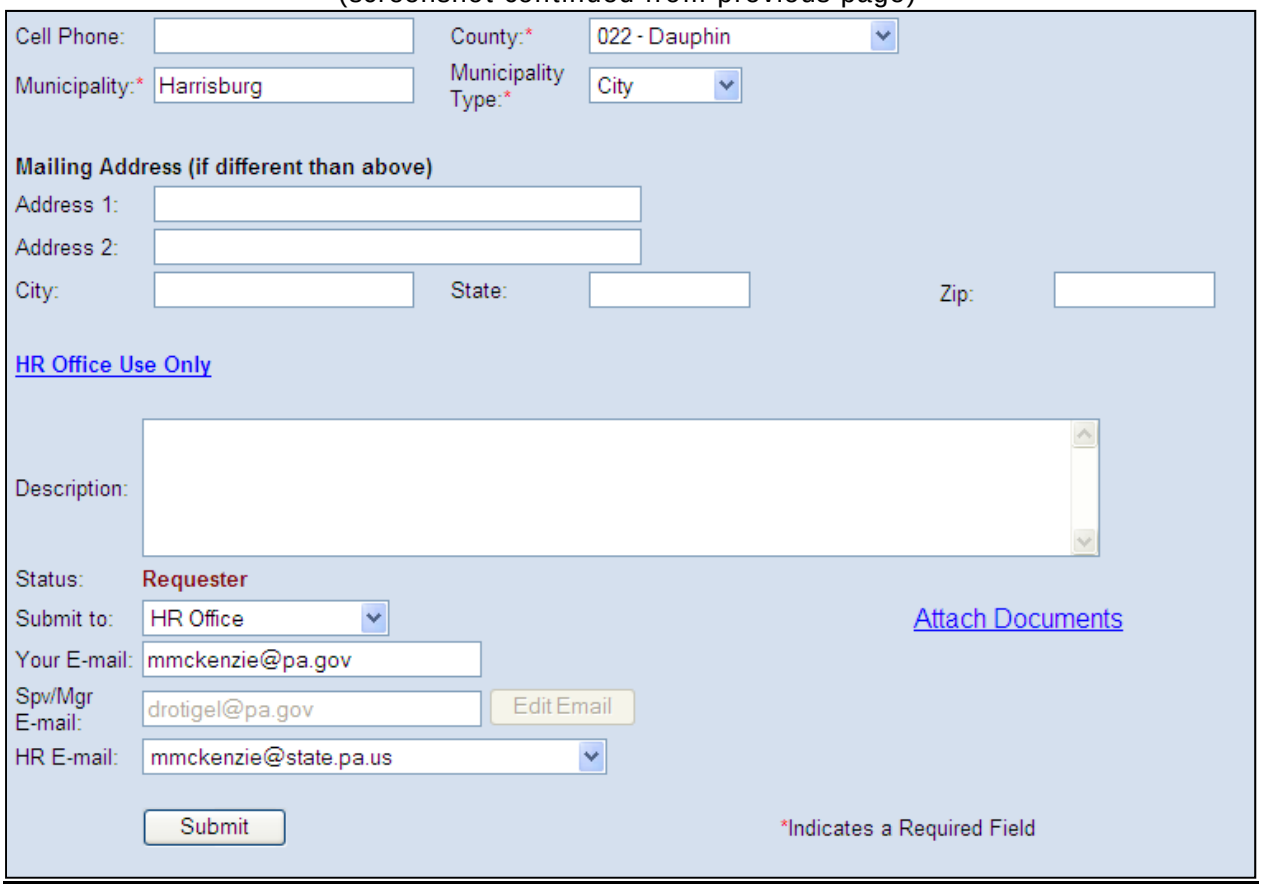
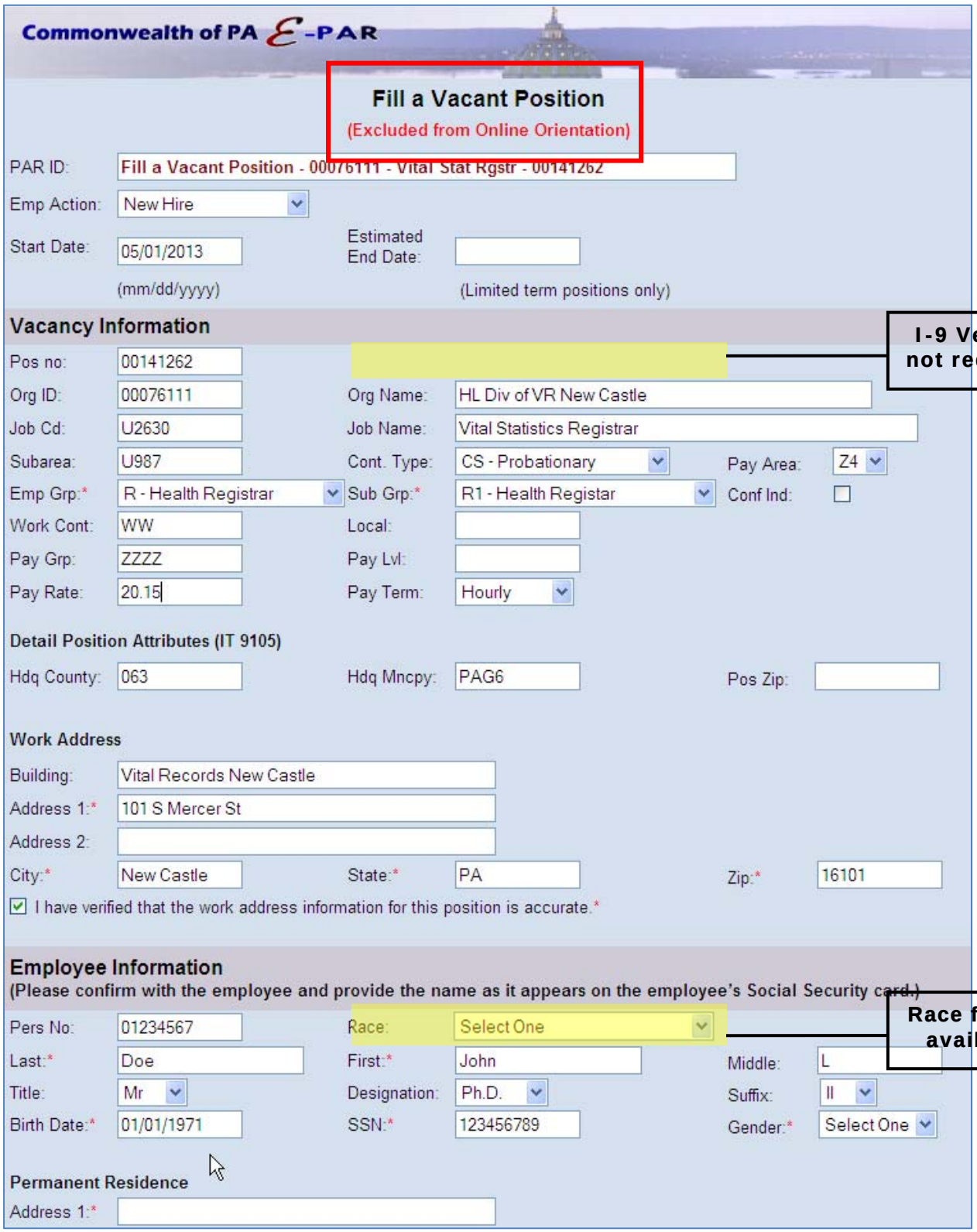


Figure 10b: Fill a Vacant Position for New Hire, Rehire, Dual Hire, and Return from Furlough (Excluded from Online Orientation)



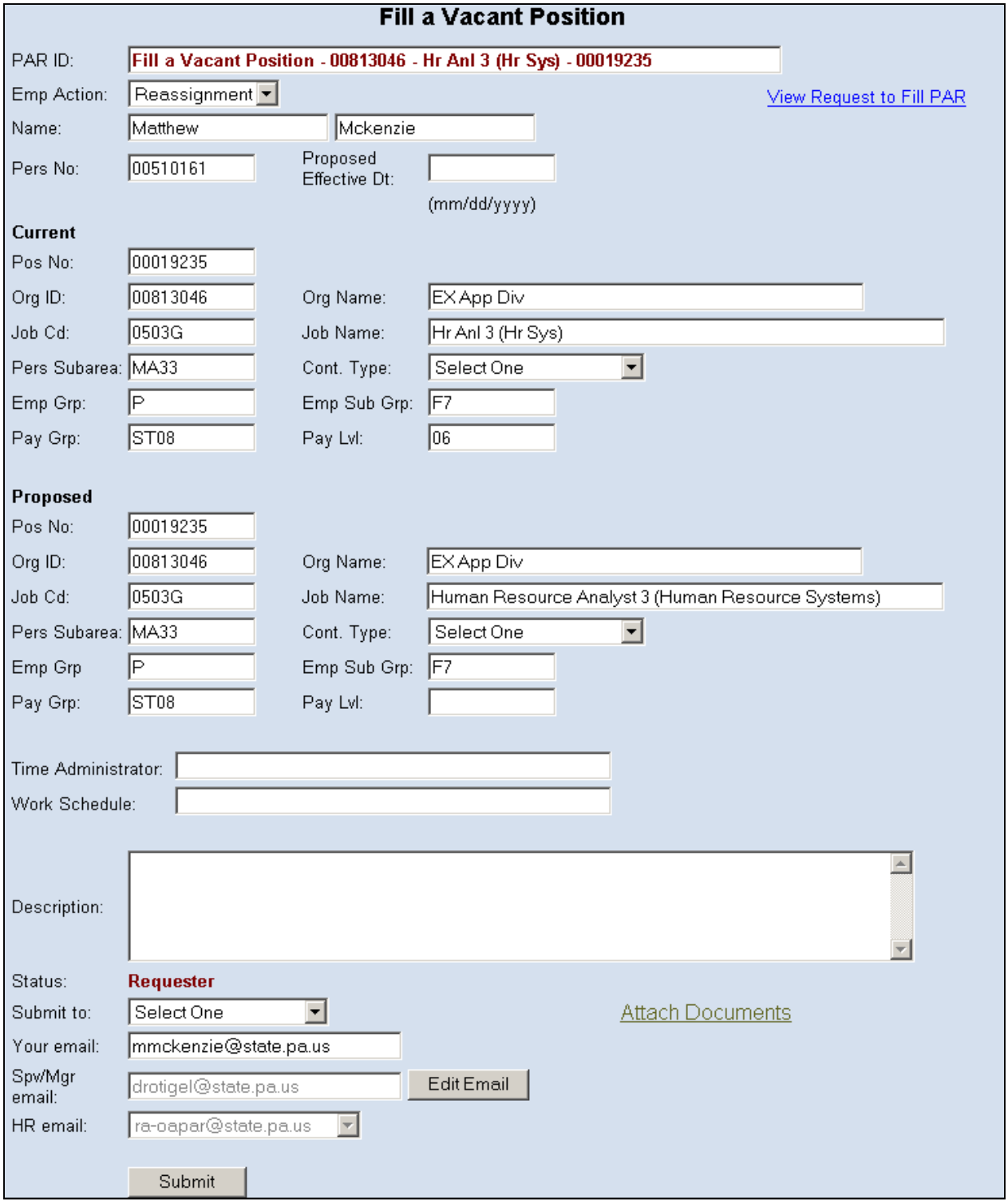


Figure 11: Fill a Vacant Position for Promotion, Demotion and Reassignment

RECLASSIFY/REALLOCATE A VACANT POSITION

This E-PAR is used to reclassify a vacant position currently on your complement. This action cannot be combined with any other action; however, a subsequent E-PAR to fill the vacancy may be submitted upon approval.

Required Information

Please complete the following information on the E-PAR form to ensure proper processing.

- **Position Number:** This information will pre-populate if a position number was entered on the E-PAR Selection Page.
- **Supervisor Pos?:** Indicate whether or not the position is supervisory.
- **Proposed Effective Date**
- **Org:** The position's organization code and name. If the position is moving, indicate the new organization where position is to be located.
- **Job/Classification:** Select the approved classification based on job duties
- **Personnel Subarea:** Defines the position's bargaining unit and Fair Labor Standards Act (FLSA) coding for overtime purposes. This information is obtained by reviewing the job/classification's detailed attributes.
- **Contract Type:** Select the appropriate employee status: civil service, non-civil service, SMS, unclassified and also the appropriate emergency, probationary, interim, regular status, etc.
- **Employee Group:** Defines the duration of the position: permanent, non-permanent, annuitant, board member, etc. If the position is anything other than permanent, provide an expiration date in the "Comments" section of the E-PAR.
- **Employee Subgroup:** Defines the position's work status: full-time, part-time. Also defines standard biweekly work hours: 75 hours per pay, 80 hours per pay, etc.
- **Pay Group:** Information will pre-populate based on the classification selected.
- **Pay Level:** Not necessary for a vacant position.
- **Budget Fund, Fund Center, &/or Cost Center:** This information should be reviewed and/or updated by your agency's budget office.
- **Internal Order & WBS Element:** Used if Federal Funds are involved with the position.
- **Local Code:** If position is bargaining unit covered, this is the bargaining unit local code that designates where the employee's union dues or fair share fees are paid. This is usually based on the bargaining unit and county of the position's work location. However, there are some bargaining units where the local code is determined by the

employee's home address county of residence. (EX: A4, G1, G2, G4, G5, Z1, Z4). If the position is management covered, this field does not need completed.

- **Budget Impasse Indicator:** Select from drop down list the appropriate indicator for criticality of position in the event of a budget impasse.

- **Promotion Unit:** For bargaining unit-covered positions, this field is to indicate the appropriate promotional unit designated in the collective bargaining contract for seniority purposes.

- **Furlough Unit:** For bargaining unit-covered positions, this field is to indicate the appropriate furlough unit designated in the collective bargaining contract for seniority purposes. For civil service management positions, this field is used to designate the appropriate furlough unit in the event of an agency furlough.

- **Hdq County, Hdq Municipality, Zip Code:** These three position work location fields are necessary for taxing purposes and for continuity of agency operations.

- **Supervisor Position Number:** The position number of the supervisor this position will report to. This cannot be the supervisor's employee number.

HR Information

The following information is required in the HR Information section to ensure proper processing.

- **Class Review Dt:** the date the agency classification unit reviewed the position.

- **OA Control #:** If the position is a centralized classification, the E-PAR must be routed to the Office of Administration's Classification and Pay Division for approval.

Comments

Please include the following in the "Comments/Description" field:

- **Employee Records:** Indicate if any necessary changes are needed (additions or deletions) to the employee's records due to the requested action.

- **EPR:** Indicate if position's EPR performance cycle code needs changed due to the change in organization.

- **Work Address:** Indicate the position's physical work address if different from the new organization's work address.

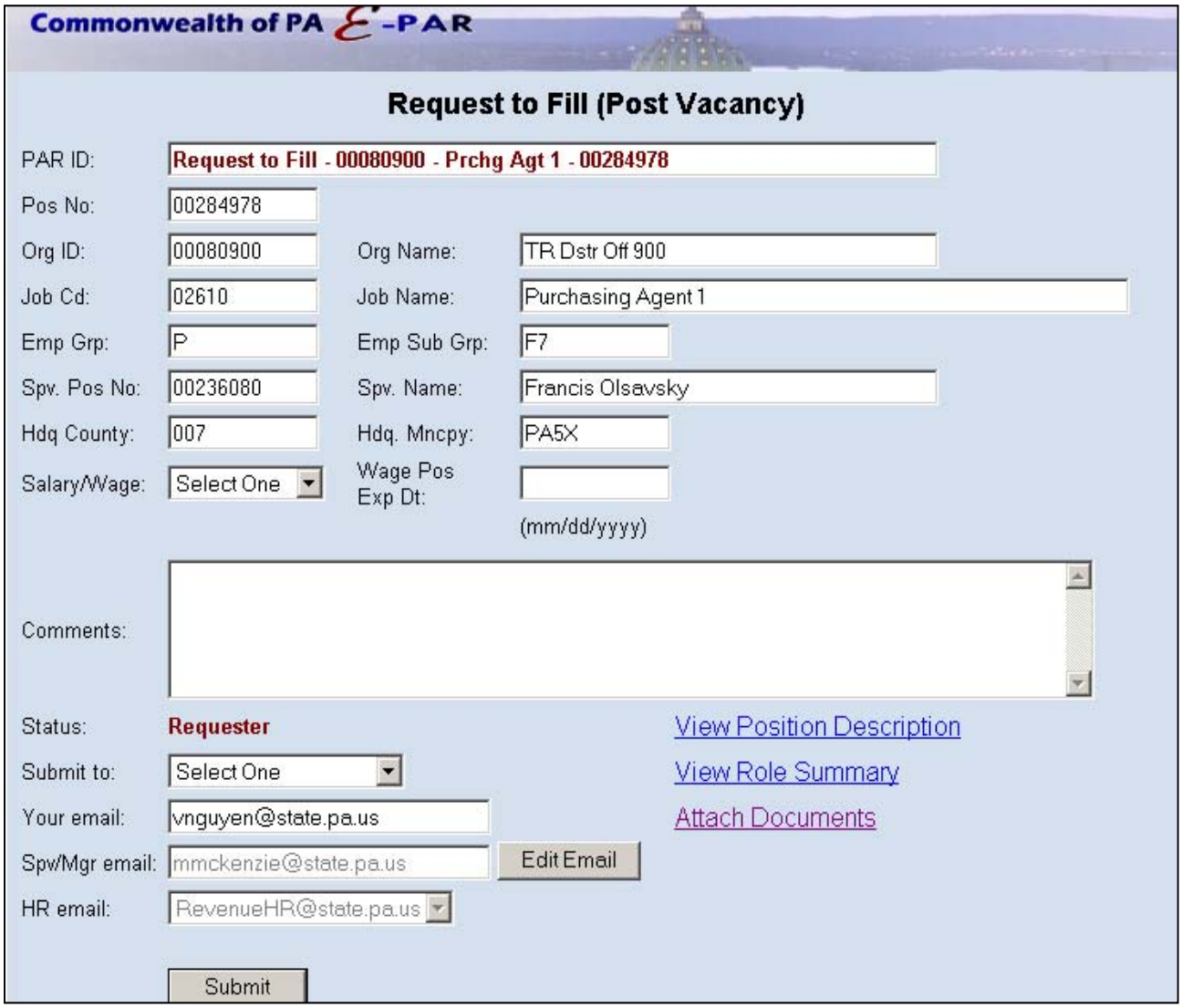
REQUEST TO FILL (POST VACANCY)

By selecting this action, you are submitting a request to begin selection of a candidate for a vacant position currently on the complement.

This form is completed simply by entering the Position Number on the E-PAR Selection page. Enter any comments that may be necessary.

Also, this E-PAR is not routed to the HR Service Center. It is used for internal agency processing only.

Figure 12: Request to Fill (Post Vacancy) Form



UPDATE ROLES

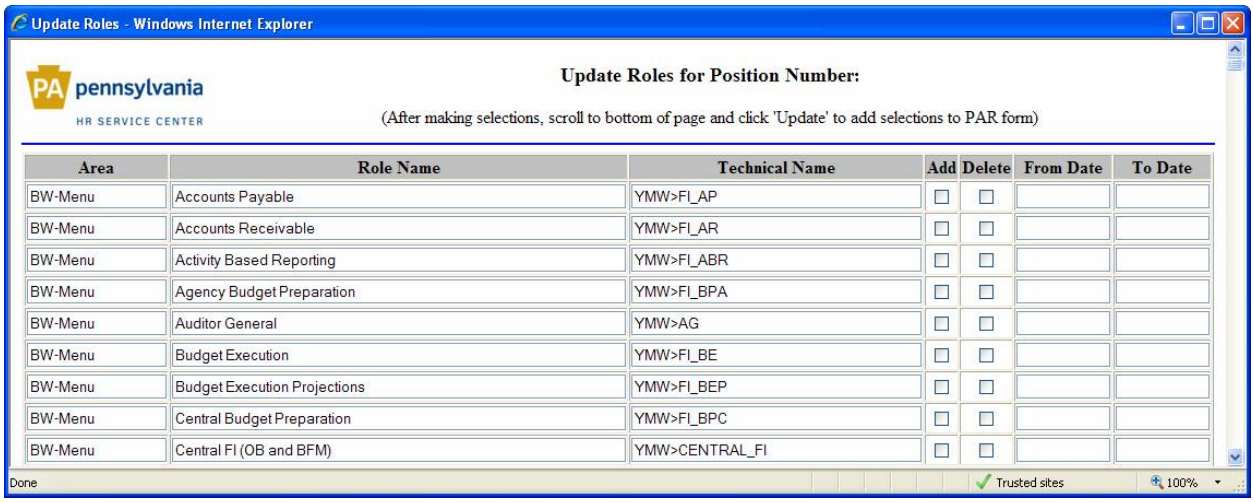
This E-PAR is used to update SAP roles assigned to a position.

Required Information

Please complete the following information on the E-PAR form to ensure proper processing.

- **Is the SAP user a commonwealth employee:** Select yes or no.
- **Select Roles:** Click the "Select Roles" button to bring up a new window with a listing of role names. To update a role, select either "Add" or "Delete" and enter a date range during which the role assignment will be valid. The user will then need to scroll to the bottom of the page to select the "Update" button in order to insert the update into the text box on the E-PAR form.
- **PD Profile:** Select the appropriate PD Profile(s) and structural authorizations based on position's access needs.

Figure 13: Update Roles Window

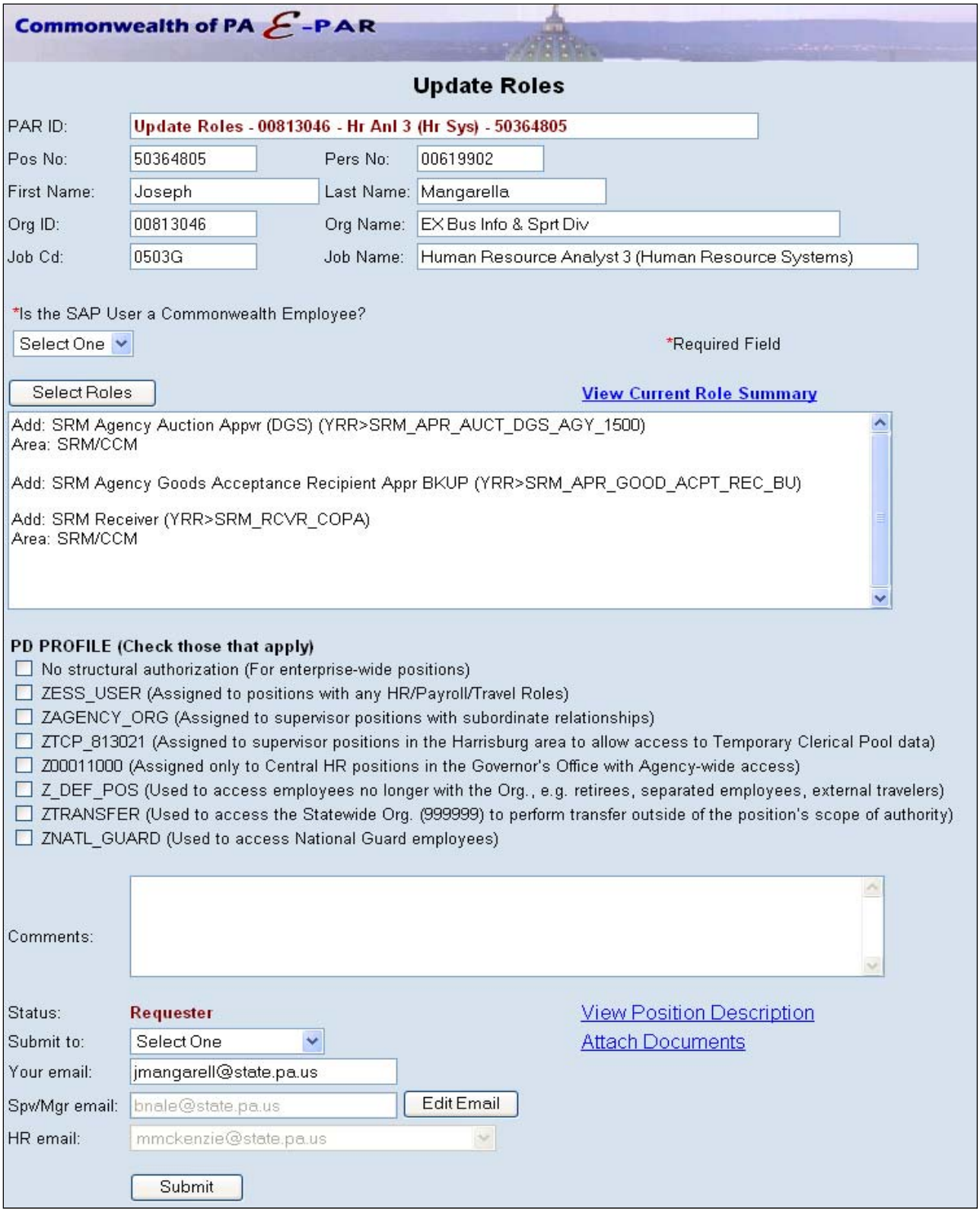


Comments

Please include the following in the Comments/Description field:

- **Authorizations:** List specific structural authorization(s) needed.

Figure 14: Update Roles Form



OTHER – PLEASE EXPLAIN

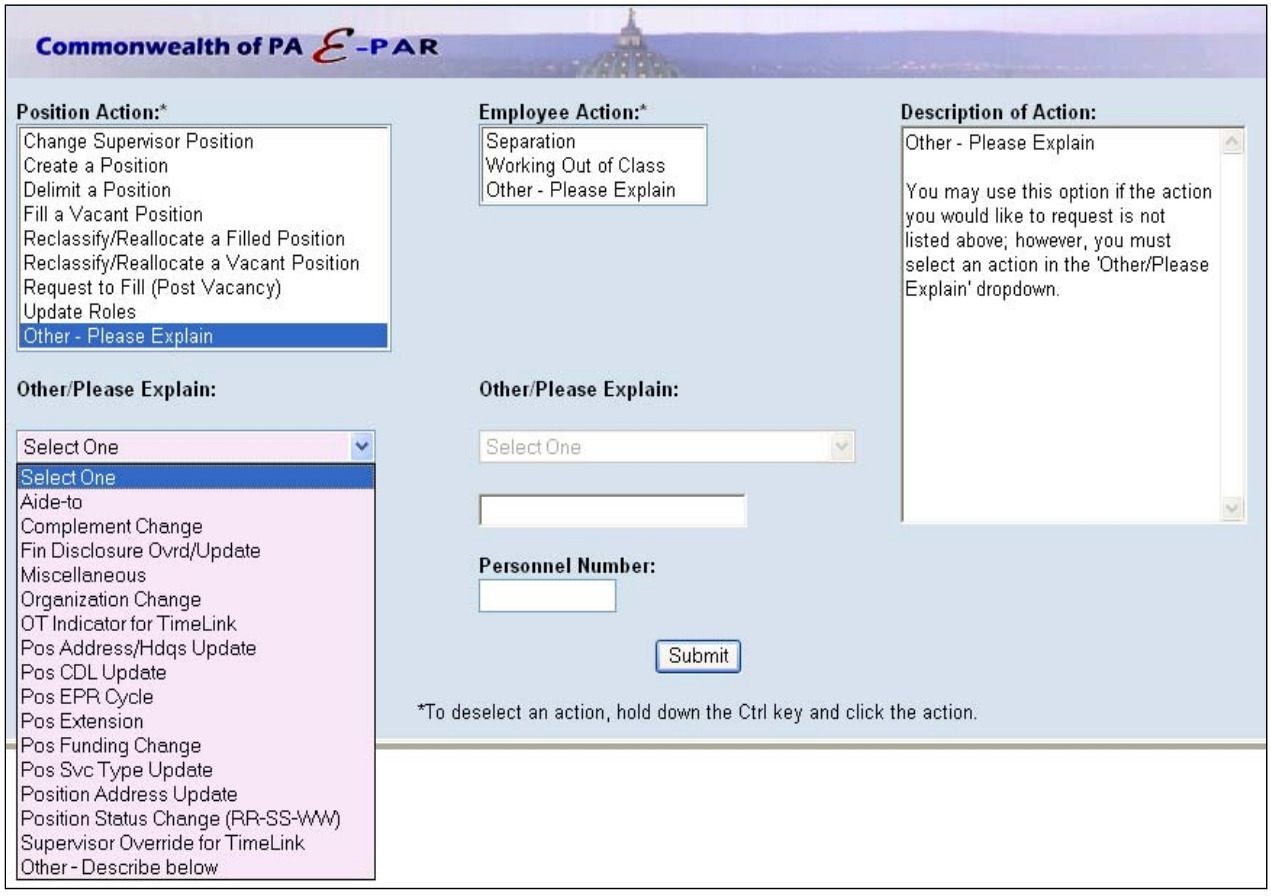
This option should be used **ONLY IF** the action you would like to request is not listed on the E-PAR Selection page. Because some of these E-PARs are rarely used, detailed instructions for completing them may not be available. If you have questions or need assistance completing one of these E-PARs, please contact the E-PAR coordinator in the agency HR office.

E-PARs that require OA Classification approval cannot be processed using an Other – Please Explain action.

When "Other – Please Explain" is selected from either the "Position Action" or "Employee Action" menu on the E-PAR Selection page, the "Other/Please Explain" drop down menu directly below it becomes active. Select the appropriate option.

If no applicable E-PAR action is listed, select "Other – Describe below." When this option is chosen, a custom description is required for the E-PAR action in the unnamed field located immediately above the Position Number (or, in the case of an Employee Action, in the field directly above the Personnel Number).

Figure 15: Other E-PAR Request Drop-Down Menu



FINANCIAL DISCLOSURE OVERRIDE/UPDATE
(FIN DISCLOSURE OVRD/UPDATE)

This E-PAR is used to assign a financial disclosure filing task designation to a position that does not already have the relationship assigned to the position's job classification.

Required Information
Please complete the following information on the E-PAR form to ensure proper processing:

- **Proposed Effective Date**

Comments
Please include the following in the Comments field:

- **Relationship:** Verify that a financial disclosure task is not already present on the position's job classification.

- **Task:** Indicate which task needs added to the position:

  Task 50333125 – for Public Official (Fin Disc PO)
  Task 50333126 – for Public Employee (Fin Disc PE)
  Task 50333127 – for Attorney (Fin Disc A)
  Task 50333128 – for Board/Commission (Fin Disc BC)

COMMERCIAL DRIVERS LICENSE CODING UPDATE
(EE CDL UPDATE)

This E-PAR is used to assign or update CDL coding on a position that does not already have the appropriate relationship(s) assigned.

Required Information
Please complete the following information on the E-PAR form to ensure proper processing:

- **Proposed Effective Date**

Comments
Please include the following in the "Comments" field:

- **Relationship/Objects:** Verify the relationship/objects are not already established on the position. Indicate to add the following to the position:

  Relationship: A-031 Requires
  Type of Related Object: Qualification
  ID of Related Object:
  00000092 – CDL Employee Training
  00000093 – CDL License
  00000094 – CDL Supervisor Training

NOTE: If the position is filled, the employee's CDL license number will also need to be provided in the "Comments" section of the E-PAR for addition to the employee's record.

POSITION EXTENSION
(POS EXTENSION)

This E-PAR is used to request to extend a current filled or vacant position with an expiration date on your agency's authorized complement.

Required Information
Please complete the following information on the E-PAR form to ensure proper processing.

- **Proposed Effective Date:**

Comments
Please include the following in the "Comments" field:

- **Expiration Date:** The date position currently expires.
- **Approval:** HR office must indicate approval of project & budget extension has been granted.

- **Attachments**
  Please attach the following documents to the E-PAR:

- **Approval:** Attach OA's approval of position extension request; which includes new position expiration date.

WORK SCHEDULE CHANGE

This E-PAR is used to request a change to an employee's current established work schedule.

This action can still be completed by the agency's time advisor and/or work schedule assigner, unless the request is changing employee's work status coding; i.e. full-time to part-time or vice versa.

NOTE: All work schedule changes must be completed in SAP prior to the employee actually changing work schedules. Work schedules drive hours to be paid if management status is 9, including shift differential, overtime, etc.

Required Information
Please complete the following information on the E-PAR form to ensure proper processing.

- **Proposed Effective Date**

Comments
Please include the following in the Comments field:

- **New Work Schedule Rule and Effective Date**
- **Time Management Status:** Indicate if there are any changes.
- **Work Status:** Indicate if employee's work status is changing from full-time to part-time or vice versa. Employee's benefits may be affected.

The agency will be notified if any follow-up or review is necessary due to future dated time or absences, via comments on the closed E-PAR.

SEPARATION

This E-PAR is used to separate an employee from his/her position as a result of retirement, resignation, termination, death, furlough, completion of a specific employment period or an employee transfer to an agency not under the governor's jurisdiction. This action cannot be combined with any other action.

Required Information
Please complete the following information on the E-PAR form to ensure proper processing.

- **Proposed Effective Date**
- **Action Reason**

Comments
Please include the following in the Comments field:

- Mailing address if different than permanent address

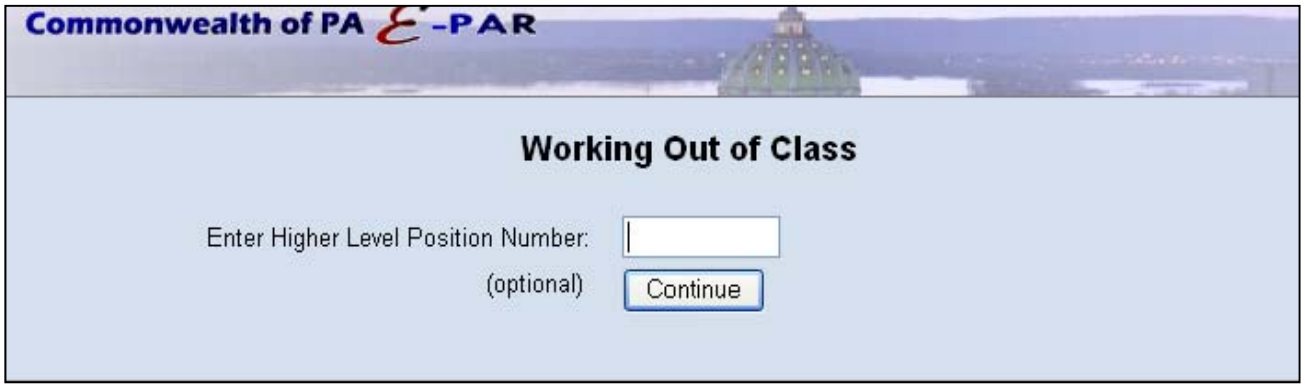
Attachments
Please attach the following documents to the E-PAR:

- Letter from Employee
- Agency generated letter (termination, furlough, etc.)

WORKING OUT OF CLASS

This E-PAR is used to temporarily assign work of a higher classification to an employee based on work existing from a current position or work assigned due to a special project. After selecting this option, the system will ask for a "Higher Level Position Number." This field is optional and is not required to continue.

Figure 16: Optional Position Number Prompt

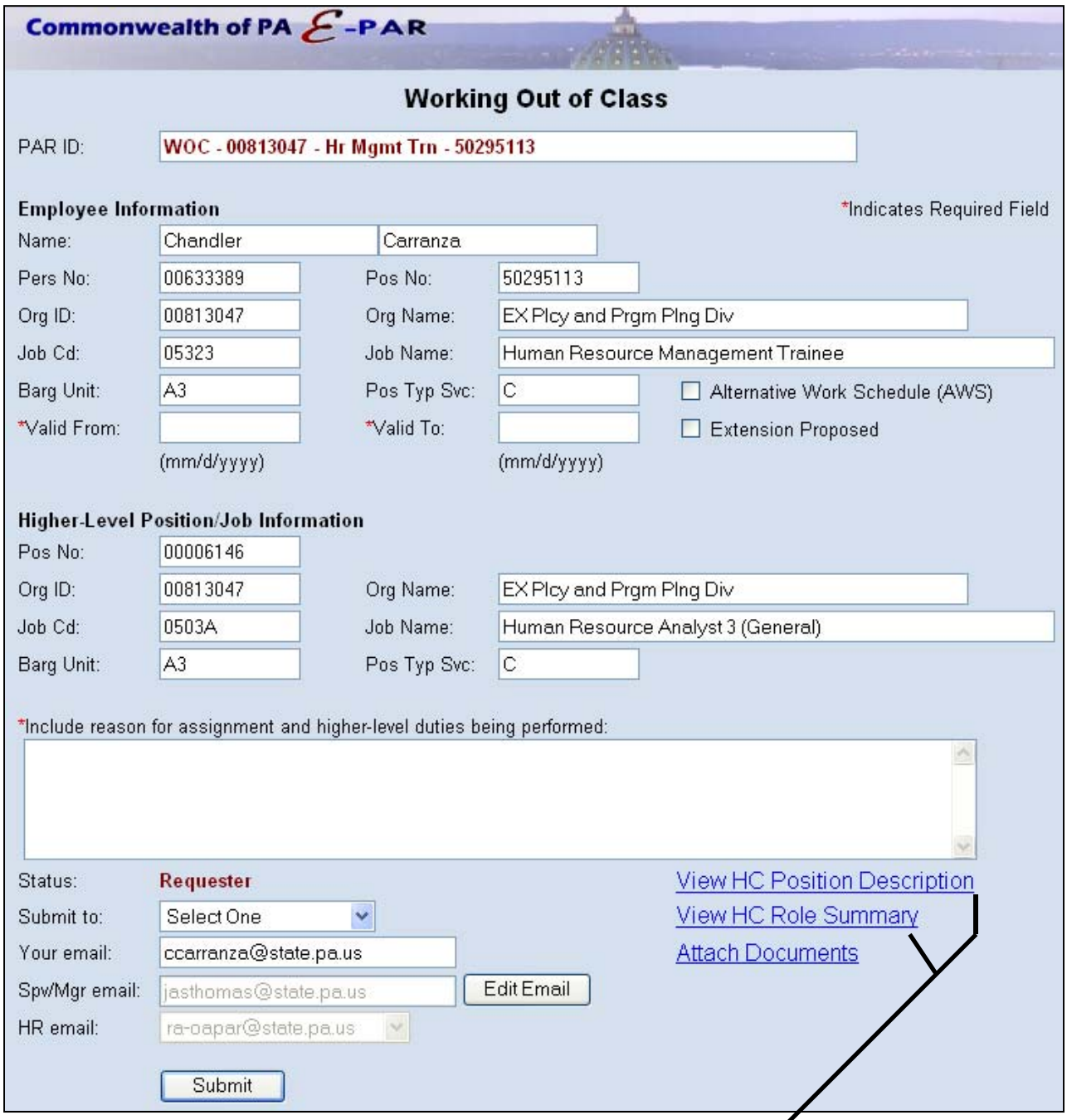


If a higher level position number is entered, the E-PAR form will, in addition to standard employee information, display fields containing information for the higher level position. Also, the links for additional information will change. Instead of displaying the employee's current position description and role summary, these links describe the **proposed higher level position description and role summary**.

If temporary roles are necessary to perform the temporary assignment, validity dates must be provided. Supervisor Self Service roles will not be assigned for temporary assignments.

Please note that Working out of Class E-PARs must be routed to the Office of Administration's Classification and Pay Division for approval.

Figure 17: Working Out of Class Form (Higher Level Position Number Entered)



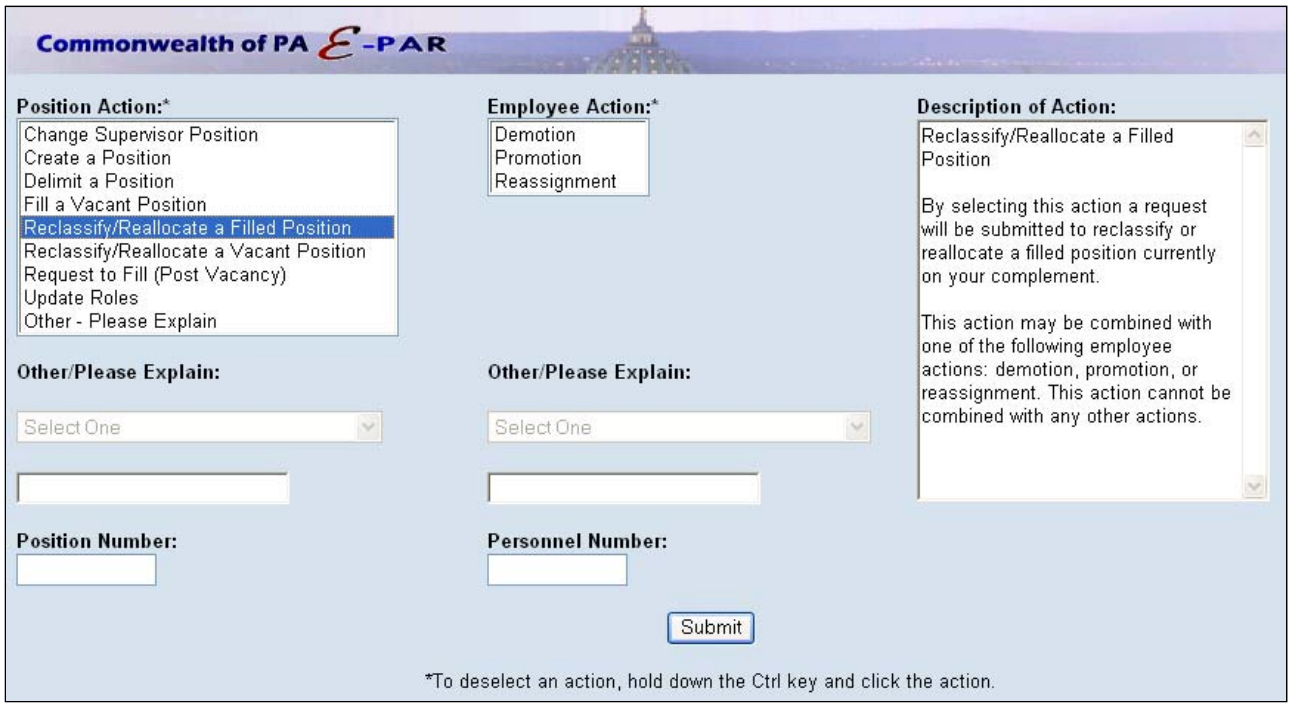
RECLASSIFY/REALLOCATE A FILLED POSITION

This E-PAR is used to reclassify a filled position that is currently in the complement. This action should be combined with one of the following employee actions: promotion, demotion or reassignment. It cannot be combined with any other position action.

To begin, select "Reclassify/Reallocate a Filled Position" from the "Position Action" menu, then select the appropriate option from the "Employee Action" menu:

- **Demotion** – A request will be submitted to reclassify the employee's position to a lower pay range.
- **Promotion –** A request will be submitted to reclassify to the employee's current position or to a class in a higher pay range.
- **Reassignment –** A request will be submitted to reclassify/reallocate an incumbent from his/her current class to a class in the same pay range for which he/she qualifies.

Figure 18: E-PAR Start Page with Alternate Employee Action Display



All Reclassify/Reallocate a Filled Position forms have an additional link labeled "View Position Cost Distribution," which displays the current cost distribution of the position. If the requester would like to modify the cost distribution for a split-funded position, the comments field on the E-PAR form should be used to detail the various funds, as well as the percentage breakdown.

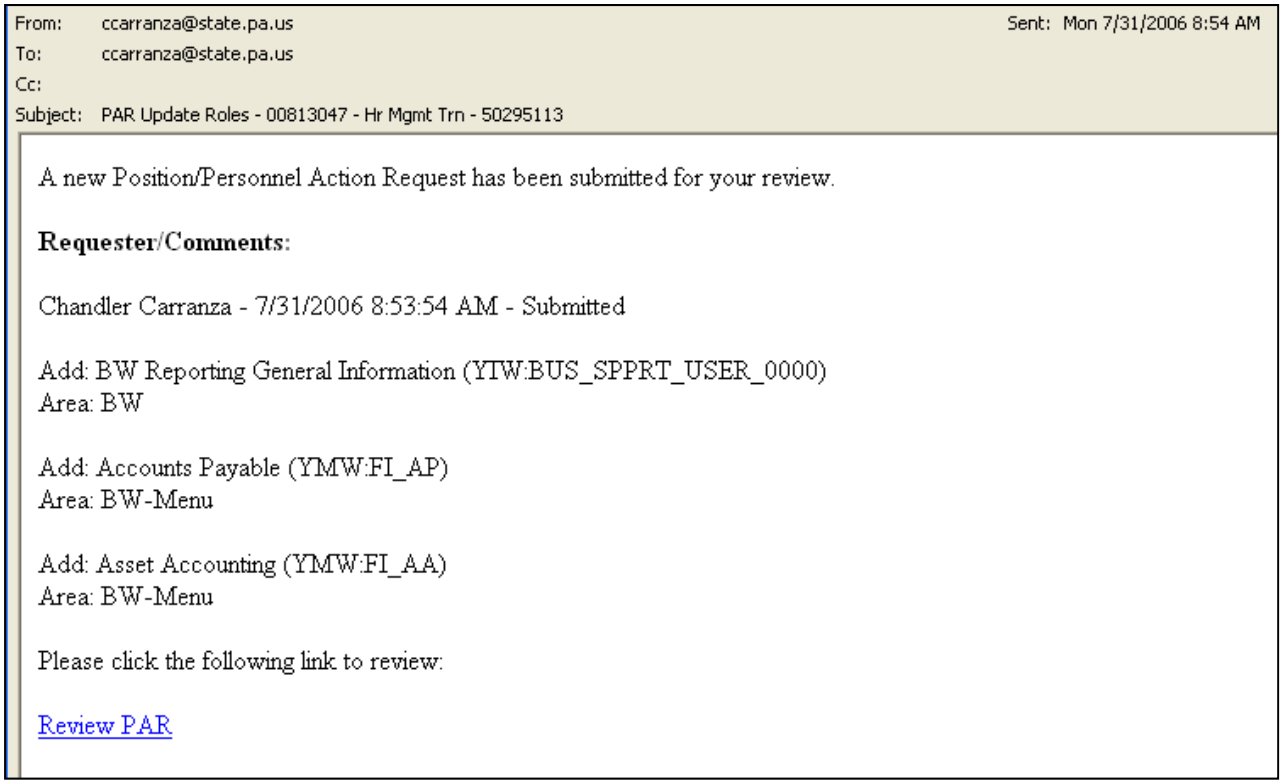
If the position is a centralized classification, the E-PAR must be routed to the Office of Administration's Classification and Pay Division for approval. See page 42 for more details.

SUPERVISOR/MANAGER REVIEW AND APPROVAL

Once the requester submits an E-PAR, an email will be sent to the commonwealth email account of the appropriate supervisor/manager. This email contains any comments the requester may have made and provides a link to review the requested E-PAR. By selecting the "Review E-PAR" link, the supervisor/manager can review the E-PAR and approve or disapprove the request.

NOTE: Supervisors/managers are unable to change any information on the E-PAR form. If corrections are necessary, the E-PAR must be routed back to the requester or to the HR office.

Figure 19: Supervisor/Manager Email


From: ccarranza@state.pa.us Sent: Mon 7/31/2006 8:54 AM
To: ccarranza@state.pa.us
Cc:
Subject: PAR Update Roles - 00813047 - Hr Mgmt Trn - 50295113

A new Position/Personnel Action Request has been submitted for your review.

Requester/Comments:

Chandler Carranza - 7/31/2006 8:53:54 AM - Submitted

Add: BW Reporting General Information (YTW:BUS_SPPRT_USER_0000)
Area: BW

Add: Accounts Payable (YMW:FI_AP)
Area: BW-Menu

Add: Asset Accounting (YMW:FI_AA)
Area: BW-Menu

Please click the following link to review:

Review PAR

Supervisor Action Options
Supervisors have the following options on the bottom of the E-PAR form:

Approve: This option marks the E-PAR as approved at this level. If administrative procedures require another manager to review and approve the request, the supervisor should choose "Supervisor/Manager" in the "Submit to" field and enter the appropriate email address using the "Edit Email" function. Refer to the Selecting E-PAR Recipients section for further instructions.

Move to: This allows the supervisor to forward the E-PAR to the requester, another supervisor, or the HR Office without marking it as "Approved" or "Disapproved." Supervisors should utilize this option if they would like to send the E-PAR back to the requester to make any necessary changes or to forward the E-PAR to another supervisor or the HR office with any questions or concerns.

Note: If the “Move to” option is selected, the supervisor is required to enter information in the “Your Comments” field.

Disapprove: When the supervisor/manager disapproves the request, the E-PAR is closed and no further actions can be taken on the request. The requester will receive an email notification that the E-PAR has been disapproved.

Note: As with the “Move to” option, the user is required to enter information in the “Your Comments” field.

Once a reviewer has taken action on the E-PAR (i.e. approve, move to, or disapprove), the reviewer cannot make any changes unless the E-PAR is routed back to the same reviewer by someone else in the workflow. If a reviewer attempts to re-access the E-PAR through the link contained in a previous email notification, the system will notify the reviewer that the E-PAR has already been reviewed.

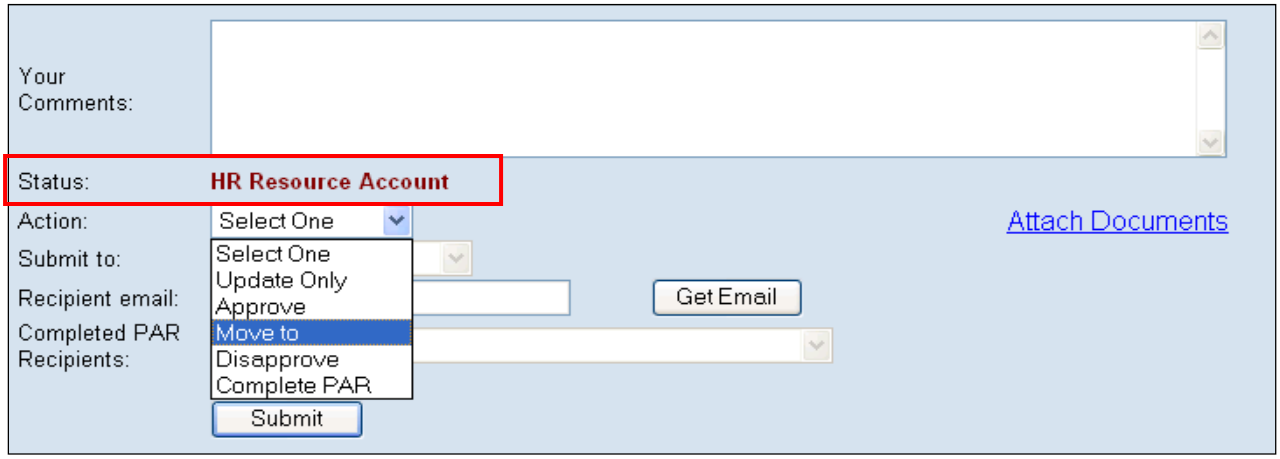
AGENCY HR OFFICE REVIEW AND APPROVAL

The agency HR office will receive all E-PARs through its assigned resource account.

When an E-PAR is received, the status will be listed as "HR Resource Account." Once the E-PAR is assigned to the appropriate agency HR specialist, the status will change to "HR Office."

HR Resource Account Manager
The resource account manager should click on the link provided in the email to review the E-PAR and move it to the appropriate division/staff member within the HR Office for processing. This is done by selecting "Move to" in the "Action" field, HR Office in the "Submit to" field and entering the email address of the appropriate division/staff member using the "Get Email" button. Refer to Selecting E-PAR Recipients for instructions on how to use this function.

Figure 20: Resource Account "Move to" Action



Action Options
The HR division/staff member within the HR office has the following options in the "Action" field when processing an E-PAR:

Update Only: This action allows the HR Office to add comments to the E-PAR without actually taking any action or moving it to another reviewer. This keeps the requester informed about the status of the E-PAR if there is a long delay. An HR staff member who updates an E-PAR can return to the request later by accessing the same "Review E-PAR" link in their original email notification.

Approve: This option marks the E-PAR as approved at this review step. If administrative procedures require the approval of another HR manager, the HR staff member must select the appropriate email address using the "Get Email" function. Refer to Selecting E-PAR Recipients to use this function.

This option may also be selected to submit the E-PAR to the HR Service Center when all internal approvals have been received (See Sending E-PARs to the HR Service Center).

Move to: This allows the HR staff member to forward the E-PAR to the requester, another supervisor or the HR Office without marking it as approved or disapproved. This option should be used to send the E-PAR back to the requester to make any necessary changes or to forward the E-PAR to another supervisor or to an HR office staff member with any questions or concerns.

This option may also be selected to submit the E-PAR to the HR Service Center when all internal approvals have been received (See Sending E-PARs to the HR Service Center).

> **Note:** When the "Move to" option is selected, the user is required to enter information in the "Your Comments" field.

Disapprove: When the HR staff member disapproves the request, the E-PAR is closed and no further actions can be taken on the request. The requester and supervisors/managers involved in the E-PAR workflow will receive an email notification that the E-PAR has been disapproved.

> **Note:** As with the "Move to" option, the user is required to enter information in the "Your Comments" field.

Complete E-PAR: Agencies should only select "Complete E-PAR" for Request to Fill (Post Vacancy) and Working out of Class E-PARs. All other action types should be submitted to the HR Service Center for processing.

When "Complete E-PAR" is selected, a final E-PAR summary email will be sent to the individual completing the E-PAR, as well as to any recipients chosen by the staff member under the "Submit to" dropdown (i.e. N/A, Requester, or Requester and All Spv/Mgr Reviewers).

Complete and Close E-PAR: As stated above, this last action in the drop-down list is available only in the Request to Fill (Post Vacancy) E-PAR. See Unique Features for Specific E-PAR Actions for functionality related to this option.

E-PARS AND THE OA CLASSIFICATION & PAY DIVISION

The following E-PAR actions cannot be completed or moved to the HR Service Center without approval from the Office of Administration Classification and Pay Division (OA C&P). Proposed job classes in the dropdown menu are classified as centralized (C) or decentralized (D) and are designated with the respective letter at the end of the job title.

- Reclassify/Reallocate a Filled Position (positions in centralized classes only)
- Reclassify/Reallocate a Vacant Position (positions in centralized classes only)
- Create a Position (positions in centralized classes only)
- Working Out of Class*

*****Care must be taken with Working Out of Class E-PARs since the system will allow HR to Complete E-PAR without OA C&P approval. E-PARs with the Alternate Work Schedule and/or Exception to Pay Rules option(s) checked must first be moved to and approved by OA C&P.

HR Office reviewers processing Reclassify/Reallocate a Filled Position or Reclassify/Reallocate a Vacant Position E-PARs will also notice the Position Description link has been replaced by the link "View PD w/Technical." This link opens a new browser window and displays the current position description with the technical evaluation provided at the bottom. This modified link is only available to reviewers in the HR office and OA C&P statuses, and not by reviewers in either Requester or Supervisor/Manager status.

All documentation previously provided to OA in hard copy, except for technical evaluations, should also be attached to the E-PAR using the attach documents functionality. Technical evaluations cannot be included as attachments or added as comments since requesters can view all comments and attachments associated with their E-PAR request. Technical evaluations should only be added in the online Position Description Application and are only accessible to HR and OA C&P users via the "View PD w/Technical" link.

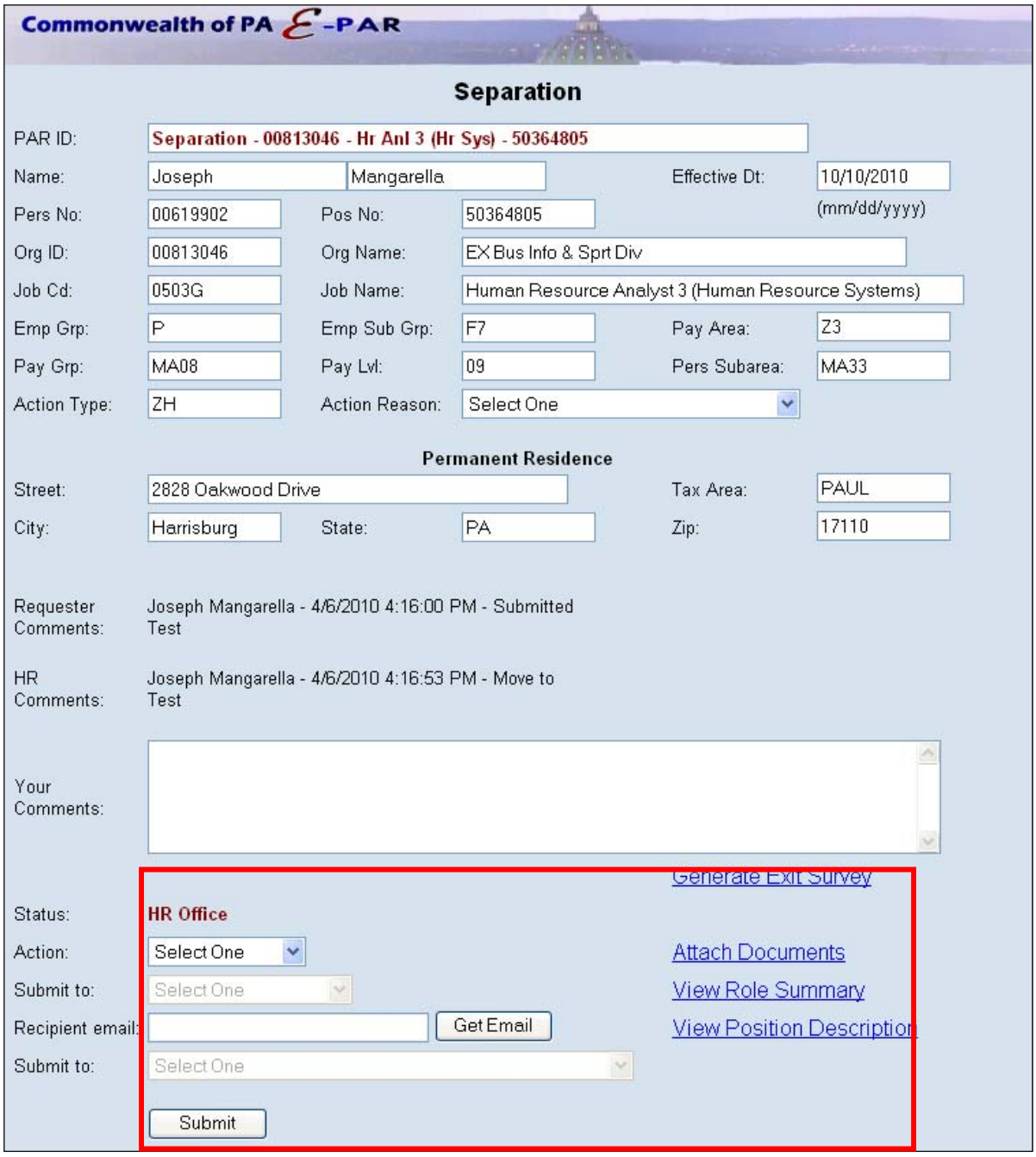
When an HR staff member receives one of the E-PARs listed in this section, they must submit the E-PAR to OA C&P by selecting "Move to" in the "Action" field and "OA-Classification and Pay" in the "Submit to" field. OA C&P's resource account email address (RA-CPPAR@state.pa.us) appears by default. Once OA C&P has processed the request, the E-PAR is routed back to the HR staff member who moved it to OA C&P for review.

The return email notification from OA C&P will include a determination as to whether the E-PAR has been Approved, Disapproved, or Returned Without Action. If OA C&P has provided an OA Control Number, the number will now appear on the E-PAR form when the E-PAR is re-accessed by the HR staff member. With an OA Control Number now in place, the E-PAR may now be completed or moved to the HR Service Center.

SENDING E-PARS TO THE HR SERVICE CENTER

E-PARs should only be sent to the HR Service Center from designated agency HR resource accounts. The HR Service Center will not accept emails from individual email accounts. Therefore, once an E-PAR has been routed through all internal reviews and approvals, it should be moved to a designated agency HR resource account before being submitted to the Service Center. The highlighted area in Figure 21 is explained in more detail below:

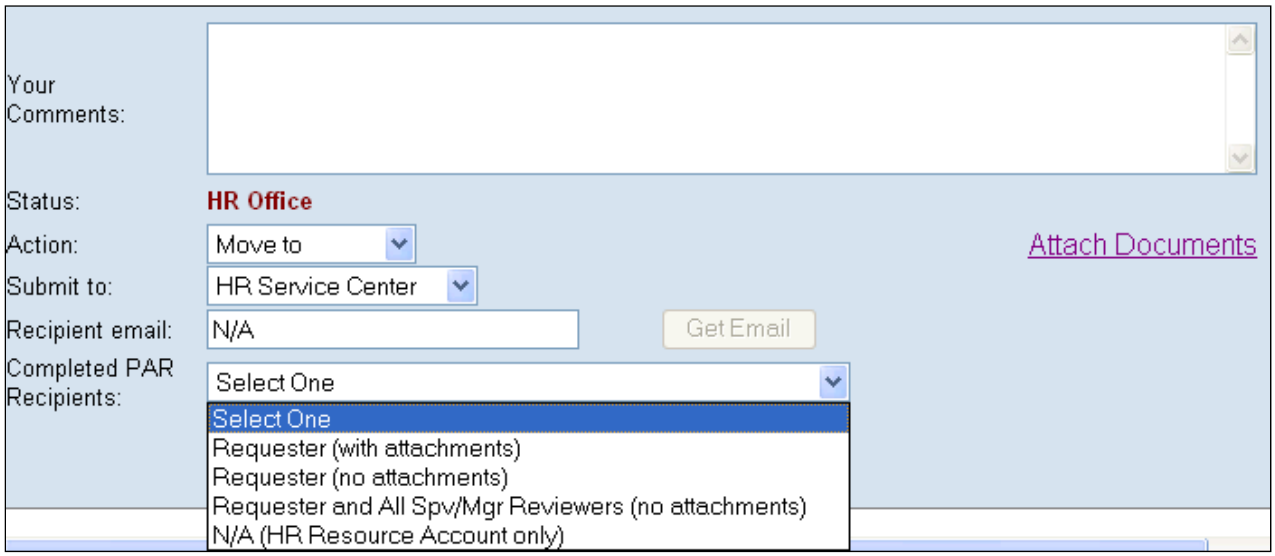
Figure 21: HR Office Status View



The agency HR office may route the E-PAR to the HR Service Center by selecting either "Move to" or "Approve" from the "Action" drop-down menu and selecting "HR Service Center" from the "Submit to" dropdown:

The "Completed E-PAR Recipients" field is required and determines who in the E-PAR workflow will receive the final E-PAR Summary notifications:

Figure 22: Completed E-PAR Recipients Drop-down Menu



Once the E-PAR has been processed by the Service Center, a summary email will be sent to the agency resource account. In addition, the completed E-PAR recipients designated by the agency HR office will receive the summary notification. The E-PAR summary contains all details of the action, as well as all comments entered by any participant in the E-PAR workflow (Figure 23).

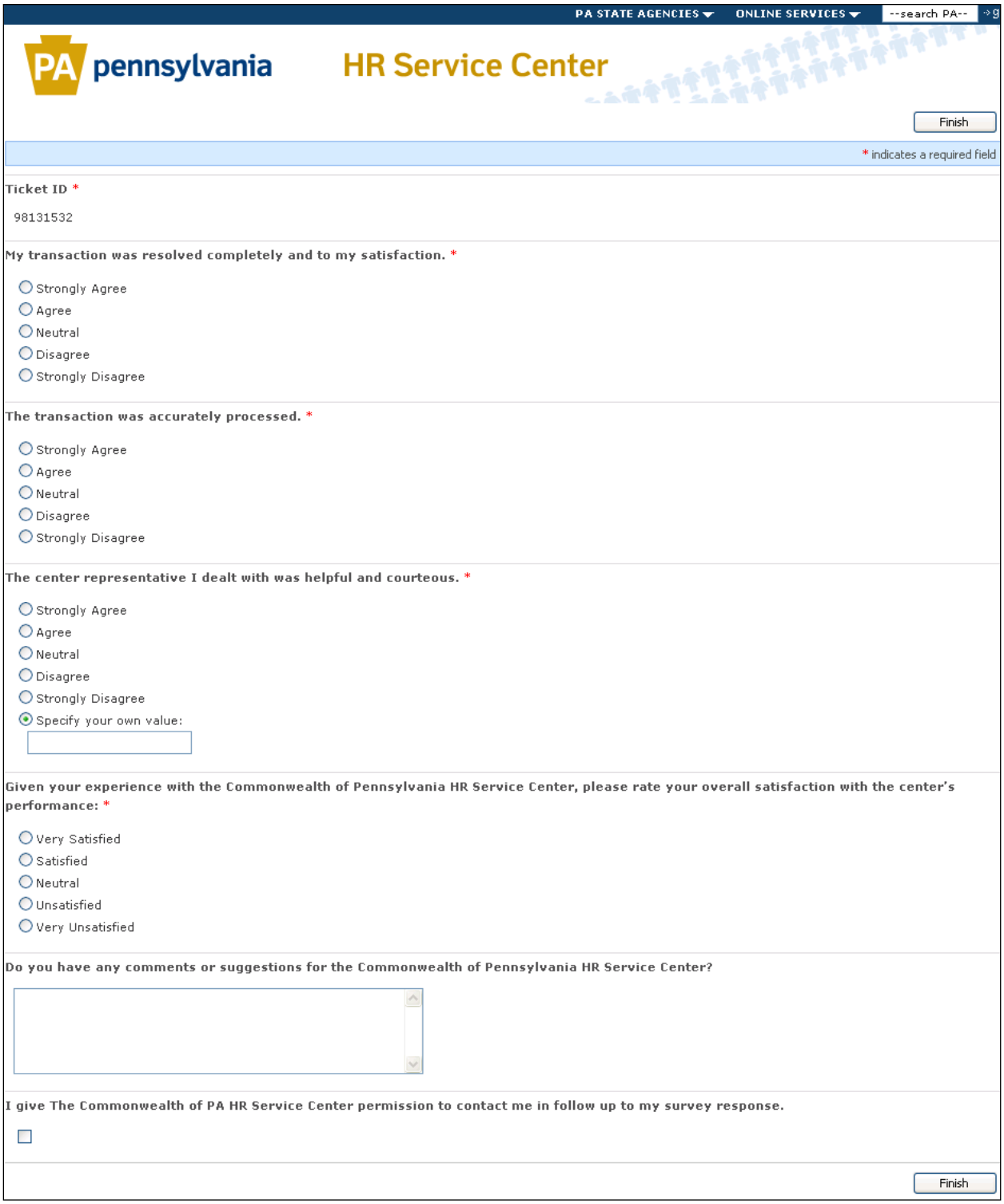
If any attachments such as an appointment letter have been included with the completed E-PAR, a row labeled "E-PAR Attachments" will appear at the bottom of the E-PAR Summary email. Click the "View Attachments" link to view the included attachments.

The introductory text of the E-PAR Summary email will also include a link to complete the Agency Services Customer Survey (Figure 24). The survey link is provided only in the email sent to the agency HR resource account, not to supervisors or requesters.

Figure 23: E-PAR Summary Email

PAR SUMMARY			
PAR ID:	**Fill a Vacant Position - 00813046 - Hr Anl 3 (Hr Sys) - 50364805**		
PAR Accesscode:	**781284712**		
Name:	**Joseph Mangarella**		
Pers No:	**00619902**	Approved Effective Dt:	**10/10/2010**
CURRENT			
Pos No:	**50364805**		
Org ID:	**00813046**	Org Name:	**EX Bus Info & Sprt Div**
Job Cd:	**0503G**	Job Name:	**Hr Anl 3 (Hr Sys)**
Pers Subarea:	**MA33**	Cont Type:	**Z1 - CS - Regular**
Emp Grp:	**P**	Emp Sub Grp:	**F7**
Pay Grp:	**MA08**	Pay Lvl:	**00**
APPROVED			
Pos No:	**50364805**		
Org ID:	**00813046**	Org Name:	**EX Bus Info & Sprt Div**
Job Cd:	**0503G**	Job Name:	**Human Resource Analyst 3 (Human Resource Systems)**
Pers Subarea:	**MA33**	Cont Type:	**-**
Emp Grp:	**P**	Emp Sub Grp:	**F7**
Pay Grp:	**MA08**	Pay Lvl:	**09**
Action Type:	**ZE - Reassignment**	Action Reason:	
CS Cert No:		BSE No:	
Time Administrator:			
Work Schedule Rule:			
Requester/Comments:	**Joseph Mangarella - 4/7/2010 8:48:16 AM - Submitted Sent to HR Office**		
HR Reviewers/Comments:	**Joseph Mangarella - 4/7/2010 8:55:36 AM - Complete PAR**		
PAR Attachments:	**View Attachments**		

Figure 24: Agency Services Customer Survey



UNIQUE FEATURES FOR SPECIFIC E-PAR ACTIONS

The following E-PARs will provide agency HR offices with additional action options not available with most other E-PARs.

Request to Fill (Post Vacancy)

Complete E-PAR: When selecting "Complete E-PAR" for a Request to Fill action, the E-PAR will be retained in the open bin of the reporting area so that a subsequent Fill a Vacant Position E-PAR for the same position may be referenced to it.

Complete and Close E-PAR: Selecting this action will send the completed E-PAR directly to the closed bin in the reporting area. This action should be used when the HR staff member does not anticipate linking a subsequent Fill a Vacant Position E-PAR to the current E-PAR being completed.

Update Roles

Training Liaison: Updates to SAP roles often result in the need for training. The HR office should route the E-PAR to the training liaison by specifying the email address of the training liaison using the "Edit Email" button. With this notice, the training liaison can enroll the employee in any appropriate courses or document on-the-job training. The training liaison may then forward the E-PAR back to the HR office or to the ASA once enrollment has been completed.

ASA (Agency Security Administrator): Agency security administrators (ASAs) may also be included in the E-PAR process for Update Roles requests. The HR office or training liaison may route the E-PAR to the ASA by specifying the email address of the ASA using the "Edit Email" button. With this notice, the ASA can complete the required updates to SAP for user security and access. The ASA may then forward the E-PAR back to the HR office once updates have been completed.

Note: E-PARs received by individuals in either the training liaison or ASA status utilize the same form as reviewers in the HR Office status. As such, these reviewers may also modify information in the E-PAR, attach documents, or complete E-PARs if required by an agency's specific business process.

Figure 25: Update Roles - Submit to Options

E-PAR REPORTING TOOL (DEPARTMENT)

Agency HR offices have the ability to search and view all E-PARs – open, closed and disapproved – via the online E-PAR Reporting Tool. Functions include:

- View the status of all E-PARs
- Delete open E-PARs
- Reopen closed E-PARs
- Maintain passwords to grant Orgs within your agency limited access to search and view E-PARs.

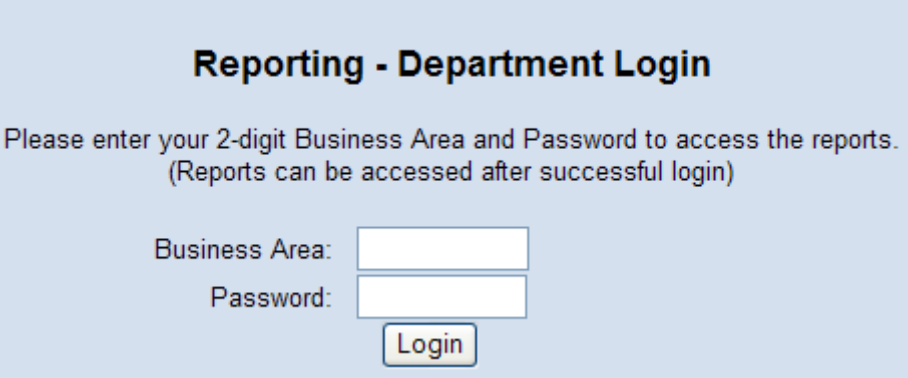
Logging On – Department Login

The E-PAR reporting tool can be found at http://oaiss.state.pa.us/par/par_reports/login.asp.

Log in by entering the following information:

Business Area: your agency's 2-digit business area
Password: your agency's 6-digit password

Figure 26: E-PAR Reporting Login



Contact your agency's E-PAR coordinator to obtain your agency's password.

*Please note: Access to the E-PAR Reporting Tool is limited to agency HR offices. Please keep your agency's password confidential.

E-PAR REPORTING TOOL HOME PAGE

Every session begins on the main E-PAR Search page:

Figure 27: E-PAR Reporting Home Page

The main search page will return all matching E-PARs within the agency, whether they are opened, closed or disapproved. E-PARs can be searched using the following filter options:

Access Code – The unique, 9-digit code provided in the confirmation email after the E-PAR was submitted. For closed or disapproved E-PARs, the access code can be found at the top of the E-PAR completion summary email.

Emp Last Name – Employee's last name

Pers No – Employee's 8-digit personnel number

Pos No – Employee's 8-digit position number

Org ID – 8-digit Org Unit number

HR Comments – Search by certain keyword(s) contained within the HR Comments portion of the E-PAR

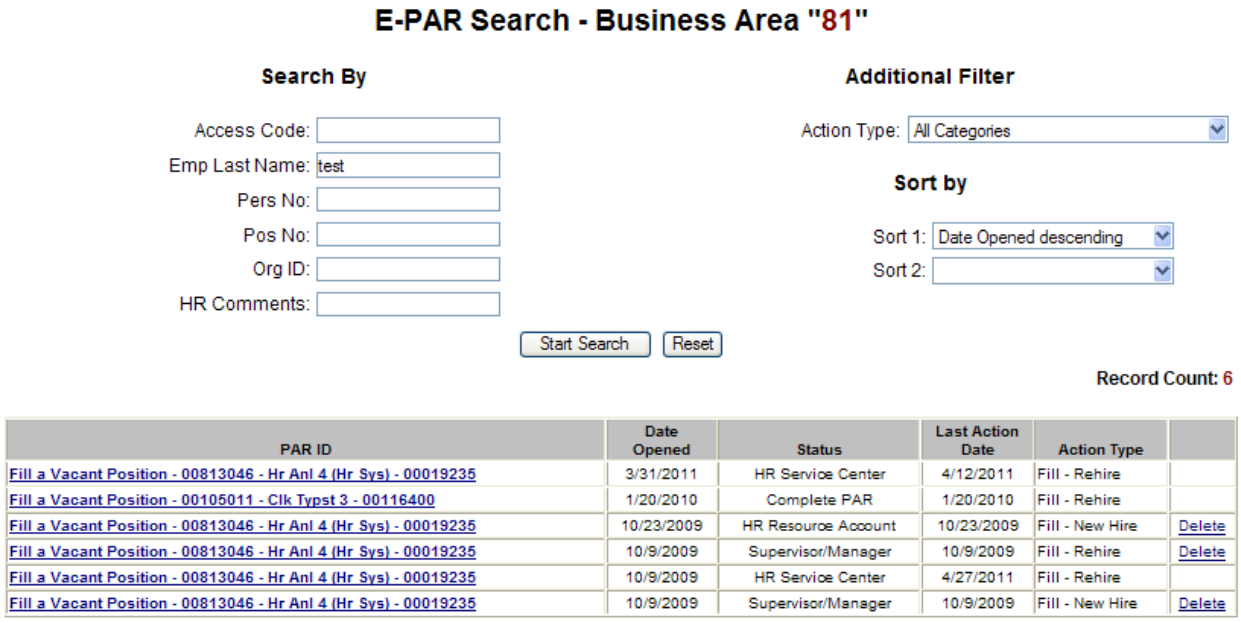
E-PARs can also be filtered by Action Type and sorted using the dropdowns provided.

Note: The main E-PAR search supports the entry of multiple search criteria and selections in order to accommodate more complex queries and to return more streamlined search results. The multiple search fields also support partial entry of search strings, e.g. “Smi” vs. “Smith”, Pers No “1234” vs. “00001234”, etc.

E-PAR Search Results

Based on search criteria, all results will be displayed below the search form. E-PAR information will be listed by PAR ID, Date Opened, Status, Last Action Date and Action Type. To view an individual E-PAR, click on the hyperlink in the ‘PAR ID’ column.

Figure 28: E-PAR Reporting Search Results



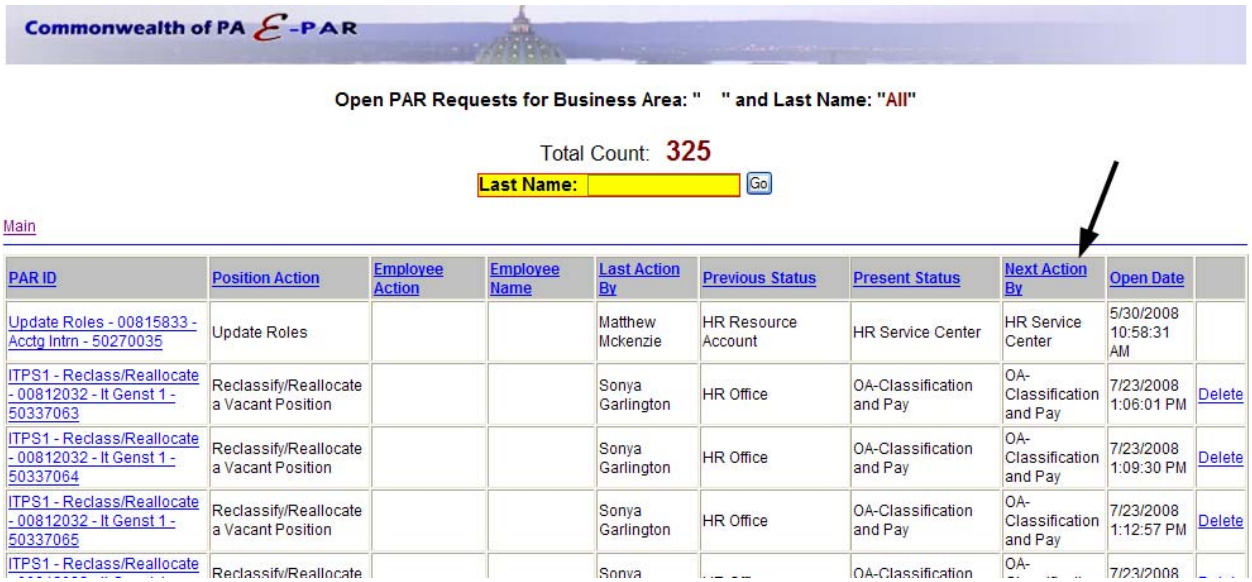
OPEN E-PAR SEARCH

To search all open E-PARs, use the links on the left-hand side of the page, listed beneath the "Open" category. Open E-PARs can be located using one of the following filter options:

- Employee Last Name
- Action
- Present Status
- Requester
- Organization
- From Position Number
- To Position Number
- Personnel Number

Click on a filter option and either enter the search criteria or select an option from the drop-down list (if applicable).

Figure 29: Search Open E-PARs by Last Name



PAR ID	Position Action	Employee Action	Employee Name	Last Action By	Previous Status	Present Status	Next Action By	Open Date	
Update Roles - 00815833 - Acctg Intrn - 50270035	Update Roles			Matthew Mckenzie	HR Resource Account	HR Service Center	HR Service Center	5/30/2008 10:58:31 AM	
ITPS1 - Reclass/Reallocate - 00812032 - It Genst 1 - 50337063	Reclassify/Reallocate a Vacant Position			Sonya Garlington	HR Office	OA-Classification and Pay	OA-Classification and Pay	7/23/2008 1:06:01 PM	Delete
ITPS1 - Reclass/Reallocate - 00812032 - It Genst 1 - 50337064	Reclassify/Reallocate a Vacant Position			Sonya Garlington	HR Office	OA-Classification and Pay	OA-Classification and Pay	7/23/2008 1:09:30 PM	Delete
ITPS1 - Reclass/Reallocate - 00812032 - It Genst 1 - 50337065	Reclassify/Reallocate a Vacant Position			Sonya Garlington	HR Office	OA-Classification and Pay	OA-Classification and Pay	7/23/2008 1:12:57 PM	Delete
ITPS1 - Reclass/Reallocate	Reclassify/Reallocate			Sonya		OA-Classification	OA-	7/23/2008	

Once the search has been complete, E-PAR information will be listed by PAR ID, Position Action, Employee Action, etc., as well as a 'Delete' column.

Results can be sorted in ascending order by clicking on a single column heading.

DELETE OPEN E-PARS

Agency HR offices have the ability to delete any open E-PAR as long as the request is not currently under review by the HR Service Center. When choosing to delete an E-PAR, understand that the E-PAR will be deleted permanently from the database. A record of the E-PAR will no longer exist, therefore, please delete with caution.

CLOSED AND DISAPPROVED E-PAR SEARCH

Both closed and disapproved E-PARs can be located using one of the following filter options:

- Employee Last Name
- Action
- Requester
- From Position Number
- To Position Number
- Personnel Number

For closed E-PARs only: due to the large number of completed E-PARs in the database, users must first enter search criteria or select an option from the filter dropdown (if applicable) before any search results will display.

Once the search is complete, E-PAR information will be listed by PAR ID, Position Action, Employee Action, etc.

Closed and disapproved E-PARs cannot be deleted.

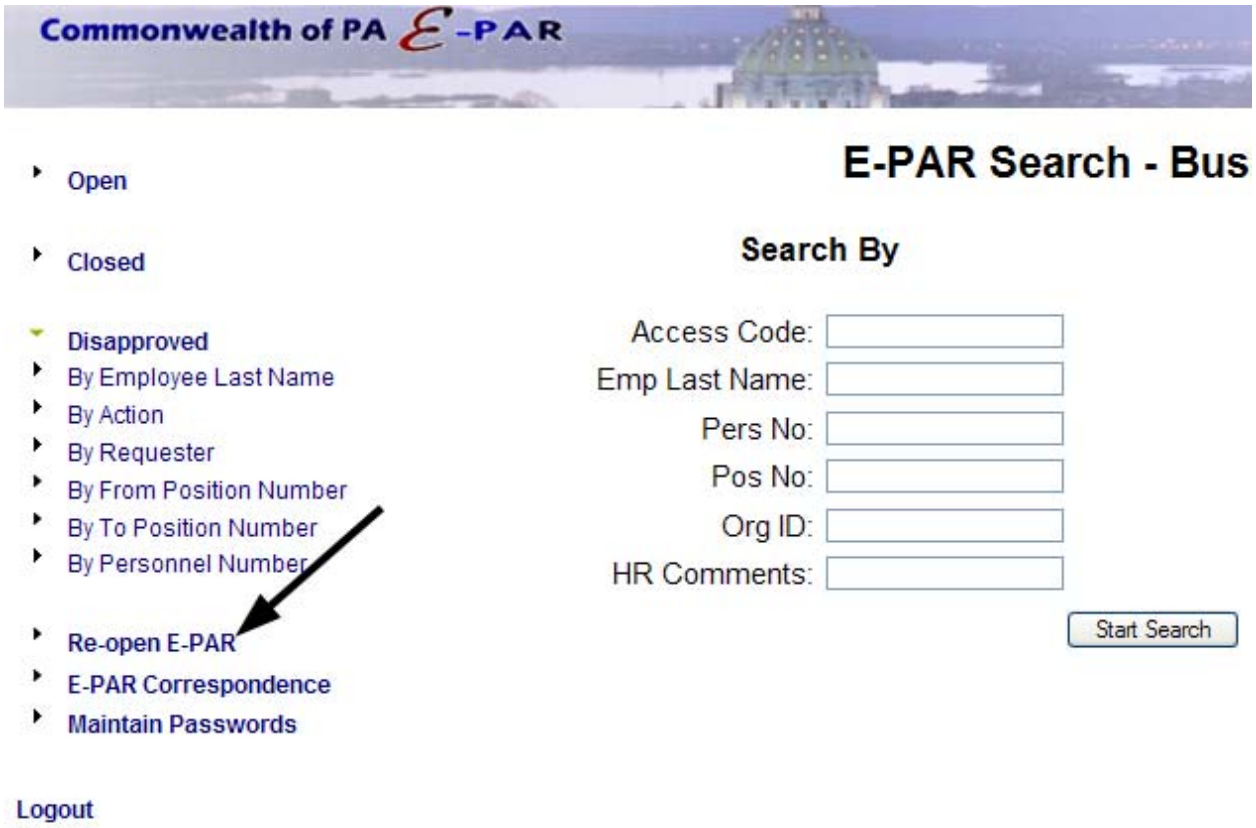
REOPEN E-PAR

Once an E-PAR has been completed by the HR Service Center, agency HR offices have the ability to reopen the E-PAR for 30 days calendar days after the completion date. One way for the agency HR office to reopen an E-PAR is through the E-PAR Reporting Tool home page. Reasons agency HR offices may need to reopen an E-PAR include:

- Letter correction
- Transaction correction
- Additional information
- Forms submission

An E-PAR cannot be reopened if it has not been routed to and completed by the HR Service Center. Any E-PARs completed at the HR Resource Account or HR Office status cannot be reopened.

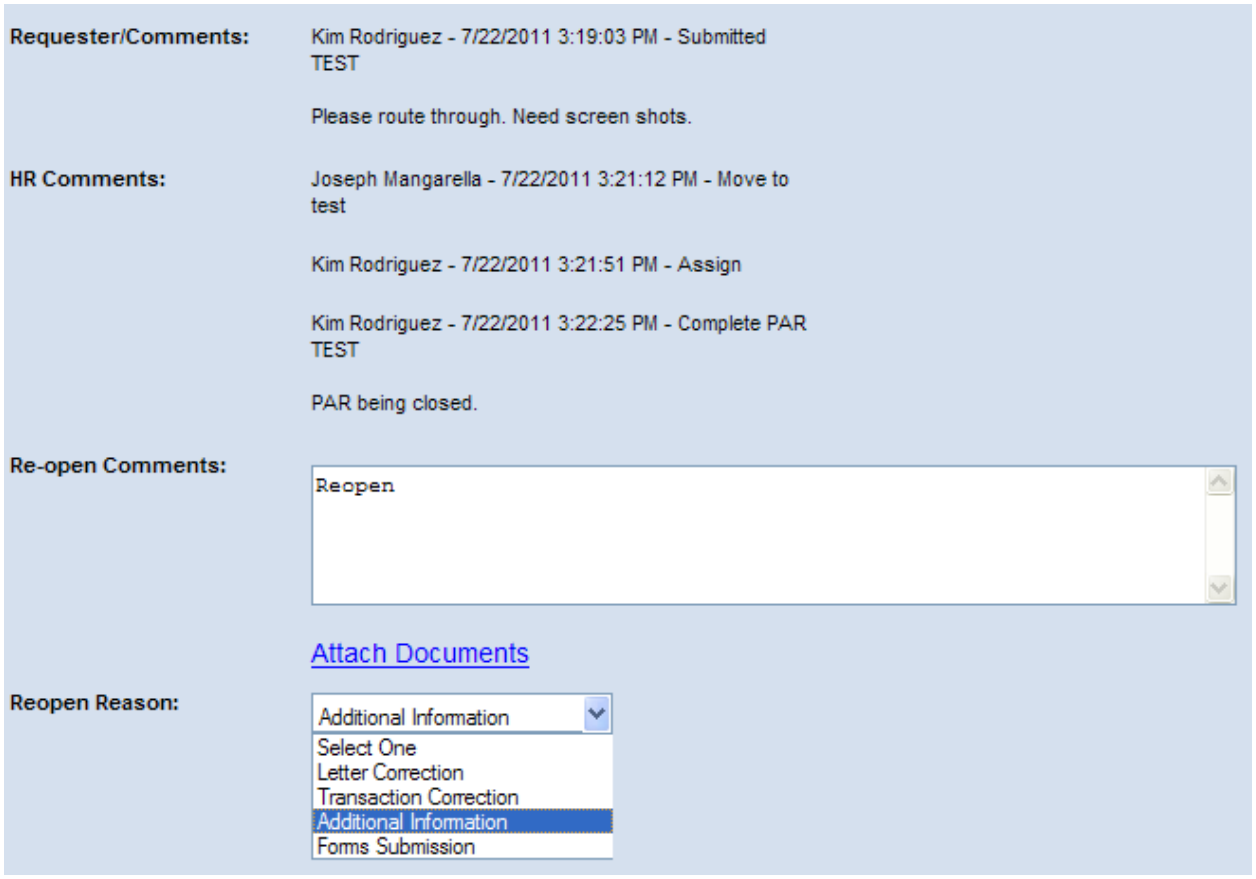
Figure 30: Reopen E-PAR



To reopen an E-PAR, select the "Reopen E-PAR" link from the E-PAR Reporting home page. All E-PARs that have been closed within the last 30 calendar days will display. E-PARs then can be filtered either by Personnel Number or Position Number. When the E-PAR is located, select the "Reopen" link in the far right column.

The E-PAR will display along with a “Reopen Comments” field at the bottom of the form. Please describe the reason your agency is reopening the E-PAR. To submit additional documents, select the “Attach Documents” link. Also, one of four options must be selected from the drop-down list as a “Reopen Reason”. Once all fields are complete and documents are attached, select the “Submit” button.

Figure 31: Reopen E-PAR fields



The E-PAR will reopen and route back to the HR Service Center. When the HR Service Center has processed and completed the reopened E-PAR, a second E-PAR completion summary will be emailed to the user who reopened the E-PAR and the agency HR resource account from which the E-PAR was originally sent.

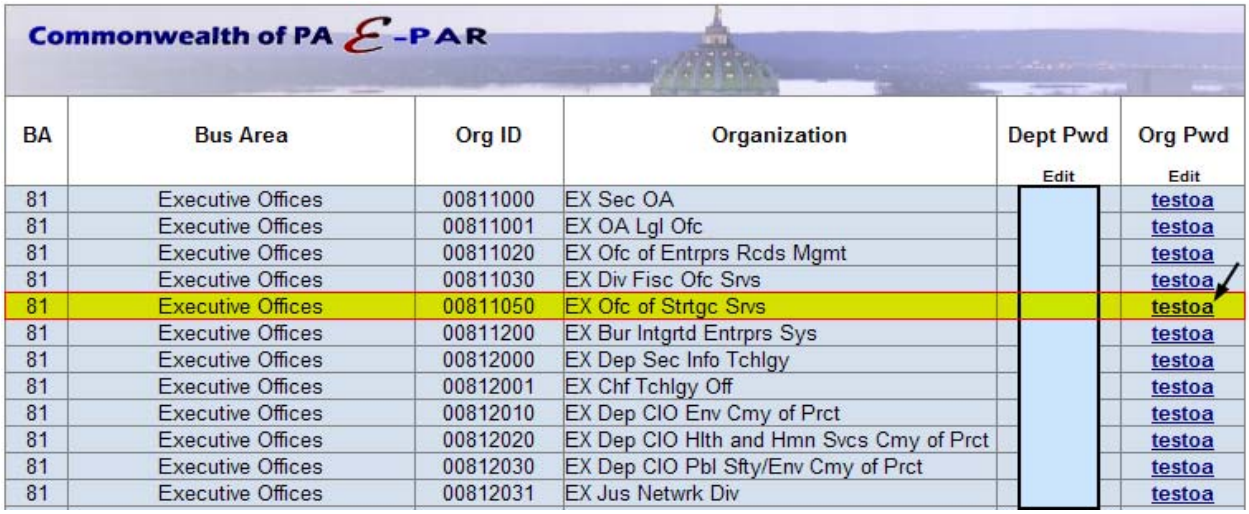
MAINTAIN PASSWORDS

Agency HR offices can grant field offices, HR liaisons or HR representatives limited access to search and view E-PARs submitted within their organizations. This access allows users to track the status of E-PARs submitted under their purview without giving them access to all E-PARs submitted in their agency. The options to delete, reopen and view E-PAR correspondence are not available through this limited view. See the Accessing the E-PAR Reporting Tool (Org) section for additional information on this topic.

To assign a password to an org in order to allow users access to the Org E-PAR Reporting Tool, select the "Maintain Passwords" link at the bottom left of the Department E-PAR Reporting home page. A new browser window will open displaying each org within your agency sorted by Org ID. Each org can be assigned a specific password by clicking the link below the "Org Pwd, Edit" column.

Agencies may assign different passwords for each org or may assign the same password for multiple orgs, depending on their specific org structure and needs. The password requires a minimum of 6 characters.

Figure 32: Changing Org Passwords



BA	Bus Area	Org ID	Organization	Dept Pwd Edit	Org Pwd Edit
81	Executive Offices	00811000	EX Sec OA		testoa
81	Executive Offices	00811001	EX OA Lgl Ofc		testoa
81	Executive Offices	00811020	EX Ofc of Entrprs Rcds Mgmt		testoa
81	Executive Offices	00811030	EX Div Fisc Ofc Srvs		testoa
81	Executive Offices	00811050	EX Ofc of Strtgc Srvs		testoa
81	Executive Offices	00811200	EX Bur Intgrtd Entrprs Sys		testoa
81	Executive Offices	00812000	EX Dep Sec Info Tchlgy		testoa
81	Executive Offices	00812001	EX Chf Tchlgy Off		testoa
81	Executive Offices	00812010	EX Dep CIO Env Cmy of Prct		testoa
81	Executive Offices	00812020	EX Dep CIO Hlth and Hmn Svcs Cmy of Prct		testoa
81	Executive Offices	00812030	EX Dep CIO Pbl Sfty/Env Cmy of Prct		testoa
81	Executive Offices	00812031	EX Jus Netwrk Div		testoa

Once the password has been established, it can be provided to appropriate users in the agency to access the Org E-PAR Reporting Tool.

E-PAR REPORTING TOOL (ORG)

Non-HR users have the ability to search and view all E-PARs – open, closed and disapproved – that are associated with their organizations. Org passwords for the organization reporting login are maintained by central HR staff and can be obtained by contacting your agency's E-PAR Coordinator.

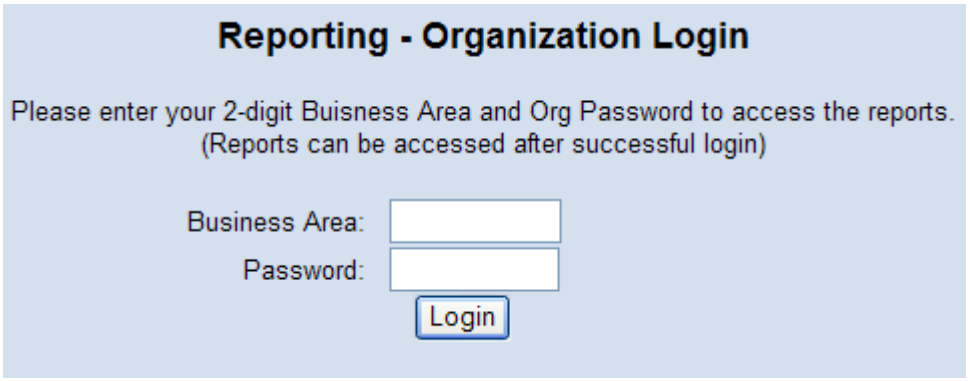
Logging On – Org Login

The E-PAR Reporting Tool (Org) can be found at http://oaiss.state.pa.us/par/par_reports/orglogin.asp.

Log in by entering the following information:

Business Area: your agency's 2-digit business area
Password: your Org's 6-digit password

Figure 33: E-PAR Reporting Login (Org)



E-PAR REPORTING TOOL HOME PAGE (ORG)

Every session begins on the main E-PAR Search page. The main search page will return all matching E-PARs within the orgs to which the org password entered by the user applies, whether they are opened, closed or disapproved. E-PARs can be searched using the following filter options:

Access Code – The unique, 9-digit code provided in the confirmation email after the EPAR was submitted. For closed or disapproved E-PARs, the access code can be found at the top of the E-PAR completion summary email.

Emp Last Name – Employee's last name

Pers No – Employee's 8-digit personnel number

Pos No – Employee's 8-digit position number

Org ID – 8-digit Org Unit number

E-PARs can also be filtered by Action Type and sorted using the dropdowns provided.

Note: The main E-PAR Search supports the entry of multiple search criteria and selections in order to accommodate more complex queries and to return more streamlined search results. The multiple search fields also support partial entry of search strings, e.g. "Smi" vs. "Smith", Pers No "1234" vs. "00001234", etc.

E-PAR Search Results

Based on search criteria, all results will be displayed below the search form. E-PAR information will be listed by PAR ID, Date Opened, Status, Last Action Date, and Action Type. To view an individual E-PAR, click on the hyperlink in the 'PAR ID' column.

OPEN E-PAR SEARCH

To search all open E-PARs, use the links on the left-hand side of the page, listed beneath the 'Open' category. Open E-PARs can be located using one of the following filter options:

- Employee Last Name
- Action
- Present Status
- Requester
- Organization
- From Position Number
- To Position Number
- Personnel Number

Click on the filter you wish to search by and either enter search criteria or select an option from the drop-down list (if applicable).

Once the search has been complete, E-PAR information will be listed by PAR ID, Position Action, Employee Action, etc.

Results can be sorted in ascending order by clicking on a column heading.

CLOSED & DISAPPROVED E-PAR SEARCH

Both closed and disapproved E-PARs can be located using one of the following filter options:

- Employee Last Name
- Action
- Requester
- From Position Number
- To Position Number

- Personnel Number

For closed E-PARs only – due to the large number of completed E-PARs in the database, users must first enter a search criteria or select an option from the filter dropdown (if applicable) before any search results will display.

Once the search has been complete, E-PAR information will be listed by PAR ID, Position Action, Employee Action, etc.

ADDITIONAL HELP

Each agency HR office has designated a staff member as its agency E-PAR coordinator. This individual will coordinate training regarding the E-PAR process, as well as assist users and organizations with the implementation and continued use of the application. Please contact your agency E-PAR coordinator for more information relating to your agency's specific E-PAR processes.