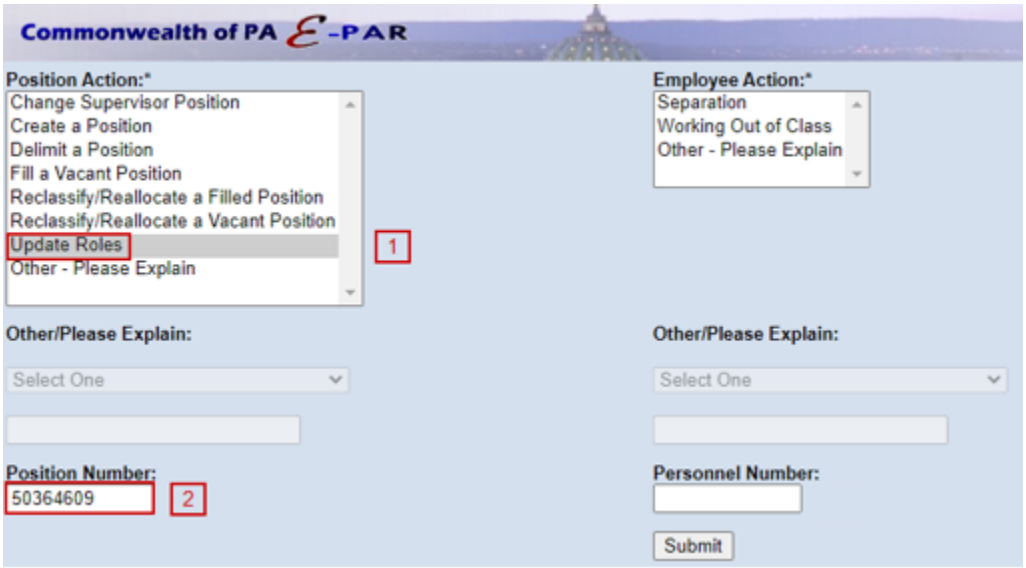
pennsylvania
HR SERVICE CENTER

UPDATE ROLES EPAR SUBMISSION GUIDE

Overview/Tips

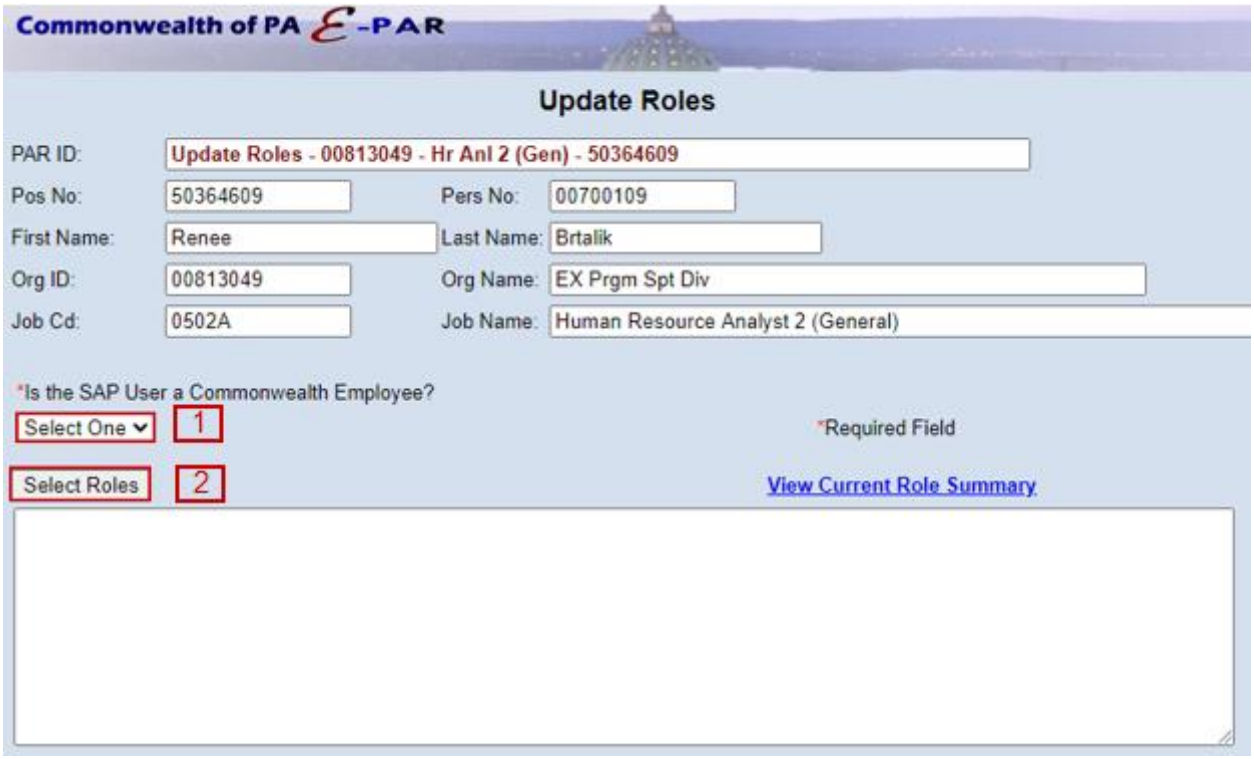
- Please review the position to ensure the roles are not already present.
- Please select roles from dropdown field in EPAR. If attaching a document with several roles, please be sure that is in the form of an unlocked Word document or Excel spreadsheet, so the HRSC can copy and paste the roles from the document into SAP. (For example, do not provide a screenshot of the roles.) If copying roles from Org Charts, be sure the prefix is followed by either a ">" or ":". (Plus signs are not used in SAP.)
- Please review the Master Roles Document provided at the end of this guide for information on specific roles.
- Please be sure to indicate if any PD Profiles or AZ02's (org structure) need to be assigned along with the role.
- AZ04 (Travel Approvers) and AZ05 (Is an aide to) information can also be found in this guide.

EPAR Form



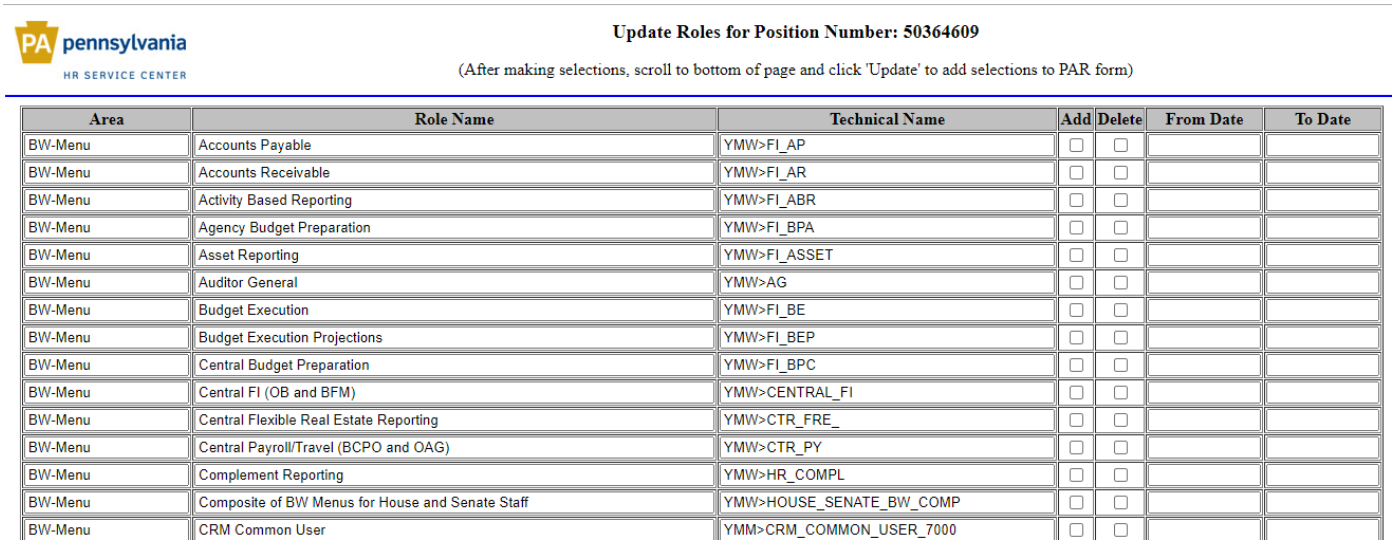
1 Select Update Roles.

2 Position number of the employee whose roles are being added or delimited. Click Submit.



1 Select Yes or No.

2 Click Select Roles. A new box will open.



pennsylvania HR SERVICE CENTER

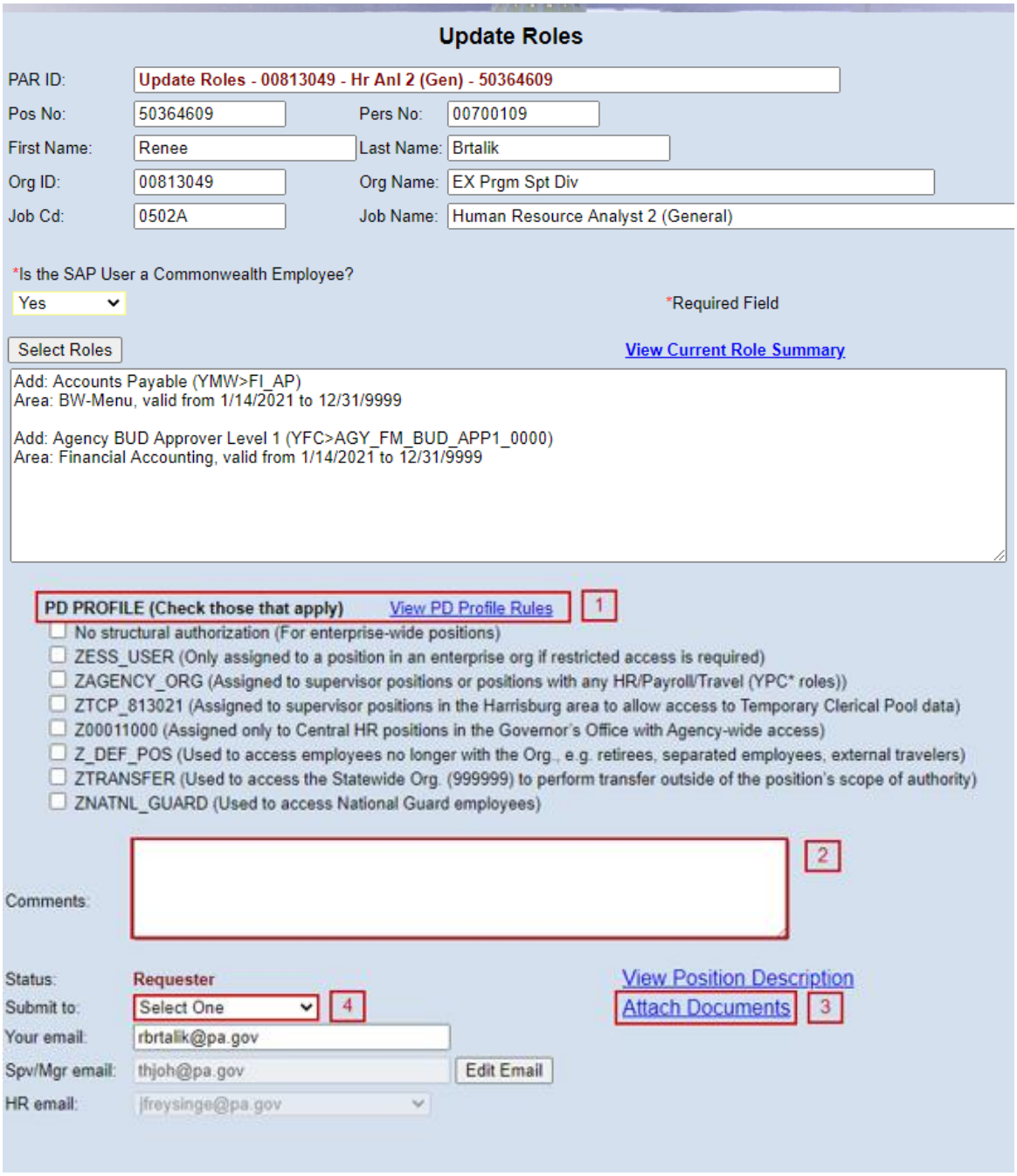
Update Roles for Position Number: 50364609

(After making selections, scroll to bottom of page and click 'Update' to add selections to PAR form)

Area	Role Name	Technical Name	Add	Delete	From Date	To Date
BW-Menu	Accounts Payable	YMW>FI_AP	☐	☐		
BW-Menu	Accounts Receivable	YMW>FI_AR	☐	☐		
BW-Menu	Activity Based Reporting	YMW>FI_ABR	☐	☐		
BW-Menu	Agency Budget Preparation	YMW>FI_BPA	☐	☐		
BW-Menu	Asset Reporting	YMW>FI_ASSET	☐	☐		
BW-Menu	Auditor General	YMW>AG	☐	☐		
BW-Menu	Budget Execution	YMW>FI_BE	☐	☐		
BW-Menu	Budget Execution Projections	YMW>FI_BEP	☐	☐		
BW-Menu	Central Budget Preparation	YMW>FI_BPC	☐	☐		
BW-Menu	Central FI (OB and BFM)	YMW>CENTRAL_FI	☐	☐		
BW-Menu	Central Flexible Real Estate Reporting	YMW>CTR_FRE_	☐	☐		
BW-Menu	Central Payroll/Travel (BCPO and OAG)	YMW>CTR_PY	☐	☐		
BW-Menu	Complement Reporting	YMW>HR_COMPL	☐	☐		
BW-Menu	Composite of BW Menus for House and Senate Staff	YMW>HOUSE_SENATE_BW_COMP	☐	☐		
BW-Menu	CRM Common User	YMM>CRM_COMMON_USER_7000	☐	☐		

For each role that should be assigned to the position, select either Add or Delete and enter the From and To dates. Scroll to the bottom of the screen and click Update.

The roles will populate in the field.



1 Select appropriate PD Profiles based on position's access needs.

2 Provide necessary comments including any specific structural authorizations (AZ02 relationships).

3 Attach any necessary documents.

4 Choose appropriate option based on your agency's chain of approval and click submit.

AZ04 and TRAVEL APPROVER GUIDE

AZ04's AND TRAVEL APPROVER (YPC>TRAVEL_APRVR_EX14)

An AZ04 relationship is required when a travel approver is approving travel requests of travel submitters whom the approver does not supervise. Neither an AZ04 relationship nor a travel approver role is needed when the approver is a supervisor approving travel requests of positions under his/her own supervision. The immediate supervisor will receive travel workflow by virtue of having the ESS Supervisor role, unless an AZ04 relationship is created to bypass that workflow.

The AZ04 relationships will identify the position number (or employee numbers in the case of an external person) of the travel request submitters. If the travel approver is not a supervisor (does not have the ESS Supervisor role), then the travel approver role must also be present in addition to a PD Profile. **THE BUREAU OF COMMONWEALTH PAYROLL OPERATIONS MUST APPROVE ALL REQUESTS FOR AZ04 RELATIONSHIPS.**

To request an AZ04 "Approves travel for" relationship, follow these steps:

1. Complete an Update Roles PAR for the travel approver's position.
2. If the travel approver is NOT a supervisor, select YPC>TRAVEL_APRVR_XXXX (enter suffix) from the drop-down box.
3. Check PD Profile ZAGENCY_ORG if not already assigned.
4. In the comments section, provide the position number or numbers of the travel submitters.
5. Choose the appropriate option based on your agency's chain of approval and click "Submit."

AZ05 'IS AN AIDE TO' GUIDE

AZ05 'IS AN AIDE TO' RELATIONSHIP

The AZ05 relationship allows the position holder to approve time and leave workflow on behalf of another executive-level position's holder or because of the lack of a holder (vacant executive-level position). This relationship will require adding another role (YPC>ESS_SUPVR_AIDE_EX14) and two PD Profiles if not already present.

Note: This role will cause workflow to simultaneously route to both the "aide" and the person he/she is aiding (normally an executive such as a Deputy Secretary) so either one can take action. Multiple aide requests for one executive are discouraged (but allowed) since there can be confusion as to who should review and approve the workflow. Workflow consists of time and leave and does not include travel.

Important: "Aide to" relationships are not to be used to circumvent normal workflow. **If there are questions as to whether the request should be processed, escalate the request through the supervisory chain of command.**

To request an AZ05 "Is an Aide" relationship, follow these steps:

1. Complete an Update Roles PAR for the employee/position serving as Aide.
2. Select YPC>ESS_SUPVR_AIDE_EX14 from the drop-down box.
3. Check PD Profile ZAGENCY_ORG if not already assigned.
4. In the comments section, request PD Profile ZAIDE.
5. In the comments section, provide the job title and position number (filled or vacant) to be aided.
6. Choose the appropriate option based on your agency's chain of approval and click "Submit."

References

Master Roles Document