



Personnel Action Form DocRoute Process

The Personnel Action Form DocRoute process will be used for the routing of paper Personnel Action forms (PA).

A completed paper PA form must be attached to the DocRoute submission. The paper PA form is located on the Human Resources website under the Forms menu.

The DocRoute form will be utilized for electronic routing and approval of the paper PA form.

The DocRoute form will populate the approval queue from the originator's Electronic Personnel Action Form (EPAF) default routing queue for the specific EPAF type selected. If an EPAF type is not available, "Other" may be selected in the DocRoute, and the originator should ensure all required approvers have been added. More information regarding the approval routing/reviews is included below.

The Personnel Action Form DocRoute will not take the place of Electronic Personnel Action Forms (EPAFs) and should only be used for actions that cannot be submitted via an EPAF. Those actions would include certain retroactive actions or other actions where an EPAF for a specific action is not available. More information regarding EPAFs can be found on the USA Online Electronic Personnel Action Form course.

Instructions for using Personnel Action Form DocRoute:

Navigate to the Faculty and Staff Logins page of the USA Website and select the DocRoute icon.



At the prompt, enter your Jag Number and SSO password.

DocRoute

This is the USA Document Routing system. It is used for tracking and approval of many different processes. If you would like to make a new request or review an existing request please login with your JagNet credentials below.

Jag Number

Password

Login

Expand "Human Resources" on the left and choose "PA Form". Select "Add New Request"

Finance & Administration ▼

Human Resources ▼

Designated Guest

Educational Benefit

Employee Separation

Employee Transfer

Name Change

PA Form

Personnel Action Form

An Electronic Personnel Action Form (EPAF) must be used in extenuating circumstances in which result in disciplinary action.

Add New Request

Browse Requests

Enter the Jag Number or email address of the employee for whom the PA is for, then click Search. The fields in gray will prefill with the employee's current information from Banner.

Employee

Employee *

Enter a Jag Number or email address

Search

Jag Number

Name

Title

Department

Division

PictCode

EClass

0

From the EPAF Route dropdown menu, select the PA type you are submitting via the DocRoute. If there is not an EPAF type listed that matches the action needed, select “Other No EPAF exists for this situation” from the dropdown menu.

Note: Selecting “Show Route” after an EPAF Route is selected will show the approval routing that will populate. This is based on how your routing queue is set up for that specific EPAF in PAWS. To make changes to the approval routing, see the section below “Approval/Review Routing”.

PA Details

EPAF Route *

Additional Notes / Comments

Add any notes or comments.

Comments added can not be removed and will be part of the permanent record.

Answer “Yes” or “No” to the question, “Does this include a Cost Transfer”?

If “Yes” is selected, new required fields will open.

Select “Add Cost Transfer” to enter the required fields.

Enter the Fund numbers for “From FUND” and “To FUND” and provide an explanation.

Select Save.

Does this include a Cost Transfer? *

☐ Yes ☐ No

Cost Transfers *

From	To	Explanation
No records found		

Add Cost Transfer

From FUND *

6 numeric digits

To FUND *

6 numeric digits

Explanation

Fully explain why the expense(s) was not originally charged to the project AND h project.

NOTE: A PAPER COST TRANSFER FORM IS NOT NEEDED AND SHOULD NOT BE ATTACHED.

All information related to the cost transfer will be entered in the body of the PA DocRoute.

If this is a Graduate Assistant PA, paper cost transfers may still be needed for changes to tuition and/or insurance funding.

Enter the Initial Expense Date.

Initial Expense Date *

mm/dd/yyyy

If the Initial Expense Date is over 90 days, a 90 Day Explanation Box will be required.

90 Day Explanation *

Explain why the error was not identified and corrected in a manner. Also explain what measures will be taken to ensure these errors are detected earlier in the future.

- To attach the paper PA, select “Choose File” and select the file of the saved paper Personnel Action Form.
- Add a File Description and select “Upload”.
- The attachment(s) will be uploaded and shown in the Attachments section of the DocRoute.
- Additional attachments may also be included, but should be relevant to the PA being processed. Attachments will become part of the permanent record.
- Graduate Assistant PAs should include the Calculation Sheet as an attachment, in addition to the paper PA. The Calculation Sheet is located under “Resources” in the USA Online Electronic Personnel Action Form course.

Attachments

Filename	Description	
Sample attachment.pdf	Paper PA	Delete

These attachments are required in order to Submit or Approve:

- Paper PA Form

Upload a file – no larger than 10MB

[Choose File](#) Sample attachment.pdf

File Description

Upload

Attach the paper Personnel Action Form that is being processed via the DocRoute.

Note: the paper PA form should not be signed. All approvals will be routed via the DocRoute.

Prior to selecting “Save w/o Submitting” or “Submit”, review the below section regarding Adding Additional Approvers/Reviewers.

Once “Save w/o Submitting” is selected, an originator may change or add “Additional Notes/Comments”, change the answer to “Does this include a Cost Transfer?”, upload additional attachments, add approvers/reviewers, and add nodes (departmental group approvers) at the current level. No other changes may be made if the DocRoute has been saved. To change other fields, the request should be cancelled and a new request submitted. When the originator selects “Save w/o Submitting”, they must “Approve” under the “Reviews” section to submit the DocRoute and have it routed to other approvers/reviewers.

Once “Submit” is selected, no changes may be made by the Originator. Each approver/reviewer will receive an email when their approval is needed. The originator will receive an email once the DocRoute is complete and it has been

NOTE: If changes are made to a section after “Save w/o Submitting” is selected, the “Save” button under the Cost Transfer question must be selected to save the changes.

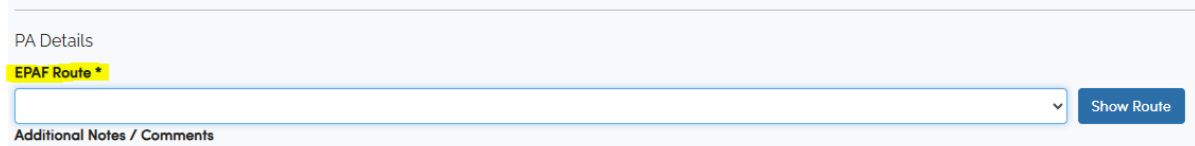
Save w/o Submitting

Submit

Approval/Review Routing

Selecting a Specific EPAF Route:

- When an EPAF Route is selected, the approval/review routing section of the DocRoute will populate based on the originator's default routing queue that is set up for the EPAF in PAWS.
- To view the approval routing queue that will populate in the DocRoute, select "Show Route" after selecting an EPAF Route from the dropdown menu.



PA Details

EPAF Route *

Additional Notes / Comments

Show Route

- If no approval routing queue has been set up by the originator in PAWS for the specific EPAF or if changes are needed to the default routing queue, navigate to PAWS, Electronic Personnel Action Forms, and select "Originator Summary" and then "Default Routing Queue" from the menu. For more information on how to set up an EPAF Default Routing Queue, visit the USA Online Electronic Personnel Action Form course and view the video "Default Routing Queues".

Please Note:

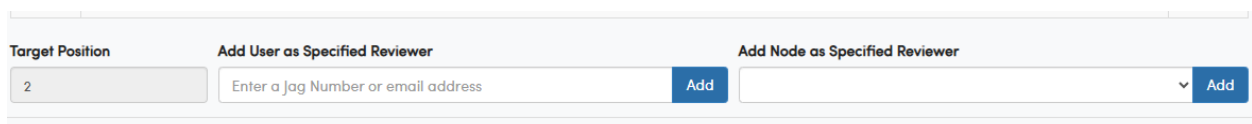
- Once Save without Submitting is selected, the approval queue under the Reviews section is populated, and additional approvers can only be added at Level 1 by the originator (see below regarding Adding Additional Approvers/Reviewers). If the missing approver/reviewer should be added at a different level, the DocRoute should be canceled, the EPAF Default Routing Queue corrected in PAWS, and a new PA DocRoute should be submitted.

Selecting "Other - No EPAF exists for this situation":

- When the "Other" EPAF Route is selected, the approval routing/reviews section of the DocRoute will populate with the required Human Resources, Payroll, and Budget Office approvals.
- Originators will need to manually add the other required approvals/reviewers for their division. Routing queue examples are located under the Resource section of the USA Online Electronic Personnel Action Form course.

Adding Additional Approvers/Reviewers:

- Specified Reviewers (available to Originator only) - may be added prior to saving or submitting the DocRoute. These will be added to Position 2 of the approval/review queue.



Target Position

2

Add User as Specified Reviewer

Enter a Jag Number or email address

Add

Add Node as Specified Reviewer

Add

Reviewer at Current Position – the Originator may add after saving but prior to approving/submitting. Approvers may add prior to approving. These will be added to the same level as the current user.

An individual approver may be added or a departmental group, such as Grants and Contracts or Academic Affairs, may be added using the “Add Node as Reviewer” dropdown.

Add User as Reviewer at current Position	Add Node as Reviewer at current Position
Enter a Jag Number or email address	

Note: If the PA DocRoute is returned, all of the approvers/reviewers that were manually added will have to be re-entered.

Approving a Personnel Action Form DocRoute

Approvers will receive an email when the PA DocRoute is in their queue for approval.

The DocRoute(s) needing approval will be shown once logged into the Personnel Action Form DocRoute (see navigation and log in instructions above).

Selecting the ID # will open the DocRoute Form.

ID	Status
1020	In Process 1
1019	In Process 1

The attached paper Personnel Action Form should be reviewed prior to the DocRoute being approved. To view the attachment, select the attachment(s) from the Attachments section.

Attachments

Filename

[Sample attachment.pdf](#)

Prior to approving, each approver/reviewer may add individual approvers/reviewers or a departmental group, as needed by entering the individual's J# or email in the "Add User as Reviewer" or "Add Node as Reviewer" by selecting the departmental group from the drop down. Either option will add the individual or departmental group as an approver/reviewer at the same level as the current approver/reviewer.

Approve

Deny

Add User as Reviewer at current Position

Enter a Jag Number or email address

Submit

Add Node as Specified Reviewer

▼

Add

No changes may be made to the DocRoute by the approver/reviewer. If a change is needed, the DocRoute should be returned to the originator.

The approver/reviewer may also "Return" to a previous approver by selecting from the "Return To" drop down menu.

Note: when a DocRoute is returned to a previous approver/reviewer or when they are denied, a comment should be added explaining the reason for return or denial. All changes and comments become part of the official record.

Return To

▼

As a reminder, the PA DocRoute process is to be used only for Personnel Action Forms that cannot be processed via an Electronic Personnel Action Form in PAWs.

For more information on Electronic Personnel Action Forms, visit the USA Online Course.

The PA DocRoute process will take the place of the current paper PA routing process and all paper PAs should be submitted using DocRoute.

If you have questions, need assistance, or need access to the USA Online EPAF course, contact your Human Resources Office.