Submitting HR Form via PASS AODocs

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Submitting HR Form via PASS AODocs

Introduction

Certain HR forms can be:

- routed to their approvers
- approved
- and routed to HR electronically

This document will provide instructions in how to submit an HR form for approval / submit to HR electronically via PASS AODocs, and how to approve the HR form submitted via PASS AODocs. Use this document in submitting JAF-M forms, MAP forms, PR/C forms, Exceptional Pay Memos, Termination forms, Leave Requests or any other HR Document not included in the Note below.

Note: This process is NOT to be used for submitting NWRNAS reports, Pay Cancellation / Reduction requests or I-9 forms and documents requiring a visible signature.

For instructions on how to submit a **NWRINAS** report for approval via AODocs, visit the Submitting NWRINAS via AODocs process guide.

For instructions on how to submit a **Pay Cancellation / Reduction request**, visit the eAUTH Cancel or Reduce Instructor Pay process guide or quick sheet.

For instructions on how to submit an I-9 remotely during COVID-19, visit the Remote Form I-9 process guide.

Action Items

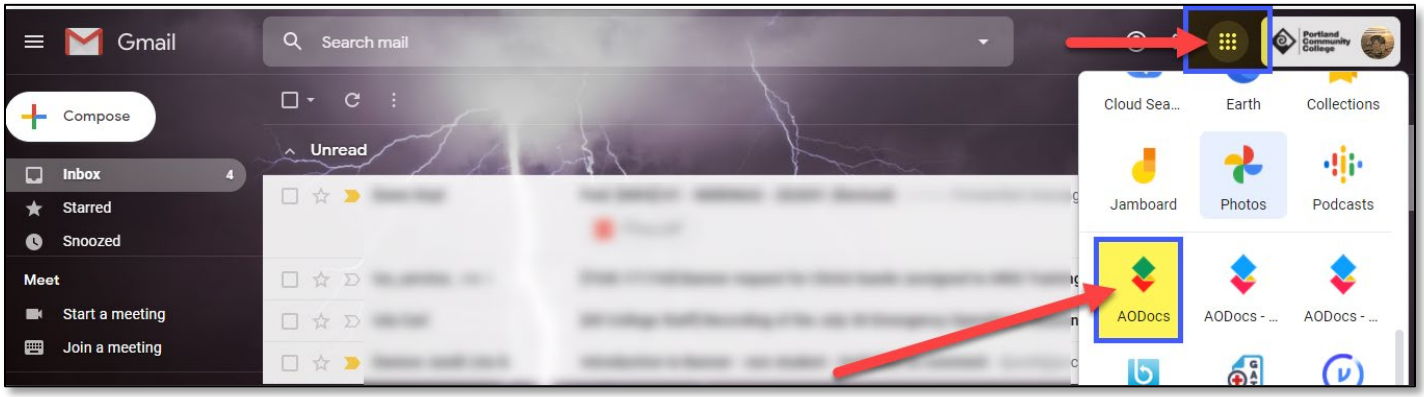
1. Submitting HR document via PASS AODocs
2. Approving HR document via PASS AODocs

Submitting HR Form via PASS AODocs

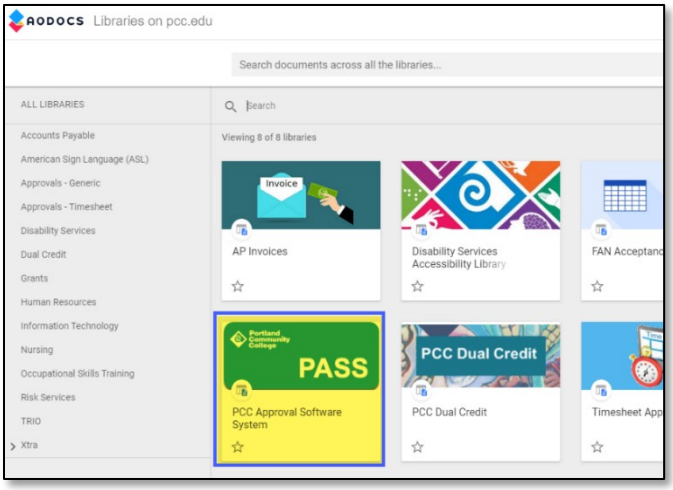
Submitting HR Document via PASS AODocs

Accessing PASS AODocs

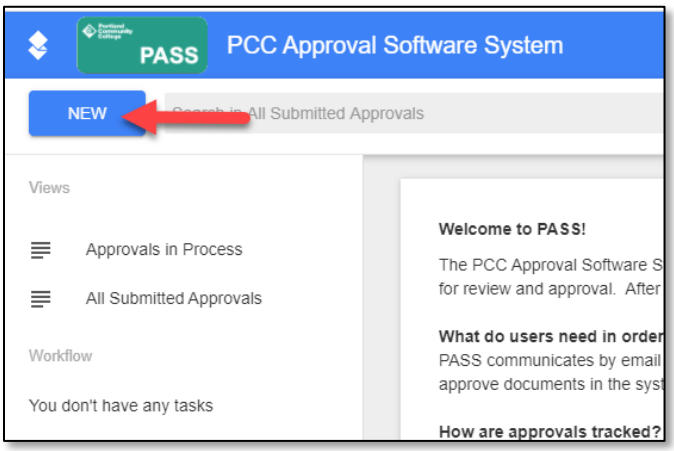
Step 1: Pull up AODocs by clicking on the grid of Google apps, scrolling down, and selecting the first AODoc app.



Step 2: In the AODocs library, select the PASS tile.



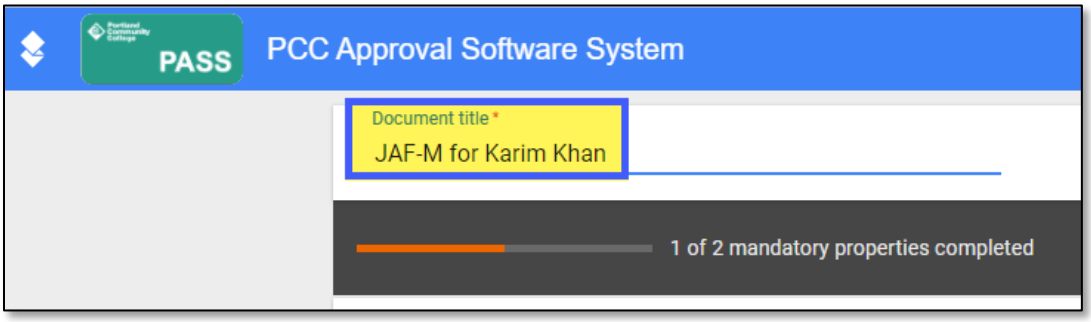
Step 3: Click **New** in the upper, left-hand corner to start a new approval.



Submitting HR Form via PASS AODocs

Entering Required Information

Step 4: **Document Title field**: Enter the title of the document and the employee's name. i.e. "JAF-M for Karim Khan 9.15.2021".

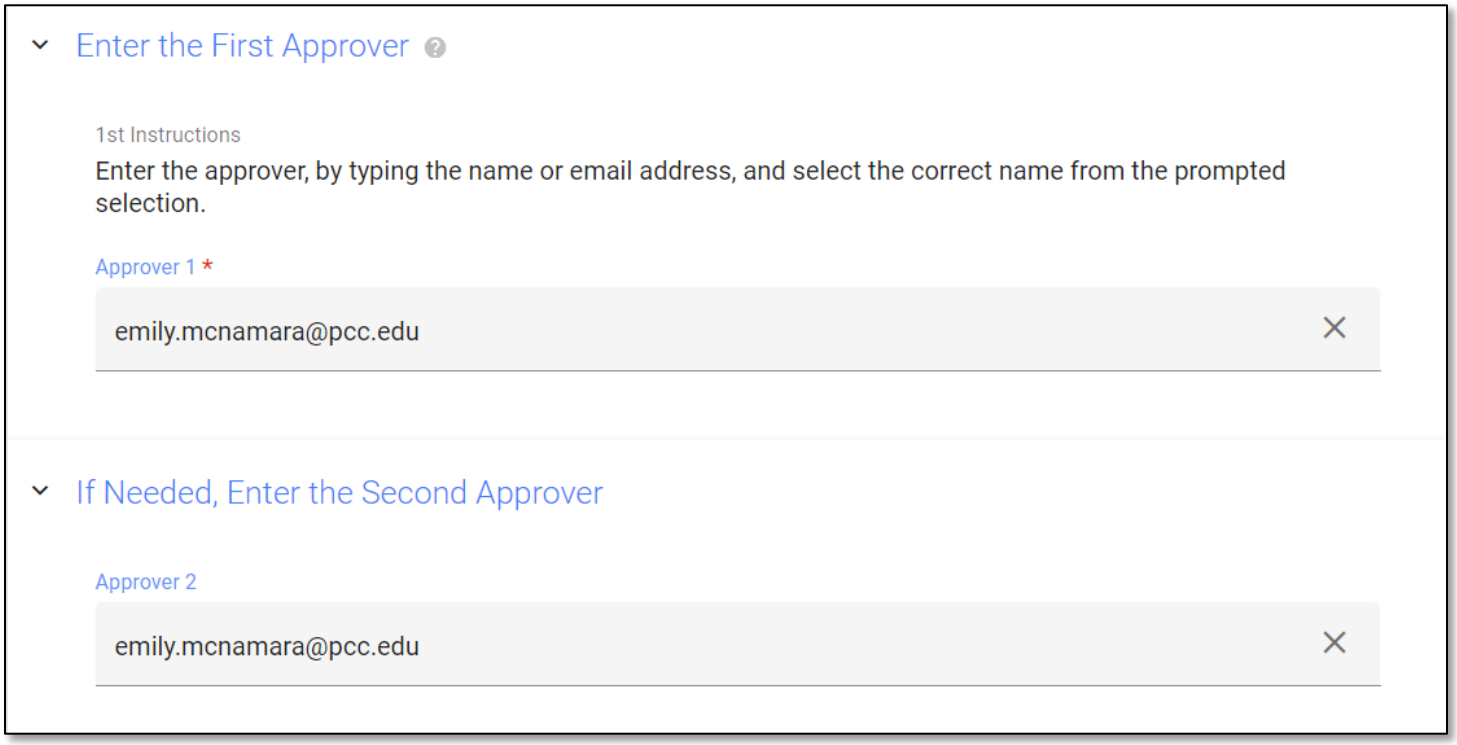


Step 5: Scroll down to the fields under **Properties** and enter the following information:

Approver 1: Enter the name or email of the first approver. The system will prompt you once you start typing to select the correct email address. This will be the **first** person to receive the requested approval email.

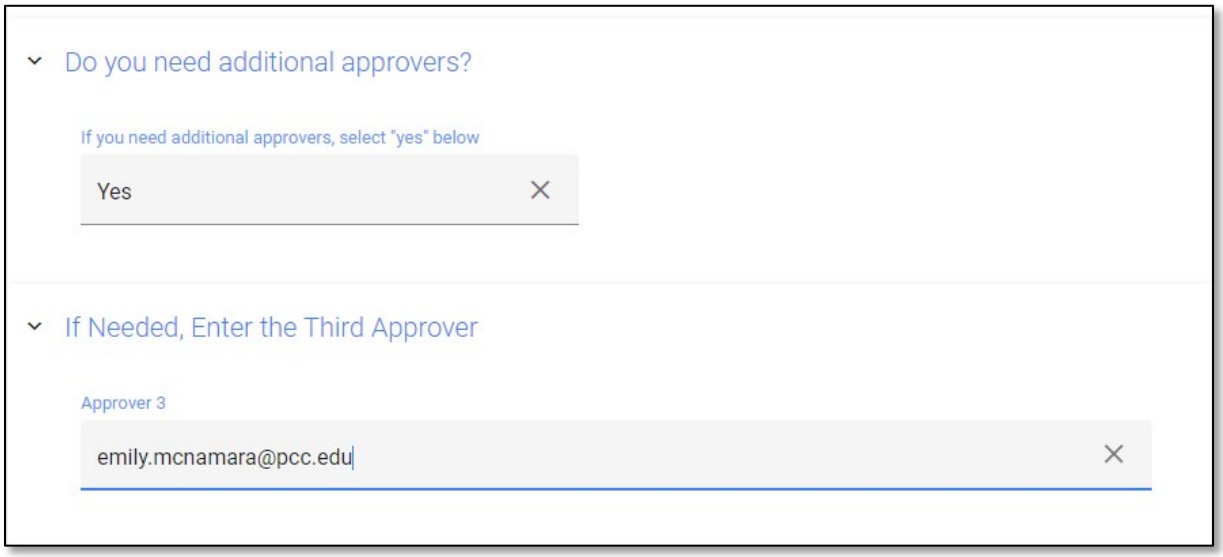
> **Note**: At least one approver needs to be entered.

Approver 2: If needed, enter the second approver. This will be the second person to receive the requested approval email once the first approver has approved your approval.



Submitting HR Form via PASS AODocs

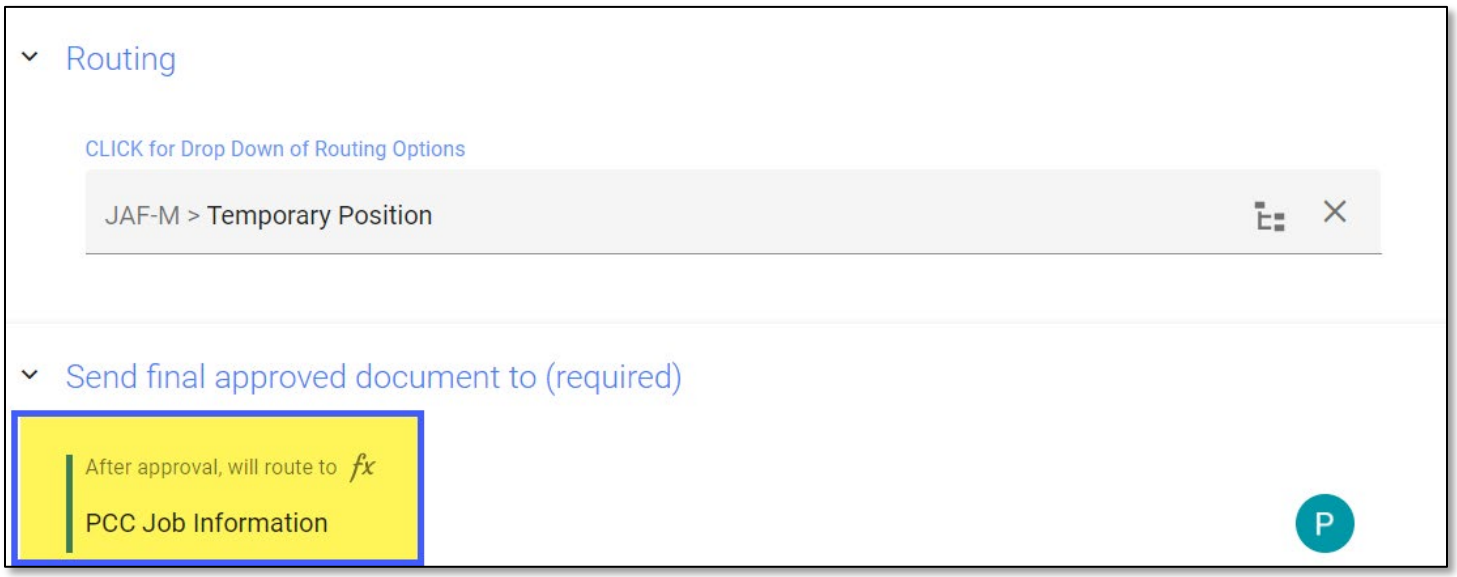
Step 6: If more approvers are needed, select 'Yes' under 'Do you need additional approvers?' and enter the additional approver(s). The final approver should be the highest-level manager/executive (if needed) to approve your approval submission once it's been approved by all prior approvers.



Routing

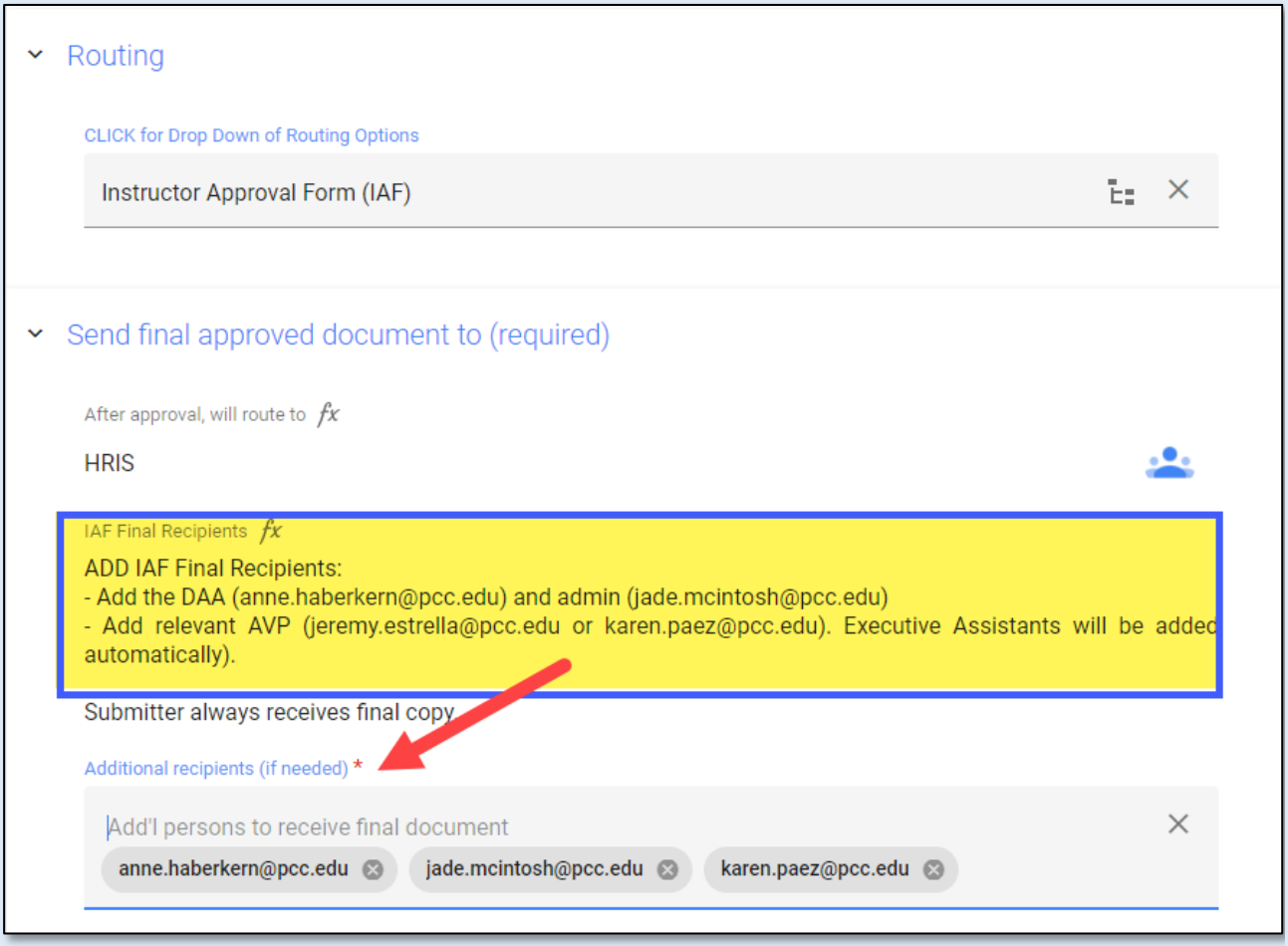
Step 7: Click in the Routing field to select the document you are submitting. Based on which document you select, the 'Send final approved document to' field will auto-populate with the appropriate recipient's email address.

Some documents will have an additional dropdown list to select from (i.e. if you select JAF-M, you will receive an additional drop-down list to select the type of JAF you are submitting to ensure it gets routed to the appropriate HR division).



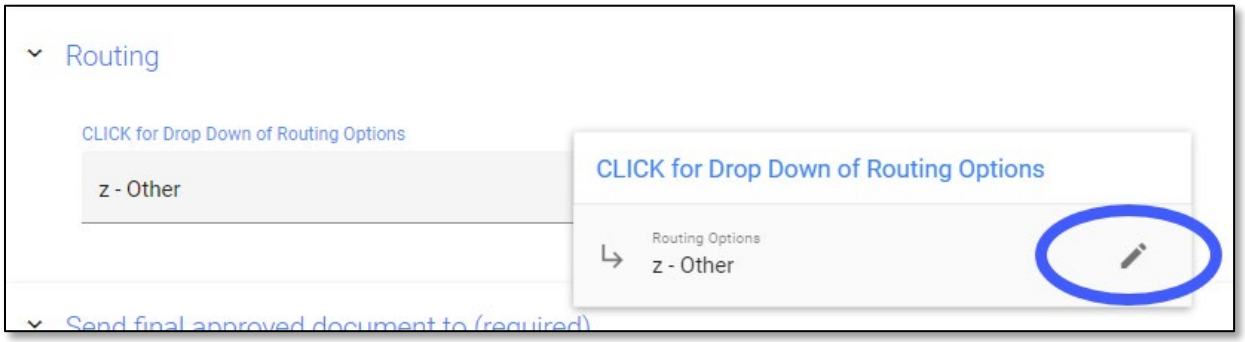
Submitting HR Form via PASS AODocs

Note: Some forms require adding specific individuals' emails as 'Additional recipients'. Be sure you follow any instructions that appear based on which Routing Option you select.



Editing the Routing Option Entry

To change the Routing Option, click in the field to bring up the pop-up box. Next to the selected Routing Option, click the **Edit pencil** to pull up the list of Routing Options.

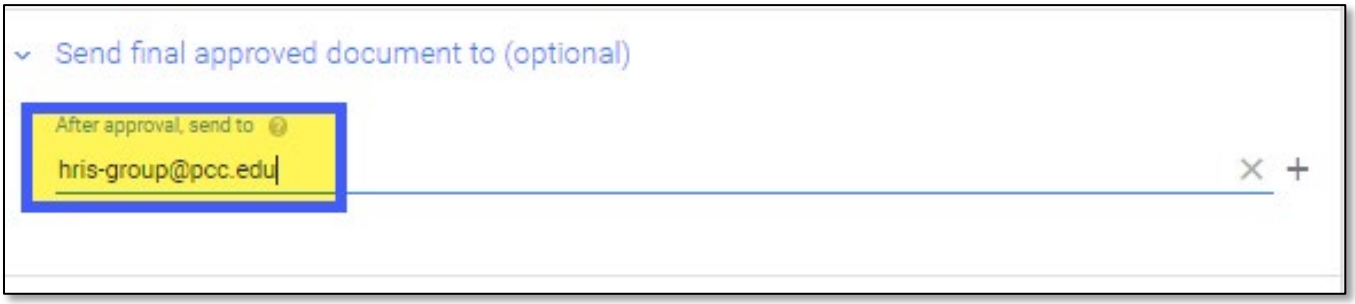


Submitting HR Form via PASS AODocs

Entering Final Destination for Approval

Step 6: If you selected **'Other'** or **'Leave Request /FMLA Form'** under Routing Options**,** enter the designated HR email address the approval must get to for processing in the '**After approval, send to**' field.

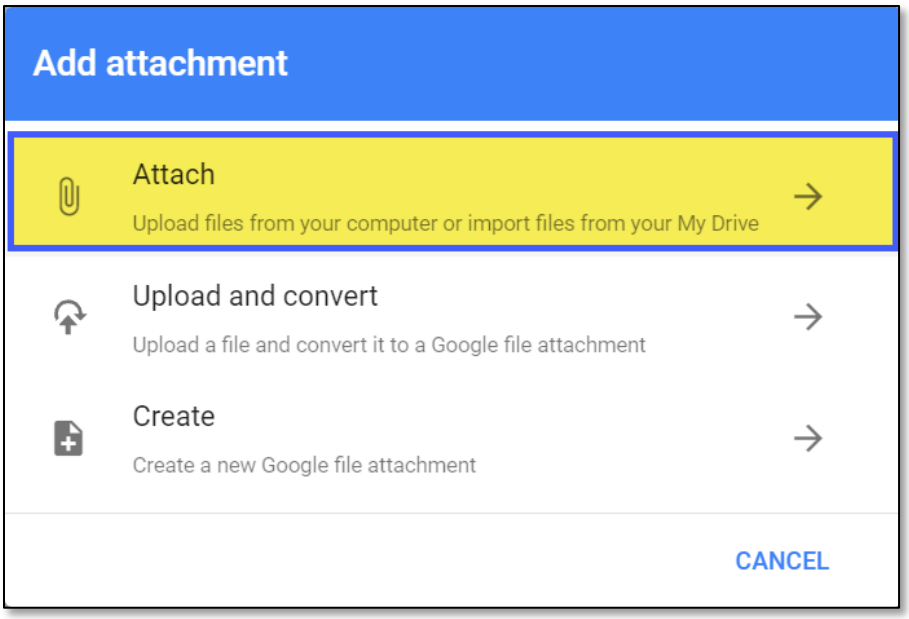
Visit the [HR Form Routing Guide] to reference the correct destination for your HR form.



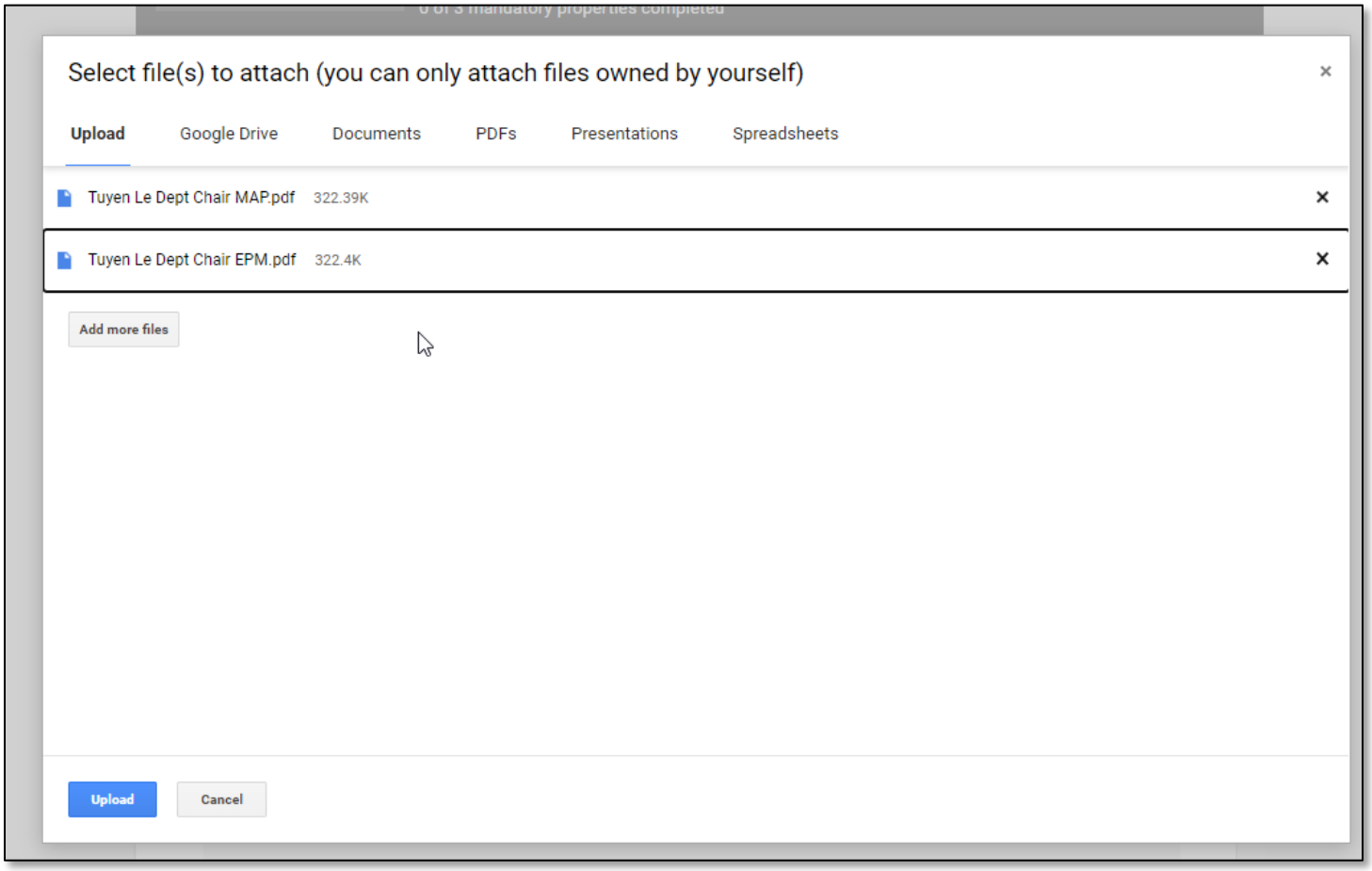
Attaching the Document

Step 7: Attach the document to the approval by clicking on the plus sign (+) to bring up the option to attach a document.

> **Note**: Do not attach more than **one HR form for approval** at a time. Each document must be submitted and approved separately in its own PASS AODocs approval.
>
> **Exception**: HR forms that must be accompanied by additional documents, such as a MAP with an Exceptional Pay Memo

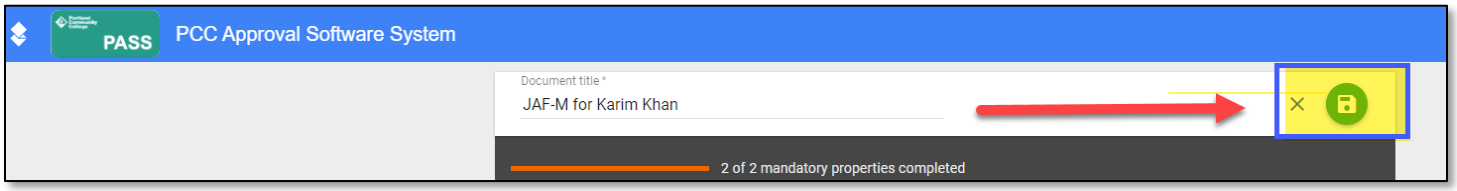


Submitting HR Form via PASS AODocs

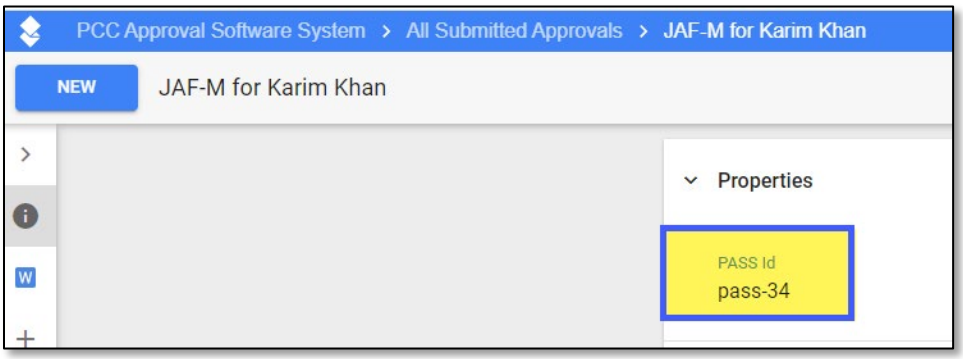


Saving the Approval

Step 8: **Save** the entry by clicking the green disc in the upper, right-hand corner.



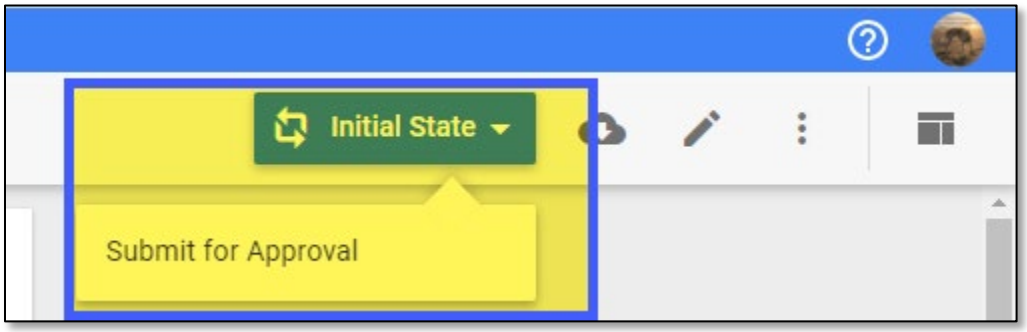
This will create a document ID.



Submitting HR Form via PASS AODocs

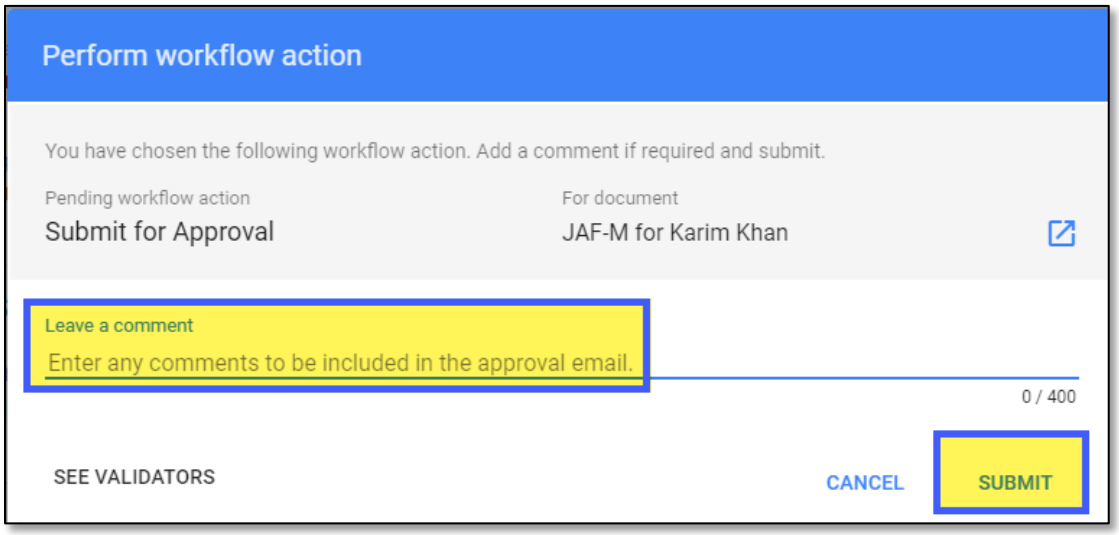
Submitting for Approval

Step 9: Click **Initial State** and select **Submit for Approval.** This option is available AFTER the entry is saved.



A dialog box pops up where you can enter comments to be sent to the manager/acknowledger, if desired.

Step 10: Click **Submit** to finish.

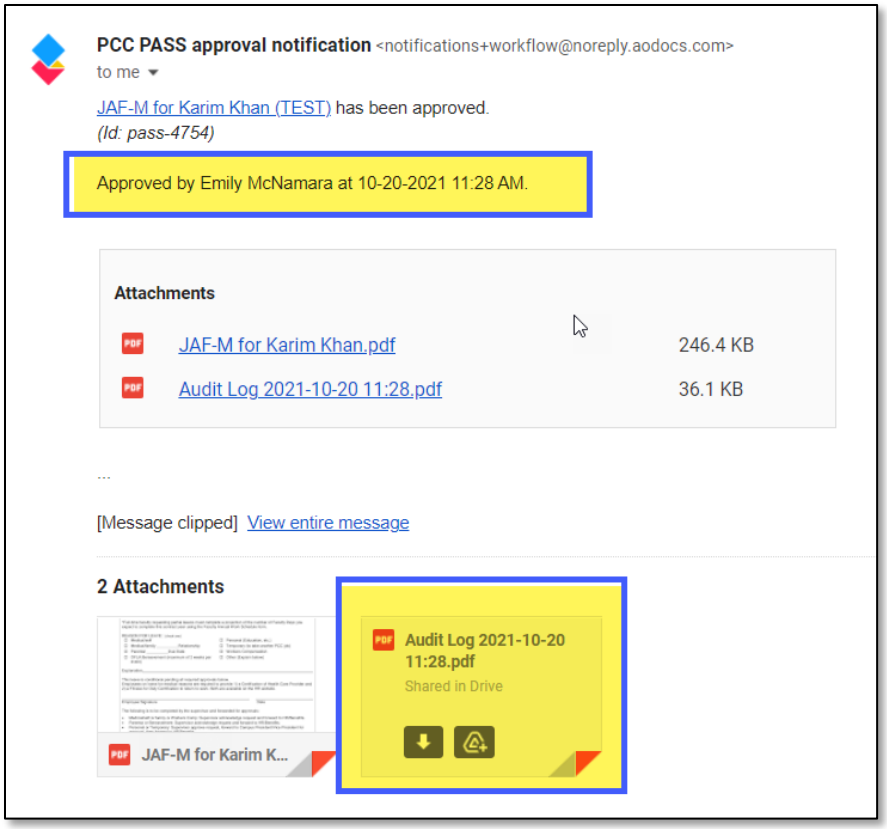


Submitting HR Form via PASS AODocs

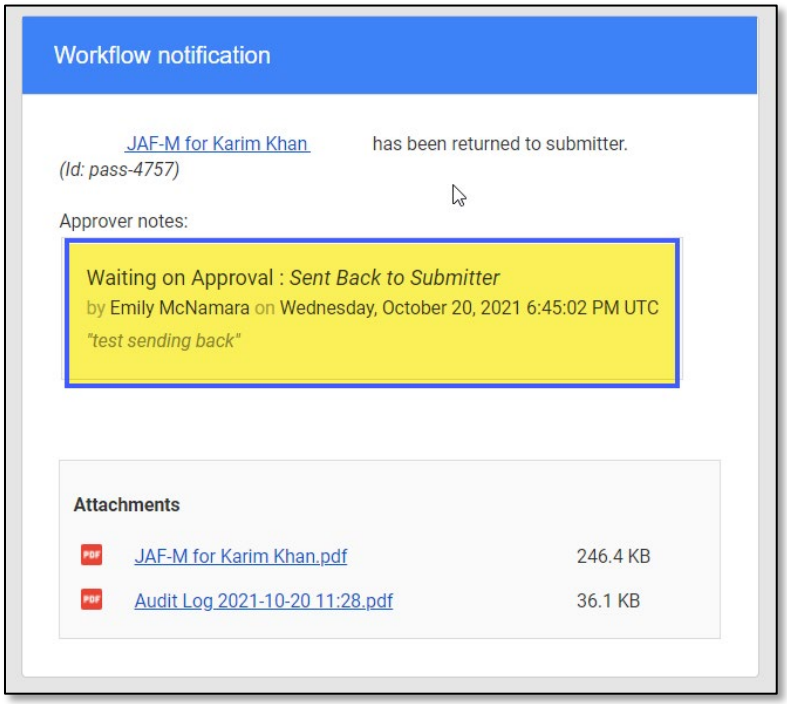
The Final Approved Document

Once the document makes it through the whole approval path or if it is rejected along the way, you will receive a final email of the results including:

- The date and time the approval was approved
- An audit log which contains more details about the approval



Email submitter receives if form is Sent Back by an approver:



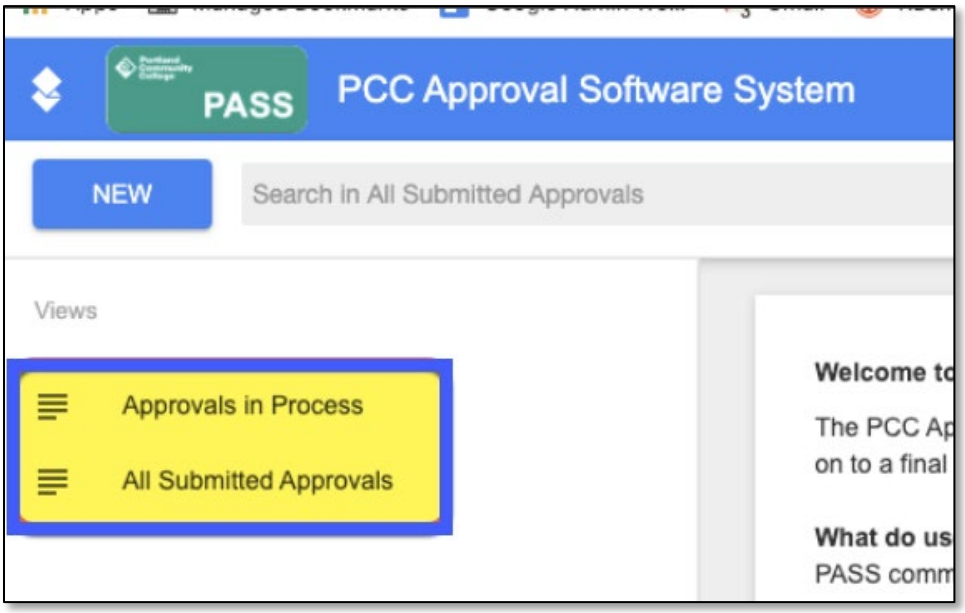
Submitting HR Form via PASS AODocs

Viewing Submitted HR AODocs

You can view HR documents waiting for approval and previous submissions by going into the AODoc PASS tile, then viewing the Views menu to the right-hand side.

Select **Approvals in Process** to view AODocs still in process.

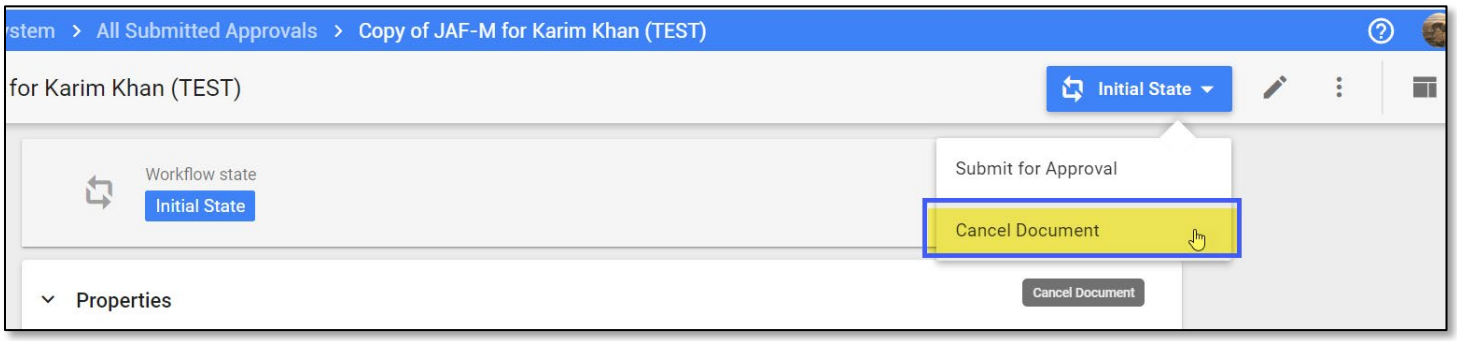
Select **All Submitted Approvals** to view all AODocs submitted for approval.



Cancel an Approval that has NOT Been Submitted for Approval

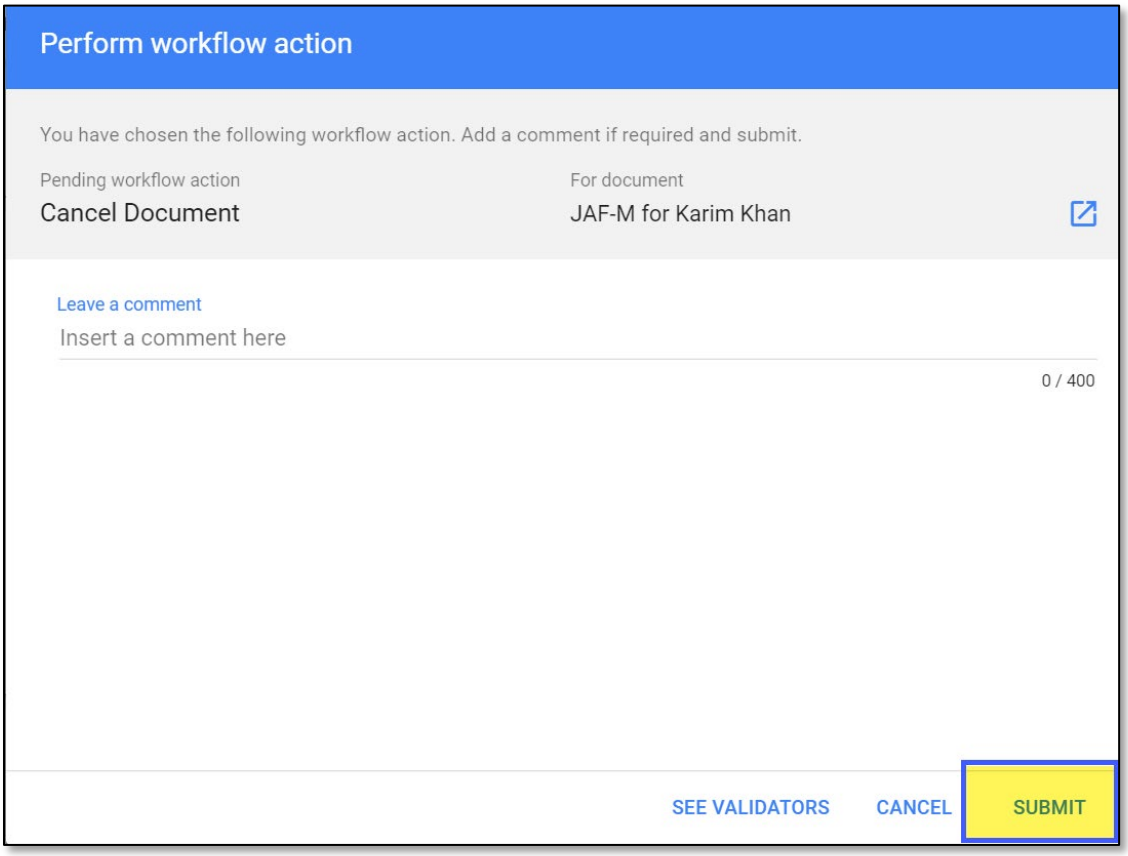
You can cancel a submission that you've begun before you click 'Submit for Approval'.

Step 1: Select **Cancel Document** from the blue "Initial State" button



Step 2: Click **Submit** on the next dialog

Submitting HR Form via PASS AODocs

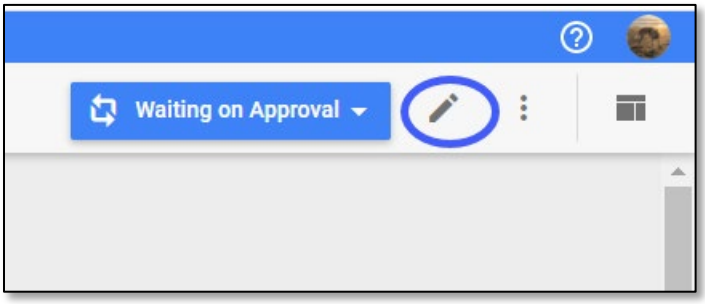


You should receive an email verifying the cancellation of the approval.

Reassign an Approval to a Different Approver

If your submitted approval is still waiting for an approver to approve it and you need to change the approver (for example, if they are unavailable), you can reassign the approval and have the request sent to a different person.

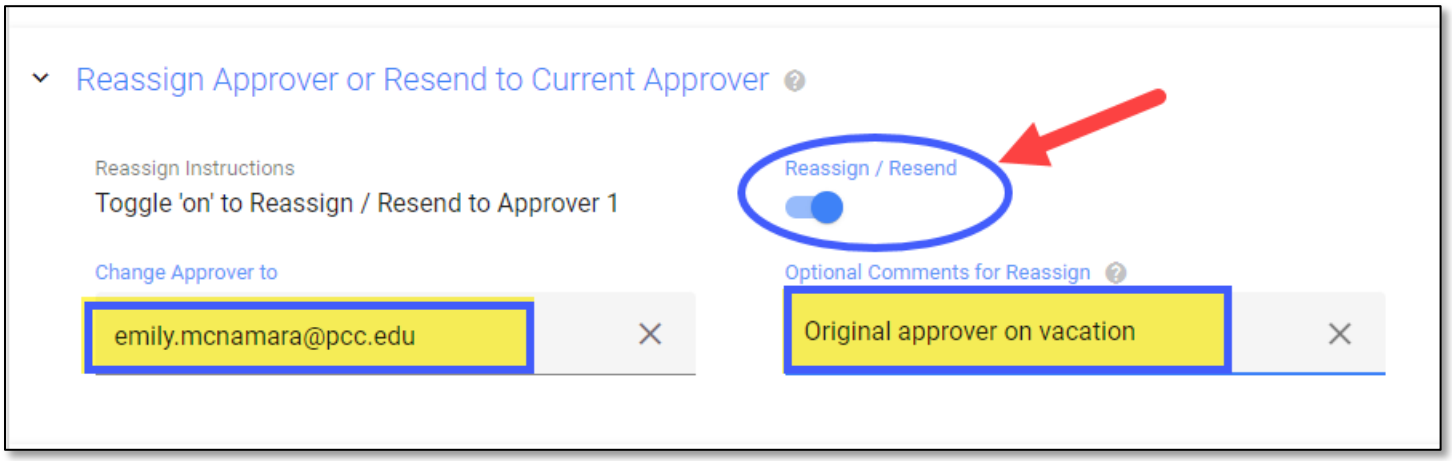
Step 1: Open the approval and click the **Edit pencil**



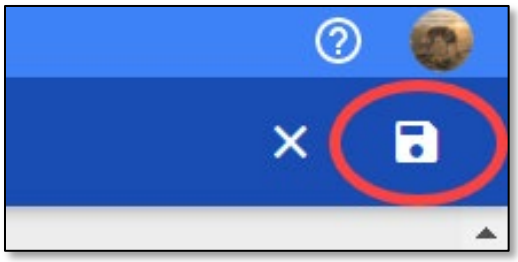
Step 2: Scroll down to the 'Reassign Approver or Resend to Current Approver' section and toggle to 'on'.

Step 3: In the 'Change Approver to' field, enter the new approver.

Step 4: If needed, add a comment explaining the reassignment in the 'Optional Comments for Reassign' field.



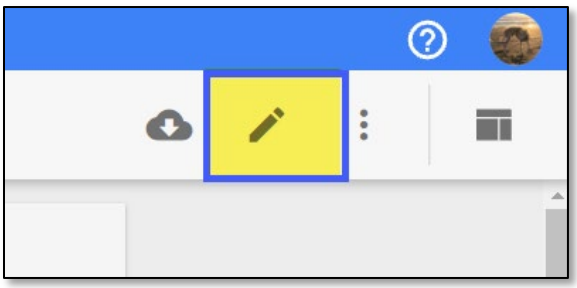
Step 5: Save the entry – the approval email will be sent to the new approver.



Cancel an Approval that Has Been Submitted for Approval

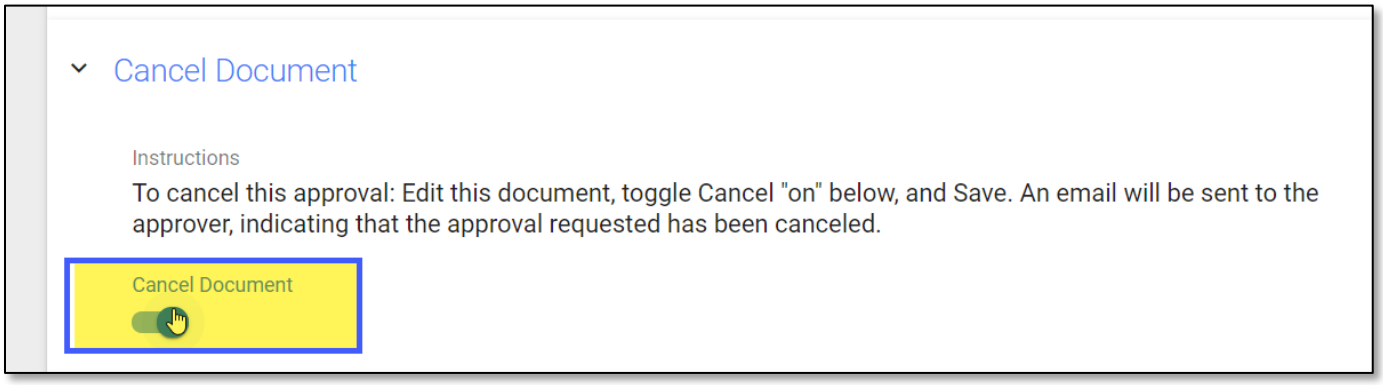
You can cancel a submission that you've already submitted for approval as long as it has not been approved and submitted to HR.

Step 1: Edit the document by clicking on the **Edit pencil** and scrolling down to the "Cancel" section

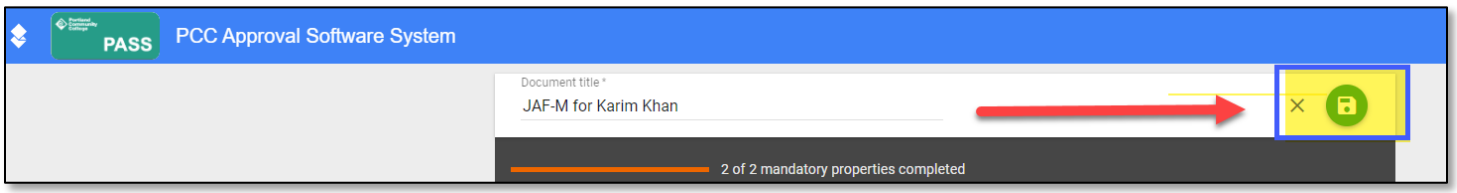


Step 2: Toggle the **Cancel** button to on by clicking it.

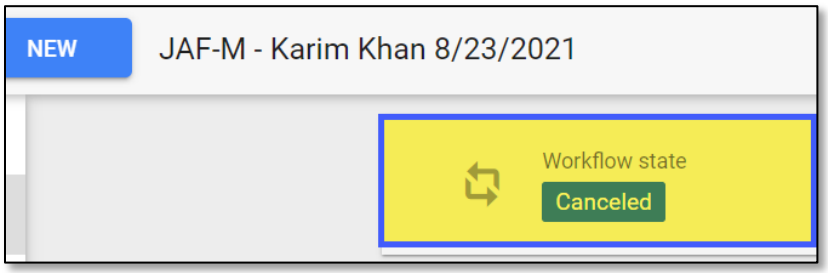
Submitting HR Form via PASS AODocs



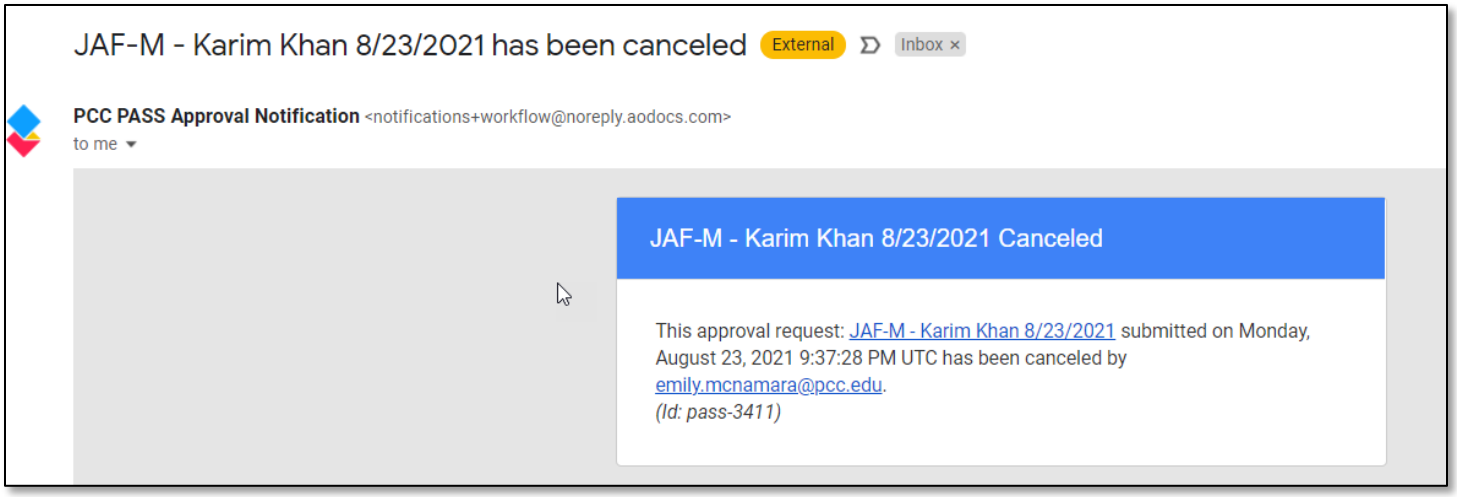
Step 3: **Save** the entry by clicking the green disc in the upper, right-hand corner.



The Workflow state will then show as cancelled.



The approver who was last sent a request for approval is automatically notified.



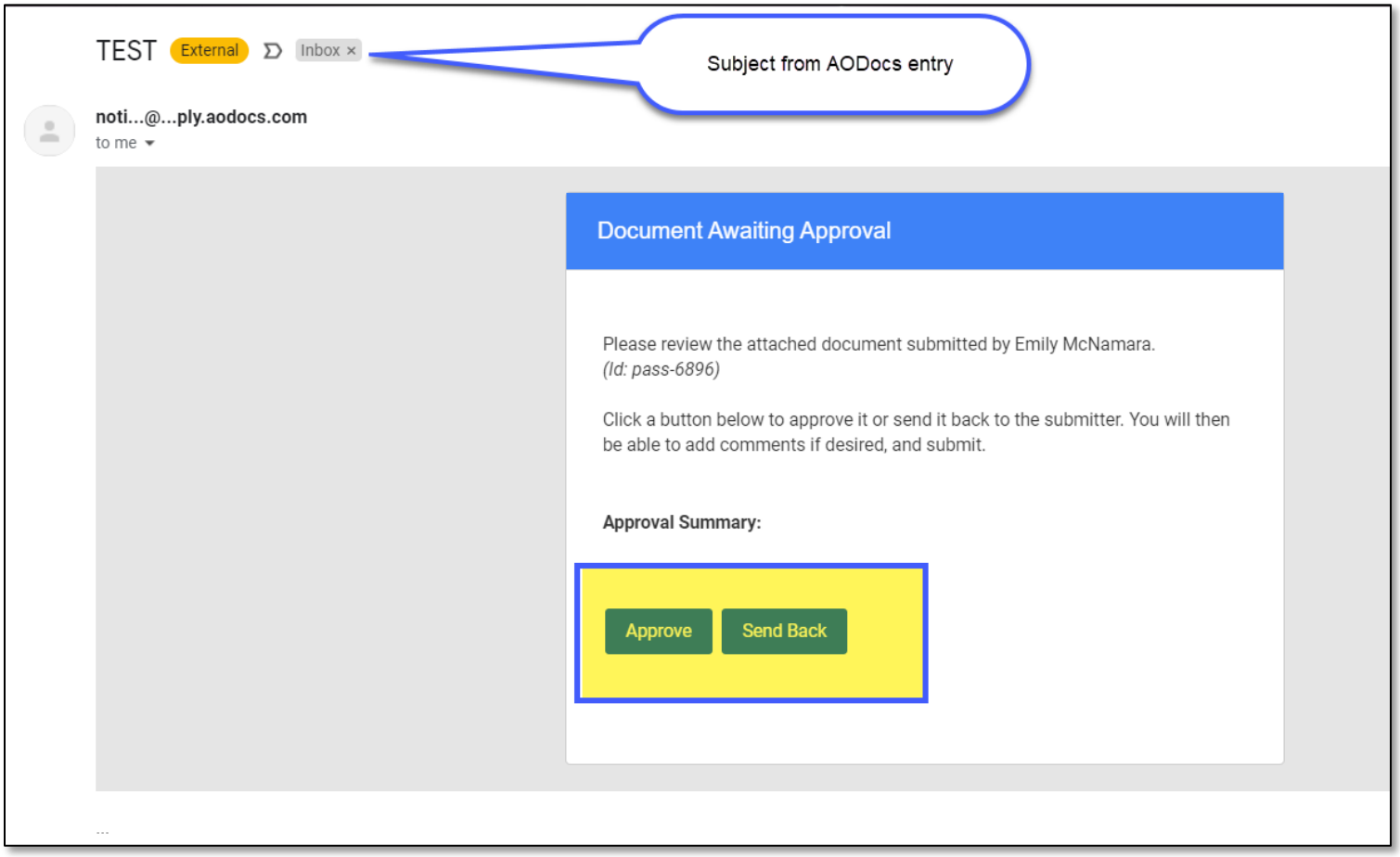
Submitting HR Form via PASS AODocs

For Managers: Approving PASS AODocs Approval

Once the HR document is submitted, an email is sent to the first approver listed.

- The sender is **PCC PASS Approval Notification**
- An approval summary is included that lists the submitter, all approvers and the final destination
- The email includes the attached document and an "**approval**" button and "**send back**" button.

Step 1: Review the Approval summary, open the attached document and review the document.

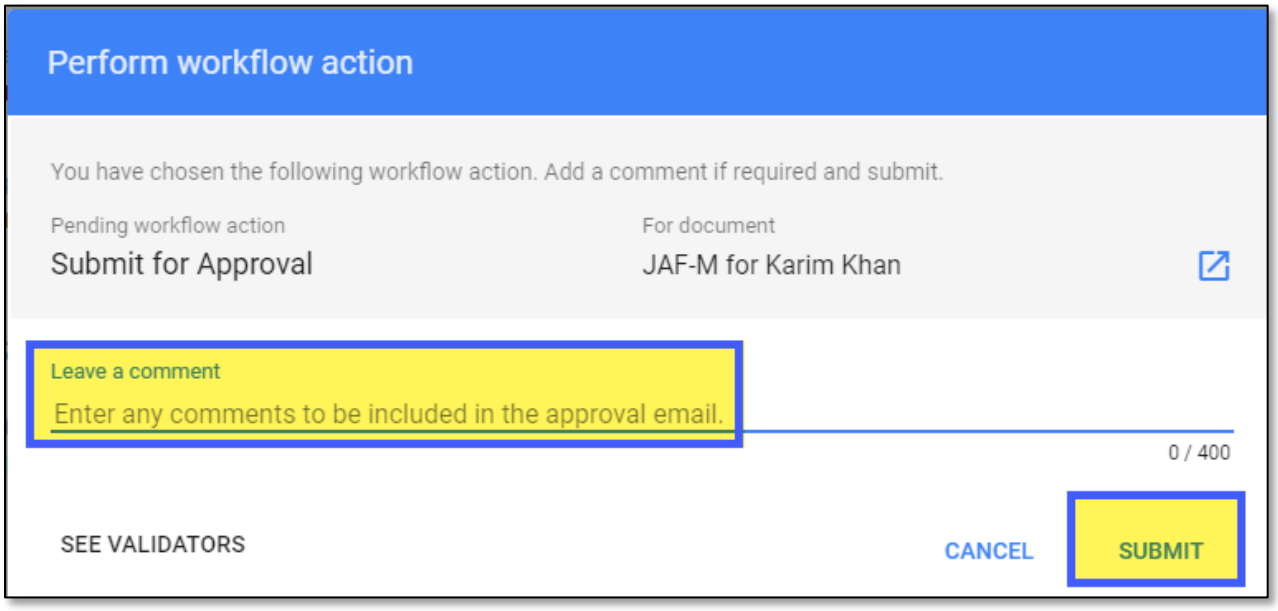


Step 2: To approve the document click **Approve**.

To send the document back to the submitter, click **Send Back**

If **Send Back** is selected, leave a comment in the popup box. This field is required. Then hit **Submit**. An email is sent to the submitter.

Submitting HR Form via PASS AODocs



Step 3: If multiple approvers are listed, once approved, the document will be submitted via email to the next approver listed and so on until it makes its way through the entire approval path.

Additional Resources

HR Form Routing Guide

Who do I contact if I'm having trouble with PASS AODocs or have questions about AODocs?

- the IT Support Team

Who do I ask questions regarding my HR document?

- For JAF-Ms, MAPS, Exceptional Pay Memos and Termination forms: the HRIS team (HRIS-Group@pcc.edu)
- For PR/Cs: the Compensation team (HRComp-Group@pcc.edu)
- For Leave of Absence requests or other Benefits-related forms: your Benefits representative
  - Last Names Beginning with A-G: Juliette Anderson
  - Last Names Beginning with H-M: Kim Searcy
  - Last Names Beginning with N-Z: Robyn Hill

Who do I ask questions regarding training for this process?

- Emily McNamara, HR Business Process Specialist

PASS – PCC Approval Software System instructions and FAQs provided by IT

Submitting NWRINAS via AODoc Process Guide