Before Starting a Position Data/Appointment Form

- **Does your change require a Position Data/Appointment Form?**
  PAF are used for permanent faculty, staff, graduate students, and undergraduate scholarships. Transactions that require a Position/Appointment Form are New Hires (if not hired through Talent Acquisition), Rehires, Additional appointment for current employees, Reappointment, Transfers, Pay Rate Changes, Personal Leave of Absence, Termination, and Position changes.

- **What changes are NOT done with a Position Data/Appointment Form?**
  Not every change requires a PAF. The following are NOT handled with PAF. Funding sources changes after new hire, Reports To changes, Stipends for Graduate student funded by TGS (DeptID -99), changes for Temporary employees including hourly temps, students, special pay, and independent contractors, Additional Pay or Special Pay, Medical Leave of Absence, Involuntary termination (HR Business Partner submit PAF)

- **For Hires, have you checked for an existing status in NW Job Summary and/or confirmed the employee's University ID number?**
  Always check the Northwestern Job Summary page (MYHR ADMINISTRATION > APPOINTMENTS & POSITIONS FOLDER > NORTHWESTERN JOB SUMMARY) first whether it is a hire, rehire, or reinstatement. Job Summary page will determine whether your new employee has an existing Employee ID number and other important background information. Check with person's SSN. If no results, check with Date of Birth and/or Name.

- **Are you *updating* a Position and/or Appointment record that already exists in myHR?**
  When updating information, you must pre-print an existing version of the form using the instructions in the next section. You may use a blank side of the form when creating a new position or a new appointment.

- **Have you verified the funding source is active?**
  Always check the View Valid Chartstring page (MYHR ADMINISTRATION > FUNDING AND PAY FOLDER > VIEW VALID CHARTSTRINGS) to confirm the chartstring is active and valid for the fiscal year.

- **Are you familiar with the form and which fields to use?**
  Refer to the **Understanding the Position Data/Appointment forms** document to see the definitions for all the fields on both forms.

- **Do you know which Action/Reason Code(s) to use? The Action/Reason Code Matrix is your friend!!**
  Refer to the Action/Reason Code Matrix to determine the appropriate code(s). Remember, you may use a code on one or both sides of the form, and you may use more than one code on the Appointment side of the form. If you are unsure of which codes to use, contact the Payroll Office, Office of the Provost, Office for Research, or your school's Faculty Affairs, Administration, or Finance Office for assistance.

- **What other System Codes might be needed?** Job Code Matrix, Pay Group, HR Dept ID, Location Codes, Position Types & Categories

Rules for Completing and Submitting Forms

- ✓ Open and edit form in Adobe Pro
- ✓ Both the Position Data and the Appointment sections of the form are always required, even if a change is being made to only one side.
- ✓ **If both position and person are new, fill in blank form for both Position and Appointment.**
- ✓ **If submitting form for a person new to NU, use existing Position form but a blank Appointment form**
  - Do not scratch out, white out, or black out the old information
  - Cross out the existing data with a single line and enter the new information above or next to it
  - Fill in blank Appointment form with new employee job data
- ✓ **If making changes to an existing Position *and* Appointment, use the existing Position and Appointment forms.**
  - Do not scratch out, white out, or black out the old information.
  - Cross out the existing data with a single line and enter the new information above or next to it.
  - If you are making a correction to a previously submitted form, indicate so in the margin. Feel free to add any clarifying notes or comments.
- ✓ For a Termination, the Effective Date should be the day *after* the Appointment End Date (last day of work).
- ✓ **Completed forms require department and school approval.**

  Research Centers, Law, FSM have workflow within OnBase for approvals; all others must obtain approvals before submission to HR Operations.
- ✓ **It is the department's responsibility to ensure that forms are completed correctly and accurately.**

  HR Operations will check the form and return with brief notes if rejected. Rejected forms must be corrected and resubmitted. Resubmitted forms go to end of the queue.
- ✓ **Forms that impact an employee's pay must arrive fully approved, complete and correct by the Cutoff Deadline indicated on the Payroll calendar.**

  Forms that do not arrive on time, are not complete, or are not accurate will be rejected and must be resubmitted. Once correct and complete and accepted, forms will be processed on the next regular pay date for the employee; any difference in pay will be paid retroactively
- ✓ Forms are submitted on the HR Documents Submission Page
- ✓ Uploads must be less than 4mb
- ✓ If purple lines gone, system is mad. Clear cache and/or new browser and try again.

- For questions about trainings and security access, contact the myHR Training Specialist at myhr-training@northwestern.edu.
- For help with the myHR system beyond the initial training classes, contact: askHR 847-491-4700 / askHR@northwestern.edu between Monday-Friday, 8:30am-5:00pm.

Finding and Downloading Position Data/Appointment Forms

[Printing PAF video]

Procedure

1. Open your browser and navigate to: www.northwestern.edu/myhr. Click the "myHR Login" button to log in with your Northwestern-assigned NetID and Password.

2. Change to Workforce Administrator, then click the HR Administration tile

3. Navigate to:

Appointment & Positions Folder > Pos/Appt by Employee Id *(to find forms by EmplID)*

- or -

Appointment & Positions Folder > Pos/Appt by Position *(to find forms by Position Number)*

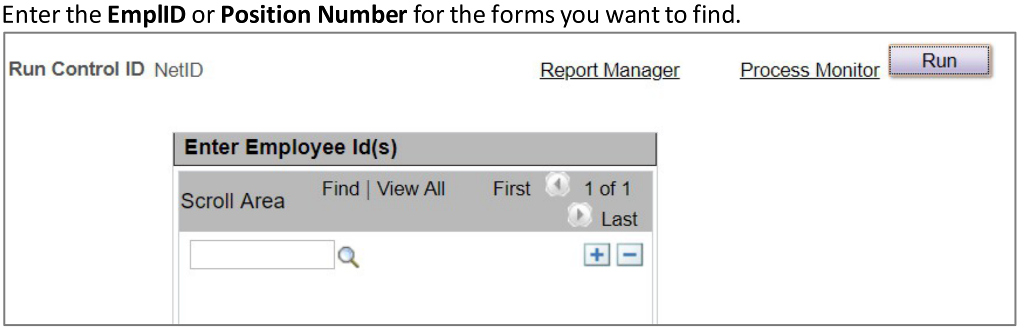
4. If this is your first time creating a form, or if you cannot remember your previous Run Control ID:

- Click **Add New Value** tab
- Enter a **Run Control ID** that will be easy to remember next time (e.g. your NetID like **abc1234**)
- Click **Add**

If you remember your previous Run Control ID:

- Enter your **Run Control ID**
- Click **Search**

5. Enter the **EmplID** or **Position Number** for the forms you want to find.

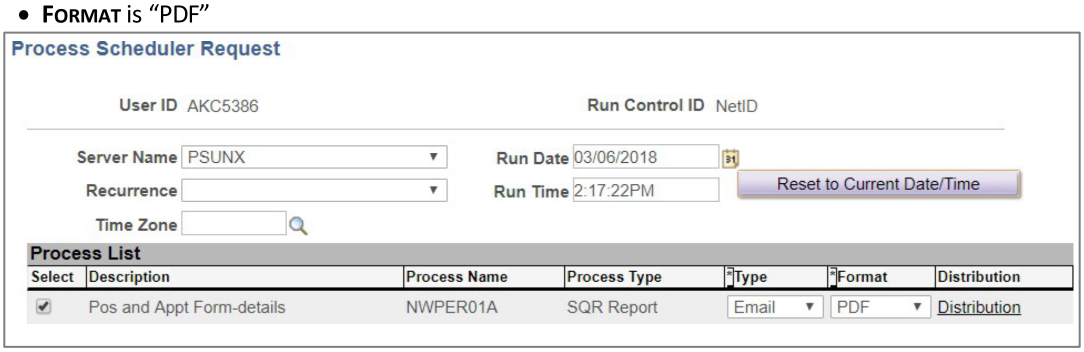


Note: Click the **[+]** button to print forms for multiple employees/positions at the same time.

6. Click **Run**.

7. Set and/or confirm the following options:

- **Server Name** is "PSUNX"
- **Type** is "Email"
- **Format** is "PDF"



Note: After setting these options for the first time, they will default in the next time you log in with the same Run Control ID in Step #4.

8.	Click **OK**. Your form will run in the background and will be emailed to your Northwestern email address as a PDF attachment.
9.	If **TYPE** in Step#7 was “Document” the document must be downloaded from myHR. Click the **Refresh** button on the upper right of the screen until your reports **Run Status** is *Success* and the **Distribution Status** is *Posted*.
10.	Click **Details** next to your report.
11.	Click **View Log/Trace.**
12.	The report will be the .pdf file. Click the file name. *Note:* If the document does not download, hold down the control key (Ctrl) and clicking again. If it still does not download be sure pop-up blockers are turned off. If you need assistance reference the Turn Off Pop-up Blocker document.