Personnel Position Payroll
Electronic Routing Management System (PERMS)

Welcome to PERMS

Personnel/Position/Payroll Electronic Routing Management System

This is a personnel action management, routing and approval system that establishes salary payments for faculty, staff and graduate students.

Department usage will be phased in. What if department areas are not included? HRS will no longer accept paper Personnel Action Forms to put employees on the payroll.

See Chapter 610 of the PERMS for procedures and documentation requirements.

Washington State University
Training provided by Human Resource Services
509-335-4521
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The Personnel Position Payroll Electronic Routing Management System (PERMS) replaces the paper Personnel Action Form (PAF). PERMS enables the user to authorize personnel transactions and communicates the status of the personnel action. PERMS is used to perform personnel actions for faculty, administrative/professional employees, classified staff, and graduate assistants.

Upon successful network authentication, the main menu appears.

*Access is determined by your chair/director. You must have a network ID and authorized access in order to use PERMS.*

Personnel information is located in Business Policies and Procedures (BPPM) Chapter 60. Personnel Action information is located in BPPM 60.25

Position Control information is located in BPPM Chapter 58.

Payroll information is located in BPPM Chapter 55.
EMPLOYEE – Display

To display employee information, select “Display” from the Employee section of the menu.

Enter the employee’s WSUID or SSN, as well as the date from which to display information.

OR

Enter a position number or organization number to generate a list of employees to select from.

Use the “JUMP TO (...)” menu at the top of the screen to change functions for this employee (i.e., add/change employee data or add/change appointment data). Depending on access, some functions may not appear.

“JUMP TO (...)” is a shortcut to other Employee and Appointment Menu items for this employee.

If the employee’s WSUID or SSN is not known, click on “NAME SEARCH” to proceed to the name search function.

Enter as much information as possible then click “Search”.

Display Employee Data

| Name: | COUGAR, BUTCH T |
| Address: | |
| Phone: | 9999999 |
| WSUID: | 09999999 |
| SSN: | 222-22-2222 |
| Date of Birth: | 04/11/1980 |
| Gender: | Male |
| Citizenship: | United States |
| Immigration Stat: | Not Applicable |
| Employment Information | |
| Home Dept: | |
| Emp Status: | Inactive |
| Status Reason: | No Active Appointments |
| Status Date: | 07/01/2005 |
| Emp Type: | Temporary |
| Parc/Temp: | |
| Full/Part: | Full-Time |
| Work Location: | |
| Work City: | |
| Tenure Year Status: | |
| Initial Hire Date: | |
| WSU Prev Mem: | 0 |
| State Prev Mem: | 0 |
| Perf Eval Year: | |
| Secv Break Mem: | 0 |
| Personal Information | |
| Highest Educ Lvl: | |
| Yr Bst Awarded: | |
Use the “Select” button to the left of the name to go to the Display Employee page. Click the name to display additional information about the person.

If the person does not appear in the search results, modify the search criteria to add or change the information.

If no information can be found, this person does not have a record in the system. Select Employee Add/Change from the menu to add a new employee.

Use the “Select” button to the left of the name to go to the Display Employee page. Click the name to display additional information about the person.

If the person does not appear in the search results, modify the search criteria to add or change the information.

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Use the “Select” button to the left of the name to go to the Display Employee page. Click the name to display additional information about the person.

If the person does not appear in the search results, modify the search criteria to add or change the information.

If no information can be found, this person does not have a record in the system. Select Employee Add/Change from the menu to add a new employee.
To add or change employee information, select “Add/Change” from the Employee section of the menu.

See Page 7 to add a new employee.

Enter the employee’s WSUID or SSN, as well as the date from which to display information.

OR

Enter a position number or organization number to generate a list of employees to select from.

If the WSUID or SSN is unknown or unrecognized, click on “NAME SEARCH”.

Enter as much information as possible then click “Search”.
The system will organize the potential matches in order of highest probability based on the criteria entered.

Click on the name to get more detail.

If the search returned the correct person, press the “Select” button next to the name.

Click “Modify Search Criteria” to enter additional or different criteria.

If the person you are looking for does not appear, modify the search criteria to add or change information. If no information can be found, this person does not have a record in the system. Click “Create New WSUID.”

Verify that the information entered is correct and click “Create”

- Be cautious when creating a new record, many new employees already have an associate record! -
Review and update the information.

Click “Update” when all changes are complete.

Use the “Change Address” button to modify the employee’s address.

Click “Cancel” if you do not wish to save changes.

Click “Reset” to reset open fields.

If a new faculty is tenure track, click “Change Tenure” and enter the information.

Select Tenure Status and Subject Area’s from the drop down menus. See BPPM 60.25 for a list of tenure areas.

Click “Send Tenure Data.” An email will be sent to Human Resource Services for HEPPS update.

Click “Close Window” after all updates have been completed.

The employee’s information was successfully added and/or updated.

Use the “JUMP TO (…)) menu at the top right of the screen to proceed to the next function for this employee, or pick from the menu at the left to proceed to a new selection screen. Depending on access, some menu items may not appear.
EMPLOYEE – Name Search

Use the “Name Search” function from the menu to search for employee information.

This function is strictly to search for and display information associated with the employee’s name.

Enter as much information as possible then click “Search”.

The system will organize the potential matches in order of highest probability based on the criteria entered.

Click on the name to get more detail.
APPONITMENT – Display

To display employee appointment information, select “Display” from the Appointment section of the menu.

 Depending on access, some menu items may not appear.

Enter the employee’s WSUID or SSN, as well as the date from which to display appointments. If the employee’s WSUID or SSN is unknown, click on “NAME SEARCH.”

OR

Enter a position number or organization number to generate a list of employee appointments to select from.

Example of an employee WITH a current employment appointment:

Example of an employee WITHOUT a current employment appointment:

Use the “JUMP TO (...)” box to access another function for the employee, or click a menu item on the left to start over. Depending on access, some menu items may not appear.

“JUMP TO (...)” is a shortcut to other Employee and Appointment Menu items for this employee.
## APPOINTMENT – Add

To add employee appointment information, click “Add/Change/Route” from the Appointment section of the menu.

Depending on access, some menu items will not appear.

Enter the employee’s WSUID or SSN, as well as the date from which to display appointments.

If the employee’s WSUID or SSN is unknown, click on “NAME SEARCH.”

If the appointment to be added is prior to the date shown in the box, the date must be changed on this screen.

Enter the Effective Date and click “Add New”.

### NOTE: The NEW PERSONNEL ACTION effective date cannot be less than the date entered on the previous selection screen. The following error will occur:

- New Action Date must be >= CURRENT from date (07/01/2008).
Thoroughly review all information.

Click “Change” to update Permanent/Temporary status (new appointments only), Home Department and Work Location.

Primary Employment Type, Full/Part-time status, and Reason fields will be automatically derived.

Enter the home department. The home department receives WSU correspondence and is responsible for processing all departmental paperwork regarding the employee. If the employee has more than one employing department, identify one department to serve as the home department.

Enter the work location code or click the map icon to select a work location from the pop up window.

Highlight the work location then click the “Return Selection” button.

Home department and Work Location may be changed at any time and does not require HRS approval. See BPPM 60.25 for a complete list of Work Locations.

After Perm/Temp, Home Dept and Work Location have been updated, click “Add Appointment.”
Select the appropriate action from the ‘Action Code’ drop down menu. Refer to BPPM 60.25 for Action Code information.

Fill in the Position Number. Based on the position configuration, the appropriate fields will open.

Enter “0” in the position number for Adjunct Faculty appointments.

Clicking the “Reset” button will return the fields to their former values.

### Initial Hire Staff –

<table>
<thead>
<tr>
<th>Appointment Add</th>
<th>Action Code: Initial (01)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Penn</td>
<td>Job Class</td>
</tr>
<tr>
<td>105847</td>
<td>1236</td>
</tr>
<tr>
<td>Appt Type</td>
<td>Appt Term</td>
</tr>
<tr>
<td>Normal</td>
<td>1234</td>
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<tr>
<td>Range</td>
<td>Step</td>
</tr>
<tr>
<td>35</td>
<td>A</td>
</tr>
<tr>
<td>Leave Ind</td>
<td>Leave Reason Cd</td>
</tr>
<tr>
<td>Not on Leave</td>
<td></td>
</tr>
</tbody>
</table>

**Conditions:**
- Cycle Appointment Dates
- Probationary Period
- Conditions: During the first six months of your appointment you will serve a probationary period in accordance with Washington Administrative Code 957-10. Additional information on probationary periods is available through the Human Resources Services website (www.hrs.wa.gov).

### Initial Hire Administrative Professional –

<table>
<thead>
<tr>
<th>Appointment Add</th>
<th>Action Code: Initial (01)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Penn</td>
<td>Job Class</td>
</tr>
<tr>
<td>50047</td>
<td>1235</td>
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<tr>
<td>Appt Type</td>
<td>Appt Term</td>
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<td>Normal</td>
<td>1234</td>
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<tr>
<td>Range</td>
<td>Step</td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Leave Ind</td>
<td>Leave Reason Cd</td>
</tr>
<tr>
<td>Not on Leave</td>
<td></td>
</tr>
</tbody>
</table>

**Conditions:**
- Use Ctrl key to select multiple, append to Conditions box when “Get” pressed
- Conditions: All Temporary - all actions
The fields available for update will open depending on the action. An ‘Initial (01)’ action opens the following fields:

**End Date:** Enter end dates for all temporary appointments
Enter 12/31/9999 for permanent appointments

**AptDept:** Enter the department number associated with the appointing department. The department number may be found on the Payroll Expenditure Audit Report, online in WSUORG, or from Human Resource Services.

**Pay Basis:**
- Unknown
- Exception
- Positive
Most WSU employees use “Exception” time reporting. See BPPM 55.26

**ApptType:**
- Normal – Normal monthly appointment
- Summer Session – summer teaching appointment
- Summer Appointment – summer research appointment

**Appt Status:**
- Permanent - A classified employee who has successfully completed a probationary or trial service period within the current period of employment or a faculty or administrative professional employee hired on a permanent basis.
- Probationary - Probationary Period: See WAC 357-19-040.
- Trial Service - Trial Service Period: See WAC 357-19-030 and WAC 357-19-050. Refer to appropriate collective bargaining unit agreement regarding trial service.
- Temporary – Any appointment with an end date.
- Transitional - The transition review period is a six-month evaluation period that allows the employer and employee to determine whether a placement into a position as a layoff option or appointment to a position from a layoff list or the general government transition pool is a good match WAC 357-01-340

**Appt %:** Complete this field for all actions except adjunct faculty.

**FT Rate:** Enter the full-time rate of pay for Administrative Professional and Faculty employees. The salary for Classified fills automatically from the position number.

**Differential:** Enter any shift differential for classified employees, or any stipend for faculty or administrative professional employee. Refer to respective WAC rules, collective bargaining agreements, or manuals.

**Conditions:** Select the conditions(s). Use the control key to select multiple conditions. Click the “Get.” You may also type your own conditions or paste from another source. The conditions selected, typed, and/or pasted will appear on the unofficial (unapproved) and the official (approved) Personnel Action.

**Comments:** Add comments. Comments will not appear on the personnel action, they will appear in the View Log. NOTE: Comments are permanent and cannot be changed once “Continue” is clicked.
Once all fields have been completed, click “Continue.”

All edits must be passed before the pending appointment(s) will be saved. For example Appt % cannot exceed 100%. All errors must be corrected before moving forward.

Saves the present state of the pending appointment(s). Some minimal edits must be passed, such as numeric data into numeric fields, before the pending appointment(s) can be saved.

Cancels input and returns to the Add/Change/Route Appointment screen.

Once all fields have been completed, click “Continue.” When all edits have been passed, the system returns to Add/Change/Route Appointment(s) and displays the pending appointment.

Review the pending appointment, the appointment status (i.e. ‘Waiting to send’) and the instructions at the top of the page. Proceed to “Routing.”

Add/Change/Route Appointment(s)

COUGAR,BUTCH T
WSU ID: 11110454
Citizenship: US
Initial Hire: Continuous Service:

CURRENT HEPPS from 10-08-2008

PENDING 10-23-2008 Waiting to send Change Routing Print

<table>
<thead>
<tr>
<th>Posn</th>
<th>Job Class</th>
<th>Begin</th>
<th>End</th>
<th>FT Rate</th>
<th>Appt %</th>
<th>Pay Rate</th>
<th>Tim Lvl</th>
<th>ApptType</th>
<th>AptDept</th>
<th>ApptStat</th>
<th>PBU</th>
<th>Tnx</th>
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<tbody>
<tr>
<td>41125</td>
<td>123E</td>
<td>10/08/2006</td>
<td>12/31/9999</td>
<td>2370.00</td>
<td>M</td>
<td>100.0000</td>
<td>E</td>
<td>N</td>
<td>3160</td>
<td>2</td>
<td>Y</td>
<td>0</td>
</tr>
</tbody>
</table>
APPOINTMENT – Change

To change employee appointment information, click “Add/Change/Route” from the Appointment section of the menu.

Depending on access, some menu items will not appear.

Enter the employee’s WSUID or SSN, as well as the date from which to display appointments.

If the employee’s WSUID or SSN is unknown, click on “NAME SEARCH.”

If the appointment to be changed is prior to the date shown in the box, the date must be changed on this screen.

Enter the Effective Date of the change and click “Add New”.

NOTE: The NEW PERSONNEL ACTION effective date cannot be less than the date entered on the previous selection screen. The following error will occur:

Please note the following:
- New Action Date must be >= CURRENT from date (07/01/2008).
Select the appropriate Action Code.

Complete all necessary fields. Depending on the position and action code configuration, the appropriate fields will open.

Add conditions.

*If this is a temporary appointment (with an end date and status of Temporary), be sure to insert the conditions.*

Highlight the conditions and click “Get,” cut and past from other sources, or type the conditions.

Enter comments. Note -- “Comments” are permanent and cannot be changed once the action has been routed.

When complete, click “Continue.”

When all edits have been passed, the system returns to Add/Change/Route Appointment(s) and displays the pending appointment.

Review the appointment as well as the instructions at the top of the page.

Proceed to “Routing.”
Once an appointment has been saved and is ‘Waiting to send,’ click the “Routing” button to assign the approvers to the routing approvals. Your college/area may set up its own procedure on how to assign the approvers.

Depending on the employee type and the type of action, the required approvals may be different from the example below. For example, a new permanent faculty employee’s approvals would include the appointing authority, provost and Center for Human Rights. These approvals are required. In the example, only the network ID for the appointing authority of the college/area is required.

Enter the network ID of the person required for this action. Click the "Add" button.
You may add other people to ‘Routing’ and specify the routing action and order in which the routing occurs. Routing order is not required by the system, however, your college/area may require the use of this feature.

- Enter the network ID of the person required for this action. Click the “Add” button.
- Select the action required of this person (approve, release, notify).
- If necessary, set the routing order.
- Continue this selection process until all required approvals have been met.
- When complete, click “Send for Approvals” or “Save and Close” depending on your college/area procedures. All required approvals must be satisfied before the “Send for Approvals” will be accepted.

The system will generate email notifications to all of the selections at once unless a routing order was set. If a routing order is set, the emails will generate in the order established and after each one completes their activity.

Routing Actions:

**Approve** Sends an email with a link to the personnel action to the Network ID provided. You may have more than the ‘Required Approvers’ approve an action. Note: A person included in the routing as an approver may not be required by the system. The action may be ‘Ready for HEPPS’ without this person’s approval.

**Notify** Sends an email with a link to the personnel action to the Network ID provided. This is a notification of a personnel action and does not require approval.

**Release** Sends an email with a link to the personnel action to the Network ID provided. Provides a final review by the person designated to release the action. The ‘Releaser’ can be anyone; however, the person originating the action or the area finance officer will most likely be the ‘Releaser.’ Each college/area should decide who will be the "Releaser" or if this function will be used. The personnel action will not advance to the next approver and/or personnel action status until the Releaser has released the action.
Routing for this appointment was successful and one email was sent to the person designated ‘1’ in the routing order. As soon as ‘1’ has completed their activity, an email will be sent to ‘2’ and so on.

If no routing order was set, the note would have indicated ‘Number of email notices sent - 4.’

The purpose of the routing order is to send an email to the next approver in the sequence or notify the next approver it’s their turn to approve. It does not prevent the approver from approving the personnel action out of the specified order.

The personnel action status will become ‘Waiting for approvals’ when the “Send for Approval” button is clicked and all the required approvals have been assigned.
To approve employee appointments, click “Approve” from the Appointment section of the menu.

Depending on access, the “Approve” and/or “Release” menu items may not appear.

This is the electronic version of the paper Personnel Action Form, you should treat this action the same as you would the paper version of the PAF.

Click “myList”

OR

Enter the employee’s WSUID or SSN and click “Select”

Clicking “myList” generates a list of the employee personnel actions that require your approval.

Click “Select” to review the personnel action or click “View Log” to see where the personnel action is in the approval process.

The order is by effective date/name. Clicking a column heading will sort by that column.
Thoroughly review all information.

Approve:
If all information is accurate, press “Approve.”
The personnel action will move to the next step.

Notify Originator:
Opens an email window addressed to the originator of the personnel action. This may be used to inform the originator of corrections, modifications, or to discard the personnel action.
**Print:**
Produces an ‘unofficial’ copy of the personnel action. The personnel action remains as unofficial until all approvals have been received and the personnel action is moved to HEPPS.

**View Log:**
Opens the ‘Activity Log’ for the personnel action.

Check the “View Log” to track activity and approvals.

**myList:**
Returns to ‘myApproval List’

Once finished with the current personnel action (approved or not), continue to the next personnel action in the list by clicking the "myList" button.

If there are more succeeding personnel actions in the approval list, click the "Next in myList" button to advance to the next personnel action without returning to myList.

Once all required approvals have been met the personnel action will become ‘Ready for HEPPS.’ See Page 36 “What’s Next.”
To release employee appointments, click “Release” from the Appointments section of the menu.

Depending on your authorization, some menu items will not appear.

Click “myList”

OR

Enter the employee’s WSUID or SSN and click “Select”

Clicking “myList” generates a list of the employee personnel actions that require release.

Click "Select" for the personnel action to "Release"

Setting a ‘release’ on a personnel action requires a final review by the person designated as ‘releaser.’ Once all required approvals and release have been met, the appointment advances to the next pending status “Ready for HEPPS.” See Page 36 “What’s Next.”

The Releaser can be anyone, however, it is most likely going to be the person originating the action or an area finance officer. Each college/area should decide if this function will be used and who will be designated. The releaser is someone who has been given the authority to release personnel actions.
To display pending appointments, click "Display Pending" from the Appointments section of the menu.

Enter one or multiple search criteria and click "Search". This will generate a results list of pending personnel actions meeting the criteria chosen from the fields below.

Search for Pending Personnel Actions

Enter your Selection Criteria below.

Position Io: 
Note: If position entered, no other search criteria allowed.

Supervising Unit Io: 

Appointing Department Io: 

Employment Type: Any 

Personnel Action Status: Any 

Appointment Action Code: Any 

Waiver Type: 

Originator: (WSU Network ID) 

Approver: (WSU Network ID) 

Under Review: 

Personnel Action Effective from: (mm/dd/yyyy) through: (mm/dd/yyyy) 

Search based on appointment data. Search based on waiver type. 

Search based on Personnel Action criteria Search based on routing activity. 

The supervising unit or appointment department along with the personnel action status can be a very useful tool in managing your college/area personnel actions.
myQUICK ROUTES

To set up routing contacts (favorites), click on “myQuick Routes” from the main menu.

myQuick Routes are the groups you will routinely route approvals and notifications to. Using Quick Routes allows you to set these up in advance instead of keying them in each time you route a personnel action. Here you may also set up the Routing Action (approve, release, notify) and the Routing Order.

Each PERMS authorized user will have a default myQuick Route, named "Routing Defaults".

You may choose to leave or delete the routing default list.

Note: Your college/area may require certain routing actions. Check with your Area Finance/Administrative Officer or the Director of Administrative Services for your college/area.

To create your own ‘Quick Route,’ enter the name of the ‘Quick Route’ and click "Add New".

Uncheck the defaults.

Enter WSU Network ID, the routing action and optional order, and click "Add".

Once you are satisfied with your route, click "Update". "Cancel" will cancel quick route changes.

"Delete Route" will delete the quick route.
HELPFUL INFORMATION

Warning: **DO NOT USE** the back button when moving through the screens. The results are unpredictable and may cause errors.

**BUTTONS**

**Add Appointment:** When clicked opens a detail appointment line with all allowable data fields open and ready for input. The blue heading line with the detail will show Appointment Add. The 'Posn' (position) box and the 'Action Code' are the only 2 fields maintainable. After entering data in the 'Posn' box, press tab, the position information will automatically populate for some fields.

**Add New:** Used in conjunction with the Effective Date to create a new personnel action. When clicked, moves to the Add/Change Appointment(s) screen.

**Cancel:** Ignores any data changed on the page and returns to the previous page.

**Change:** Allows changes to employee or appointment information. Choosing Add/Change/Route from the Appointment menu takes you to the Add/Change/Route Appointment(s) page. If there is a 'PENDING' action, the "Change" button will appear. When "Change" is clicked, you will navigate to the Add/Change Appointment(s) page, where you can make changes to employee information and appointments, you will be given other options such as "Discard Pending", which discards the entire pending personnel action; "Change" employee information, Home Department and Work Location; "Change" the appointment; "Discard" the pending appointment.

**Continue:** Clicking this button saves the personnel action. All edits MUST be passed before the pending appointment(s) will be saved. Routing will be calculated at this time. At this time the status becomes "Waiting to Send".

**Discard:** This button is used on the Add/Change/Route Appointment(s) page. If you choose the "Discard" button on the appointment line, only that pending appointment will be discarded. If you choose "Discard Pending", you will discard the entire pending personnel action.

**Email:** Clicking this button will open a new email message using your email program.

**Print:** This button will print to pdf the UNOFFICIAL Personnel Action Form.

**Reset:** Removes any data changed on the page or line. Remains on the same page.

**Routing:** Takes you to the ‘Routing For Approvals’ page. This button is shown on the Display Appointment(s) page when you choose Add/Change/Route from the menu.

**Save:** Saves the present state of the pending appointment(s). Some minimal edits must be passed first such as numeric data input into numeric fields. The status becomes "Saved".
LINKS

Position & Job Class: Clicking either link from "CURRENT HEPPS" or "PENDING" appointment(s) will open a new window displaying the position and job class information.

View Log: Displays the Activity Log (comments, routing activity, and approval status) for the pending appointment. View Log is shown as a button or as a link in the following pages: Display Appointments, myApproval List, myRelease List, Add/Change/Route 'Pending' Appointment(s), or when you search for pending actions in Display Pending.
How to...

Change a Home Department/Work Location

Select “Add/Change/Route” from the Appointments section of the menu.

Enter the employee’s WSUID or SSN, as well as the date from which to display appointments. If the WSUID or SSN is unknown, click on “NAME SEARCH.”

Enter the ‘Effective Date’ of the change and click “Add New”

Click “Change”

Update home department and/or work location.

When complete, click “Continue”

Home Department and/or Work Location changes DO NOT require ‘approval.’ They are immediately “Ready for HEPPS.” However, you may wish to ‘Notify’ others within the unit/area.

To notify others of the change: Click “Routing,” enter the network ID of the person(s) to notify, choose the “Notify” radio button, click “Add,” click “Send for Approvals.” An email will be sent to the person(s) chosen to be notified of this action.

When this action is updated in HEPPS, a Personnel Action Form will be generated showing the change(s) and placed into the employee’s personnel file.
Change Position Numbers and/or Change Employing Department

Select Add/Change/Route from the **Appointments** section of the menu.

Enter the employee’s WSUID or SSN, as well as the date from which to display appointments. If the WSUID or SSN is unknown, click on “NAME SEARCH.”

Enter the ‘Effective Date’ of the change and click “Add New”

Click “End” to term the current position and “Add Appointment” to add the new position.
Select action code ‘Position Number Change’ or ‘Change’

Position Number Change and Change will cause the end date to be 1 day prior to the personnel action effective date.

Select the appropriate action code (i.e., New Appointment, Promotion).

Complete all open fields.

Enter conditions.

Enter comments.

When complete, click “Continue”.

When all edits have been passed, the system returns to Add/Change/Route Appointment(s) and displays the pending appointment.

Review the appointment as well as the instructions at the top of the page.

Proceed to “Routing.”
End an Employee Appointment

Select Add/Change/Route from the 
Appointments section of the menu.

Enter the employee’s WSUID or SSN, as well as 
the date from which to display appointments. If 
the WSUID or SSN is unknown, click on 
“NAME SEARCH.”

Enter the ‘Effective 
Date’ of the change 
and click “Add 
New”.

Select “End”

Select the 
appropriate action 
code.

Enter conditions.

Enter comments.

When complete, 
click “Continue.”

System will return 
to the Add/Change 
Appointment screen.

Review the pending appointment, appointment status and the instructions at the top of the page.

Proceed to “Routing”
**Discard Pending Appointment**

Select Add/Change/Route from the **Appointments** section of the menu.

Enter the employee’s WSUID or SSN, as well as the date from which to display appointments. If the WSUID or SSN is unknown, click on “**NAME SEARCH**.”

Select “**Change**”

Select “**Discard**” pending appointment.

OR

“**Discard Pending**” personnel action (this discards the entire personnel action).
Add Graduate Assistant Appointment with Waiver

Select “Add/Change/Route” from the Appointments section of the menu.

Enter the employee’s WSUID or SSN, as well as the date from which to display appointments.

If the WSUID or SSN is unknown, click on “NAME SEARCH.”

Enter the ‘Effective Date’ and click “Add New”.

Thoroughly review all information.

Click “Change” to update Permanent/Temporary status (new appointments only), Home Department and Work Location.

After Perm/Temp, Home Dept and Work Location have been updated, click “Add Appointment.”
Select the appropriate action from the ‘Action Code’ drop down menu. Refer to BPPM 60.25 for Action Code information.

Fill in the Position Number.

Complete all open fields.

Add conditions.

Clicking the “Reset” button will return the fields to their former values.

Add waiver information.

Contact the Graduate School for waiver and graduate appointment information.

Once all fields have been completed, click “Continue.”

When all edits have been passed, the system returns to Add/Change/Route Appointment(s) and displays the pending appointment.

Review the pending appointment, the appointment status (i.e. ‘Waiting to send’), and the instructions at the top of the page.

Proceed to “Routing”
Frequently Asked Questions

Currently Under Construction