Overview

Workflow is the electronic routing of a personnel action through request, approval, and processing. There are two workflow Process Designs in Capital HR: PAR Workflow and Recruit Workflow.

PAR Workflow identifies the process for the request, approval, and processing of personnel actions.

Recruit Workflow identifies the process for the request and approval of Job Openings.

Workflow is based upon 4 system roles for Administrative staff and 2 system roles for HR Staff.

Administrative staff roles: Requester (REQ), 1st Authorizer (1st), 2nd Authorizer (2nd), Approver (SIG).

HR staff roles: HR Reviewer (REV), and HR Processor (PRO)

Procedures

1) Navigation

Home > Workforce Administration > Job Information > (Supervisor Request USF, 1st Rqst Authorization, 2nd Rqst Authorization or, Approve Request) OR Click on “Worklist” if not initiating the request.

Menu

- My Favorites
- Recruiting
- Workforce Administration
- Personal Information
- Job Information
  - Contract Administration
  - Review Job Information
  - Reports
    - Hire Employee USF
    - Concurrent Hire USF
    - Supervisor Request USF
    - 1st Rqst Authorization USF
    - 2nd Rqst Authorization USF
    - Approve Request USF

Note: The menu items available to you are defined by your security level.
2) Using the search box, find the appropriate employee record

Find an Existing Value

EmpID: begins with

EmpID Rdr Nbr: =

Name: begins with mouse,m

Last Name: begins with

[Include History] [Correct History] [Case Sensitive]

Search   Clear   Basic Search   ✎ Save Search Criteria

3) The Data Control tab for the employee’s Job Information record will be displayed. After completing the appropriate data fields for the particular personnel action request, you are now ready to change/update the PAR status code. The code will automatically default to “REQ” when you are creating the request for personnel action.

a) If your Administrative Office uses a 3-step Workflow process and you are the “Requester”, you will want to change the PAR Status Code to “1st”, this will enable the 2nd authorizer to review the action.

b) If your Administrative Office uses a 3-step Workflow process and you are reviewing the action as the 2nd authorizer, you will change the PAR Status Code to “2nd”, this will enable the Approver to review and “sign” the action.

Note: The system is designed around your role. When an action is created, it will follow a prescribed path. Pages 5 & 6 provide examples of the various Workflow routes available and illustrates how to change the PAR Status Code for all Workflow processes.
# Table of available PAR Status Codes

<table>
<thead>
<tr>
<th>PAR Status Code</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REQ</strong> (default for Requester)</td>
<td>Routes action to 1st Authorizer</td>
</tr>
<tr>
<td><strong>INI</strong></td>
<td>Enter some data for action, save it and return to complete it at a later time. The action/requisition has not been routed through workflow yet.</td>
</tr>
<tr>
<td>1st</td>
<td>Routes action to 2nd Authorizer</td>
</tr>
<tr>
<td>2nd</td>
<td>Routes action to Approver</td>
</tr>
<tr>
<td><strong>RET</strong></td>
<td>Routes action back to Requester. Some reasons for returning an action: need for additional information, incorrect information entered, or action was sent to wrong person.</td>
</tr>
<tr>
<td><strong>DIS</strong></td>
<td>Disapprove &amp; remove action from workflow. The action is routed back to Requester, but the Requester cannot modify and re-route back into workflow. <strong>This PAR Status code should be used cautiously since an action saved with this Status becomes part of the employee’s Capital HR electronic history record.</strong></td>
</tr>
<tr>
<td><strong>WTH</strong></td>
<td>Withdraws the action from workflow. This status is used when an action is entered by mistake.</td>
</tr>
<tr>
<td><strong>SIG</strong></td>
<td>Approve and use notify button to route action to HR Reviewer</td>
</tr>
</tbody>
</table>
4) After you have updated the PAR Status Code, you will click “Save”. This will take you to the “Route To” page. Depending on which PAR Status Code was entered/Saved, the next screen shot will provide you with the “Routing Based on:” information line. For example, if you saved the request in “REQ” the Routing Based on will state “Route to 1st Review”. If you saved the request in “1st”, the routing Based on will state “Route to Approver”. If you saved the request in 2nd, the Routing Based on will state “Route for Signature”.

a) To route the action to the next reviewer/approver click the “Route To” button.

b) After selecting the appropriate “Route To” employee, click “OK”. You are now finished with routing your Request for Personnel Action through the Workflow process.

**Note:** When the Approver signs the action (SIG) you should use the “Notify” button to let the HR office know an action has been approved for processing. An email will not be automatically sent by the Cap HR system.

Administrative Offices may use any of the Workflow examples illustrated below:

**SAMPLE WORKFLOW ROUTES:**

(Management & Staff) 4 Step Workflow process:
For example, a supervisor recommends a promotion for one of their subordinates. The supervisor makes the Request. The request is forwarded for 1st Authorization. Upon arrival by the 1st Authorizer, the action is forwarded for 2nd Authorization. When that individual approves the action, the Approver receives it. The Approver, by changing the PAR Status Code to “SIG”, will automatically flow the action to HR for processing.

(Management & Staff) 3 Step Workflow process:

**"Must change PAR Status Code to "1st""

For example, a supervisor recommends a promotion for one of their subordinates. The supervisor makes the Request (REQ). The request is forwarded for 2nd Authorization (2nd). When that individual approves the action, the Approver receives it. The Approver, by changing the PAR Status Code to “SIG”, will automatically flow the action to HR for processing.
(Management & Staff) 2 Step Workflow process:

In this scenario, a supervisor makes the Request for promotion. That request would be forwarded directly to the Approver. The Approver, by changing the PAR Status Code to “SIG”, will automatically flow the action to HR for processing.

For Help Contact HR Systems Support:

Submit a help desk ticket:
http://intrahr.od.nih.gov/helpdeskform.htm

Email:
hrss@nih.gov

Website:
http://hr.od.nih.gov/hrsystems/staffing/caphr/default.htm

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