

PowerPR Personnel Recommendation for Benefited Employees

Human Resources, Payroll, and the Budget Office have partnered to develop a new DocuSign PowerForm for Personnel Actions. This new PowerPR form replaces the current Personnel Recommendation (PR) form and is designed to:

- Improve accuracy through dynamic drop down options and in-form field guidance
- Create electronic workflow and Banner integration efficiencies
- Improve communication and tracking through a single process flow and DocuSign tracking for all steps including routing to the HR and Payroll offices

Like the previous PR form, the updated PowerForm is to be used to initiate personnel actions for benefited employees only. Temporary (Adjunct) Faculty Contracts, One-Time Payment Authorization Forms, and Time Cards will continue to be submitted for temporary payroll purposes.

Effective November 28, 2021, all personnel recommendations must be submitted using this form. The HR Office will no longer accept the prior version of the PR form.

Completing the PowerPR Form

PowerForm Signer Information

When starting the [form](#), users will immediately complete the applicable Signer Information. Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

- 1) Preparer – your name and email
- 2) Name of Employee – **EMAIL SHOULD BE EPAF@ISU.EDU** (this will allow HR to search for the PR by the employee's name).

If a delegate is signing on behalf of Chair/Dean/Director, UBO or VP, put the delegate's name and email.

- 3) Department Chair, Dean, or Director (or their delegate)
- 4) Additional Department Chair, Dean, or Director (or their delegate) - *this field is optional*
- 5) University Business Officer-UBO (or their delegate)
- 6) Signature Authority: VP or VP Delegate
- 7) Copy to Grants & Contracts (for grant-funded actions only) - Enter the Grant & Contracts' accountant name and email you work with
- 8) Begin Signing

Once in the form, a Notes for Preparer box appears. This can be closed or re-opened at any time while working in the form by clicking the <CLICK ICON TO CLOSE.

Notes for Preparer:

- Required fields are indicated in red.
- For help tips, hover your cursor over the field.
- If the employee is leaving ISU, most fields are not required.
- Step "12. Labor Distribution" will not be available until "3. Type of Employee" and "11. Salary/Pay Information" are complete.
- You can attach any relevant documents with the paperclip icon.
- After you click "FINISH", the form will automatically begin routing for signatures. After all signatures have been collected, it will automatically be sent to HR/Payroll for final approval and data entry.

LINKS:

- Visit Payroll's website (isu.edu/payroll) for Contract and Payroll Dates.
- Visit the HR Forms Page (isu.edu/hr/forms) for Offer Letter Templates, Moving Reimbursement Forms, etc.

All required fields are indicated in red. Each field contains useful help tips when your cursor hovers over each field.

Personnel Actions for Classified, Faculty, and Non-Classified Employee Types

If the employee is leaving ISU, select **Yes** and choose the appropriate separation or termination reason from the drop-down.

PROPOSED APPOINTMENT ACTION			
Is the employee leaving ISU?		Action:	-- select --
<input type="radio"/> Yes <input type="radio"/> No			-- select --
ACTION DETAILS			
Effective Date			T-ORG
			T
<div style="border: 1px solid gray; padding: 5px;"> <p>Most fields are not required for this action. Use the Comments/Remarks field for additional information.</p> </div>			

-- select --
 -- select --
 Separation-Temp Appointment
 Separation-Probation Layoff
 Separation-Budget Layoff
 Separation-Personal
 Separation-Retirement
 Separation-Death
 Separation-Transfer Agency
 Termination-Probation
 Termination-Dismissal

Depending on the Action selected, the form will adjust the required information accordingly. If the employee is leaving ISU, the only enterable fields will be Action, Effective Date, and Comments. These are the only fields required for processing.

If the employee is not leaving ISU, select **No** and choose the appropriate Action from the drop-down.

PROPOSED APPOINTMENT ACTION			
Is the employee leaving ISU?		Action:	-- select --
<input type="radio"/> Yes <input checked="" type="radio"/> No			-- select --
ACTION DETAILS			
Effective Date			New Appointment
11/03/2021		Sarah Qu	T-ORG
Job Title			T 489
University Business Officer		FTE	Information
Type of Employee	PCN	1.0	Bi-Weekly
Non-Classified	123400	Lab	Hourly Rate
Appointment Type		Index Nu	
Regular		aa010	Other Action Details First)
Appointment Months per Year			% (xx.xx)
12 Months			Amount (per year)
			100.00 \$ 80000
			\$
			\$
			Other: See Comments

Applicable supporting documentation is required to be attached in the form utilizing the paperclip icon in the top right-hand corner of the form. For example, an Offer Letter should be attached for New Appointments, and a Separation Letter should be attached for separations.

Applicable comments and/or remarks on conditions of employment should be included in the comments section on the PR. **Please do not use the comment feature in DocuSign as those are not saved on the final form & will not be processed by HR or Payroll.**

When complete, click **FINISH**. You may download a copy for your records. ***Note: You will need a saved electronic copy to include with any related Budget Transfer in Fast.*** An email will be sent to you, which will enable you to track the progress of the document. To track the progress, go to the email and click on the "Review Documents" button. In the new window, click on the "Other Actions" button at the top right and select 'View History.' Look in the 'Action' column for the bottom-most 'Action' called 'Sent Invitations.' The name to the right is where the document currently resides in the queue.

DocuSign will route the PowerPR for all signatures as previously indicated. After all approvers have signed, the PowerPR is sent automatically to HR and Payroll for processing.