



Version #:	1	Effective Date:	01-MAY-2020
		Replaces Date:	NEW

<b>Document Title:</b>	HR Document Submission Instructions in forms.uoregon
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- From the [University Human Resources Website](#), select the form you need to route and you will automatically be navigated to the workflow form at forms.uoregon.edu
- Enter the UO ID, UO Email, and first and last name for the employee. If employee UO Email is unknown or does not exist, input x@uoregon.edu without the DUCKID. Future form improvements will include the name auto filling based on UO Email.
- Enter the Department name.

Employee Information

UO ID \*  
95\*\*\*\*\*

Employee Email Address \*  
JDuck@uoregon.edu  
Please provide the employee email address.

Employee First Name \*  
Jane

Employee Last Name \*  
Duck

Department \*  
TEST Department Name

- Upload the file to be reviewed (e.g., PRF, RTO, etc.)
  - For PRFs and ERFs, upload an editable PDF version, when possible.
  - Classified Performance Appraisals, Sabbatical Applications, and Unpaid Leave of Absence Requests must be signed by the employee (or acknowledged via email attachment).
  - All other documents should be submitted without signatures, since they will be approved via forms.uoregon.edu.
- Upload supplemental documentation as needed. Add a description if the filename is not descriptive.
- In the Comments field, add any additional notes to assist approvers. *Note: these comments will be included in the employee personnel file*
- Click save when complete to go to the Signature page.

FILE INFORMATION

File to Review \*  
Browse... Jane Duck PRF\_20200421.pdf Upload  
Files must be less than 2 GB.  
Allowed file types: pdf xlsx xls doc docx txt.

SUPPLEMENTAL DOCUMENTS

Add a new file  
Browse... Jane Duck PRF justification paperwork.docx Upload  
Files must be less than 2 GB.  
Allowed file types: pdf xlsx xls doc docx txt.

Comments

Save Preview

- Click Edit to enter approvers in the first three lines of the Signature Block workflow ONLY. Please do not edit the pre-filled approvers, as this could result in the document not being processed. See Definitions section below for a list of the Signature Role definitions.

Your unit may have unique approvals for documents. Follow what is typically required for your unit following instructions by your Dean or VP office, this form does not modify the signatures established by your unit.

As the submitter of the document your approval is not required but if 3 is too many approvers for your unit, you, as the “originator” of the form can put yourself as one of the approvers. Please check with your Dean or VP office if you are unclear of who to put at each step.

If additional approvals are needed, like Provost signature on a document, Human Resources will route to the appropriate appointment authority after their review.

Signature Block

Authorization	Name
Edit Dept Head/Supervisor	
Edit Unit HR/Admin/Budget	
Edit Dean/Director/VP	
Reassign University Human Resources Review	HR Reviewer
Reassign University Classification and Compensation Review	ClassComp Review
Reassign Appointment Authority	Appointment Authority
Reassign Payroll Processing	Payroll Processor



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9. "Other Signature Role" and the title will be pre-filled, but you also have the option to choose the signature role from the dropdown menu, or to customize the title.
10. Enter the email or name of the approver (use the UO Find People lookup as needed). As you type, you may see a list of options. Selecting from this list will autofill the approver name. You will need to manually enter if not available on the list.
11. The Message will be prefilled – send as-is, or edit if desired.
12. Click Save to go back to the Signature Block.

13. Repeat the process to assign the first three approvers.  
  
*Note: If the document needs to be sent to someone that isn't an approver, you can send them the form through the CC button.*
14. After entering your internal unit approvers, select "Send Document" to begin the document approval workflow.

Authorization	Name	Email Address	Signature Status
Headsign Dept Head/Supervisor	Sara Pater	spater@uoregon.edu	Unsent
Headsign Unit HR/Admin/Budget	Mark Schmidt	mschmidt@uoregon.edu	Unsent
Headsign *** Dean/Director/VP	James Miller	jmill@uoregon.edu	Unsent
Headsign *** University Human Resources Review	HR Reviewer	hrsig@uoregon.edu	Unsent
Headsign *** University Classification and Compensation Review	ClassComp Review	hrsig@uoregon.edu	Unsent
Headsign *** Appointment Authority	Appointment Authority	hrsig@uoregon.edu	Unsent
Headsign *** Payroll Processing	Payroll Processor	payroll@uoregon.edu	Unsent

Add Signature Row

Read Document    CC    Edit Document    Delete Document

### Definitions

#### Signature Role Definitions

- *Dept Head/Supervisor:* Supervisor of the employee or the head of the unit.
- *Unit HR/Admin/Budget:* If this is a school or college, this should be an individual in the Dean's office tasked with reviewing or approving documents
- *Dean/Director/VP:* This is the highest level of approver needed for your area. If this is a school or college put the appropriate Dean approver, all other units choose the appropriate delegated authority in the VP office (as required).
- *University HR Review, HR Talent, or HR Classification and Compensation:* Any of these approvals indicate HR has authorized and/or reviewed the submitted documents.
- *HR Other:* HR will be using this role to show they bypassed an approval step that is not needed for the submitted document.
- *Appointment Authority:* If appointment authority is required, HR will assign this role to the appropriate approvers. For example, this includes the Office of the Provost, VP Research, or other authority as assigned.
- *Payroll:* As part of the payroll role, they may be marking their task as complete prior to processing in Banner, following the current processing procedures. If the document is "signed" and you are not seeing the changes in Banner, you can check the status by contacting payroll directly.
- *Back Office:* Back office tasks are used primarily to take action on a document after it is completely signed, save documentation for personnel files, or other administrative tasks. Units may add additional back office tasks for similar unit purposes.

### Other

**Browser preferences:** If file downloads or you are unable to preview the document, check browser application/adobe settings. Remove the "open certain file types automatically. Preferred browser is Chrome, but the form does work in Firefox, etc.

To turn off in chrome:

1. Go into Chrome Control Sidebar (3 dots)



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2. Settings>Advanced
3. Navigate to Privacy And Security and Click on "Site Settings"
4. Scroll to PDF Documents
5. Disable "Download PDF files instead of automatically opening them in Chrome"

To turn off in Firefox:

1. Options>General>Applications
2. Scroll to PDF Documents
3. Select "Preview in Firefox"