

Submitting HR Forms via Dynamic Forms

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Introduction

Human Resources and Payroll will begin utilizing Dynamic Forms, a web-based interface that allows departments to submit forms through an online workflow, for certain Human Resources maintained forms. Dynamic Forms will give departments the flexibility to submit forms online, track the status of forms in the workflow, and retrieve and save HTML and PDF versions of forms.

While Dynamic Forms will keep a history of forms received, limited space capacity and changes to forms and processes limits the ability for forms to be retained indefinitely. Therefore, departments still must maintain a copy of forms within their department's personnel files.

Forms can be accessed through a direct link provided to departments or at [HR Liaison Resources](#).

To track or view draft/submitted forms, users can log in to [Dynamic Forms Home](#).

Unit Approvers

When submitting a form, users will be asked to list the name and email address of their unit approver. Once the form is submitted, it will go to their unit approver for approval. All approvers will be reminded if they have a pending form every 2 days.

Provost Units

Academic Administration

Provost Personnel Project Management provppm@gmu.edu

College of Education and Human Development

Jackie Anderson jander14@gmu.edu

College of Health and Human Services

Germaine Louis

College of Humanities and Social Sciences

Joan Mlotkowski jmlotkow@gmu.edu

College of Science

Primary: Maria Walters mwalter1@gmu.edu

Secondary: Dan Taggart dtaggart@gmu.edu

College of Visual and Performing Arts

Catherine Winkert cwinkert@gmu.edu

School for Conflict Analysis and Resolution

Juliette Shedd jshedd@gmu.edu

School of Law

Annamaria Nields anields@gmu.edu

School of Business

Tara Hammon thammon1@gmu.edu

Diane Vermaaten dvermaat@gmu.edu

Schar School of Policy and Government

University Life

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Advancement and Alumni Relations

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Business Services

Communications and Marketing

Compliance, Diversity, and Ethics

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Fiscal Services

Government and Community Relations

Intercollegiate Athletics

Internal Audit

IT Services

Police & Public Safety

Office of the President

Office of the Senior Vice President

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Submitting a Form

Forms are accessible via the HR website. Upon clicking a form that utilizes the Dynamic Forms workflow, submitters will be asked to log-in with their Patriot pass username and password.

1. Once logged in, click “Complete This Form.”

Welcome to Dynamic Forms

Let's get started, Megan R.

The [Faculty Separation Form](#) form needs to be completed.



You can check back here anytime to view your [Pending / Draft Forms](#) and review your completed [Forms History](#).

Thank you for using Dynamic Forms!

2. Enter the appropriate **UNIT APPROVERS**

Instructions

Please enter the name and email address for your unit approver. If you are unsure as to who approves for your unit, please refer to the [Dynamic Forms Guide](#) [Dynamic Forms Guide](#) for additional information.

Form Participants

| Unit Approver | | |
|----------------------|----------------------|----------------------|
| First Name | Last Name | Email |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Continue

3. Complete form and click “Next”
4. Electronically sign the form as your name appears
5. Click “Sign Electronically” to submit the form. You should receive a confirmation message and email to confirm that your form has been submitted.

Thank you! Your form has been submitted.

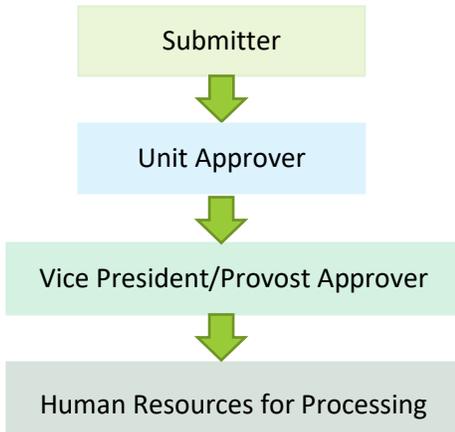


6. You can now review the PDF version of your form and **TRACKING A FORM**.

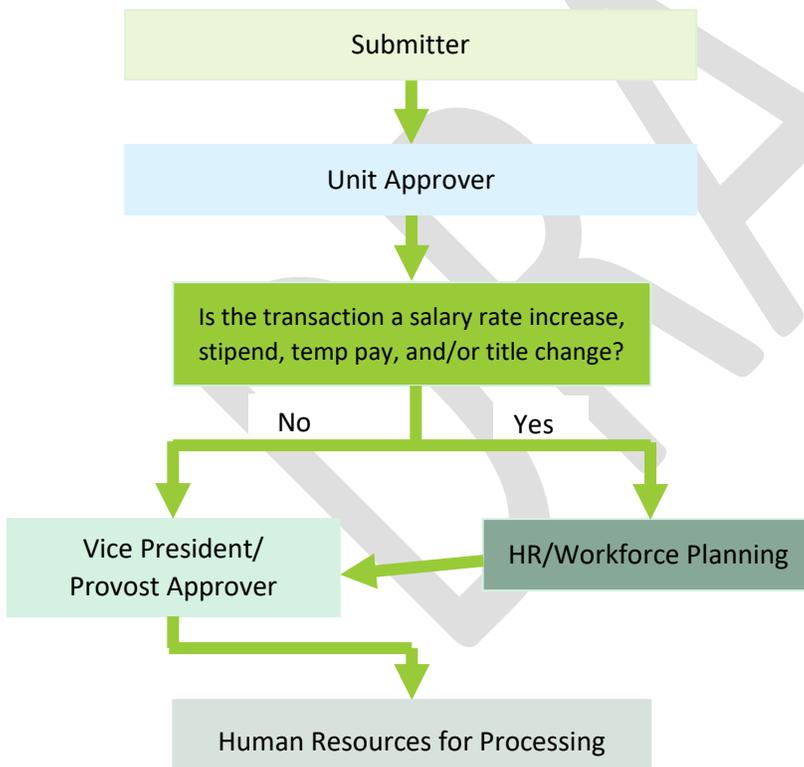
Workflow

Once a form is submitted, it will be automatically moved along in a workflow. Each approver will receive an automated email to approve the transaction and will receive a reminder email every 2 days if they have not taken action to approve.

Faculty and Classified Separations



Faculty Transaction Forms



Additional Approvals

If a unit wishes to require additional signatures internally, such as department heads, the submitter has the option to “Save Progress” instead of clicking “Next” to submit the form. Once they have saved the form, they may wish to log into their “Pending/Draft Forms” to print the HTML version of the form and have others sign before officially submitting. However, submitters must remember to log back in and submit the form!

1. Complete form and “Save Progress”

Separation Information

Position Number: *02479Z **Separation Date:** *01/11/2018 (Last date paid) **Separation Reason:** *RI - Ill Health ▼

Is this position grant funded? *No ▼

Upload Resignation Letter:
*Duffy0215121903a_000.jpg

Submitter Comments (Optional):

Additional Documentation (Optional):
 No file chosen
Files over 25 Mb will not be accepted

HR/Payroll Use Only:

| | | |
|---|--------------------|------------|
| <input type="checkbox"/> HR Assistant <input type="checkbox"/> PEAESCH or NBAJOBS/PEAEEMPL <input type="checkbox"/> PMIS | Processed by _____ | Date _____ |
| Benefits <input type="checkbox"/> Check log <input type="checkbox"/> Exit Packet sent on _____ <input type="checkbox"/> Payroll Adjustment for benefits deductions sent to Payroll on _____ | Processed by _____ | Date _____ |
| <input type="checkbox"/> All Have Payout processes on PHAADJT Have balances zeroed on PEALEAV | Processed by _____ | Date _____ |

2. Log Out after saving

Close

Your form has been saved as a draft. If you need to stop working on this form and continue it later, you may find the form in the pending / drafts section under "My Forms"

3. Log back into the Dynamic Forms [Home Page](#)
4. Review Pending/Draft Forms
5. Select the HTML version of the form you wish to print
6. Obtain additional signatures (you may wish to upload it to the form)
7. Log back in and submit!

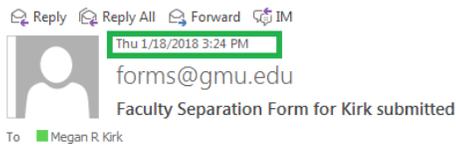
Tracking a Form

Pending/Draft Forms

The **submitter** will receive a confirmation email when 1) they have submitted a form and 2) when all required signatures have been collected and the form reaches Human Resources for final review and processing.

The **unit approver** will receive an email to review and approve the form once it is submitted.

Submitters and **approvers** will be able to log into Dynamic Forms and review the status of forms. Unfortunately, the Form Name is the only identifying information from the "Pending/Draft Forms" view. Therefore, it is highly encouraged to maintain all confirmation emails so that you may use the email timestamp to keep track of the forms. Of course, you can always sort through the forms by clicking the PDF or HTML for the full details, but ain't nobody got time for that.



The following form has been submitted for approval:

Faculty Separation Form

G00494456
Megan Kirk
Position: FA5691z Separation date: 01/19/2018 Reason: SR

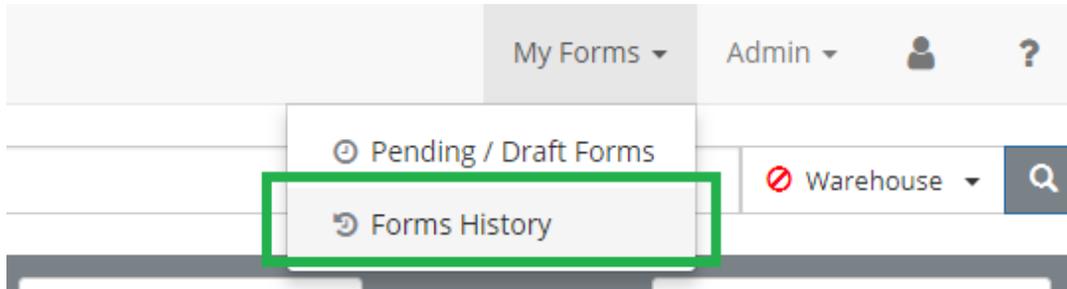
| Pending / Draft Forms 3 | | | |
|-----------------------------------|--------------------------|--|----------------|
| Form Filter | Show All Forms | Text Filter | Type to search |
| Form Name | | | PDF HTML |
| D Faculty Transaction Form | Started By: Megan R Kirk | Last Saved: 11/29/2017 2:43:49 PM | |
| D test_Faculty Separation Form_MK | Started By: Megan R Kirk | Last Saved: 6/21/2017 4:06:35 PM | |
| P Faculty Separation Form | Started By: Megan R Kirk | Signature Request Date: 1/18/2018 3:23:57 PM | |

You can review the status of the form in the workflow by clicking on the PDF or HTML version of the form and reviewing the signature lines at the bottom.

| | |
|---------------------|--|
| Submitter Signature | Electronically signed by Megan R Kirk on 01/18/2018 3:23:57 PM |
| Unit Signature | Electronically signed by Megan R Kirk on 01/18/2018 3:52:23 PM |
| Provost Signature | Electronic Signature Pending |

Forms History

Once a form has reached HR for final processing, the form can be viewed in “Forms History” as opposed to “Pending/Draft Forms.” While Dynamic Forms will keep a history of forms received, limited space capacity and changes to forms and processes limits the ability for forms to be retained indefinitely. Therefore, departments still must maintain a copy of forms within their department’s personnel files.



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