

## Using Forms in PAC

PAC has forms that are used to submit information for processing to the HRPC. Using PAC forms eliminates the sending of paper forms and emails.

## Types of PAC Forms

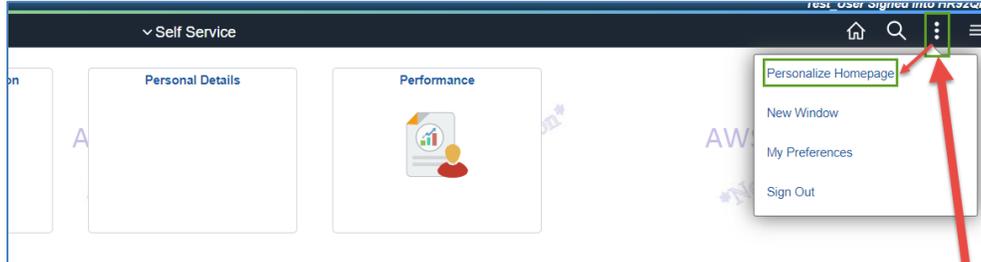
Access to forms is specific to your role and you will only see forms that you can submit. Currently, only the *Position Management Request* form is available. Central HR teams have access to additional forms.

*Position Management Request* – this is used to request a new position number or update a current position number for positions that are not posted in TalentLink.

## The Forms Tile

To use Forms, you first must add the tile to your PAC homepage.

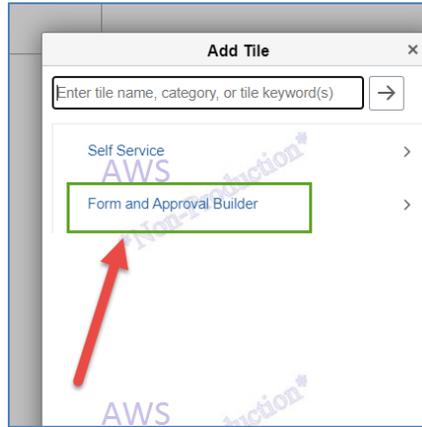
1. Navigate to [my.columbia.edu](http://my.columbia.edu)
2. Select the **HR Manager** tab on top of the page
3. Scroll down and select the **People at Columbia (PAC)** icon and log in with your UNI and Password
4. **Click the three dots icon** located on the upper-right corner of your screen, then select **Personalize Homepage**.



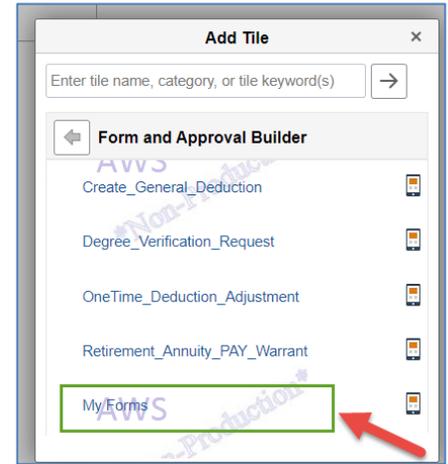
5. Click the **Add Tile** button in the upper-right corner of your new screen.



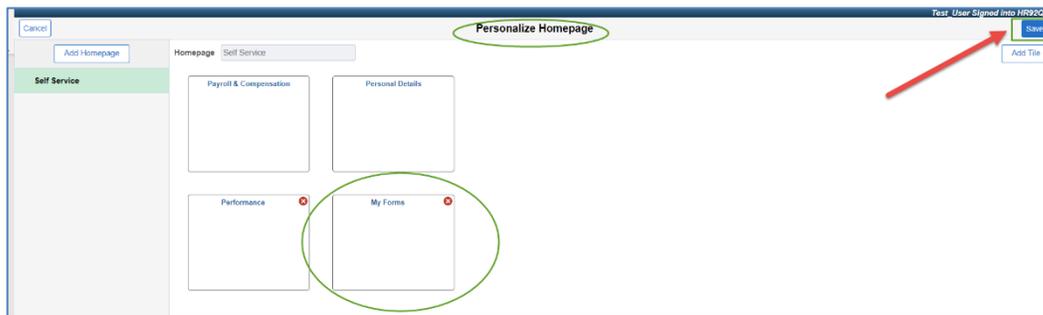
6. Select **Form and Approval Builder** from the Add tile pop-up window.



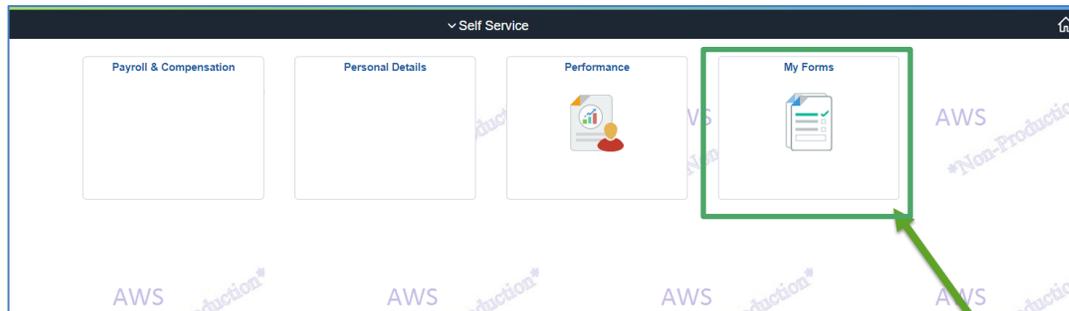
7. Select **My Forms** from the list.



8. The new tile appears on your Personalize Homepage screen. Click **Save** at the top-right corner of the screen.

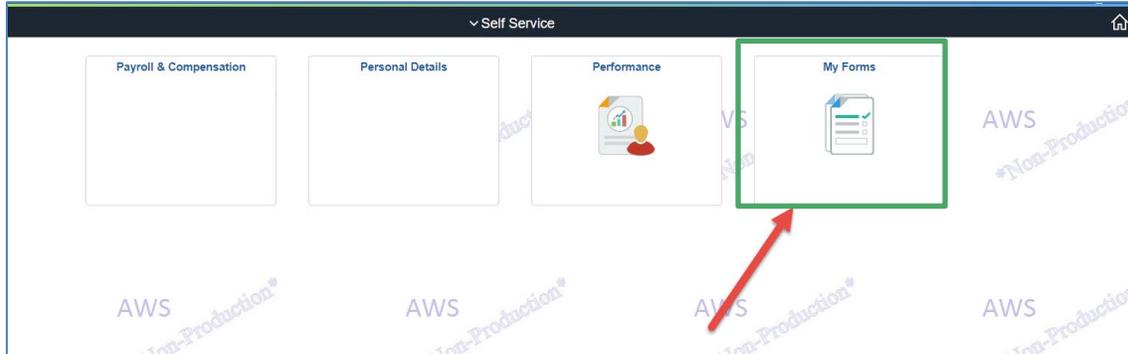


9. Your Self-Service homepage now has the **My Forms** tile.

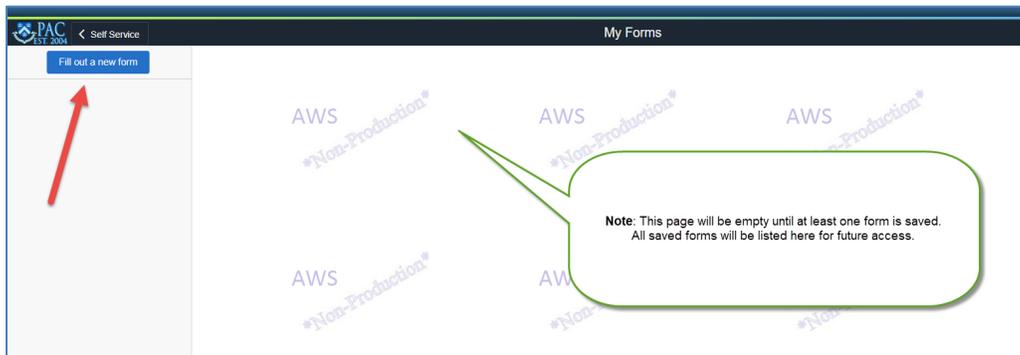


## Select a Form

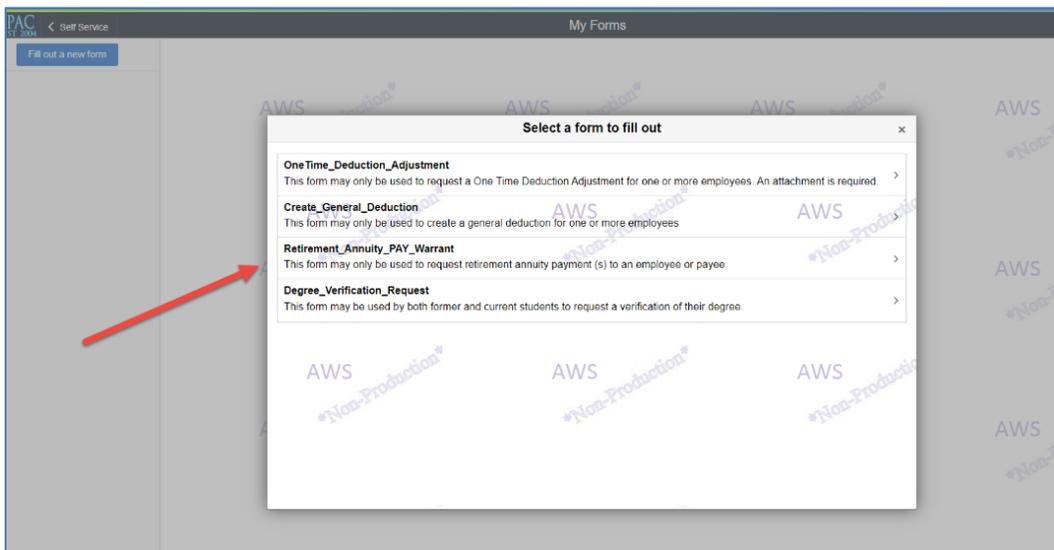
1. Select the **My Forms** tile from the homepage.



2. Click the **Fill out a new form** button located on the upper-left corner of your screen. The page is empty until a form is saved. All saved forms will be listed here for future access.

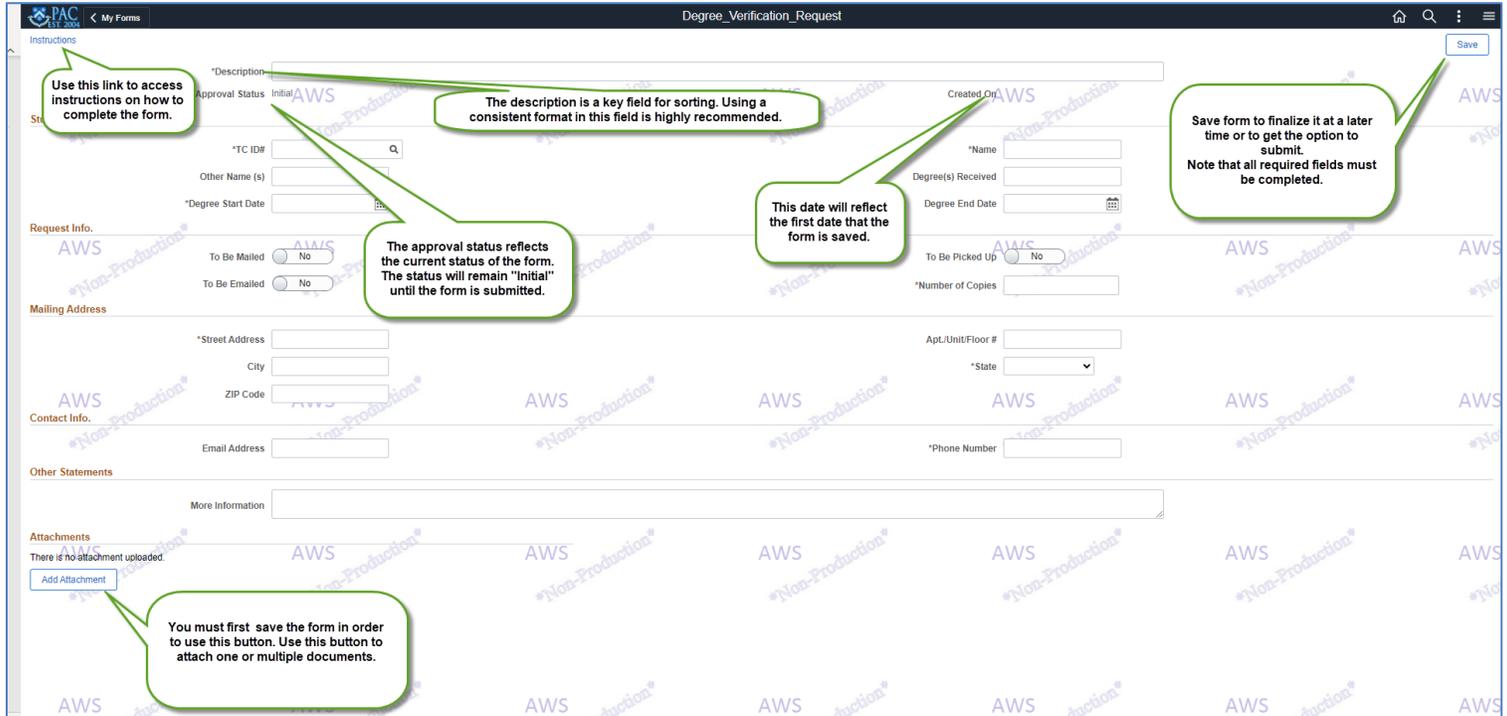


3. Select the form to complete from the list that appears. The forms available to submit are based on your access.



## Complete and Submit a Form

Key in all needed information on the form.



The screenshot shows the 'Degree\_Verification\_Request' form in the PAC system. The form is divided into several sections: Instructions, Request Info., Mailing Address, Contact Info., Other Statements, and Attachments. A 'Save' button is located in the top right corner. Several callout boxes provide instructions:

- Instructions:** Use this link to access instructions on how to complete the form.
- Description:** The description is a key field for sorting. Using a consistent format in this field is highly recommended.
- Approval Status:** The approval status reflects the current status of the form. The status will remain "Initial" until the form is submitted.
- Created On:** This date will reflect the first date that the form is saved.
- Save:** Save form to finalize it at a later time or to get the option to submit. Note that all required fields must be completed.
- Add Attachment:** You must first save the form in order to use this button. Use this button to attach one or multiple documents.

- **Instructions.** The Instructions link provides form specific information.
- **Approval Status.** Remains as Initial until submitted.
- **Description.** Use a specific and unique naming format. As the amount of forms are created, it will become difficult to find a specific form. Example: **Employee Name\_Department Number\_Date\_Position Management**
- **Asterisk Fields.** Fields with an asterisk must be filled out.
- **Add Attachment.** Documents can be attached as needed to support the request. The form must 1<sup>st</sup> be saved before adding an attachment. Locate the file and then upload. .

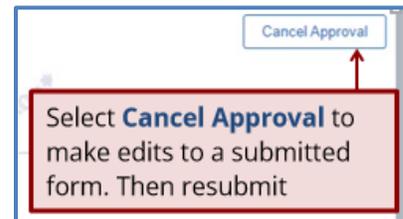
## Review/Edit Previously Submitted Forms

You will maintain access to all forms that you saved and/or submitted.

1. Select the **My Forms** tile from the homepage.
2. You will see the list of your completed forms and their status. It is important to name each form separately to be able to easily locate them.

Form	Description	Approval Status	Created Datetime	Submitted Datetime
Create_General_Deduction	123 AWS	Pending	10/05/2023 9:02AM	10/05/2023 9:02AM
OnTime_Deduction_Adjustment	RET - Adjustment for Multiple Employees	Pending	10/04/2023 2:40PM	10/04/2023 2:52PM
OnTime_Deduction_Adjustment	Test A	Pending	10/04/2023 1:58PM	10/04/2023 2:27PM
OnTime_Deduction_Adjustment	Test D	Pending	10/04/2023 2:13PM	10/04/2023 2:18PM
Degree_Verification_Request	Degree Request for Today's Demo	Pending	10/04/2023 7:34AM	10/04/2023 11:34AM
Degree_Verification_Request	Test Form for Demo - Pending Status	Approved	10/04/2023 7:39AM	10/04/2023 7:39AM

To edit a submitted form, first select Cancel Approval, make edits and resubmit.



3. For additional details on the form's status, click on the **Approval Status** link located on the form.

**Instructions** [Save] [Cancel Approval]

\*Description: Degree Request for Today's Demo

Approval Status: Pending Approval

Created On: 10/04/2023

**Student Info.**

\*TC ID# 10000006

Other Name (s) Cassie

\*Degree Start Date 10/15/2023

Name Cassandra Walker

Degree(s) Received Bachelors

Degree End Date 10/31/2023

**Request Info.**

To Be Mailed Yes

To Be Picked Up No

To Be Emailed Yes

\*Number of Copies 4

**Mailing Address**

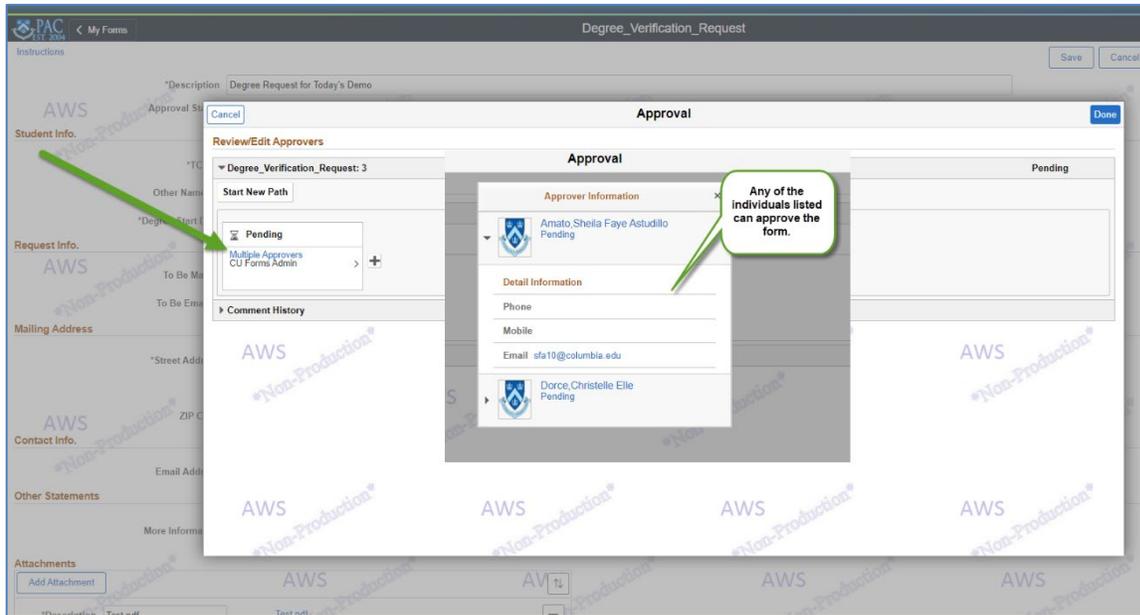
\*Street Address 6 Kayake St

City Greenville

Apt./Unit/Floor # Unit B

\*State CT - Connecticut

- Another screen will display the approval workflow for the form. If the approval is pending with multiple approvers, click on the **Multiple Approvers** link to view more information about the approvers.



- Note that you can also access, on this page, any comments recorded by the approver.

