Dynamic Form Personnel Action (PA) Standard Operating Procedure (SOP)

Department:	Human Resources
Effective Date:	May 12, 2025
Revision Date:	July 9, 2025
Scope:	UToledo and UTMC Staff
Responsible Party:	UToledo Human Resources

Prerequisites Completion of Dynamic Form Training and Access to Dynamic Form system

Purpose

To provide clear, step-by-step instructions for completing and submitting the Dynamic Form Personnel Action (PA) for changes with UToledo and UTMC staff.

Guidelines

- Always consult your HR representative before initiating any Personnel Action (PA).
- Use "NA" in the Requisition Number field unless the action is tied to a requisition or posting.
- Banner data in the form reflects the moment the form is created; discrepancies must be noted in comments.
- Note: CWA seniority and longevity will appear differently due to formatting in Banner. Please make sure the step and longevity is filled out correctly.

Procedure

Step 1: Consult with your HR representative to discuss the employment change prior to submitting a Dynamic Form.

Step 2: Access the Dynamic Form PA system at: [Dynamic Form - PA]

Step 3: Complete all fields indicating the reason for the change.

In the Job Change Reason field, contact HR if clarification is needed.

Enter "NA" in the Requisition Number field unless tied to a requisition.

Step 4: Identify the employee by entering their Rocket Number.

Press Tab — the employee's First and Last Name should auto-populate.

Provide a brief description of all changes.

Step 5: Select the correct position from the dropdown. The Change From section will auto-populate with current Banner information.

If the information is incorrect, add a comment to explain (especially for CWA-related fields). Include the correct step and longevity information for CWA positions in the comment section.

Step 6: Enter the End Date for the change under the Change From section.

Step 7: Enter the new Position Number under the Change To section.

The system will auto-fill position data. Enter the hours per week and the shift.

Step 8: Enter the total FTE for the employee, including all active positions. The Home Org will reflect their current Home Org, so if they are changing Home Org make sure you update that with the new Home Org number.

Step 9: Make sure the PEAEMPL E-Class is correct.

Step 10: Complete the remaining Change To fields:

- For salaried positions: enter "NA" for Salary Step and Longevity.
- For salaried positions: enter "0" in Hourly/Salary Rate.
- For hourly positions: enter "0" in Annual Salary.
- Enter the Start Date of the new assignment.
- Ensure the End Date in "Change From" is one day prior to the new Start Date.

Step 11: Enter the Supervisor's Rocket Number. You do not need to enter the Position Number or Suffix.

Step 12: Enter the Funding Information using data from NBAJOBS. To add multiple indexes, click Add Another Index.

Step 13: Review all form entries. If uploading documentation, do so before clicking Next.

Step 14: Click Next and provide your electronic signature. Type your First and Last Name exactly as displayed and click Sign Electronically.

*Please note that only the requestor can make changes to the form. If any information is incorrect, the form will need to be returned to the requestor for revisions.

Post-Submission

- After submission, the form routes through the required approval workflow.
- You will receive email updates after each approval.
- To check the status of your form, visit your MyForms tab on your LaunchIT page.

- Click the Forms tab at the top right of the page
- Under "Dynamic Forms Access" – Click "MyForms"

Visual Aids (Screenshots)

Dynamic Form PA Page 1

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The University of Toledo
Human Resources
Center for Administrative Support
2801 West Bancroft Street
Toledo, OH 43606
419.530.4747

Personnel Action Form

REQUESTER INFORMATION

First Name	Jason	Last Name	Beck
Department	Human Resources	Title	SR Dir Talent & Emp Strategy
Email	jason.beck@utoledo.edu	Phone	*419-530-1476

PERSONNEL INFORMATION

Have you reviewed this with your HR Representative? * `Yes`

Select HR Specialist: * `-- Please Select --`

Is this for an existing job? * `-- Please Select --`

Is the action limited to a labor distribution or index change? * `-- Please Select --`

Will this action result in a 5% or greater increase in the employee's compensation? * `-- Please Select --`

Requisition Number: *

Does this Employee have a UToledo Rocket Number? (Find Rocket Number) * `-- Please Select --`
If you do not have access, please complete the form at this link:
Report Access Request On the access request form check the box indicating
'HR- General' and email the completed form to the listed Data Custodian.

Please describe the reason for the personnel action:
*

CHANGE FROM and CHANGE TO

POSITION INFORMATION

Select Current Job: [▼]

CHANGE FROM		CHANGE TO

Please Enter Position Number First

CHANGE FROM		CHANGE TO	
Position Number:	* [ ]	Position Number:	* [ ]
Position Title:	* [ ]	Position Title:	[ ]
NBAJOBS E-Class:	* [ ]	POSITION E-Class:	[ ]
Position FTE:	* [ ]	Position FTE:	[ ]
Hours/Week:	* [ ]	Hours/Week:	* [ ]
Shift:	* [ ]	Shift:	* [ ]
Home Dept Org:	* [ ]	Home Dept Org:	[ ]
PEAEMPL E-Class:	* [ ]	PEAEMPL E-Class:	[ ]
Total Employee FTE:	* [ ]	Total Employee FTE:	* [ ]
Table:	* [ ]	Table:	* [ ]
Salary Grade:	* [ ]	Salary Grade:	[ ]
Salary Step:	* [ ]	Salary Step:	* [ ]
Longevity:	* [ ]	Longevity:	* [ ]
Annual Salary:	* [ ]	Annual Salary:	* [ ]
Hourly/Salary Rate:	* [ ]	Hourly/Salary Rate:	* [ ]
Number of Pays:	* [ ]	Number of Pays:	* [ ]
Prob Period:	[ ]	Prob Period:	[ ]
Start Date:	[📅]	Start Date:	* [📅]
End Date:	* [📅]	End Date:	[📅]
Supervisor:		Supervisor:	
Rocket Number:	[ ]	Rocket Number:	* [ ]
Position Number:	[ ]	Position Number:	[ ]
Suffix:	[ ]	Suffix:	[ ]

Funding Information Section from NBAJOBS

FUNDING INFORMATION

INDEX 1:

CHANGE FROM	CHANGE TO
Index: *	Index: *
Account: *	Account: *
Percent: *	Percent: *

☐ Add Another Index

Supporting Documents

Document: 1   🔗 Attach File   Upload Another Document: ☐

[Save Progress] [Next]

Checking Status using MyForms Tab

THE UNIVERSITY OF TOLEDO   🚀 LaunchIT

Banner	Banner 8	Lawson	Concur	Applicant Tracking	InfoEd	Other Applications	Forms

Forms   Access and Production Request Forms

📋 **Production Request**   Enterprise Business Systems Production Request

[Oracle] [SQL Server] [Automic]

🗄 **Dynamic Forms Access**   Links to Dynamic Forms Tool

[MyForms] [Forms Admin]

🗄 **System Access**   System Access Request Forms

[Imaging Request]

Appendix: Definitions

FTE (Full-Time Equivalent)

A unit that indicates the workload of an employed person. 1.0 FTE means full-time work; 0.5 FTE means half-time.

PCN (Position Control Number)

A unique identifier assigned to a specific job position within the organization.

Rocket Number

The employee's unique identification number used at UToledo.

Dynamic Form PA (Personnel Action)

A digital form used to request or record employment changes.

NBAJOBS

A module in Banner where job and funding data for employees is stored and reviewed.

Home Dept Org

The organizational unit responsible for managing the employee's primary position.

Requisition Number

An identifier used when hiring through a PageUp job requisition; marked "NA" if not tied to one.