

PAF Action Form Instructions

Created: 12/30/2016

Revised: 9/21/2021

Version: 1.1



The purpose of this document is to provide a guide on filling out PAF Forms through the Laserfiche online interface once you have received an email notification that a PAF Form has been assigned to you.

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Reviewing the PAF Form and Submission

01. You will receive an email when a PAF Form has been assigned to you for review and approval and will look like the screenshot below



Figure 1: Standard Laserfiche notification email

02. Begin by clicking on the link to open the Laserfiche web interface and log into the site using your County email (e.g. jdoe@gunnisoncounty.org) and password (same as logging into your computer)

Figure 2: Laserfiche Login Screen

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03. Once you login, you will be presented with form as shown below

The screenshot shows the Laserfiche Forms interface. At the top, there is a blue navigation bar with 'Laserfiche Forms™' and tabs for 'Tasks', 'My Reports', and 'Processes'. Below this, the form title is 'Manager Approval' for 'Michael' and 'Personnel Action Form 2604: Cheryl Seling'. It shows 'Assigned to: Cheryl Seling', 'Date assigned: 9:28 AM', 'Due date: None', and 'Priority: None'. The main form area has a dark green header with the Gunnison County logo and the title 'Personnel Action Form'. The form fields are as follows:

- Submitter:** Cheryl Seling
- Date Originated:** 12/30/2016
- Department:** Human Resources
- Manager:** GUNCOUNTY1\cseling
- Type of Action:** * Use General for - Annual Performance Evaluation, Merit/Anniversary Increase, Market Adjustment, Completion of Probation. Radio buttons include: New Hire, Promotion or Rehire; 6 Month Review; Reclassification/Title Change; Leave of Absence; Other; General* (selected); Suspension; Separation of Employment; Vacancy.
- Type of General Action:** Radio buttons include: Annual Performance Evaluation; Market Adjustment; Merit/Anniversary Increase; Completion of Probation (selected).
- Employee Name:** Michael
- Payment Status:** Full-time salary

Figure 3: First screen presented upon clicking the email link and logging into Laserfiche

04. Review all sections of the form to verify all information listed is correct

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05. Make sure to fill in any portions of the form that are required by you

a **NOTE:** All asterisked (*) sections are required, if they are not filled in you will get an error

06. You will need to attach a copy of the completed Employee Evaluation Form using the 'Upload' button. Clicking on the 'Upload' button will open the below File dialog to allow you to locate and attach the form

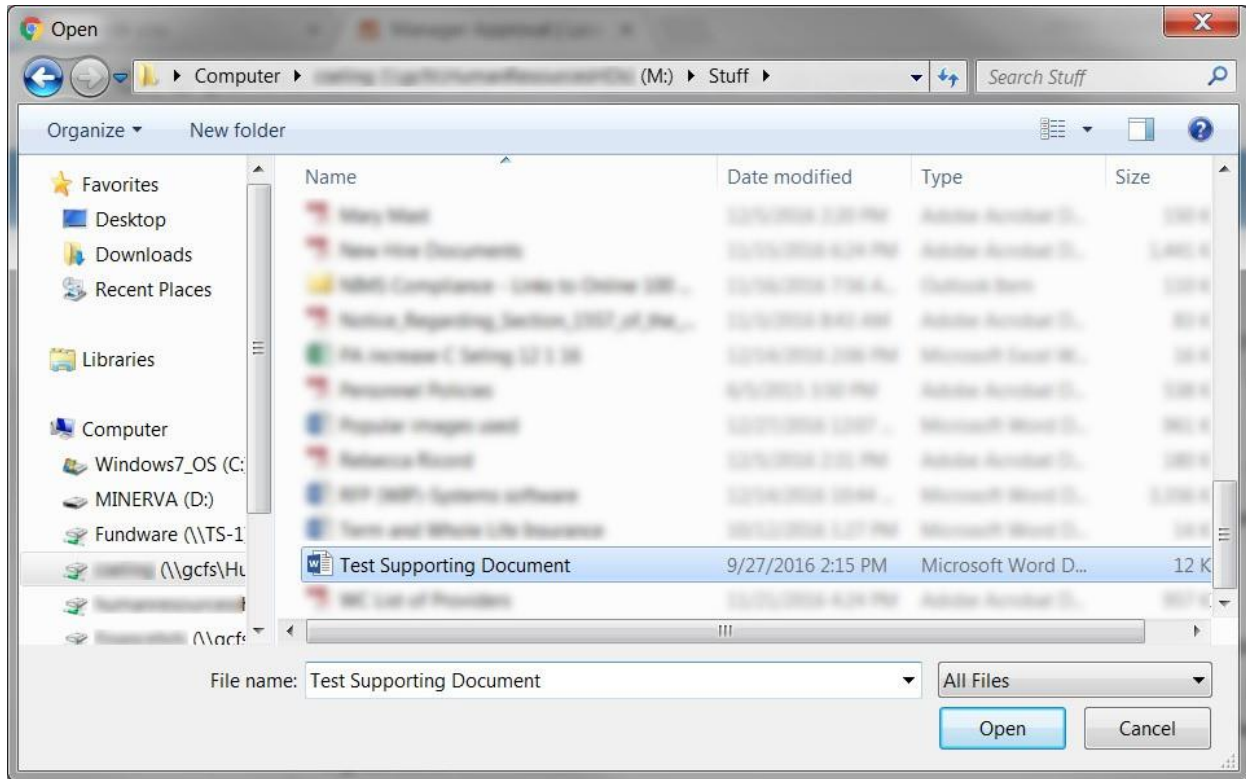


Figure 5: Employee Evaluation Form upload dialog

07. Once completed you will need to sign the document using your electronic signature, if you do not have your electronic signature setup you can do so following the instructions for [Setting up your Electronic Signature](#)

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08. You will be presented with the 'Sign' button and a Comments section. See the two screenshots below to see a before and after example

Certification:

I hereby certify that the facts above are correct, that funds are available for the action proposed, and that no budgetary deficit will result from the proposed action.

Department Head/Elected Official: *

Date

Comments

Figure 6: Before using the 'Sign' function and adding comments

Certification:

I hereby certify that the facts above are correct, that funds are available for the action proposed, and that no budgetary deficit will result from the proposed action.

Department Head/Elected Official: *

Date

Comments

Original promotion date was effective 01/23/2016 and Michael was hired into the position above the entry level pay rate.

Figure 7: After using the 'Sign' function and adding comments

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09. Once you have signed and filled in any comments needed you can click on 'Approve' to submit the form, you have completed the PAF

Reasons for Rejecting a PAF Form

Most of the time the PAF Form will be straight forward and have no issues, but there will be times when a form needs to be rejected. Below are a few examples of why you would reject a PAF Form.

- Original or New information on the form is incorrect
- The probation period for an employee has been extended
- PAF Form has been received by the wrong department head

If there are any questions about a form that may present cause for rejection you can contact HR Director (x7962).

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Setting up your Electronic Signature

The first time you use the Laserfiche online interface you may need to setup your Electronic Signature for signing forms. This is simple to complete and you have a few options available to you.

01. When logged into the Laserfiche online interface (<https://dms.gunnisoncounty.org/Forms>) you will need to navigate to your account settings by clicking on your name at the top right and clicking on 'Account'

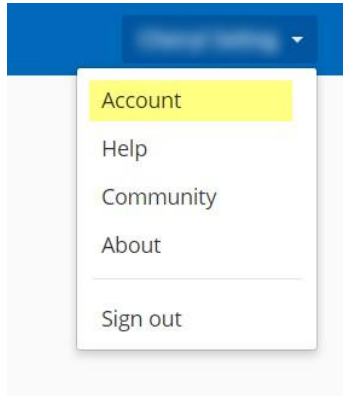


Figure 8: Account selection from the menu in the Upper Right

02. You will be presented with a screen similar to below if you have no signature setup, if you have a signature you will see it in the signature area. To edit or create a new signature click on the small pen icon in the right-hand corner of the signature area

Account

User name


Name

Email

Time zone

(UTC-07:00) Mountain Time (US & Canada) ▼

Signature

Click here to setup your signature 

Save

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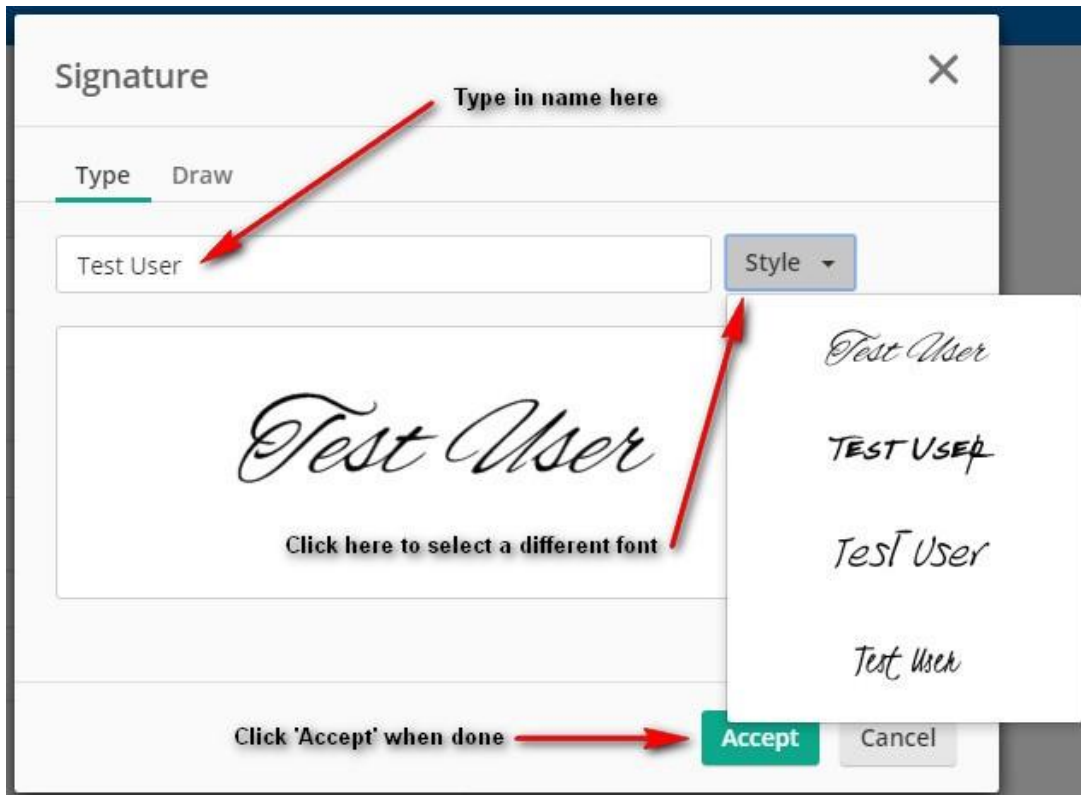
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Figure 9: Account information & signature block

03. A new dialog window will open with a few options as seen in the screen show below, follow the steps to complete the signature
- Enter in your name
 - Select the 'Style' dropdown if you want to use a different font
 - Click 'Accept' to complete the process



04. Once completed your new signature will appear in the signature box back in Figure 9 and will be used when signing any form in Laserfiche

NOTE: If you create a new signature prior to completing a PAF Form you will have to start over. To return to the PAF Form you will click on 'Tasks' at the top left of the page and this will present you with a list of forms that need to be completed by you. Click on the form you need to return to it.