Making a PTF Request

Revision History

Date	Revision
March 3, 2021	Guide Creation

Introduction

The Office of Human Resources has implemented this system in order to automate all personnel transactions on campus. This training guide focuses on the following actions in BP Logix:

1. How to create and submit a PTF
2. How to view and check on the status of the PTF

Access within the System

Each user on campus has been categorized into a particular user group, which provides them certain permissions in the BP Logix system. Please see below for a brief overview of access granted to different types of users:

Role	Access Level
Requestor	Allowed to enter a PTF and view PTF’s they have submitted
Approver	Allowed to review and approve PTF’s assigned to them
College UBO	Allowed to approve PTF’s assigned to them and view all PTF submissions for their College

Modes of Training

The recruitment team in the Office of Human Resources understands that every individual has a different learning style. Please see below for the various modes of training offered on this piece of the BP Logix system:

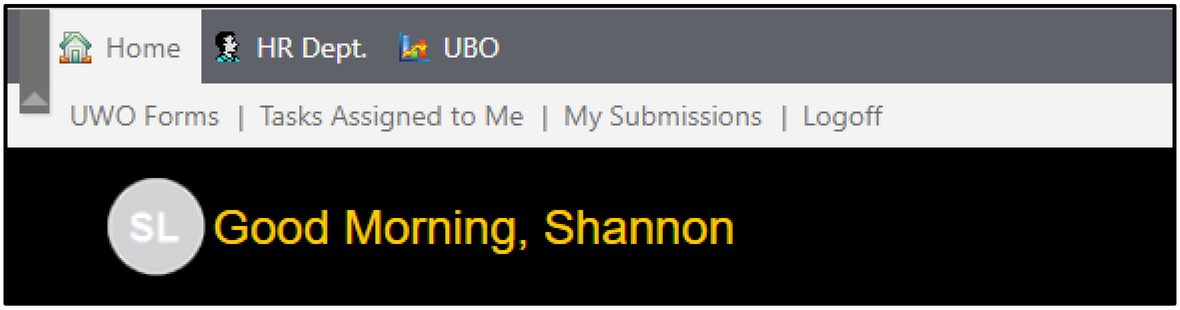
If you would like to have an in-person or Microsoft Teams meeting with a member of the recruitment team to walk you through creating a PTF, please contact the college/department recruitment and hiring contact for your area or call the Office of Human Resources at 920-424-1166 and schedule a time for this meeting.

If you would like to have a member of the recruitment team walk you through creating a PTF over the phone, please contact the college/department recruitment and hiring contact for your area or call the Office of Human Resources at 920-424-1166.

If you feel comfortable solely using this training guide to create your PTF, this is acceptable. Please know that a member of the recruitment team may reach out to you if there are any follow up items up for discussion.

Homepage Tips

When you log in to BP Logix, you should see a homepage similar to this one. Please familiarize yourself with the options on this page.



1. UWO forms - The BP Logix system will be used for multiple forms across campus. This tab lists all the forms you have access to submit.
2. Tasks assigned to me - Requests listed here require your review and approval.
3. My submissions - All active and complete requests you have made can be viewed here.
4. Logoff - Use this link to ensure you securely log out of the system.

Step 1: Log into BP Logix

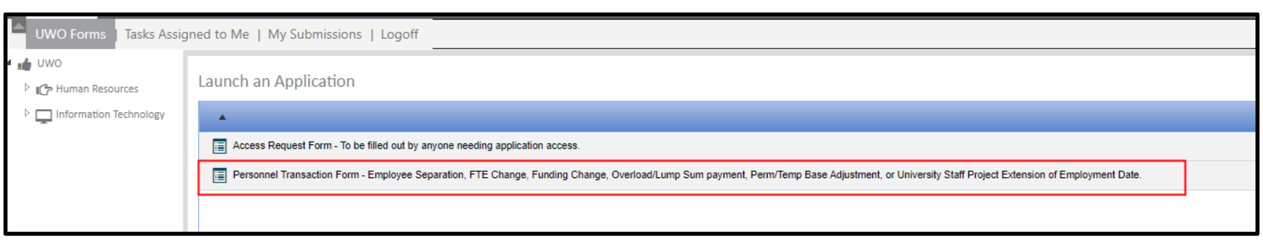
To log into the BP Logix system, you may follow the link below:

uwosh.bplogix.net

Your username and password is pre-set as your **NetID**.

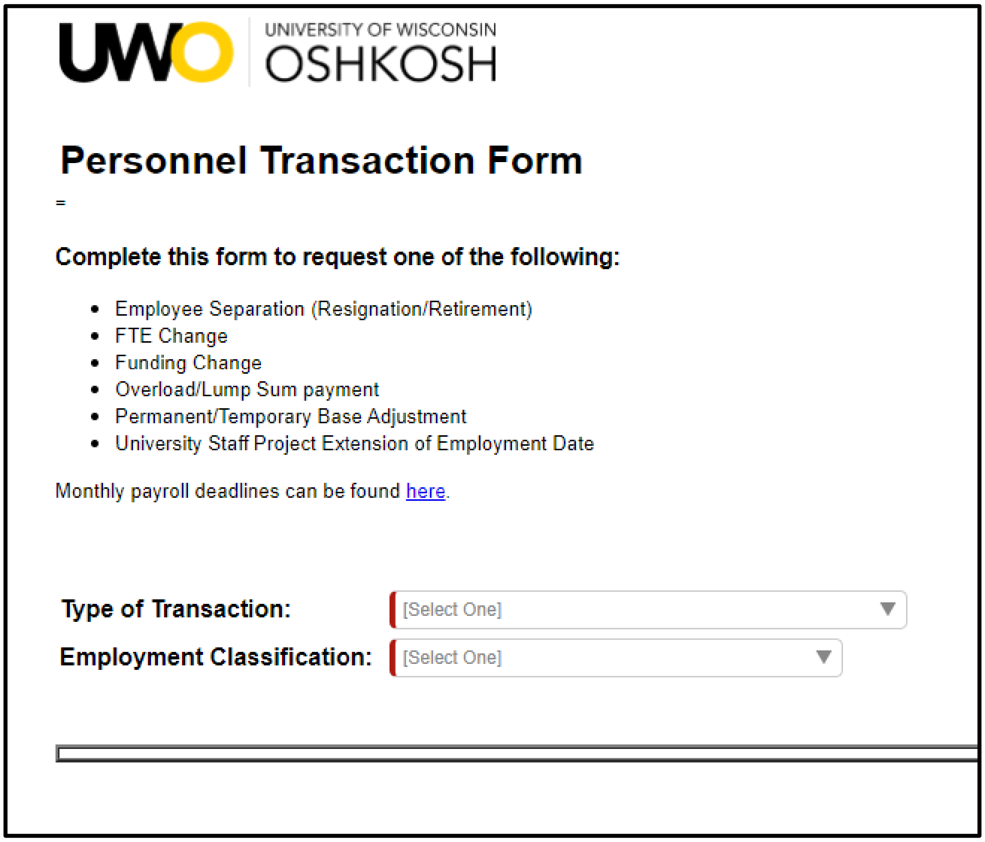
Step 2: Navigate to the PTF form

From your home page, click on “UWO Forms”. This will display all the forms you have access to. Click on Personnel Transaction Form.



Step 3: Select transaction and employment classification

Use the drop down menus to select the transaction type and employment classification you would like to submit.


UNIVERSITY OF WISCONSIN OSHKOSH

Personnel Transaction Form

Complete this form to request one of the following:

- Employee Separation (Resignation/Retirement)
- FTE Change
- Funding Change
- Overload/Lump Sum payment
- Permanent/Temporary Base Adjustment
- University Staff Project Extension of Employment Date

Monthly payroll deadlines can be found here.

Type of Transaction: [Select One]

Employment Classification: [Select One]

Step 4: Fill in form

Fill in all the required information on the form for your transaction.

Helpful tips

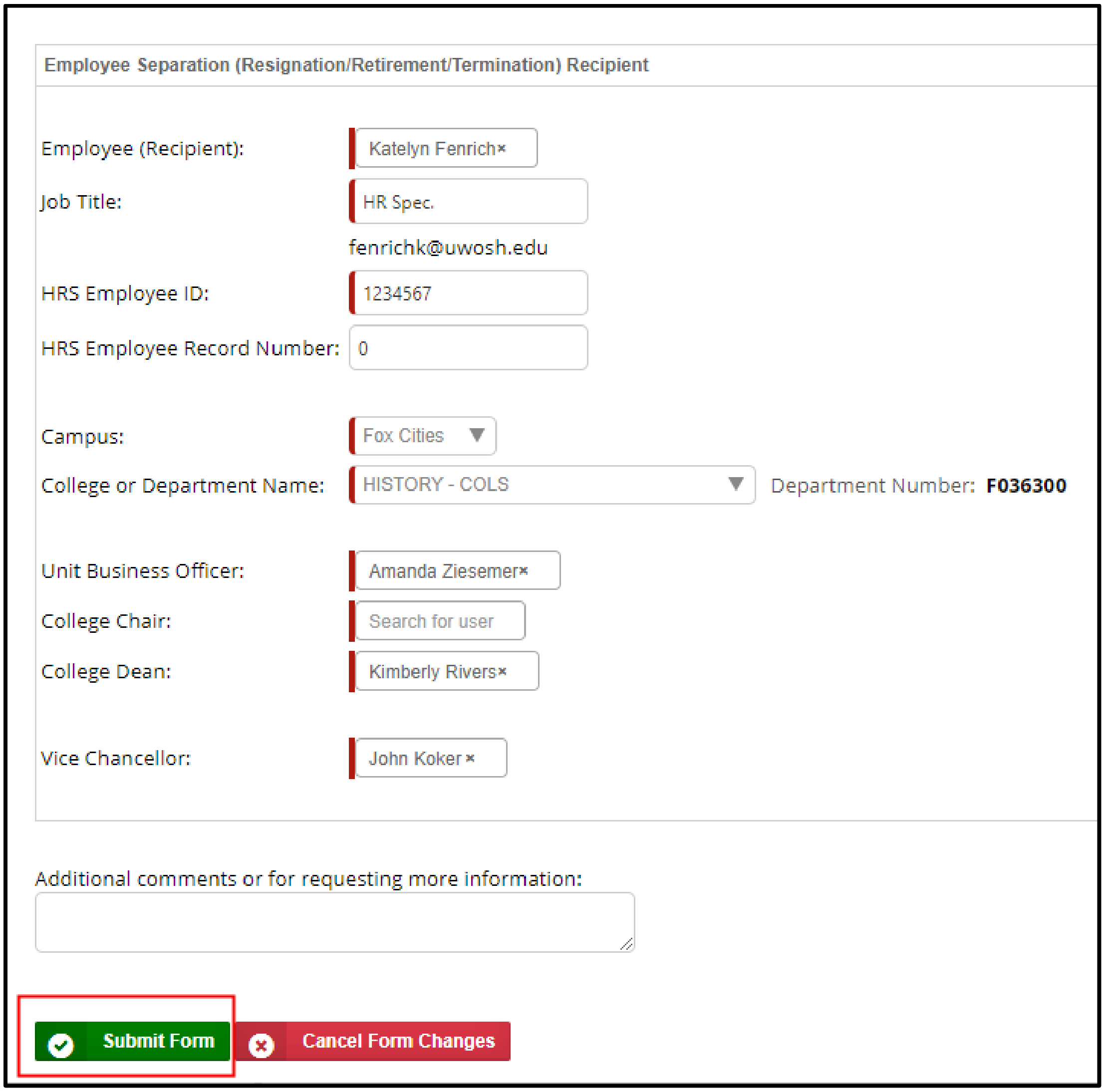
Anything marked in red is a required field and must be filled in. The system will not push forward the request until all required fields are complete.

Date fields need to be in the following format: MM/DD/YYYY

A resignation/retirement letter or email is a required document upload for any separation transactions.

Step 5: Submit for approval

Complete the recipient and approval section at the bottom of the form. Please fill in all required fields and click “Submit Form” to submit your request. You will receive an automatic email from the system acknowledging the request you have submitted.



Employee Separation (Resignation/Retirement/Termination) Recipient

Employee (Recipient): Katelyn Fenrich×
Job Title: HR Spec.
fenrichk@uwosh.edu
HRS Employee ID: 1234567
HRS Employee Record Number: 0

Campus: Fox Cities
College or Department Name: HISTORY - COLS
Department Number: **F036300**

Unit Business Officer: Amanda Ziesemer×
College Chair: Search for user
College Dean: Kimberly Rivers×

Vice Chancellor: John Koker×

Additional comments or for requesting more information:

Submit Form
Cancel Form Changes

Helpful tips

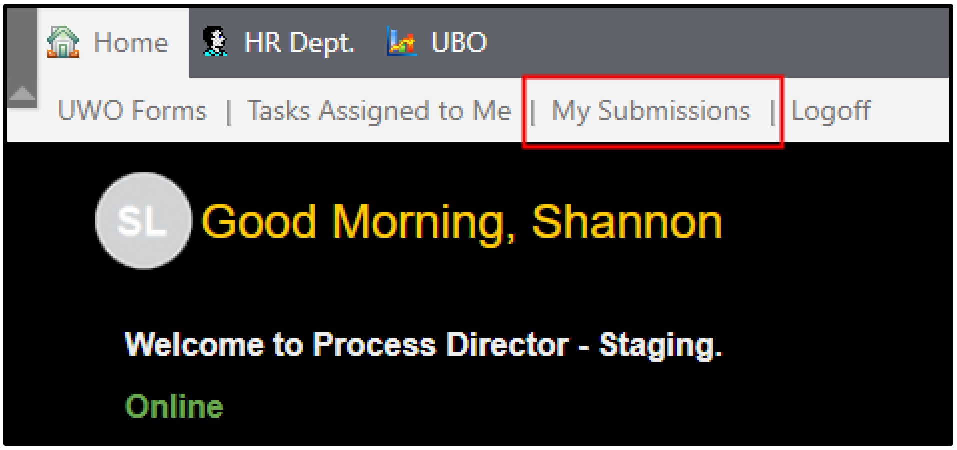
The College or Department name should be the department the employee is doing the work for.

The form has prepopulated approver names based on the College or Department name selected. In most cases, these names should not be changed. Please reach out to your area’s UBO if you have questions about these selections.

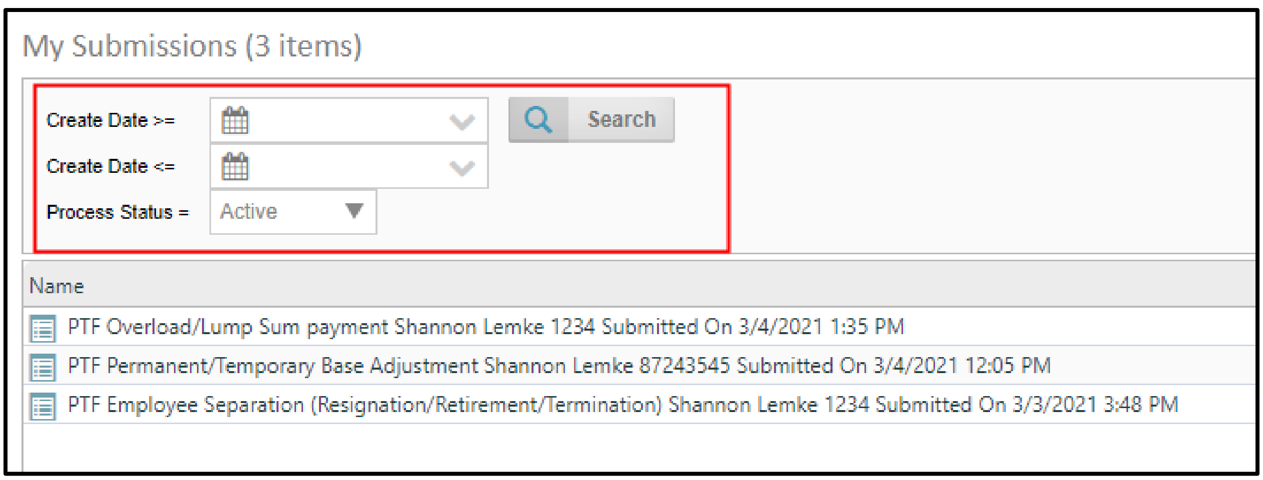
The form will automatically pull the employee’s job title, HRS employee ID, and email address. Generally, these fields will not need to be manually changed, unless an employee has more than one position on campus. The form will pull the employee’s title from their primary job. If the PTF action is for one of their additional jobs, this field should be updated manually, accordingly.

How to view active and/or completed submissions

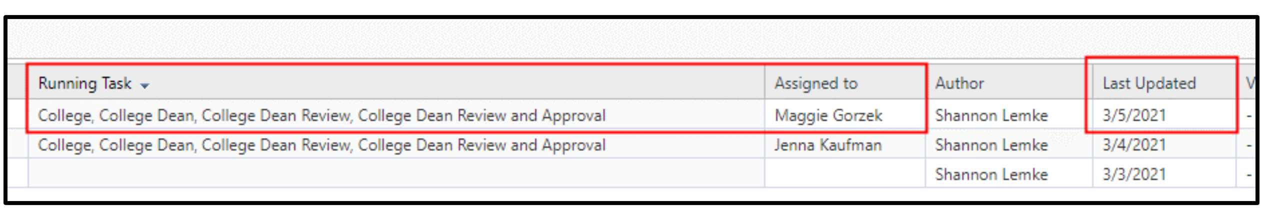
You can view your requests at any time by clicking on the "My Submissions" link from your home page:



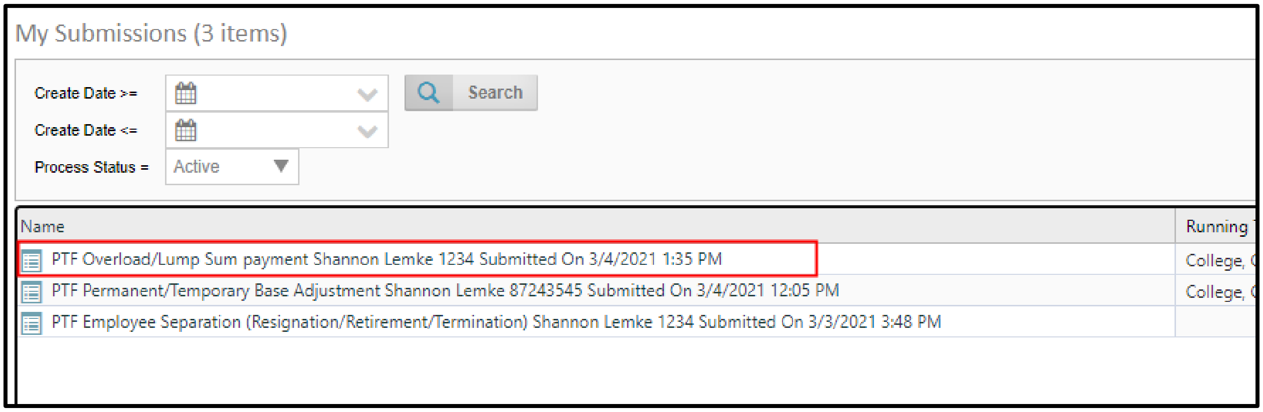
You can use the following search fields and drop down menus to filter your requests:



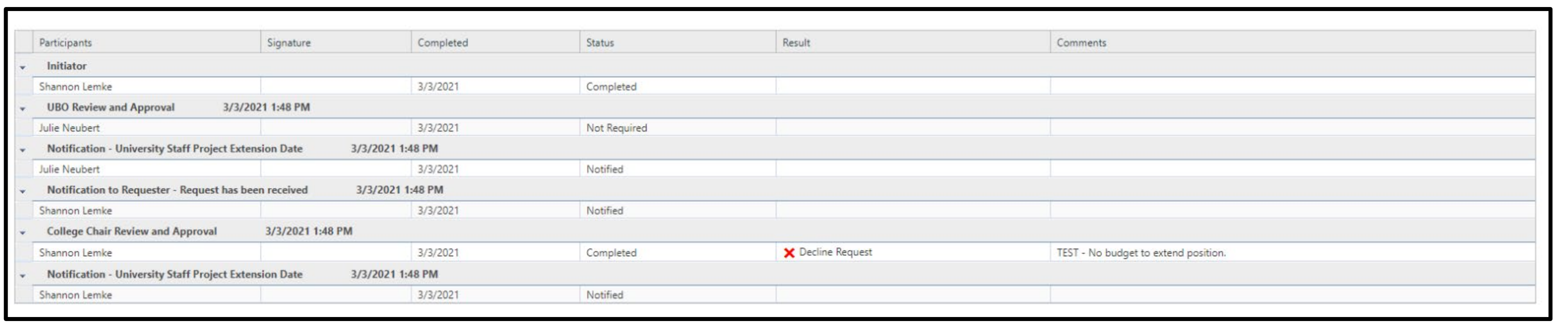
You can also quickly view what approval step your request is on and when it was last updated from this screen:



If you would like to see all the details of your request, including the approval history and any comments, click on the name of your request:



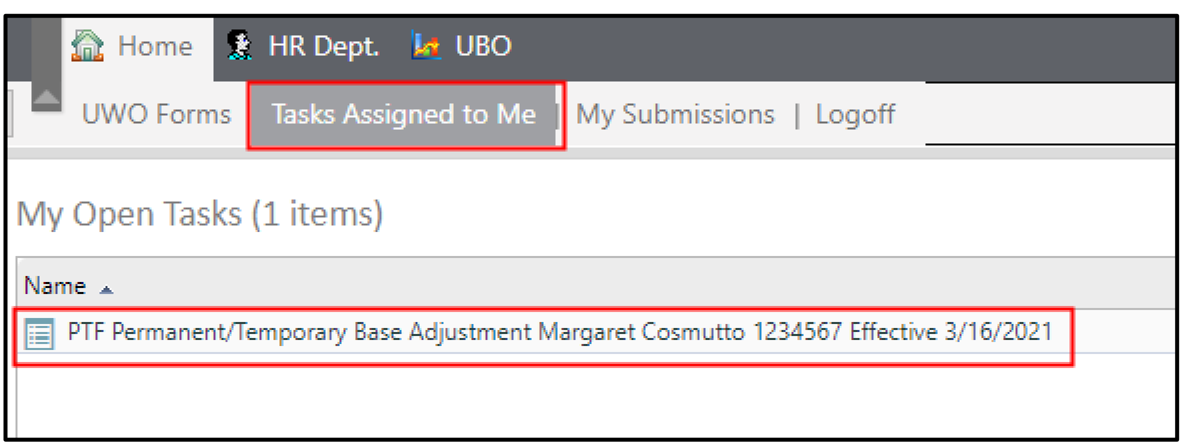
And then scroll to the bottom of the form:



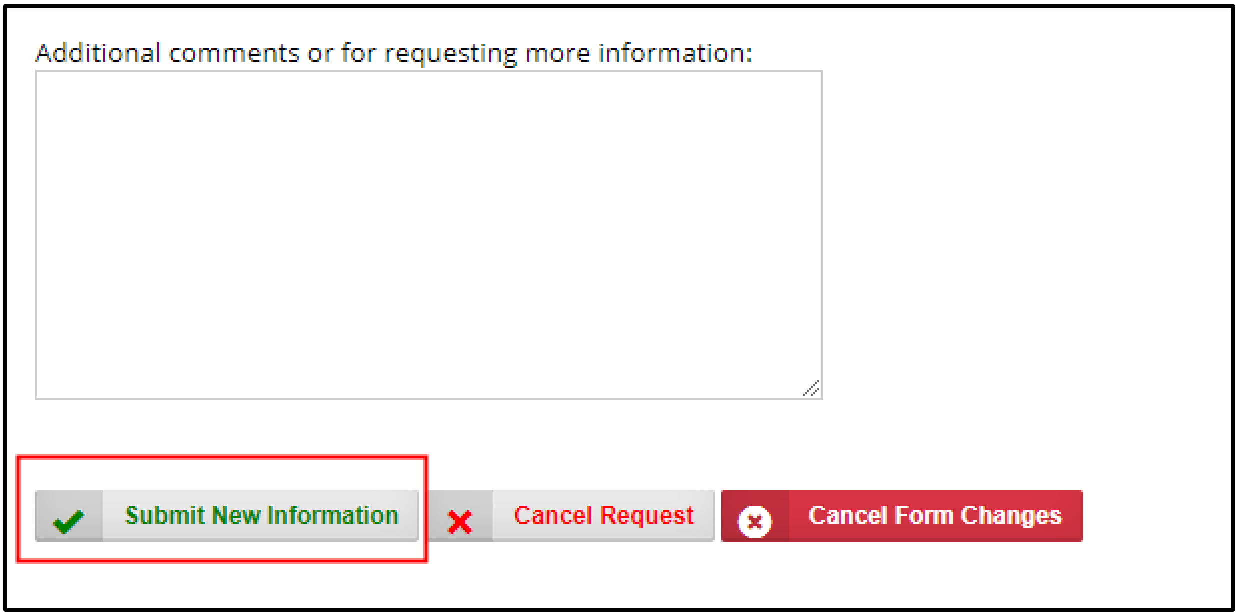
Helpful tips

You will receive an automatic email once your request has been fully approved by all parties. Please do not share this information with employee until you receive this email.

An approver may ask for more information regarding your request. Once you receive that email, you may log into the system, and click on the "Tasks Assigned to Me" Link and click on the name of the request this pertains to:



Provide the additional information the approver is requesting in the text box and click the "Submit New Information" button. This information will be shared with the approver and they will complete their review.



Email notifications

The BP Logix system will send out automatic emails throughout the process. Here is a breakdown of when and who receives those communications:

Email Recipient	Communication
Notification to Requester	Request has been received
Notification to Requester	Request has been approved/declined
Notification to Requester	Approver needs more information; requestor resubmittal
Notification to Approver	Request needs review and approval
Notification to Employee	Employee separation acknowledgement
Notification to Employee	FTE change
Notification to Employee	US Project end date extension
Notification to Supervisor/Dept. Chair, Director/Dean's Office, Budget Office/Grant Accountant, Vice Chancellor	Employee separation