Office of Human Resources

	How to Use eForms in NeoEd

What: NeoEd eForm is an application that allows HR to collect necessary information from current faculty and staff.

Why: To securely capture data in electronic format while allowing approval workflows where necessary.

Who:

- Submitter: You are an employee and you need to provide certain information to HR (e.g. Change of addresses, emergency contacts, tax deduction forms, etc.)

- Approver: You are an approver of the form. You can approve, accept or return to the submitter for correction, and finalize the form (e.g. Fiscal approvers to review tax deduction forms, HR Technicians to check on Legal Name change requests, etc.)

1. **Login**:

   1.1. Go to URL: https://pasadena.edu/faculty-and-staff/index.php > Click **NeoEd Workforce Management Platform** > Use your PCC login credentials to log in.

2. **Access NeoEd eForm**:
   2.1. Click **Forms** in vertical Menu on the left section
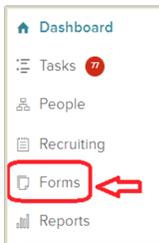
3. **Start a Form Process**:
   3.1. Go to **Quick Links** section > Click the Process you want to start > Click **Start Process** > Confirm

   3.2. In this example, you have triggered the Personal Record Change Request Form. Click **Complete Form.**

   3.3. Fill the Form:

   Fill the required fields > **Submit**

   3.4. Edit and Submit a form that is tasked to you by someone else, or you triggered yourself

   All forms that require your attention will show up as tasks.

   Click **Forms** in vertical Menu > My **Tasks** > Click Form name > Fill and submit.

   Important: In this example, this is a form that you submitted previously, but the approver **has returned to you** for correction. Click the

Communication Bubble to read the instructions > Update the form > **Submit**.

3.5. Review, Accept, or Deny a Form (For Approvers only)

Note: The form will show up as a Task on e**Forms** Dashboard.   You can also find it in the Unified Dashboard.

Click **Forms** on the left vertical Menu > Click My **Tasks** > Click the Task Name

The form opens > Review the content >

- Click **Approve** to accept OR
- Click **Deny and Return** to send the form back to the submitter for correction.

If you **deny** the form, enter **instructions** in the **Comments** box for the first contributor to correct.

Important: Some forms **require your explicit signature or additional information after approval**. You need to **Approve the form first**. The form closes and will come back as a new task. Open it to process and submit.

4. Where do the completed forms go?

4.1. Go to Unified Dashboard > Click Forms on the left vertical menu > Click Documents >   Click and drill down to the folders and sub-folders where the documents reside.

Note: you will see **only** folders and forms that you have been granted access to.

5. **General Hints**:
5.1. You always need to Start a Process before the targeted users can fill the form, including yourself.
5.2. Once activated, the form will show up as a task in the eForms Dashboard, as well as on the Unified Dashboard screen(along with other tasks).