

Electronic Routing and Approval for non-Outlook users

Electronic routing and approval of forms and templates provides departments with improved efficiency and effectiveness in processing many Human Resource classification and compensation documents. Electronic routing is currently available via e-mail, using the Voting Buttons feature in Microsoft Outlook, or Forwarded Messaging, in programs other than Outlook.

Both systems are simple to use cut down on paper-based processing, improve the department's ability to keep track of documents, and to know their approval status at all times. Here's how the non-Outlook process works:

Using Email Programs other than Outlook

1. Identify the approvals required for your department,* and the hierarchical order (if any) in which approval should be obtained
2. Create a new e-mail message addressed to the first required "signatory" in the hierarchical order
3. Type APPROVAL REQUEST in the Subject Line along with the form/template, person, department, etc appropriate to the process you are following. Please include today's date. (Inclusion of all this information is necessary for the process to work).
Examples:
 - APPROVAL REQUEST: lump sum bonus request for Jane Doe; Jan 1 2020
 - APPROVAL REQUEST: role description, Admin Assoc III, Department of Education, Jan 1 2020
 - APPROVAL REQUEST: RAF, Admin Assoc III, Department of Education, Jan 1 2010
4. Attach the document(s) to be approved
5. In the body of the e-mail describe what you need from the signatory. E.g. *"Attached for your review is a [lump sum bonus] request for [Jane Doe]. After reviewing the document, please reply to this message, writing in the body of the email whether you approve or deny the request. A prompt response is greatly appreciated. Many thanks."*
6. Send the message to the first required signatory
7. In order for each required signatory to view the responses of the others as the document proceeds through the authorization process:
 - a. Open the response from the first required signatory and click "Forward" (the template for sending a new message will open with the previous emails on the topic appearing below)
 - b. Address this new e-mail to the next required signatory
 - i. Subject line: as per #3, above
 - ii. Attach the completed document (if not already attached from previous email exchanges)
 - iii. In the body of the e-mail describe what you need from the signatory. E.g. *"Attached for your review is a [lump sum bonus] request for [Jane Doe]. Below are the approvals already received. After reviewing the document yourself, please reply to this message by writing in the body of the email whether you approve or deny the request. A prompt response is greatly appreciated. Many thanks."*
 - iv. Send.
8. Once the second required response is received, repeat #7 above, for the third signatory and so on until all signatories have reviewed the document(s) and responded. Always use the Forward option (never send an entirely new message to any signatory other than the first required because their response will not be added to the others). By using "Forward" each new approval is requested in an email in which all previous approvals/denials are included, and subsequent recipients can review other responses.

Submission of Approvals to Human Resources

9. Please note that Human Resources is unable to accept submissions that have not been approved by all the department's required authorities. Please do not send requests that have been denied by even one signatory. However, approved documents should be submitted in the following way:
 - a. Open the email received from the final required signatory and check that all previous signatories' responses are included in this single message (having used the "Forward" option throughout the process as described above). The template for sending a message to another recipient will open with the previous emails on this topic appearing below). Always use the Forward option in order for Human Resources to be able to view the responses of all the required signatories at one time.
 - b. Address this new e-mail to hrpp_forms@montana.edu
 - i. Subject line: SUBMITTAL followed by the additional relevant information as per #3, above
 - ii. Attach the completed document (if not already attached from previous email exchanges)
 - iii. In the body of the e-mail describe what you are submitting. E.g. *"Please find attached a [lump sum bonus] request for [Jane Doe] and the email record of all the necessary approvals. Please process accordingly. Many thanks."*
 - iv. Send.

If you experience technical difficulties please contact your Personnel Associate in Human Resources:

Team M: Kaye Ellen Ford
994-4823

Team S: Kasia Maison-Franklin
994-3739

Team U: Kallie Mathers
994-3738

*Human Resources requires only supervisory and budgetary authority approvals