

## Instructions for Electronic Routing and Approval

Electronic routing and approval of Flexible Pay Options is now required via e-mail, using the Voting Button feature in Microsoft Outlook. The process has been established in order to provide departments with improved efficiency and effectiveness in processing the necessary documentation. It is simple to use (please see below), cuts down on paper-based processing, and improves the department's ability to track the documentation and to know the approval status of each request at all times, including knowing when requests are submitted to Human Resources/Personnel & Payroll. Here's how the process works:

### Set Up

1. Identify the approvals required for your department\* and the hierarchical order in which approval should be obtained
2. In Outlook, create a new e-mail message addressed to the first required "signatory"
3. In the Subject Line, type APPROVAL REQUEST followed by the Flexible Pay Option name; employee's last name; and today's date. (E.g. APPROVAL REQUEST; Lump Sum Bonus; Jane Doe; Jan 1, 2020)
4. On the e-mail Options tab, click on "Use Voting Buttons" and open the Message Options dialog box (under Options, then Tracking; or Options, then Custom). In the Message Options dialog box:
  - a. Under Message Settings set
    - i. "Importance" at High
    - ii. "Sensitivity" as Confidential
  - b. Under Voting and Tracking Options
    - i. check "Use Voting buttons" and select Approve;Reject from the drop down menu
    - ii. in order to track when each signatory receives the message check "Request a read receipt for this message"
  - c. In Delivery Options check "Have replies sent to" (enter your email address if it does not appear)
5. Attach the document(s) to be approved
6. In the body of the e-mail include a message such as: *"Attached for your review is a [specify which Flexible Pay Option] request for [employee's name]. After reviewing the document, please click on the "Vote" icon (appearing at the left end of the tool bar at the top of the Outlook window when this message is open) and select "approve" or "reject" to indicate whether or not you endorse this request. A prompt response is greatly appreciated. Many thanks."*
7. Send the message to the first required signatory. If there is hierarchy (multiple approvals needed before submitting to Human Resources/Personnel & Payroll), repeat after each appropriate level of approval has been received.

### Submission

8. Please note that Human Resources/Personnel & Payroll is unable to accept Flexible Pay Option requests that have not been approved by all the department's required authorities. Please do not submit requests that have received any "reject" responses from signatories. However, approved requests should be submitted in the following way:
  - a. Open your Sent Items folder and select, but don't open, the original e-mail (sent to the first required signatory)
  - b. Click on the "Tools" tab. Roll over "Instant Search", and then click on "Related Messages". A list of all the responses you have received in connection with this Flexible Pay Option request will appear. It shows each signatory's approval or rejection of the request
  - c. Maximize this screen (important) and press Cntrl+PrintScreen (the PrintScreen button is above the number pad on most keyboards)
  - d. Create a new e-mail, attaching the document(s) to be processed:
    - i. To: your departmental Personnel Technician in Human Resources/Personnel & Payroll
    - ii. Subject line: SUBMITTAL followed by the Flexible Pay Option name; employee's last name; and today's date. (E.g. SUBMITTAL of a lump sum bonus; Jane Doe; Jan 1, 2020)
    - iii. Attach the completed Flexible Pay Option request form
    - iv. Introductory text, in the body of the message: *"Please find attached a request form for lump sum bonus for Jane Doe, and a print screen of all the necessary approvals. Please process accordingly. Thank you"*
    - v. Click below this text, in the body of the e-mail, and press Cntrl+V (or right click and select "Paste"). The list of messages will be pasted into the email. Send.

If you experience technical difficulties please contact your Personnel Technician in Human Resources/Personnel & Payroll.

\*HR/Personnel & Payroll only requires supervisor and budgeting authority

Date of update: 05/23/08