Workflow for Level 1 Approvers

This function is used to approve human resources actions that have been started by an initiator/originator. Approval by the Level 1 approver (dean, director, or vice president level) is essential to move the work to the Level 2 approver at the central office level of Academic Personnel, Employment and Classification, or Student Employment. Level 1 approval is required for the “Add A Position,” “Creating A Requisition to Post a Position,” “Hiring,” and many other job/position actions.

FOUR-STEP APPROVAL PROCESS

Step 1
- Log into the system via the myUFL portal, using your GatorLink user ID and password (http://my.ufl.edu)

Step 2
- Access your worklist by clicking on the “Worklist” link
  - Best practice: Schedule time to check your worklist each day

Step 3
- Select an item in the Worklist
  - Scan the Worklist to review the items needing your approval
  - Note the “Sender,” “Date,” “Work Item,” and “Link” for each listing
  - Click on the “Link” for the item you are selecting for action

Step 4
- Review
  - What information is provided in the notes and data fields?
  - What information is provided in the status chart?
  - Best practice: Make sure you are familiar with the action you are approving in its entirety. Become familiar with accessing all the information relative to the approval you are considering. To obtain all the information about an initiated action, you can navigate to the function in PeopleSoft and complete a search to bring up all of the data for the specific case you are reviewing.

- Respond
  - Approve: Work is sent to Level 2 approver
  - Recycle: Work is returned to initiator/originator (not available in “Creating a Requisition to Post a Position”)
  - Deny: Workflow and process are ended completely
    - Be cautious to only respond with “deny” when you do not want to see an action again.
    - Remember to use “recycle” when the initiator needs to make changes and resubmit for approval.
    - If you “deny” a job or position action, you must also delete the row for the position or job action that was denied (assuming the action is still future dated).
    - If you are unable to complete the deletion of the row, contact your Level 2 approver for assistance.
  - More Information: Add needed notes for the Initiator/Originator, if your response is to “Recycle” or for the Level 2 approver, if your response is to “Approve”
- Click on “Save”
- Click on “OK” when the standard error message appears

**Next Steps**
- Await Level 2 approval
- Return to next item on worklist by clicking on “Worklist” link at top of page