**State of Wisconsin**
**Department of Administration**

# Electronic Personnel File (P-File)

Revised 02/17/2023

# Contents

# Resources

WHRHC 180: Classified Employee Personnel Records -
https://dpm.wi.gov/Hand%20Book%20Chapters/WHRH_Ch_180.pdf

DPM-0437-AO/MRS: Electronic Storage of State Employee Official Personnel File -
https://dpm.wi.gov/Bulletins/DPM-0437-AO-MRS%20-%20Electronic%20Personnel%20Files.pdf

# Overview

Electronic personnel file functionality was added to PeopleSoft on February 1, 2017. Personnel file documents created on or after 02/01/2017 shall be scanned or created in electronic PDF format by the agency and be uploaded into PeopleSoft by the designated agency representative. The documents will be indexed according to the appropriate document category as provided under WHRH Chapter 180.

# Security

Users must have one or more personnel file security roles to access this functionality. Who the user can see is based on their row-level security (typically their business unit or a subset of their business unit). Users are not able to view their own P-File.

| **Role Name** | **Usage** |
|---|---|
| P-File Viewer | View-only access to P-Files. |
| P-File User | Views P-File, adds documents, moves documents, requests deletions, prints documents. |
| P-File Restricted Access | Ability to flag agency P-Files as restricted. Marking a file as restricted will make the employee's P-File non-viewable to the general P-File user within the agency. Use of this feature is at an agency's discretion.<br><br>This role can also view documents, add documents, move documents, request deletions, and print documents from a restricted file. |
| P-File Requestor | Ability to request checkout of P-File s from another agency. |
| P-File Approver | Record custodian - approves checkout request from another agency to view P-Files. |
| P-File Maintenance | DPM Enterprise Only. Role used to hard delete documents from a P-File. |

# Viewing a P-File Within Your Agency (Row Level Security)

**Roles**:

- For General P-Files: P-File User or P-File Viewer
- For Restricted P-Files: P-File Restricted Access

Use the following steps to view an employee's P-File.

**STEP 1:** Navigate to the employee's P-File:

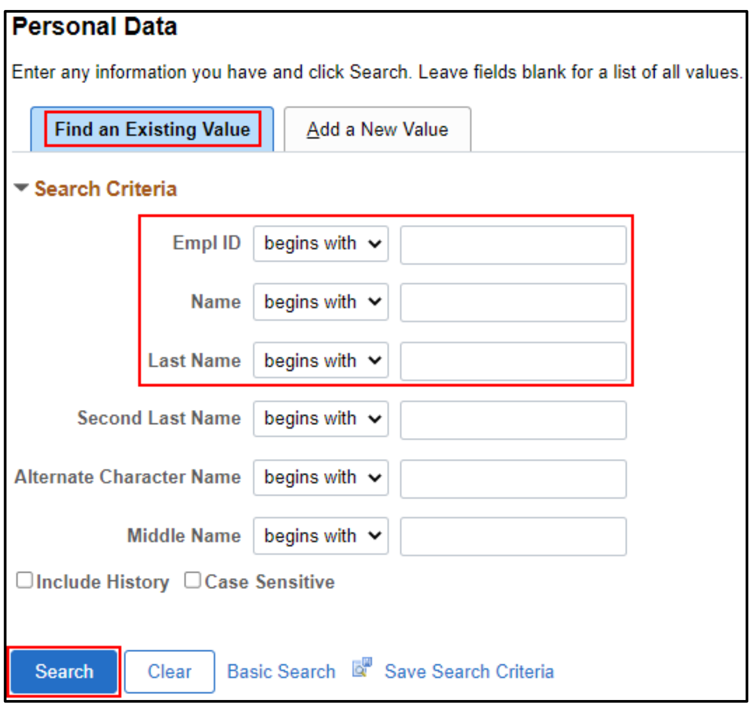
Navigation:

- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > P-File
- Workforce Administrator Homepage > Human Resources Dashboard > Person Tile > Modify a Person
- NavBar > State of Wisconsin (STAR) > Human Resources > Process > Document Management > Employee Personnel File
- NavBar > Workforce Administration > Personal Information > Biographical > Modify a Person

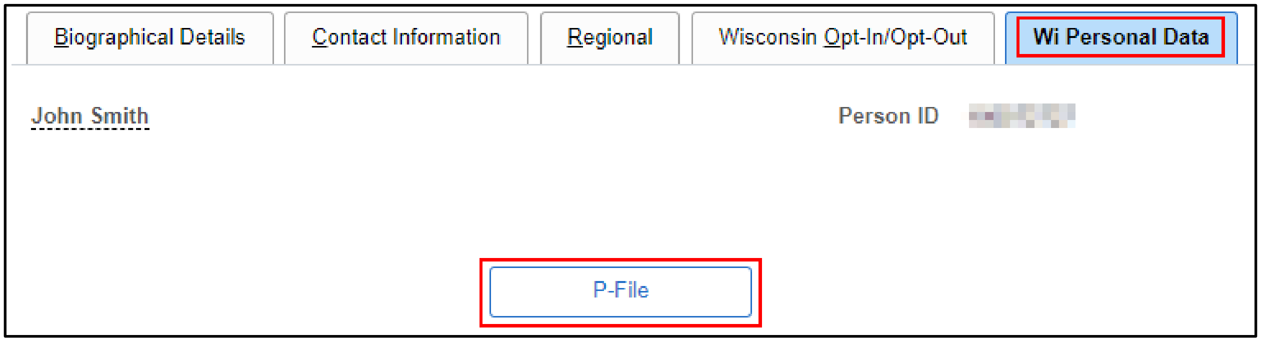
To view a restricted employee's P-File:

- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > Restricted Access Employees
- NavBar: State of Wisconsin (STAR) > Human Resources > Setup > Document Setup > Restricted Access Employees

  A. On the Find an Existing Value tab, enter the employee's name or ID.
  B. Click Search.

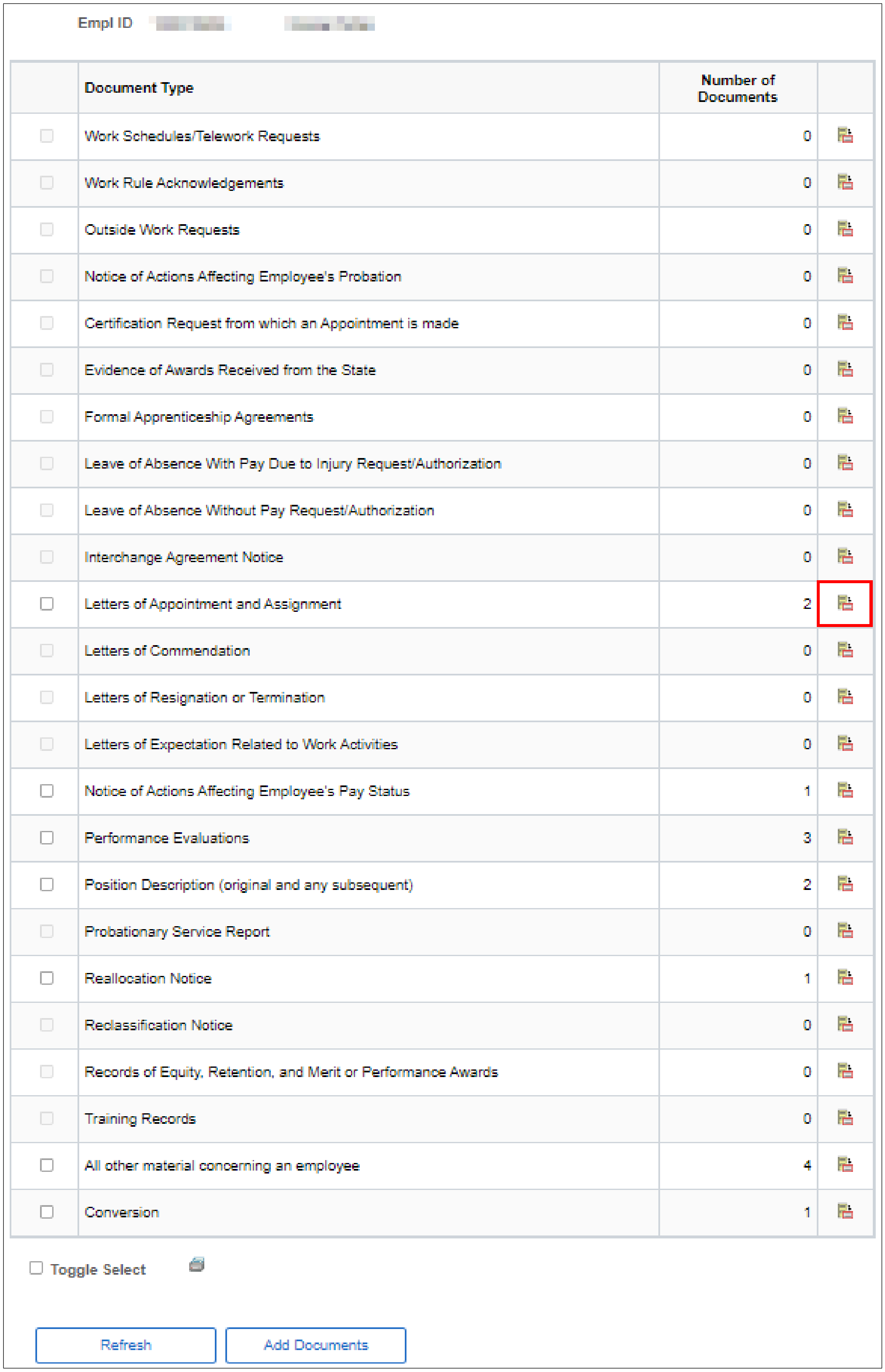


**STEP 2:** Select the Wi Personal Data tab, and click on the P-File button.




The P-File button will be greyed out for your own P-File and for certain people that don't have P-Files. Additionally, if the file has been marked as restricted, it will be greyed out if you don't have the security role to view restricted P-Files.

**STEP 3:** Click the yellow paper icon next to P-File section where the document is located.



Empl ID

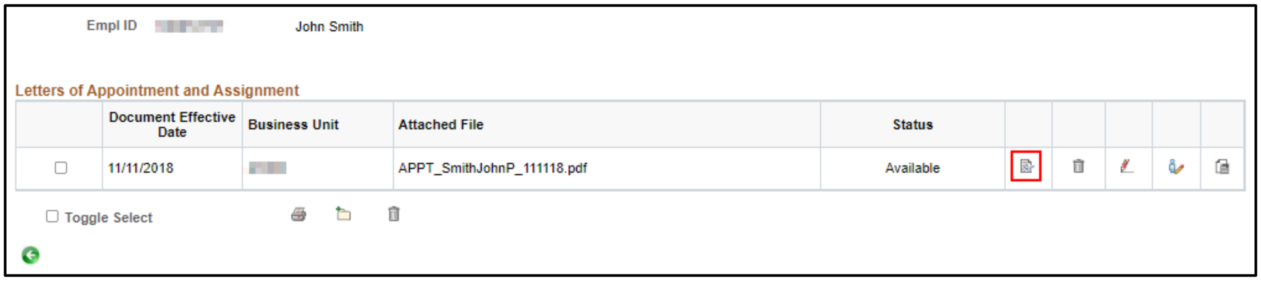
| | Document Type | Number of Documents | |
|---|---|---|---|
| | Work Schedules/Telework Requests | 0 | |
| | Work Rule Acknowledgements | 0 | |
| | Outside Work Requests | 0 | |
| | Notice of Actions Affecting Employee's Probation | 0 | |
| | Certification Request from which an Appointment is made | 0 | |
| | Evidence of Awards Received from the State | 0 | |
| | Formal Apprenticeship Agreements | 0 | |
| | Leave of Absence With Pay Due to Injury Request/Authorization | 0 | |
| | Leave of Absence Without Pay Request/Authorization | 0 | |
| | Interchange Agreement Notice | 0 | |
| | Letters of Appointment and Assignment | 2 | |
| | Letters of Commendation | 0 | |
| | Letters of Resignation or Termination | 0 | |
| | Letters of Expectation Related to Work Activities | 0 | |
| | Notice of Actions Affecting Employee's Pay Status | 1 | |
| | Performance Evaluations | 3 | |
| | Position Description (original and any subsequent) | 2 | |
| | Probationary Service Report | 0 | |
| | Reallocation Notice | 1 | |
| | Reclassification Notice | 0 | |
| | Records of Equity, Retention, and Merit or Performance Awards | 0 | |
| | Training Records | 0 | |
| | All other material concerning an employee | 4 | |
| | Conversion | 1 | |

Toggle Select

Refresh  Add Documents

Only sections with documents in them are selectable with the P-File Viewer security role.

**STEP 4**: Click the white paper icon next to document you want to view. This will download the document to your computer.




**STEP 5:** To return to the first screen of the P-File. Click the on-screen green arrow. Do NOT use the browser back button.

# Maintaining A P-File

**Roles:**

- For General P-Files: P-File User
- For Restricted P-Files: P-File Restricted Access

## Adding Documents

**Reminder: Do NOT load discipline documents directly to the p-file. They will load directly from the discipline module. See https://dpm.wi.gov/Documents/STAR%20Discipline%20Module%20Job%20Aid.docx.**

**STEP 1:** Navigate to the employee's P-File:

Navigation:

- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > P-File
- Workforce Administrator Homepage > Human Resources Dashboard > Person Tile > Modify a Person
- NavBar > State of Wisconsin (STAR) > Human Resources > Process > Document Management > Employee Personnel File
- NavBar > Workforce Administration > Personal Information > Biographical > Modify a Person

To view a restricted employee's P-File:

- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > Restricted Access Employees
- NavBar: State of Wisconsin (STAR) > Human Resources > Setup > Document Setup > Restricted Access Employees

**STEP 2**: Click the yellow paper icon next to the applicable P-File section.

Empl ID

| | Document Type | Number of Documents | |
|---|---|---|---|
| ☐ | Work Schedules/Telework Requests | 0 | |
| ☐ | Work Rule Acknowledgements | 0 | |
| ☐ | Outside Work Requests | 0 | |
| ☐ | Notice of Actions Affecting Employee's Probation | 0 | |
| ☐ | Certification Request from which an Appointment is made | 0 | |
| ☐ | Evidence of Awards Received from the State | 0 | |
| ☐ | Formal Apprenticeship Agreements | 0 | |
| ☐ | Leave of Absence With Pay Due to Injury Request/Authorization | 0 | |
| ☐ | Leave of Absence Without Pay Request/Authorization | 0 | |
| ☐ | Interchange Agreement Notice | 0 | |
| ☐ | Letters of Appointment and Assignment | 2 | |
| ☐ | Letters of Commendation | 0 | |
| ☐ | Letters of Resignation or Termination | 0 | |
| ☐ | Letters of Expectation Related to Work Activities | 0 | |
| ☐ | Notice of Actions Affecting Employee's Pay Status | 1 | |
| ☐ | Performance Evaluations | 3 | |
| ☐ | Position Description (original and any subsequent) | 2 | |
| ☐ | Probationary Service Report | 0 | |
| ☐ | Reallocation Notice | 1 | |
| ☐ | Reclassification Notice | 0 | |
| ☐ | Records of Equity, Retention, and Merit or Performance Awards | 0 | |
| ☐ | Training Records | 0 | |
| ☐ | All other material concerning an employee | 4 | |
| ☐ | Conversion | 1 | |

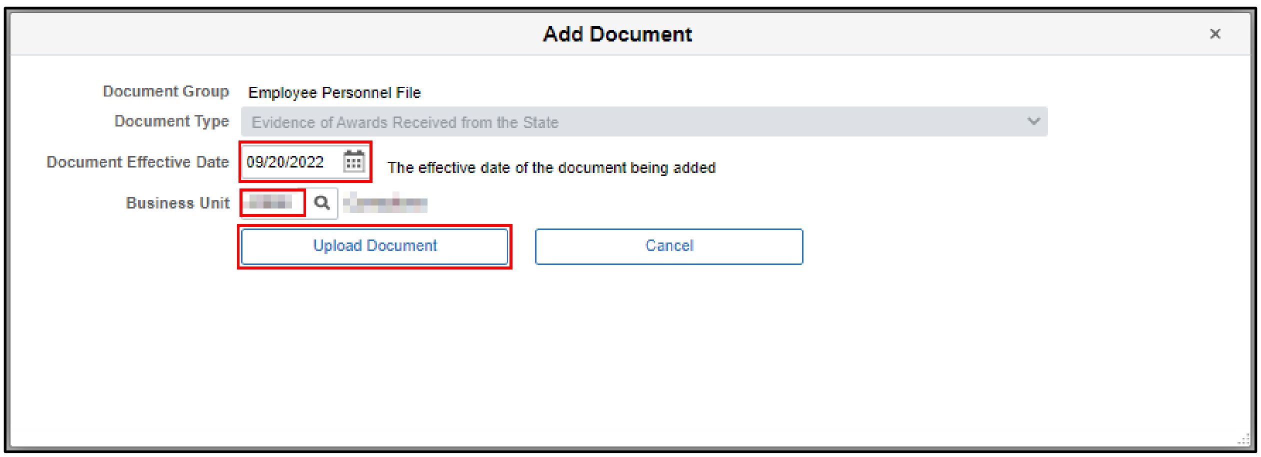
☐ Toggle Select

Refresh | Add Documents

**STEP 3:** Click the file folder icon.


**STEP 4**: Enter details about the document being uploaded:

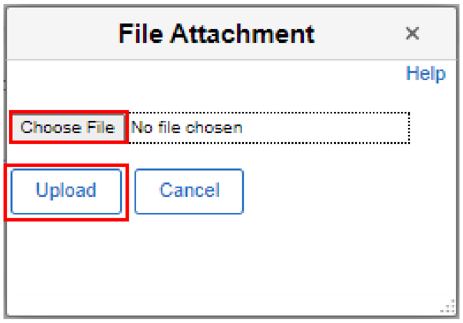
A. **Document effective date**: The effective date of the document.
B. **Business Unit:** The employee's agency as it relates to the document being uploaded.
C. Click **Upload Document.**

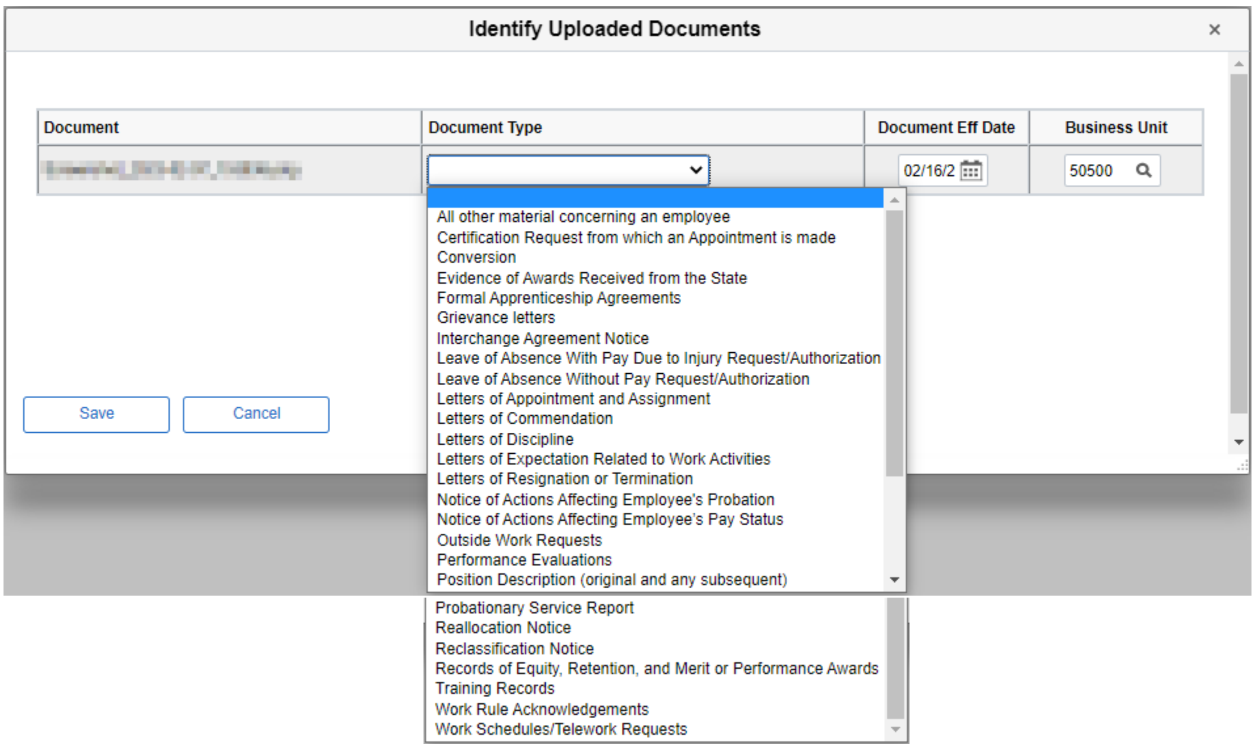


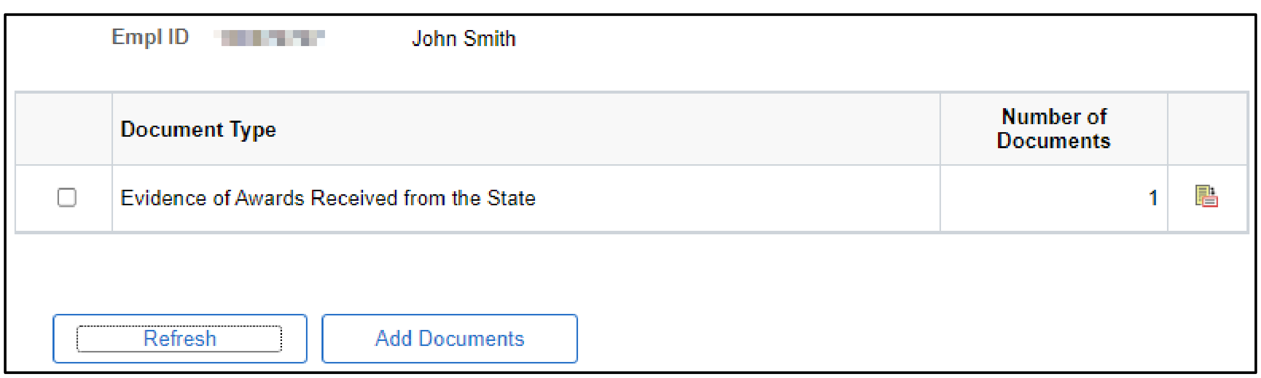

**STEP 5**: Select the document to be uploaded.

All documents must follow a standard naming convention. The naming conventions are detailed in the Appendix.

A. Click Choose File and select the document to upload.
B. Click Upload.




The document is now in the P-File.

## Modifying Document Effective Date And/Or Business Unit

**Roles:**
- For General P-Files: P-File User
- For Restricted P-Files: P-File Restricted Access

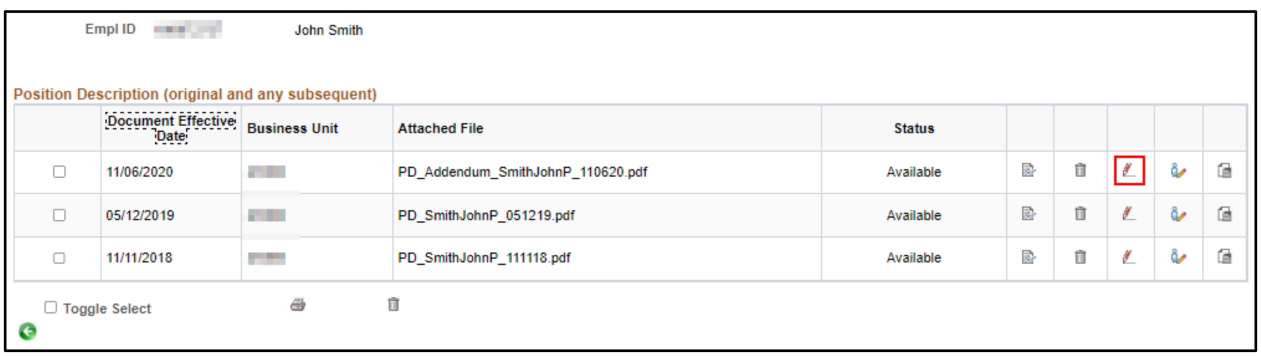
**STEP 1**: Navigate to the employee's P-File:

Navigation:
- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > P-File
- Workforce Administrator Homepage > Human Resources Dashboard > Person Tile > Modify a Person
- NavBar > State of Wisconsin (STAR) > Human Resources > Process > Document Management > Employee Personnel File
- NavBar > Workforce Administration > Personal Information > Biographical > Modify a Person

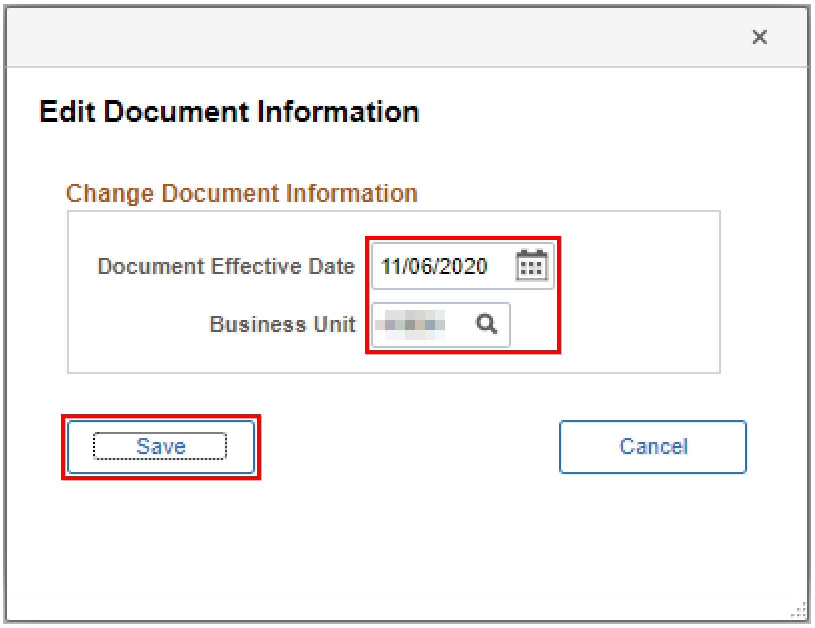
To view a restricted employee's P-File:
- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > Restricted Access Employees
- NavBar: State of Wisconsin (STAR) > Human Resources > Setup > Document Setup > Restricted Access Employees

**STEP 2**: Navigate to the document that needs modification.

**STEP 3**: Click on the red pencil icon next to the document that needs the effective date or business unit changed.



A. Enter the correct Document Effective Date and/or Business Unit.
B. Click Save.




## Moving Documents To A Different P-File Section

**Reminder: Do NOT submit a deletion request to move a document from one section to another. Use the steps provided below to move a document between folders.**

**Roles:**

- For General P-Files: P-File User
- For Restricted P-Files: P-File Restricted Access

**STEP 1**: Navigate to the employee's P-File:

Navigation:

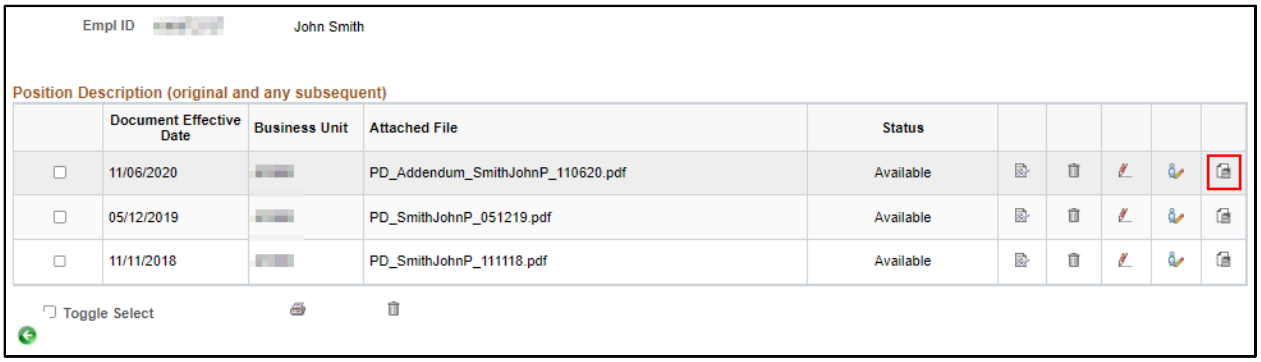
- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > P-File
- Workforce Administrator Homepage > Human Resources Dashboard > Person Tile > Modify a Person
- NavBar > State of Wisconsin (STAR) > Human Resources > Process > Document Management > Employee Personnel File
- NavBar > Workforce Administration > Personal Information > Biographical > Modify a Person

To view a restricted employee's P-File:

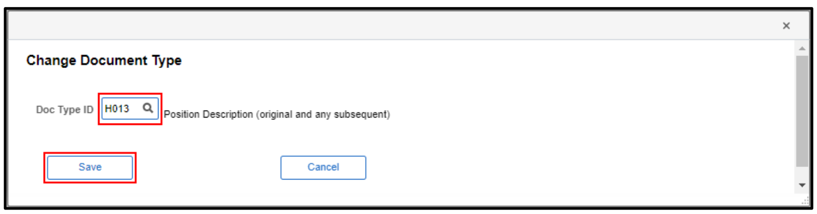
- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > Restricted Access Employees
- NavBar: State of Wisconsin (STAR) > Human Resources > Setup > Document Setup > Restricted Access Employees

**STEP 2**: Navigate to the document that needs modification.

**STEP 3**: Click on the white and grey paper icon next to the document that needs to be moved to a different section.




A. Click the magnifying glass icon to select the correct section (Doc Type ID).
B. Click Save.




## Moving Documents To Another Employee’s P-File

**Reminder: Do NOT submit a deletion request to move a file between p-files. Use the steps below to move the file between p-files.**

**Roles:**

- For General P-Files: P-File User
- For Restricted P-Files: P-File Restricted Access

**STEP 1**: Navigate to the employee’s P-File:

Navigation:

- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > P-File
- Workforce Administrator Homepage > Human Resources Dashboard > Person Tile > Modify a Person
- NavBar > State of Wisconsin (STAR) > Human Resources > Process > Document Management > Employee Personnel File
- NavBar > Workforce Administration > Personal Information > Biographical > Modify a Person

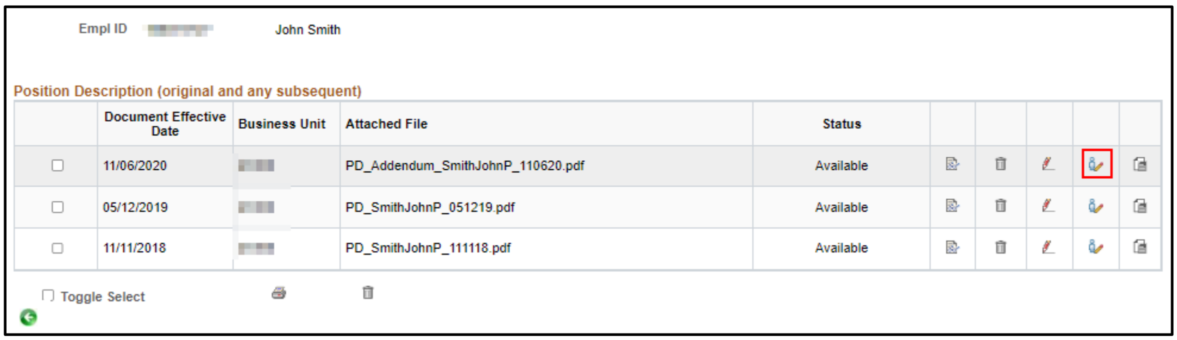
To view a restricted employee's P-File:

- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > Restricted Access Employees
- NavBar: State of Wisconsin (STAR) > Human Resources > Setup > Document Setup > Restricted Access Employees

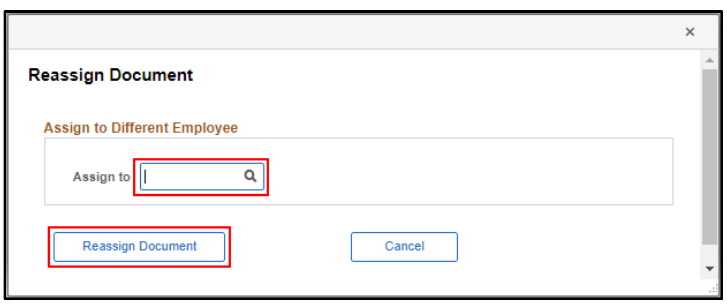
**STEP 2**: Navigate to the document that needs modification.

**STEP 3**: Click on the blue person icon next to the document that needs to be moved to another employee's P-File.

Users will only be able to move documents to another user within their agency (row level security).




A. Enter the Employee ID.
B. Click Reassign Document.
   - To search for an employee ID, click the magnifying glass next to the Assign to field.




## Deleting Documents

**Reminder: Requests to delete a document are individually reviewed and approved or denied by a representative in Central DPM. There may be delays in reviewing deletion requests depending on volume and staff availability. If there is a high priority request please reach out to ___ after submitting the deletion request.**

**Please do NOT submit deletion requests to move a document between folders within a p-file or between employees p-files. You can do this yourself with the instructions in this job aid.**

**Roles:**
- For General P-Files: P-File User
- For Restricted P-Files: P-File Restricted Access

Document deletion requests are routed to DPM for approval.

**STEP 1:** Navigate to the employee's P-File:

Navigate to the employee's P-File:

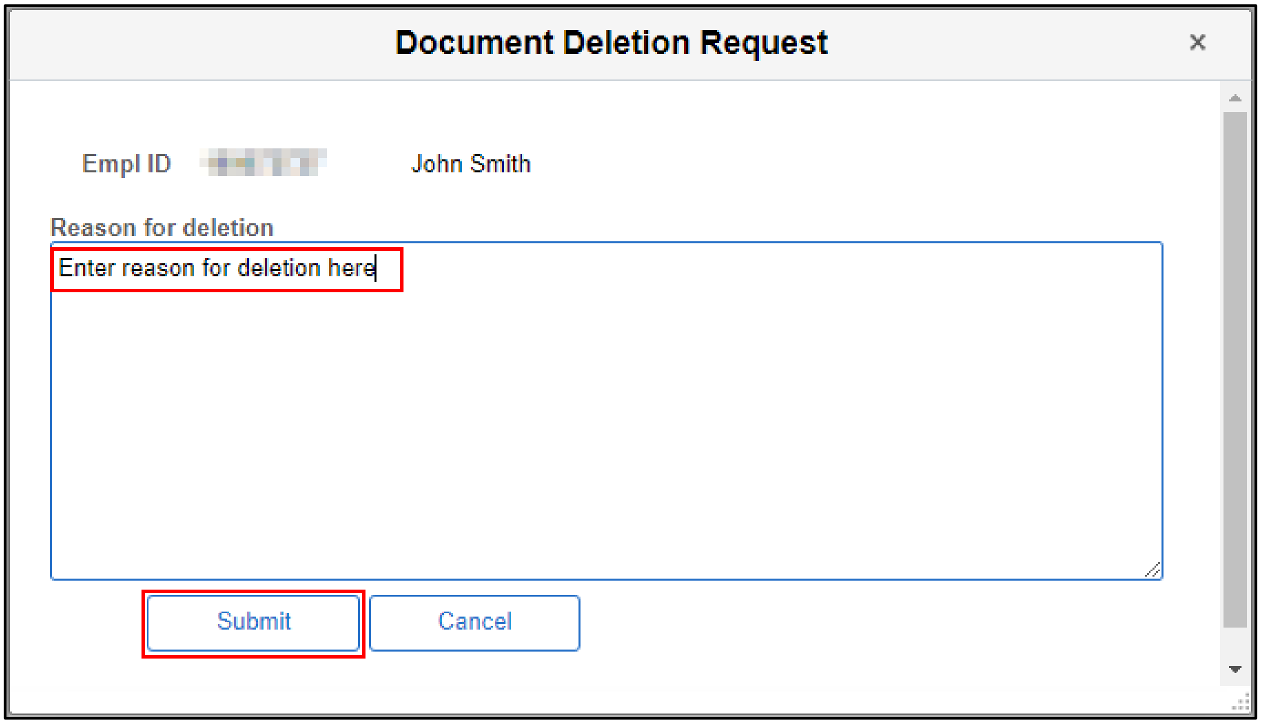
Navigation:
- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > P-File
- Workforce Administrator Homepage > Human Resources Dashboard > Person Tile > Modify a Person
- NavBar > State of Wisconsin (STAR) > Human Resources > Process > Document Management > Employee Personnel File
- NavBar > Workforce Administration > Personal Information > Biographical > Modify a Person

To view a restricted employee's P-File:
- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > Restricted Access Employees
- NavBar: State of Wisconsin (STAR) > Human Resources > Setup > Document Setup > Restricted Access Employees

**STEP 2**: Click the yellow paper icon next to P-File section where the document is located.

**STEP 3**: Click the trash can icon next to the document that should be deleted.

A. Enter the reason for the deletion request.
B. Click Submit.




You will receive notification that your document deletion request was sent to DPM. Additionally, an email will be sent to DPM notifying them of the deletion request.


The document status will show as “Pending Deletion" until the deletion request is either approved or denied by DPM.

# Restricting Access To A P-File

**Roles**:

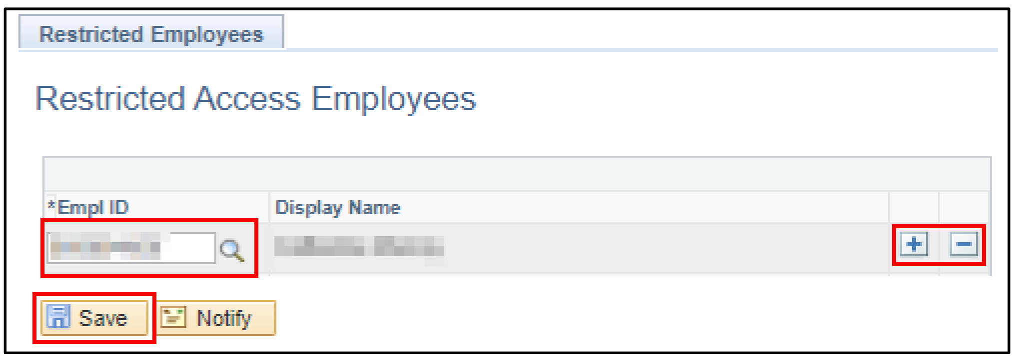
- For Restricted P-Files: P-File Restricted Access

Use the following steps to mark an employee's P-File as restricted.

**STEP 1:** Navigate to the Restricted Access Employee page:

- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > Restricted Access Employees
- NavBar: State of Wisconsin (STAR) > Human Resources > Setup > Document Setup > Restricted Access Employees

A. Enter or search for the employee's ID by clicking the magnifying glass.
B. Click Save.
C. To add additional employees, click the plus (+) sign and repeat the steps above.
D. To remove employees, click the minus button, and click save.




An employee's P-File will remain restricted when they transfer to a different agency. The receiving agency should remove the employee from the list of restricted employees if the restriction is not applicable to their agency.

# Requesting Access To A P-File (Checking Out A P-File)

**Role:**

- P-File Requestor

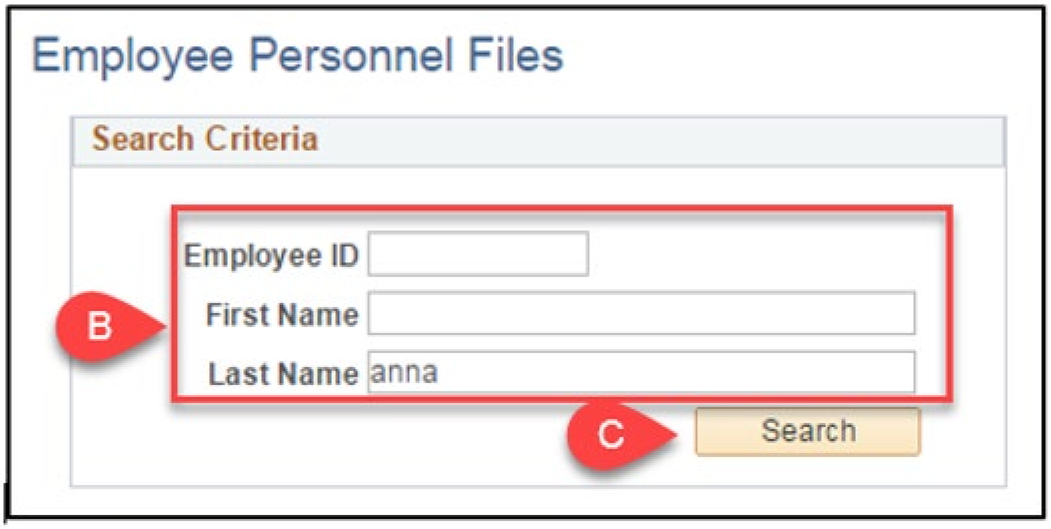
Use the following steps to request view-only access to a P-File at another agency.

**STEP 1**: Navigate to the Request for Outside Emp P-File page:

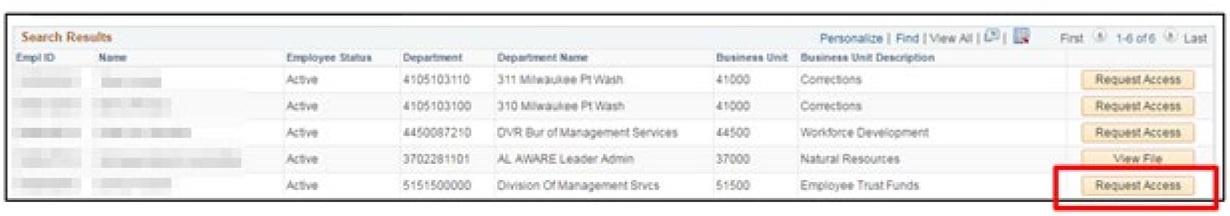
Navigation:

- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > Request For Outside Emp P-File
- NavBar > State of Wisconsin (STAR) > Human Resources > Process > Document Management > Employee Personnel File

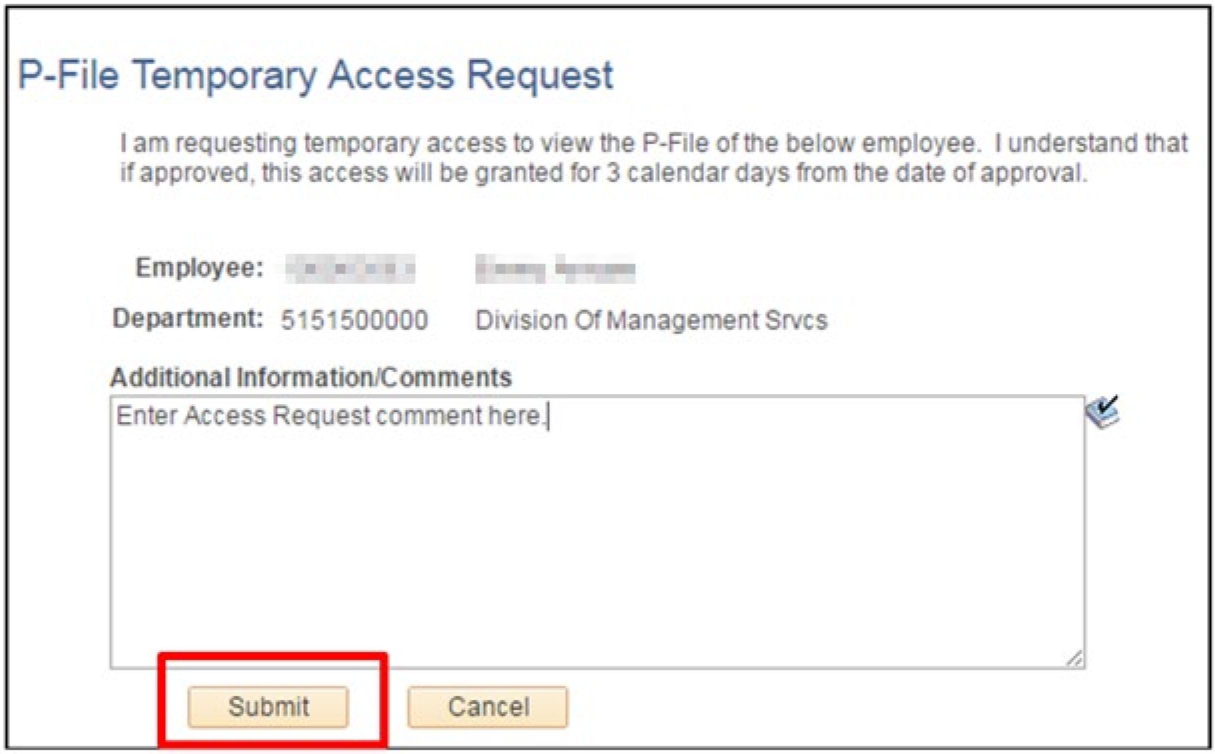
A. Search for an employee by entering all or part of the employee's Employee ID, First Name, or Last Name.
B. Click Search.




**STEP 2**: Click Request Access next to the applicable employee.

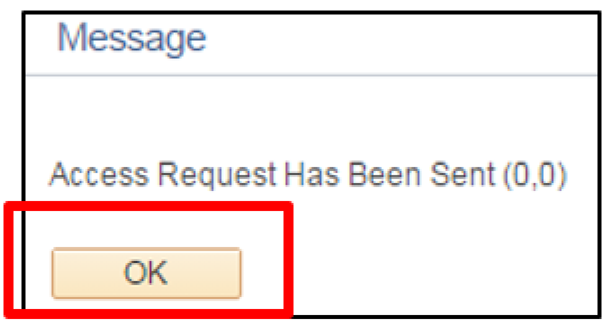


A. Enter a comment and click Submit.



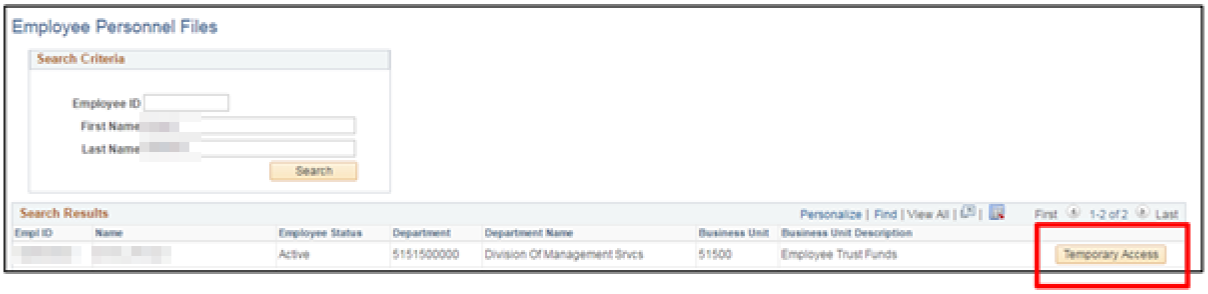

You will receive confirmation that the request has been sent. Additionally, an email will be sent to all users with the P-File Approver role at the employee's agency.

B. Click OK




Once you've received an email stating that your request has been approved, you may view the P-File through the same navigation.

C. Click the Temporary Access button to view the employee's P-File.




You will have 3 calendar days to review the P-File after the request is approved. If additional time is needed, a new request must be submitted.

# Approving A P-File Check Out Request

**Role:**

- P-File Approver

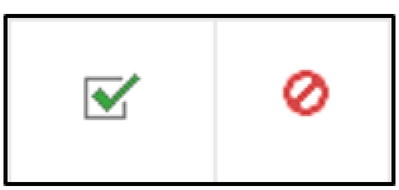
Use the following steps to approve view-only access request to a user outside your agency.

**STEP 1**: Navigate to the Approve/Deny P-File Access Request page:

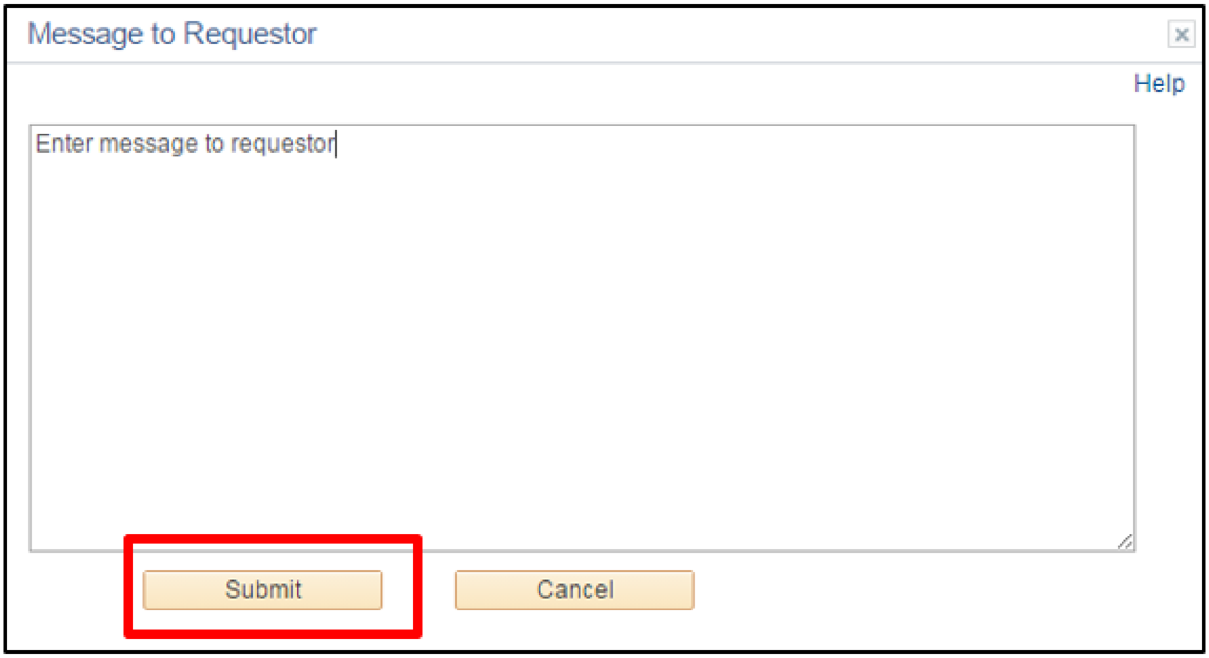
- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile >Approve/Deny P-File Access Req
- NavBar > State of Wisconsin (STAR) > Human Resources > Process > Document Management > Approve/Deny P-File Access Requests

All pending P-File access requests will be automatically displayed.


**STEP 2**: To Approve the access request, Click the green checkmark icon to the right of the request. To Deny the access request, Click the red symbol to the right of the request.



**STEP 3**: Enter a message to the requestor and click Submit.




An email will be sent to requestor notifying them of the approval or denial.

# Printing Documents

**Roles:**

- For General P-Files: P-File Viewer, P-File User
- For Restricted P-Files: P-File Restricted Access

## Printing An Entire P-File

**STEP 1:** Navigate to the employee's P-File:

Navigation:

- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > P-File
- Workforce Administrator Homepage > Human Resources Dashboard > Person Tile > Modify a Person
- NavBar > State of Wisconsin (STAR) > Human Resources > Process > Document Management > Employee Personnel File
- NavBar > Workforce Administration > Personal Information > Biographical > Modify a Person

To view a restricted employee's P-File:

- Workforce Administrator Homepage > Human Resources Dashboard > P-File Administrator Tile > Restricted Access Employees
- NavBar: State of Wisconsin (STAR) > Human Resources > Setup > Document Setup > Restricted Access Employees

**STEP 2:** Click the Toggle Select option to select all sections in a P-File that have documents.

A. Click the print icon.

Empl ID [redacted]

| | Document Type | Number of Documents | |
|---|---|---|---|
| ☐ | Work Schedules/Telework Requests | 0 | |
| ☐ | Work Rule Acknowledgements | 0 | |
| ☐ | Outside Work Requests | 0 | |
| ☐ | Notice of Actions Affecting Employee's Probation | 0 | |
| ☐ | Certification Request from which an Appointment is made | 0 | |
| ☐ | Evidence of Awards Received from the State | 0 | |
| ☐ | Formal Apprenticeship Agreements | 0 | |
| ☐ | Leave of Absence With Pay Due to Injury Request/Authorization | 0 | |
| ☐ | Leave of Absence Without Pay Request/Authorization | 0 | |
| ☐ | Interchange Agreement Notice | 0 | |
| ☑ | Letters of Appointment and Assignment | 2 | |
| ☐ | Letters of Commendation | 0 | |
| ☐ | Letters of Resignation or Termination | 0 | |
| ☐ | Letters of Expectation Related to Work Activities | 0 | |
| ☑ | Notice of Actions Affecting Employee's Pay Status | 1 | |
| ☑ | Performance Evaluations | 3 | |
| ☑ | Position Description (original and any subsequent) | 2 | |
| ☐ | Probationary Service Report | 0 | |
| ☑ | Reallocation Notice | 1 | |
| ☐ | Reclassification Notice | 0 | |
| ☐ | Records of Equity, Retention, and Merit or Performance Awards | 0 | |
| ☐ | Training Records | 0 | |
| ☑ | All other material concerning an employee | 4 | |
| ☑ | Conversion | 1 | |

☑ Toggle Select A

Refresh | Add Documents

The documents will open as a single .pdf document with a cover sheet in a separate window.

## Printing One Or More Sections Of A P-File

**STEP 1:** Navigate to the employee's P-File.

**STEP 2**: Click the checkbox next to all sections in a P-File that you want to print.

**STEP 3:** Click the print icon.

Empl ID

| Document Type | Number of Documents |
|---|---|
| Work Schedules/Telework Requests | 0 |
| Work Rule Acknowledgements | 0 |
| Outside Work Requests | 0 |
| Notice of Actions Affecting Employee's Probation | 0 |
| Certification Request from which an Appointment is made | 0 |
| Evidence of Awards Received from the State | 0 |
| Formal Apprenticeship Agreements | 0 |
| Leave of Absence With Pay Due to Injury Request/Authorization | 0 |
| Leave of Absence Without Pay Request/Authorization | 0 |
| Interchange Agreement Notice | 0 |
| Letters of Appointment and Assignment | 2 |
| Letters of Commendation | 0 |
| Letters of Resignation or Termination | 0 |
| Letters of Expectation Related to Work Activities | 0 |
| Notice of Actions Affecting Employee's Pay Status | 1 |
| Performance Evaluations | 3 |
| Position Description (original and any subsequent) | 2 |
| Probationary Service Report | 0 |
| Reallocation Notice | 1 |
| Reclassification Notice | 0 |
| Records of Equity, Retention, and Merit or Performance Awards | 0 |
| Training Records | 0 |
| All other material concerning an employee | 4 |
| Conversion | 1 |

Toggle Select

Refresh Add Documents

The documents will open as a single .pdf document with a cover sheet in a separate window.

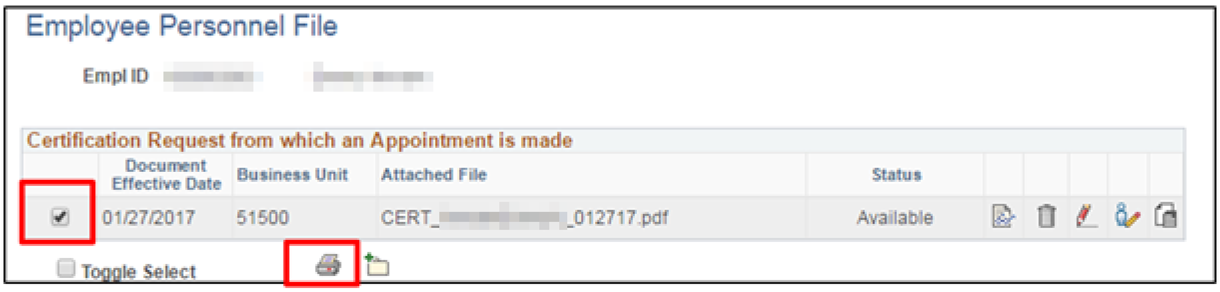
## Printing One Or More Documents Within A Section

**STEP 1:** Navigate to the employee's P-File.

**STEP 2:** Click the yellow paper icon next to P-File section where the document is located.

**STEP 3**: Click the checkbox next to document(s) you want to print.

**STEP 4**: Click the print icon.




The documents will open as a single .pdf document with a cover sheet in a separate window.

## P-File Audit Query

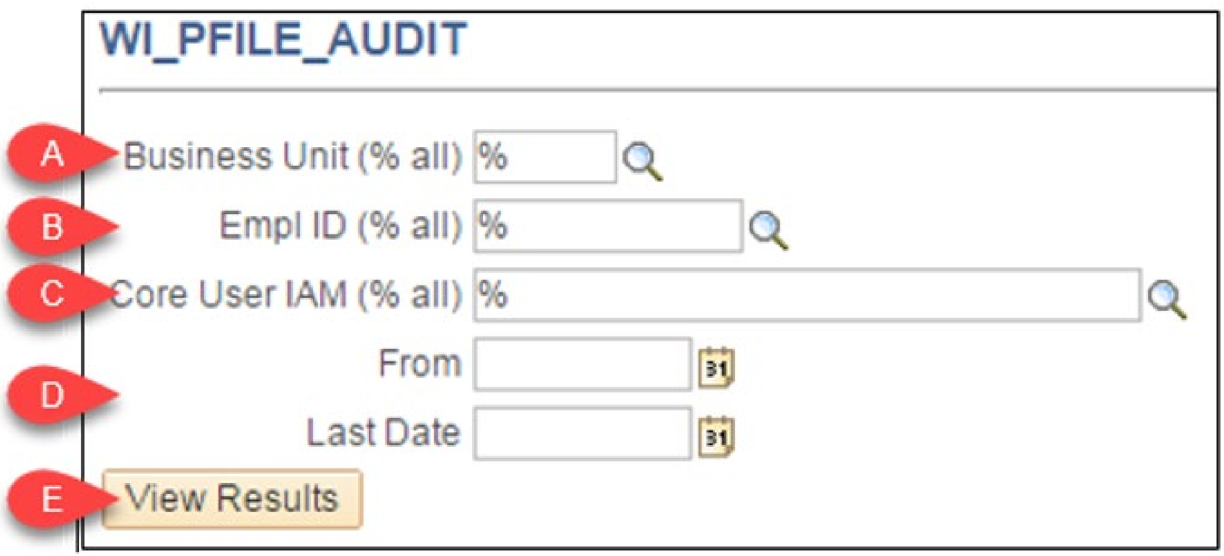
All users will have access to the query, but users must have access to the data to produce query results.

**STEP 1:** Navigate to Query Viewer and enter the name of the query:

- NavBar > Reporting Tools > Query Viewer
- The name of the query is WI_PFILE_AUDIT

**STEP 2**: Enter the search criteria:

A. **Business Unit:** Enter a business unit to return results for a specific agency. To return all business units, enter a percentage sign (%).
B. **Employee ID:** Enter an employee ID to return results for a specific employee. To return all employees, enter a percentage sign (%).
C. **Core User IAM:** Enter an IAM to return results for a specific P-File user. To return all P-File users, enter a percentage sign (%).
D. **From Date and To Date:** Enter a date range. This date is based on the document effective date.
E. Click **View Results.**




**STEP 3**: Interpreting the query results:

A. **ID:** Employee ID associated with a P-File
B. **Personnel File:** Name of employee associated with a P-File
C. **Unit:** Business Unit number
D. **Business Unit Description**: Description of Business Unit
E. **Doc Group ID:** At this time, it will always be PFILE
F. **Doc Type ID:** Short description of the P-File section
G. **Doc Description:** Long description of the P-File section
H. **Seq Number:** Document order within the P-File section

I. **Doc Effective Date:** Effective date of the document
J. **Document Status:** Available, Pending Deletion, Deleted
K. **Attachment:** Name of document
L. **Creation Date/Time:** Timestamp of when the document was originally uploaded
M. **Document Created By:** IAM of user who uploaded document
N. **Last Update Date/Time:** Timestamp of the most current change to the document
O. **Document Last Updated By:** IAM of user who last updated the document
P. **Document Action Date/Time:** Timestamp of the document action
Q. **Document Actions:** Deleted, Added, Viewed, Printed
R. **Document Action By:** IAM of user who deleted, added, viewed, or printed a document

# FAQS

## Multiple Jobs

- When an employee has appointments at two separate agencies, who can view the employee's P-File?

  A P-File is tied to a particular employee, and access to a P-File is based on who has row level security to view the employee within PeopleSoft HCM. Both agencies will have access to view all documents in the employee's P-File.

- When an employee has appointments at two separate agencies, which agency will receive and approve P-File checkout requests?

  Both agencies will receive the checkout request, but the system requires only one agency to respond by either approving or denying the request.

- When an employee has appointments at two separate agencies, how will restricted access be handled?

  An employee's P-File cannot be restricted at just one agency when they have appointments at two separate agencies. If their P-File is marked as "restricted" by one agency, it will be marked as "restricted" at both agencies.

## Employee P-File Review

- How will an employee view their P-File once it is fully digitized?

  Make a paper copy for the employee to review, or meet with the employee to show the electronic version. A future enhancement is being planned to allow employee to have electronic access to their P-Files.

## Termed Employees

- What happens to an employee's P-File when they leave state service?

  The electronic file will remain in the system, and it will remain accessible to the agency where the employee was last active. If the employee is rehired, the P-File will move with the employee and be accessible to the new agency. If a file needs to be uploaded after an employee has been terminated, a person with the P-File Restricted Access role will be able to upload the document.

## Purging

- If an employee does not return to state service within 8 years, what happens to their electronic P-File?

  The electronic P-File will be purged from PeopleSoft in accordance with the RDA.

## Emails

- What transactions will generate an automatic email notification?

Six transactions will generate an automatic email notification: P-File check out requests, notification that a P-File check out request has been approved, notification that a P-File check out request has been denied, P-File document deletion request, notification that a P-File document deletion request has been approved, and notification that a P-File document deletion request has been denied.

## Errors

- Should I request a deletion if I uploaded a document with the incorrect name?

Depends – If the document is generally named correctly or the date is close, there is no need to request a deletion. If the document name is completely incorrect, request deletion.

- How should amended documents be handled?

If a particular document has been amended, the original should remain in the section. The updated document should be titled the same as the original with "_AMD" at the end of the name.

## Sections With Multiple Documents

- How do I differentiate between different documents within the "OTHER" category?

Some sections of the P-File may contain a variety of documents. When uploading documents into a section and additional differentiation is desired, include qualifying language in the name after the document type.

**Example:**

a. OTHER_OutsideEmpl_SmithTroyJ_022217
b. DISC_1DAY_SmithTroyJ_022217

## Documents Missed During Conversion

- What should I do with a document that was effective prior to conversion but not included in the uploaded file?

If a P-File document with an effective date prior to 2/1/2017 is identified after the employee's legacy file has been uploaded, the document should be given the appropriate name from the naming conventions found in the Appendix but should be uploaded into the "Conversion" section of the P-File.

## P-File Document Naming

Documents uploaded to an employee's electronic P-File will use the following naming conventions:

| P-File Section | Naming Convention | Date Used |
|---|---|---|
| Work Schedules/Telework Requests | WORKSCH_LastNameFirstName_mmddyy | Date Request was Approved |
| Work Rule Acknowledgements | WORKRULE_LastNameFirstName_mmddyy | Date Employee Acknowledged/Signed |
| Outside Work Requests | OWR_LastNameFirstNameMI_mmddyy | Date Request was Approved |
| Notice of Actions Affecting Employee's Probation | PROBCOMP_LastNameFirstName_mmddyy (Probation Completion)<br>PROBEXT_LastNameFirstName_mmddyy (Probation Extension) | Effective Date of Action |
| A Certification Request from which an appointment is made | CERT_LastNameFirstNameMI_mmddyy | Effective Date of Appt |
| Evidence of awards received from the State | AWARD_LastNameFirstNameMI_mmdd | Date of Award |
| Formal apprenticeship agreements | APPRENT_LastNameFirstNameMI_mmddyy | Date of Agreement |
| Leave of Absence With Pay Due to Injury Request/Authorization | LOAWP_LastNameFirstNameMI_mmddyy | Date Leave Begins |
| Leave of Absence Without Pay Request/Authorization | LOAWOP_LastNameFirstNameMI_mmddyy | Date Leave Begins |
| Interchange Agreement Notice | INCHG_LastNameFirstNameMI_mmddyy | Date Interchange Begins |
| Letters of appointment and assignment | APPT_LastNameFirstNameMI_mmddyy | Effective Date of Appt |
| Letters of commendation | COMMEND_LastNameFirstNameMI_mmddyy | Date Letter Issued |
| Letters of discipline | DISC_LastNameFirstNameMI_mmddyy<br>DISC_1Day_LastFirstNameMI_mmddyy<br>DISC_5Day_LastFirstNameMI_mmddyy<br>DISC_3Day_LastFirstNameMI_mmddyy<br>DISC_PROB_LastFirstNameMI_mmddyy<br>DISC_TERM_PROB_LastFirstNameMI_mmddyy | Date of Letter |
| Letters of resignation/termination | RESIGN_LastNameFirstNameMI_mmddyy<br>TERM_LastNameFirstNameMI_mmddyy | Resignation or Termination Date |
| Letters of expectation related to work activities | EXPECT_LastNameFirstNameMI_mmddyy | Date of Letter |
| Notice of actions affecting employee's pay status | PAYACT_LastNameFirstNameMI_mmddyy | Effective Date of Change |
| Performance Evaluations | PERFEVAL_LastNameFirstNameMI_mmddyy<br>PERFEVAL_plng_LastFirstNameMI_mmddyy<br>PERFEVAL_rsl_LastFirstNameMI_mmddyy<br>PERFEVAL_PIP _LastFirstNameMI_mmddyy<br>PERFEVAL_IDP _LastFirstNameMI_mmddyy | Date Review was Completed |

| P-File Section | Naming Convention | Date Used |
|---|---|---|
| Position Description (original and any subsequent) | PD_LastNameFirstNameMI_mmddyy | *Effective Date of Appt for new PDs<br>*Date of Sup Signature for revised PDs |
| Probationary Service Report (former title) or probationary performance evaluations and letters related to the results of the employee's probationary period(s) or trial period. | PROB_LastNameFirstNameMI_mmddyy | Date Review was Completed<br><br>Date of Letter |
| Reallocation Notice | REALLO_LastNameFirstNameMI_mmddyy | Effective Date of Reallocation |
| Reclassification Notice | RECLASS_LastNameFirstNameMI_mmddyy | Effective Date of Reclassification |
| Records of equity, retention, and merit or performance awards | ERMPREC_LastNameFirstNameMI_mmddyy | Date of Award |
| Training records | TRAIN_LastNameFirstNameMI_mmddyy | Date Training Completed – If multiple days, use last day |
| All other material concerning an employee, except those documents designated by an appointing officer as requiring special handling or separate filing. Examples of other documents that should be kept in the P-file include Outside Employment or Conflict of Interest requests. | OTHER_LastNameFirstNameMI_mmddyy<br>OTHER_Conf_LastFirstNameMI_mmddyy<br>(Confidentiality Agreement)<br>OTHER_COI_LastFirstNameMI_mmddyy<br>(Conflict of Interest)<br>OTHER_NetA_LastFirstNameMI_mmddyy<br>(Network Access)<br>OTHER_OnbdChklst_LastFirstNameMI_mmddyy<br>(Onboarding Checklist)<br>OTHER_SIGNON_LastFirstNameMI_mmddyy<br>(Sign-on Bonus Agreement) | *Dates differ – for documents that the employee has signed use that date |