

Create Personnel Action Form Transactions

After setting up company locations, position families, salary grades and positions and assigned position titles to employees, you are ready to start creating Personnel Action Form Transactions.

To begin, navigate to Personnel Action Forms and click "Create Personnel Action Form Transactions" from the Personnel Action Form Transactions tile.

Personnel Action Form Transactions

Create Personnel Action Form Transactions

Create Personnel Action Form Transaction(s) For Employee(s)

Personnel Action Form Dashboard

Pending PAF Transaction(s) Requiring Action

5 Pending PAF Transaction(s) Requiring Action

Approved One-Time Payroll Actions

Generate Payroll Files From One-Time Actions approved through PAFs

7 Pending One-Time Payroll Actions

Create a personnel action form for an individual employee at a time by selecting the employee's name.

The top of the personnel action form shows the employee's information and their Employee History and Performance where you can view their Position Tenure, Performance Reviews and Performance Discussion Forms. *If your organization does not have Performance Management and/or Performance Discussion Forms, the Performance Reviews and Performance Discussion Forms tabs are not visible.*

Home / Personnel Action Forms / Create Personnel Action Form Transactions / Create Personnel Action Form Transaction

Important Warnings **1**
Ignore Warnings

Open Payroll Transaction [View Details](#)

BAKER, SUZIE (A04A) [View Profile](#)

Position Business Title	Department	DOL Status	Hire/Rehire Date	Salary Grade	Salary/Hourly Rate(s)
Corporate Trainer	Human Resources	(None)	08/22/2023		\$85,468.27/Per Annum

Employee History and Performance

Position Tenure
Performance Reviews
Performance Discussion Forms

Hire Date	08/22/2023 (2 Year(s) 6 Month(s) 4 Day(s))	Rehire Date	N/A
Seniority Date	08/22/2023 (2 Year(s) 6 Month(s) 4 Day(s))	Last Position Change	08/12/2024 (1 Year(s) 6 Month(s) 14 Day(s))



To create a Personnel Action Form for multiple employees, check the box next to each employee you would like and then click "Batch Create." *Users must have the Batch Create Personnel Action Form Transactions permission enabled in their permission profile to use this feature.*

Home / Personnel Action Forms / Create Personnel Action Form Transactions

Filters

Add Filter... Saved Filters

Select Employee(s) For Personnel Action Form Transactions Batch Create

ken 1 record selected Previous Next 100

Select	Employee Name	Status	Pending PAF Exists	Business Title	Department	DOL Status	Hire Date
<input checked="" type="checkbox"/>	HARRIS, KENNY (A039)	On Leave		Customer Service Representative	Production [100]	Full Time	08/11/2011
<input type="checkbox"/>	HUNTER, KENNEDY (A05T)	Active			Learning and Development [125]	(None)	02/05/2025
<input type="checkbox"/>	KENDEL, TOM (A018)	Active		Sales Representative	Sales [200]	Full Time	03/01/2010
<input type="checkbox"/>	LYNN, KENDRA (JORD)	Active		Executive Assistant	Executive Management [800]	Full Time	11/13/2016
<input type="checkbox"/>	MARIE, KENDALL (KEJE)	Active		Security Officer	Security [150]	Full Time	04/03/2017
<input type="checkbox"/>	NESBY, MACKENZIE (A023)	Active		Security Officer	Sales [200]	Part Time	03/01/2007

Showing 1 to 6 of 6 entries Previous Next Go to Page Batch Create

Fill in the appropriate information for the Personnel Action Form including the type, reason and effective date. Remember any payrolls on or after this date will include any pay rate changes and take effect for the entire pay period.

When uploading supporting documentation, the maximum file size is 5MB. The following file types are allowed: PDF, DOC, DOCX, XLS, XLSX, PPT, PPTX, TXT, RTF, MDB, MDBX, JPG, JPEG, JPE, JIF, JFIF, JFI, PNG, ZIP.

Upon completion, select who to submit the Personnel Action Form to and click one of the options from the "Submit and Email" drop-down.

Home / Personnel Action Forms / Create Personnel Action Form Transactions / Create Personnel Action Form Transaction

Create Batch Personnel Action Form Transactions - 1 Employee Selected

* Indicates Required Field

Select a PAF action type for your employees * Retirement

PAF Reason * Retirement

Effective Date * 07/14/2025

Display in ESS upon Final Approval

Employee Status

ESS Enable/Disable

ESS Access Profile

Comments

Upload Supporting Documentation

Submit to * Bellingham, Jacob (rvachon)

Submit and Email

Submit to Approver

- Final Approve, Send to Payroll, and Email
- Final Approve and Send to Payroll
- Save Draft

Employees

HARRIS, KENNY (A039)



When creating a Personnel Action Form Transaction, any warnings associated with the transaction will display at the top of the screen. Similar to Payroll warnings, each warning is categorized as Critical or Important and guides you on the appropriate action to take.



In the Critical Warning section, the following warning could display:

- **Pay Class Warning:** This warning will display if the employee has time that is not archived on their current pay class and has a proposed pay class change for a future effective dated Personnel Action Form.

In the Important Warning section, the following warnings could display:

- **Open Payroll Transaction:** This warning displays if the employee is currently in an open payroll transaction.
- **Position Seat Discrepancies:** This warning displays if a proposed field differs from the default seat value.
- **Position Title Discrepancies:** This warning displays if a proposed field differs from the position's default setting.
- **Salary Outside Range:** This warning displays if the employee's proposed rate falls outside the salary grade for their position.
- **Pending Transactions:** This warning displays if the employee has existing Personnel Action Forms.

To view a warning's details and take the appropriate action, click "View Details."



You must address all Critical Warnings before you can final approve the Personnel Action Form. As a best practice, you should review all Important Warnings; however, you may ignore them if necessary to final approve the Personnel Action Form.

To ignore an Important Warning, check the box next to the appropriate warning. Or, to ignore all Important Warnings, check the box for "Ignore Warnings."



If you select "Bonus" as your PAF action type, you can check "Assign Alternate Payout Allocation to Bonus [BON] OTP Action" to add an alternate allocation to the One-Time Payroll (OTP) Action. This allocation will not change default allocations in Employee Forms.

Click "Assign Allocation" to assign a department, job and location.

Paycom regularly updates and improves functionality to meet client needs and expectations, which may result in differences between the content of these materials and actual system functionality. The information in this guide does not constitute legal or professional advice.



If you enabled Allow Effective Time Selection in the template's Step 1: PAF Template, the Select Effective Time checkbox is selectable after you add an Effective Date. The Effective Time drop-down menus appear when Select Effective Time is enabled.

If you have the Position Seat enabled in the template's Step 2: PAF Template Fields, you can select which position seat the employee will move to with the PAF. There, you can vacate the previous position seat or close the previous seat. If you have Applicant Tracking enabled, the "Create requisition upon submitting personnel action form" option appears. This automatically creates a requisition draft for the previous position seat. These options also appear if you have the Employee Status field enabled in the PAF template.



Create Personnel Action Form

* Indicates Required Field

Select a PAF action type for your employee *

PAF Reason *

PAF Approval Workflow * Promotion Approval

Effective Date *

Display in ESS upon Final Approval

Select Effective Time

Effective Time * Central Standard Time

Position Seat **From** 0002L - Corporate Trainer **To** 0006G - Instructional Designer

[change](#)

Vacate Previous Seat Close Previous Seat

Create requisition upon submitting personnel action form

Position Level **From** N/A **To**

When you're ready to submit the Personnel Action Form, click "Submit and Email" to submit and email the approver simultaneously.

Business Title **From** Corporate Trainer **To** Instructional Designer

Comments

Upload Supporting Documentation

Promotion Approval

Step: Supervisor Approval | Approver: HR Approval

Use the PAF Status column on the Personnel Action Form Dashboard to verify the Personnel Action Form was sent.

Home / Personnel Action Forms / Personnel Action Form Dashboard

Filters:

Open Transactions Final Approved Denied

Select All	Employee Name	Current Department	Created Date	Requested By	Last Modified By	Last Action Date	Action Type	Reason	Effective Date	PAF Status	Waiting On	View
<input type="checkbox"/>	ANDERSON, JAMIE ALEXIS (A03Y)	Production	01/22/2026	LILLIAN MARTIN	LILLIAN MARTIN	01/22/2026	Acquisition	Employee Acquisition	01/23/2026 08:00 AM CST	Pending	LILLIAN MARTIN	<input type="button" value="Actions"/>
<input type="checkbox"/>	ABBY, LAUREN (8971)	Customer Service	07/02/2025	Jacob Bellingham	Jacob Bellingham	07/02/2025	Promotion	Promotion	07/14/2025	Supervisor Approval	Jacob Bellingham	<input type="button" value="Actions"/>



