Personnel Action Form Guide

Human Resources Information Systems

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Understanding Personnel Action Forms

General Information

Personnel Action Forms are available through Web*Salary and are used to implement changes to an employee's job records.

Personnel Action Forms can be used for the following situations:

- Promotion
- Demotion
- Wage Adjustment
- Department Transfer
- Job Title Change
- Status Change
- Hours Change
- Termination
- Shift Code Change
- Leave of Absence
- Return from Leave of Absence
- Workers Compensation
- Return from Workers Compensation

When you want to make one of these changes, simply check the corresponding box at the top of the page, and then mark the changing information on the bottom part of the form.

Once HRIS has processed your PAF, you should see these changes on a new PAF in Web*Salary.

Remember to obtain the necessary approval signatures on the bottom of the PAF. HRIS will not process the form unless these signatures are visible. Please refer to the Approval Authorization for Personnel Actions Policy (HR-71) regarding the required approvals.

Personnel Action Form Sections

Recommended Action

This is the most important section on the Personnel Action Form as it generates history on the employee's record. Your choice here determines which other sections of the PAF need to be completed. You must always complete this section.

What should I do?

Select the box next to what best describes the change you are administering to the employee's job record. If two totally separate actions are occurring on the same Effective Date, you may check the box next to both actions.

Sample Situation One

An employee is being promoted to a new position. Their pay rate and title are changing with this promotion. Since the promotion is what brought about all of these changes, you would select Promotion.

Sample Situation Two

An employee receives a merit increase and changes to part time status on the same effective date. Since both actions are occurring on the same day but are not occurring from the same action, select Wage Adjustment AND Status Change.

Effective Date and Employee Demographics

This section specifies the effective date and employee demographical information for the PAF.

What should I do?

Verify or update the following fields:

Effective Date: The date on which the Recommended Action is effective. You must always complete this field.

Date Generated: This field will default to the date you retrieved and printed the PAF from Web*Salary.

Remarks: Use this section to type any comments that you want to include on the PAF.

Distribute To: This field will default to whomever listed as the Authorized Financial Manager of the PAF for an employee's organizational code.

Employee ID: This field will default to the employee's University ID.

Employee Status: The employee's job status. Active, Leave of Absence, or Terminated are all valid values.

Hire Date: The employee's original date of hire will default.

Adjusted Hire Date: In most cases, the date that defaults in this field is the same as the hire date. The following are situations in which this date might be different:

- If the employee was terminated and rehired after 90 days, the rehire date is defaulted.
- If the employee was hired due to a merger from a previous institution, the benefit date used for pension and vacation entitlement will be defaulted (i.e. the original hire date from the previous institution).

Employee's Name: The employee's name will default in this order: Last, First, Middle

Home Phone: The employee's home telephone number will default.

Work Phone: The employee's campus telephone number will default.

Department and Time Sheet Organization Information

This section specifies what organization numbers the employee is listed under.

What should I do?

Verify or update the following fields:

Home Organization No. & Title: The home organization number that has administrative responsibility for the employee, along with the title of that home organization number. This number is a four digit numeric code and exists for reporting purposes.

Time Sheet Organization No. & Title: The time sheet organization number that has time keeping and PAF responsibility for the employee, along with the title of that time sheet organization number. This number is a four digit numeric code and exists for check distribution purposes.

Job Specific Information

This section specifies the employee's position information.

What should I do?

Verify or update the following fields:

Employee Class & Description: The employee's class and description of the code. Double click on the text to view a complete list of employee classes and descriptions.

Hours Per Pay: The employee's hours per pay cycle.

Pay ID: The employee's type of pay schedule. Monthly (MD), Bi-Weekly (BD), or Weekly (WD) are all valid values.

Shift: The employee's work shift. Most employees are listed under shift 1, however, some employees may have 2 or 3 listed.

FLSA Code: The employee's exemption status according to the position number. Exempt or Non-Exempt are valid values.

FT/PT: The employee's full time or part time status.

Contract Type: The type of contract is defaulted. Primary and Secondary are valid.

Position & Compensation Information

This section specifies the position, start date, and end date information.

What should I do?

Verify or update the following fields:

Position: The employee's position number. This number is assigned during the requisition process and is tied to a particular department.

Suffix: Should always be 00.

Position Class Code: The position class code assigned to the employee by HR/Compensation. A complete list of position class codes can be found in the Supplemental Materials section.

Grade: The grade of the employee's position class. Grades are determined by Compensation and are used to note the ranges of a position class.

Step: The employee's step value. Steps specify the level of progression within a salary structure.

Begin Date: The first work day in this position.

End Date: The last work day in this position is defaulted if the employee has an end date on their record. Most full-time employee do not have an end date, so this field would default blank.

Job Title: The title of the position number. Job Titles are determined by Compensation and are tied to the assigned employee class.

Hourly Rate: The employee's hourly rate. Double click on the text to view instructions on calculating the hourly rate.

Annualized Salary: The employee's annual salary. The annualized salary is calculated by using the hourly rate and scheduled hours.

Change Reason Code: The cause for the change on the PAF. This code should correspond with the Recommended Action that was selected at the top of the PAF. Double click on text to view a complete list of change reason codes.

Personnel Action Form Sections

Leave of Absence Information

This section specifies all information related to a leave of absence. You may also write notes in the Remarks section if necessary.

What should I do?

Verify or update the following fields:

Leave Code: Code that identifies the type of leave. Approved leave codes are:

- AL – Administrative Leave
- FM – Family Medical Leave
- SA – Full Academic Year Sabbatical
- SP – 6 Month Sabbatical

Leave Begin Date: The date the employee started a leave of absence.

Last Day Worked: The last date the employee worked before beginning their leave of absence.

Actual Leave Return Date: The date the employee returns to work from their leave of absence

Personnel Action Form Sections

Termination Information

This section specifies termination reason, the final date worked, and rehire eligibility for an employee when they are terminating from the university.

What should I do?

Update the following fields:

Term Code: The code that specifies the reason for termination. Double click the text to view a full list of acceptable termination codes. The following are standard termination codes:

- VR (Voluntary Termination)
- AO (Accepted Other Work)
- PR (Personal Reasons)
- RS (Returned to School)
- IV (Involuntary Resignation)
- UP (Unsatisfactory Performance)
- RT (Retirement)

Last Day Worked: Date of the last day the employee worked for the organization.

University Specifics: Field must remain blank.

Personnel Action Form Sections

Labor Distribution Information

This section specifies the fund, organization, and account code the employee is charged to.

What should I do?

Verify or update the following fields:

Fund: Six digit code designated to the funding source (i.e. 110100 for Education and General Unrestricted Fund).

- Fund codes starting with 2 represent grants. PAFs for employees paid by grants must be approved by Research before HRIS can enter it in the system.

Orgn: Four digit code designated to departmental/budgetary subdivisions of the university (i.e. 9865 for University Finance Department).

Acct: Four digit code designated to the salary line (i.e. 3018 for Computer Supplies).

Percent: Percent of salary being charged to a specific fund/orgn/acct combination. Valid percentages range from 1-100%. The total for all combinations must equal 100%.

Eff Date: The date that the labor distribution goes into effect.

Personnel Action Form Sections

Employment History Information

This section displays recent changes applied to the employee's job record. Note that this information is for reference only and cannot be changed by submitting a PAF.

University Approval Signatures

All PAFs must be signed by the appropriate party as specified in the Approval Authorizations for Personnel Actions Policy (HR-71).

What should I do?

Before submitting the PAF for signatures, double check the changes you have made, as well as the information that you opted to remain the same, making sure that all required information is completed.

HR Approvals

This section lists the internal HR Approvals that may be required depending on the nature of the change and is for HR use only.

What should I do?

Wait patiently. Once Human Resources receives the approved PAF, it is routed internally for HR Approvals based on the type of action. Once all approvals have been received, the PAF is forwarded to HRIS for final review and processing.

Promotion

This option is to be selected when an employee is being promoted within the same department, to a newly created position, or to an existing position.

What should I do?

Recommended Action
- Check box next to Promotion

Effective Date & Employee Demographics Information
- Effective Date: Enter the employee's start date in new position
- Date Generated: Date that you printed the PAF will default
- Remarks: Enter any information that you want to include concerning the promotion

Job Specific Information
- Employee Class & Description: Change if applicable
- Hours per Pay: Changes if promoting a non-exempt employee to an exempt position
- Pay ID: Change if promoting a non-exempt employee to an exempt position
- Shift: Change if applicable
- FLSA Code: Change if promoting a non-exempt employee to an exempt position
- FT/PT: Change if applicable
- Contract Type: No change

Position & Compensation Information
- Position: Change if applicable
- Position Class: Will be changed by Compensation
- Grade: Will be changed by Compensation
- Begin Date: Enter the same date that you entered in Effective Date in Effective Date & Employee Demographics Information
- End Date: Enter end date if applicable
- Job Title: Change if applicable
- Hourly Rate: Calculate and enter the hourly rate (click on text for help, if necessary)
- Annualized Salary: Enter annual salary
- Change Reason: PROMO

Labor Distribution Information
- Fund/Orgn/Acct/Percent/Eff Date: If promotion information differs from current information, cross out old information and enter new

University Approval Signatures
- Obtain appropriate signatures

Wage Adjustment

This option is to be selected when an employee's salary changes.

What should I do?

Recommended Action

- Check box next to Wage Adjustment

Effective Date & Employee Demographics Information

- Effective Date: Enter the date that the salary change starts
- Date Generated: Date that you printed the PAF will default
- Remarks: Enter any information that you want to include concerning the wage adjustment

Position & Compensation Information

- Begin Date: Enter the same date that you entered in Effective Date in Effective Date & Employee Demographics Information
- End Date: Enter end date if applicable
- Job Title: Change if applicable
- Hourly Rate: Calculate and enter the hourly rate (click on text for help, if necessary)
- Annualized Salary: Enter annual salary
- Change Reason: SALIN

Labor Distribution Information

- Fund/Orgn/Acct/Percent/Eff Date: If labor distribution information differs from current information, cross out old information and enter new.
- If there is a labor distribution change you must attach a Budget Transfer form.

University Approval Signatures

- Obtain appropriate signatures

Job Title Change

This option is to be selected when an employee's job title is changed without affecting their salary.

What should I do?

Recommended Action

- Check box next to Job Title Change

Effective Date & Employee Demographics Information

- Effective Date: Enter the date that the job title change starts
- Date Generated: Date that you printed the PAF will default
- Remarks: Enter any information that you want to include concerning the job title change

Position & Compensation Information

- Position: Change if applicable
- Suffix: 00
- Position Class: May be changed by Compensation
- Grade: May be changed by Compensation
- Step: 0
- Begin Date: Enter the same date that you entered in Effective Date in Effective Date & Employee Demographics Information
- End Date: Enter end date if applicable
- Job Title: Enter new job title
- Hourly Rate: Calculate and enter the hourly rate (click on text for help, if necessary)
- Annualized Salary: Enter annual salary
- Change Reason: POSTL

University Approval Signatures

- Obtain appropriate signatures

Termination

This option is to be selected when an employee leaves the university.

What should I do?

Recommended Action

- Check box next to Termination

Effective Date & Employee Demographics Information

- Effective Date: Enter the employee's end date
- Date Generated: Date that you printed the PAF will default
- Remarks: Enter any information that you want to include concerning the termination

Termination Information

- Term Code: Enter appropriate code (Click text to view list of available term codes)
- Last Day Worked: Enter the employee's end date
- University Specifics: You can ignore this field

University Approval Signatures

- Obtain appropriate signatures