Instructions for completing the Personnel Action Form (PAF)

Employee transactions are processed using the Personnel Action Form. Instructions for completing the Personnel Action Form are as follows:

Employment Classification: Click drop down for the appropriate employee's classification.

WORKFORCE DATA

1. **Employee Name:** Enter the employee's name as follows: **First, Middle, Last (e.g., Jane E. Doe)**.

2. **Employee ID:** Always enter the employee's 8-digit employee ID, not the employee's social security number. **When hiring new employees, leave this space blank.**

3. **Empl Rec #:** Enter the employee's Empl Rec #. If employees hold more than one position or job and works in multiple departments, they will have multiple Employment Record Numbers that correspond to each job worked.

4. **Effective Date:** Enter the date on which the action is to begin. In most cases, action start dates are effective on a Sunday.

5. **Expected Job End Date:** Enter the date on which the action is to end. If it is a permanent benefited position on state or trust funds, leave blank. For grant-funded positions, the appointment end date cannot exceed the grant end date. In most cases, appointment end dates are effective on a Saturday.

6. **Expected Return Date (Leaves Only):** Fill in this field ONLY if the employee is on a leave.

7. **Action Code:** Provide the action affecting this employee. If multiple actions are occurring at the same time, list all of them here in the order they should occur. Be sure each Action Code has a corresponding Reason Code indicated in the next field.

8. **Action Reason Code:** For each "action," there must be a specific "reason." Provide the Reason Code that corresponds to the Action Code affecting this employee. If multiple actions are occurring at the same time, list the Reason Code that corresponds to each Action Code here. Please note: All the Action/Reason combinations must be for the Effective Date indicated on the PAF.

9. **Comments:** Use this section to provide any additional data that may be relevant or helpful to have in the employee file. It does not take the place of putting in the correct Action/Reason codes.

POSITION DATA

1. **Department Name:** Enter employees' home department name.

2. **Department ID:** Enter corresponding department ID.

3. **Mail Drop ID (C#):** This is a code used by HR and the Mail Room for certain distributions.

4. **Position Number (Benefited Only):** If the position is benefited, enter the position number for the employee. Position number authorization comes from Office of Budget & Financial Planning (OBFP) unless grant funded. Contact Josephine Sturgis (7-5197) in HR if you have additional questions regarding position numbers.

5. **Position Title (Benefited Only):** If the position is benefited, enter the position number's corresponding position title.

6. **Business Title (Benefited Only):** If the position holds a title that is different from the Position Title, enter it here.

7. **Job Code (Non-Benefited Only):** If the position is non-benefited, enter the applicable job code. (See Job Code chart.)

8. **Position Title (Non-Benefited Only):** If the position is non-benefited, enter the job code's corresponding job code title.

9. **Standard Hours:** Enter the standard number of hours the employee is expected to work each week.

10. **FTE:** Enter the employee's FTE. The FTE is the employee's standard hours divided by the total number of hours a full-time employee is expected to work in that particular job code title or position title. (See "Standard Hours/FTE Chart.") An employee's total employment within the University, as well as all other State Agencies, cannot exceed 1.00 full-time equivalent.

11. **Union Code:** Enter the employee's union code. (See Union Code chart.)

REPORTS TO: For benefited employees, provide name and *position number* of Supervisor/Dept Head/Manager.

SUPERVISOR ID: For non-benefited employees, provide name and *employee number* of Supervisor/Dept Head/Manager.

COMPENSATION

1. **Salary Administration Plan (SAP Level) (Professional Benefited Positions):** This is the grade that was authorized by HR based on the job description provided.

2. **Salary Grade/ Salary Step (Classified Benefited Positions):** Enter the employee's salary grade based on the position.

3. **Bi-Weekly Rate*:** If compensation rate is bi-weekly, check the box and then enter the rate. Employees paid a bi-weekly rate are paid a salary (e.g., $1,345.50 bi-weekly with an annual salary of $34,983.00). Salaried employees are also known as *exception reporting* employees.

4. **Annual Rate:** If employee is paid a bi-weekly rate, multiply by 26 weeks; this is the number of pay periods in the calendar year.

5. **Hourly Rate*:** If compensation rate is hourly, check the box and then enter the rate. Employees paid an hourly rate are paid by the hour (e.g., $10.50 for each hour worked). Hourly employees are also known as *positive reporting* employees.

*Note: Do not check both "Bi-weekly" and "Hourly," employees can only be paid by one method.

Funding Source/Chartfields/Encumbrance Amount

1. **Past Funding:** If changing the funding source for the employee, list the current HR Combo Code(s) and percent breakdown. This is referred to as "Past Funding" because it will be replaced with the information provided in the Present Funding fields. Funding information can be found in the Department Budget Table panel.

2. **Present Funding:** For hires, rehires, reappointments, or if changing the funding source for the employee, list the new HR Combo and percent breakdown.

3. **Chartfield Information:** List the Chartfield Information (i.e., Fund, Department Chartfield ID, Program, Project/Grant), along with the amount being encumbered for the appointment.

    - State-funded appointments do not need an encumbrance amount listed.
    - Trust- and Grant-funded appointments require an encumbrance amount listed.
    - If paid ***bi-weekly***, and paid from ***state or trust funds***, calculate from effective date through the fiscal year end.
    - If paid ***bi-weekly*** from ***grant funds***, calculate from effective date through end of appointment (end date of appointment cannot fall beyond the end date of the grant period).
    - If paid ***hourly***, and paid from ***trust funds***, calculate based on hourly rate and standard hours per week from effective date through fiscal year end.
    - If paid ***hourly*** from ***grant funds***, calculate based on hourly rate and standard hours per week from effective date through end of appointment (end date of appointment cannot fall beyond the end date of the grant period).

    The Fund in the Chartfield indicates the type of fund (i.e., state, trust, grant). Fund numbers beginning with "1" as in 1xxxx are state funds. Fund numbers 51xxx are trust funds. Fund numbers 52xxx are either trust funds or UMB (internal) project funds. Fund numbers 53xxx are grant funds (external).

    Please use Chartfield Crosswalk to accurately fill out Chartfield Detail information:

    Go to this page: http://www.umassp.edu/connect
    Under the heading "Operational/Project Tools" choose Chartfield Lookup.

    Grant End Date (if a grant-funded appointment): For grant-funded positions only, enter the date the grant ends.

Prepared by Information: Enter the Contact Person, Phone Number and E-mail address. This will give HR an individual to contact if there are questions concerning the PAF.

Date: Enter the date the personnel action form was prepared.

Signatures: Have the appropriate designees sign and date the form where applicable.