# WINSTON-SALEM STATE UNIVERSITY

# Instructions for completing the Personnel Action Form

Many employee transactions are processed using the Personnel Action Form. Personnel Action Forms are to be initiated by departments and routed for the appropriate approvals whenever any of the following personnel actions are taken on an employee. If you need assistance with completing the form, please contact the Office of Human Resources.

    a.      **Appointments-** New specified time/title periods for the employee
    b.      **Reappointment-** Extension of current appointment
    c.      **Job assignment change**- a employee class or type change (i.e., Permanent to Temporary)
    d.      **Supplemental Pay Request**- Pay for additional duties outside of permanent job.
    e.      **One-Time Payment-** 1 month payment (i.e., Bonuses, Stipend, or Work Completed)

**Section I -**

**1. Employee Name:** Enter the employee's name as follows: **Last, First, Middle Initial, Banner ID**
                (e.g., Bender, Marian E.)
        *Note: If the employee does not have an ID number this is not the form to use*.

**2. Department Name:** Enter the official department name.

**3. Campus Address/Phone Number:** Enter the employee address on campus. If the employee is working remotely, please enter their location address.

**4. State Physically Working:** This is the State where the work is physically being completed (NC –North Carolina)

**5. Position Number:** Enter the position number based on the employee type. (If you are not 100% sure of position number then LEAVE THIS FIELD BLANK and budget will complete.)

***For temporary assignments please use the assigned temporary position number assigned to your department for student and non-student positions. All Federal Work Study Students use the same position number. For further assistance, contact the Budget Office. ***

***These numbers are used for extra compensation assignments for permanent employees only. ***

**Position XC1110:** Use for EHRA Non-Faculty employees ONLY **Account # 911140**
**Position XC1210:** Use for SHRA employees ONLY **Account # 912140**
**Position XC1310:** Use for Faculty employees ONLY **Account # 913140**

**Section II: Employee classification**

**1. Employment Class/Type:** Insert a ☑ in the appropriate box that describes the employee's classification.

- EHRA Non-Faculty – Exempt from the Human Resources Act in a staff role.
- SHRA Non-Exempt – Subject to the Human Resources Act in a staff role can earn comp time.
- SHRA Exempt- Subject to the Human Resources Act in a staff role that cannot earn Comp time.

# Instructions for completing the Personnel Action Form

- Undergrad Hourly – Any student (undergrad and graduate) working for hourly pay.
- Undergrad Flat- Any student (undergrad and graduate) working for a flat rate of pay.
- Full time – An employee working at least 30 hours per week.
- Part time – An employee working 29 or less hours per week.
- Non-Student Temporary Salaried – A non-permanent employee working for a flat rate.
- Non-Student Temporary Hourly – A non-permanent employee working for an hourly rate.
- Work Study- Any student awarded monies for Federal Work Study work for hourly pay.
- Affiliate - An individual not directly employed by the University but is granted access to confidential information to perform services for the University.
- Graduate Assistant- A graduate student that has been hired as a teaching or research assistant related to their field of study.

## Section III:  Assignment Status

**Action request:**  Insert a ☑ in the appropriate box that describes the action requested for the employee(s).

- Permanent- Employee who is leave/benefit earning.
- Temporary- A non-permanent employee
- Time limited- A permanent employee but is only employed for a specified time period.

**Action request:**  Insert a ☑ in the appropriate box that describes the action requested for the employee(s).

- Full time – An employee working at least 30 hours per week.
- Part time – An employee working 29 hours or less per week.

## Number of Hours Per Week

Specify how many hours per week the employee will work.

**Effective Date of Appointment/Service.** Enter the effective date on which the change will occur for the employee. Enter effective date if a change, or both begin and end date for work assignment periods.

## Section IV:  Nature of Action

**Action request: Check all that apply ☑**

- Appointment
- Reappointment
- Change of Status: a possible employee class or type change (i.e., Permanent to Temporary)

**Action request:**  Insert a ☑ in the appropriate box that describes the action requested for the employee(s).

## Compensation

- Supplemental
- One-time payment
- Retention Bonus: a one-time bonus paid to retain an employee.

# WINSTON-SALEM STATE UNIVERSITY
## Instructions for completing the Personnel Action Form

**Section V: Form Information**

The person completing the form should provide their name.
Check if this is a new form or a revised form (changing an existing assignment).
Add form completion date.

**Section VI: Reporting Information**
*****Only complete this section if it is for a New Hire or Promotion*****

Add Supervisor Name, Banner ID, and Position Number.

**Section VII: Time and leave Reporting and Approval**
Add timesheet/Leave Approver name here.
Add timesheet org number. (Typically, this information is your department org number or a sub department under your division)

*****If you are a new supervisor a Ram Tech ticket for Banner access will need to be completed. This allows you to be set up in Banner to gain access to your employee(s) timesheet/leave report.*****

**Section VIII: Salary, Budget, Contracts & Grants, Title III Information/Foundation**
- What is the total amount to be paid per pay period?
- How is the employee being compensated? (Choose one) Hourly, Monthly, One-Time Payment
- What is the total budgeted amount for the position?

**Funding**

Enter the FOAP (Fund, Organization #, Account #, Program) Activity Code may be required.
Enter the percentage to be paid from each FOAP

*****If you do not know the account and program number it will be entered by the campus funding office*****

*Routing for funding initials will depend on where your funds are coming from, reach out to the dept. to ensure you route to the correct person.*

Examples:
> State Funds will route to the Budget department.
> Grant Funds will route to the Contracts and Grants department.
> Title III Funds will route to the Title III department, **then** to the Contracts & Grants department.
> Foundation funds will be routed to the Foundation department, **then** to the Budget department.
> Board Action Required will be checked if the action has to receive Board of Trustee's approval (i.e. interim appointments)

# Instructions for completing the Personnel Action Form

Make sure the necessary department approvals are on your form. HR is not responsible for knowing who in your department should approve the form. If the signature and information is correct, we will process the form unless told otherwise.

**Section IX: Justification and Comments**

Add the detailed justification for the action and any additional information that HR or anyone in the routing queue should know. **IF** this is **funded through foundation** you **MUST PROVIDE** the Name & Account # of the fund in this section. Please attach any additional documentation about this action in the box indicated. (Signed contracts, etc...)

**Approval: (Note: Please reach out to the dept. BEFORE completing form to know who actually needs to sign off on the request)**
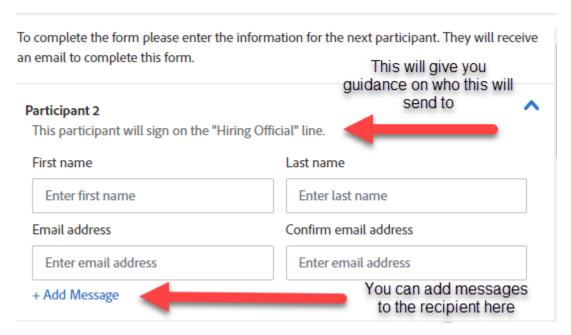
**Hiring Official -** is the supervisor/PI of the position, not necessarily the initiator of the form.
**Department Head/Director –** This could be the head of the department or the departmental budget approver.
**VC/Dean –** Route to the VC or Dean if they request to approve or is the hiring official's direct report.
**Office of Human Resources –** the action will be automatically route to the appropriate person that is responsible for the hiring of that employee type. **DO NOT add anyone from OHR on the routing queue for your action.** All forms automatically route to OHR after completion.

*NOTE: Federal Work Study, UG, and Temp actions ONLY require the Hiring Official, Department Head, the Campus Budget Office, and the Office of Human Resources approval.*

**The "Submit" button will only show up once all required fields are entered.**

## Assign to next participants

To complete the form please enter the information for the next participant. They will receive an email to complete this form.

This will give you guidance on who this will send to

**Participant 2**
This participant will sign on the "Hiring Official" line.

First name                          Last name

[ Enter first name ]                [ Enter last name ]

Email address                       Confirm email address

[ Enter email address ]             [ Enter email address ]

+ Add Message          You can add messages to the recipient here

# WINSTON-SALEM
## STATE UNIVERSITY

# Instructions for completing the Personnel Action Form

## Each Participant Line will indicate who that will need to route to. For Ex. Participant 4 is set up for Title III/Foundation Signature

**Participant 4**

This participant will sign/initial in the "Grants & Contracts", "Title III", or "Foundation" Box. AND they may add the FOAP information.

First name | Last name
Enter first name | Enter last name

Email address | Confirm email address
Enter email address | Enter email address

+ Add Message

## You can add notes to this specified recipient here

After everyone has approved the document, a final email will be sent from adobe sign with the completed document attached. IF you need to CANCEL the form, it can only be cancelled by the person whose queue it is in OR contact the OHR office to cancel.