

General Overview for Completing the Personnel Action Form

To access the most recent version of the Personnel Action Form, instructions for completion and samples, click the link below.

http://payroll.ua.edu/forms_guides.html#paform

Purpose: The primary purpose of the Request for Personnel Action, **PA form**, is to request and approve payment of wages to employees which include faculty, staff and students. Once an employee is hired, this form is used to record changes that affect an employee's pay, benefits eligibility, or job assignment, to name a few examples. Since the information on this form can affect an employee's paycheck, benefits, and receipt of other information such as state retirement and W-2s, it is critical that it be completed by the department accurately and in a timely manner.

- Always use the PA form located on the Payroll website to ensure you are using the most recent version of the form.
- Give ample time for routing of the PA to Payroll through all the approval channels and budget review.
- Attach any required documents such as W-4, A-4, direct deposit authorization, as well as any other document that provides needed approval or additional information, e.g. Approval Request for Supplemental or Occasional Pay Form.

Resources: Many answers to common questions on the PA form or the payroll process in general can be found on the Payroll website at <http://payroll.ua.edu/index.html>. Topics include Schedules; Forms & Guides; Helpful Links; Frequently Asked Questions; and Contact Information.

Routing: A PA form is typically completed at the departmental level for which an employee works. It is then routed through the appropriate approval channels for that department and at times to the vice president's office of that department. Next it takes one of the standard University routes depending on the type of employee.

Deadlines: It is important that Payroll receives a PA form by the published deadline to ensure timely payment to employees. This schedule can be found on the Payroll website at <http://payroll.ua.edu/payrollschedule.html>.

Copies: All PA forms should be submitted to Payroll in triplicate with all copies legible. Print the form on NCR paper for all copies.

Attachments: Do not staple attachments to the PA form. Paper clips or small binder clips are a good alternative to staples. Please do not use colored paper for any attachments. Also, each attachment should include the employee's CWID or SSN to ensure it is filed correctly. All I-9's should be sent directly to the Human Resources Service Center (G-69 Rose Administration Building).

Note: Tabs at the bottom of the form provide helpful resources such as listings of Employee and Position class codes, Account and Program numbers, etc.

Form Layout: There are 6 primary sections on the PA form which are explained in detail in the sections below.

A) Purpose of Personnel Action.....	pages 2-4
<i>The following fields are also included in Section A. Please refer to the corresponding page numbers for guidance.</i>	
(I) Requisition Number.....	page 4
(II) Budget Change Form Number.....	page 4
(III) Superseding PA.....	page 5
B) Employee Information.....	page 5
(I) Employee Retirement Information & Direct Deposit.....	page 5
C) Assignment Information	
(I) From.....	pages 6-7
(II) Appoint, Reappoint or Change to.....	pages 7-9
D) For Separation Use Only.....	page 9
<i>For Family Medical Leave, Military Leave & Other Leave, Termination Date is the only field required in Section D.</i>	
E) Comments.....	page 10
(I) Time and Attendance Approvers and Timekeepers.....	page 10
(II) Degree Information.....	page 10
(III) PA Prepared By.....	page 10
F) Approvals.....	page 10

A) Purpose of Personnel Action: Enter the appropriate code for the type action requested. Definitions for each of these action types are listed below. Please contact the Human Resources Service Center at (205)348-7732 with any questions concerning the appropriate Personnel Action type to be used.

[Click here](#) to view sample PA forms for all action types.

Code	Description	Definition
1	New Employee	<ul style="list-style-type: none"> Never worked for the University Works or has worked for UA in a student (undergraduate or graduate) capacity and is now hired into a faculty or staff position
2a	Extension of Appointment	<ul style="list-style-type: none"> Use only for extension of appointment ~Do NOT use if there is a break in service – use “2b” instead ~Do NOT use if there is a salary change – use “3” instead ~Do NOT use if there is a distribution change – use “5” instead
2b	Rehire	<ul style="list-style-type: none"> Returns to work at UA after <i>any break in service</i> which may include a termination or retirement
2c	Return from Leave	<ul style="list-style-type: none"> Employee returns from an approved leave <i>Note:</i> Indicate in the comments section what type of leave the employee is returning from. Make sure to complete this PA in a timely manner to avoid incorrect payment to employee.
3	Salary Change	<ul style="list-style-type: none"> Salary change is NOT the result of an assignment change Job duties have not changed Use for merit or equity increase, career ladder increase, etc. Even if the distribution changes as a result, it is still a salary change
4a	Promotion	<ul style="list-style-type: none"> Employee moved to a different job, OR Had a change of assignment, OR His/her job has been reclassified <p><i>With the end result being a job in a higher grade or classification</i></p> <p>For faculty, this includes a change in rank as well as a change to a department head and/or assistant/associate dean.</p>
4b	Position Modification	<ul style="list-style-type: none"> Employee’s position description has been modified <i>with the end result the same or lower grade or classification OR</i> Had only a title change
4c	Transfer	Employee moved to a different job at the same or lower grade or classification <i>even if the employee received a pay increase</i>
4d	Demotion	Employee placed by management in another job at a lower grade or classification
4e	Temporary Salary Change	<ul style="list-style-type: none"> Used to pay an employee a higher rate or salary while assuming a temporary or interim assignment as well as when returning the employee to his/her regular rate or salary upon completion of the temporary assignment ~Do NOT use “3” (Salary Change) or “4a” (Promotion) ~If the duration of the temporary salary increase is known, a second PA form should be attached to return the employee to his/her regular rate of pay
4f	Additional Assignment	Employee hired into a second part-time job in addition to the employee’s primary job. <i>Note:</i> The FTE for the second job cannot make the total FTE for the employee exceed 1.0. If the employee’s primary and secondary jobs are both hourly paid, any hours worked over 40 hours in a workweek are subject to UA’s overtime policy.
5	Labor Distribution Change	<ul style="list-style-type: none"> Changes to the labor distribution account number or salary charges If there is also a change in salary, use another action code that best describes the reason for the salary change e.g. “3” (Salary Change), “4a” (Promotion), etc.
6	Status Change	<ul style="list-style-type: none"> Change in employment status within the employee’s current assignment e.g. part-time to full-time or temporary to regular If changing from a student to a faculty or staff position, use Code 1

7	Summer/ Interim	All type “7” actions are for interim term or summer school teaching and administrative payrolls only. The assignments begin and end concurrently with the summer school schedule. <i>This is not used for hourly paid assignments.</i> Interim and Summer School assignments are paid on the last day of classes for the session appointed. Click here for complete instructions on completing Summer Faculty Teaching PAs
7a	Interim	
7b	1st Term SS	
7c	2nd Term SS	
7d	1st & 2nd Terms	
7e	Summer Research	<ul style="list-style-type: none"> • Use only for Summer Research – not teaching • Summer Research is paid on the last working day in the months May thru August. • Click here for complete instructions on completing Summer Faculty Research PAs
8a	Supplemental Pay	<ul style="list-style-type: none"> • Provide <u>any pay</u> in addition to an existing <u>full-time</u> employee’s primary job. <p><i>Special Notes:</i></p> <ul style="list-style-type: none"> • This could include a one-time or on-going special work assignment e.g. overload, consulting work, special projects for home department, special projects for other department in area of expertise as well as, including but not limited to, commissions, bonuses, or awards. • This does NOT include: <ul style="list-style-type: none"> ~Payment of overtime for non-exempt employees which should be recorded on the employee’s timesheet. ~A 2nd part-time job in addition to an employee's primary part-time job. The 2nd part-time job would be a “4f” (Additional Assignment). ~<i>The Occasional Pay “8b” action might be used for other situations involving paying individuals who do not have an ongoing work assignment. See the 8b definition for more information.</i> • All supplemental pay must be approved in advance of the work being performed by the appropriate vice-president, using the Approval Request for Supplemental or Occasional Pay Form. • The Approval Request for Supplemental or Occasional Pay Form, which can be found on the Payroll website, should be attached to the PA form except for teaching assignments. • Detailed instructions for completing Bi-weekly, Monthly and Multi-month Supplemental Pay PA forms can be found on the Payroll website. • The Faculty Supplemental Compensation Policy for Faculty can be found in the Faculty Handbook . • The Staff Supplemental Compensation Policy can be found on the HR website.
8b	Occasional Pay	<ul style="list-style-type: none"> • Provide pay to an individual for work/services to be performed which are of a very short-term nature (less than 3 weeks) and non-repetitive in nature, usually not more than 4 times in a 12 month period for the same assignment. <p><i>Special Notes:</i></p> <ul style="list-style-type: none"> • Examples might include the following: Payment to a UA student for a special one-time, short-term work assignment; Payment to a UA retired employee for work on a project that took 2 weeks to complete. • This does NOT include: <ul style="list-style-type: none"> ~Any pay for teaching or instruction to include classroom or online courses ~Any work assignment of more than 3 consecutive weeks

		<p>~Any pay in addition to an existing full-time employee's primary job which should be handled as "8a" (Supplemental Compensation)</p> <p>~A 2nd part-time job in addition to an employee's primary part-time job. The 2nd part-time job would be a "4f" (Additional Assignment)</p> <p>~Payment to an employee who had a recent active work assignment e.g. a student employee who just graduated</p> <ul style="list-style-type: none"> • All Occasional Pay must be approved in advance of the work being performed by the appropriate vice-president, using the Approval Request for Supplemental or Occasional Pay form. • The Approval Request for Supplemental or Occasional Pay form, which can be found on the Payroll website, should be attached to the PA form. • Detailed instructions for completing an Occasional Pay PA form can be found on the Payroll website.
9	Leaves	Employees going on leave must contact the Benefits Office
9a	Sabbatical Leave	<ul style="list-style-type: none"> • Employee has been approved for a sabbatical leave • A second PA form should be attached to return the employee to his/her regular appointment after his/her sabbatical leave <p><i>Note:</i> This mainly involves faculty. In some rare cases staff employees have been given sabbatical leave if individual credentials warrant such a leave and proper administrative approval had been given.</p>
9b	Family Medical Leave (FML)	<ul style="list-style-type: none"> • Employee goes off of payroll while on approved Family Medical Leave. Make sure this PA form and that the Return from Leave PA form are done on a timely basis to avoid incorrect payment to the employee. <p>~The FML policy can be found on the HR website.</p>
9c	Military Leave	<ul style="list-style-type: none"> • Employee goes on unpaid military leave <p>~Attach a copy of the leave orders to the completed PA form.</p> <p>~The Military Leave policy can be found on the HR website.</p>
9d	Other Leave Of Absence	Employee goes on any other unpaid Leave of Absence.
10	Voluntary Separation	<ul style="list-style-type: none"> • Employee resigns for any reason other than disability or retirement • This includes an employee who does not return to work after an approved leave or for an employee who has abandoned his/her job i.e. walked off the job or did not report to work for consecutive days with no notice to the department.
12	Disability	Employee has been approved for long term disability
14	Retirement	Employee has been approved for retirement
17	End of Temporary/ Contract Appointment	Employee had a contract or expectation for working a specific period of time which could be based on the availability of funds
20	Involuntary Separation	Employee terminated for any reason other than position elimination, reduction in force, department reorganization, etc.
30	Death	Employee died
33	Position Elimination/ RIF/Department Reorganization	<ul style="list-style-type: none"> • Employee is terminated due to position elimination, reduction in force or department reorganization. • This does NOT include an employee who was terminated due to an end of a temporary or contract appointment "17."

A(I) Requisition Number: If an employee is hired via one of UA's online recruitment systems, please insert the requisition number that corresponds to the position the employee is filling.

A(II) Budget Change Form Number: If needed.

A(III) Superseding PA: A Superseding Personnel Action Form (PA) is completed only to replace a PA that was submitted with an error, not to make changes during an active assignment, such as a salary or labor distribution change. The intent is to override the original PA with a superseding (correction) PA.

Check the Superseding PA box if the date of the change is the exact same date of the PA that was originally submitted OR if only the begin date needs to be corrected. On the left-hand side under section C, "Assignment Information From," put the information of the PA that was originally submitted and needs to be replaced. The left-hand side of a superseding PA should always have an assignment that needs to be stopped, or corrected in some way. This is vital information to ensure the correct assignment is replaced. Add the corrected assignment information to the right-hand side of the PA. Also, in the comments section, please describe the change. [Click here](#) to view an example.

B) Employee Information: Complete this section on all PA's.

Current employees are encouraged to make address changes through Employee Self-Service in [myBama](#). Employees may also complete and submit an [Address & Personal Information Change Form](#) to the Human Resource Service Center.

Field on PA	Instructions
SSN	Enter the employee's Social Security Number. It must agree with the number on the employee's Employment Authorization document e.g. Social Security card or passport.
CWID	Enter the CWID for the employee. If a new employee does not have a CWID, leave field blank and it will be assigned by Payroll. <i>Exception:</i> In OAA, the CWID must be on the PA form for <i>new faculty</i> . Click here for the form in order to obtain a CWID in advance.
Type of Employee	Indicate if the employee is a Faculty, Staff, or Student employee. Note: "Other (Non-Employee)" should ONLY be selected for Occasional Pay PA's.
Name	Enter the employee's full name as shown on his/her Employment Authorization document, e.g. Social Security card or Passport.
Suffix	Enter appropriate suffix, if known, e.g. Sr., Jr., III, PhD, Md. etc.
Title	Enter appropriate title for employee to be addressed, e.g. Mr., Mrs., Ms., Miss, Dr., Prof., etc.
Mailing List	Indicate if the employee should be included on or removed from the Deans, Directors, and Department Heads mailing list.

B(I) Employee Retirement Information & Direct Deposit: Complete the Employee Retirement Information and Direct Deposit sections for all new employees, rehires and occasional pay PA's. If an employee begins working at UA during an interim or summer school assignment, please complete these sections on those PA's as well.

Field on PA	Instructions
Employee Retirement Information	<ul style="list-style-type: none"> • If the new or rehired employee is currently or has been enrolled in the State Teachers Retirement System or the State Employees Retirement System of Alabama, indicate this in the appropriate box. • If the new or rehired employee is currently receiving retirement benefits from the Retirement Systems of Alabama, indicate this in the appropriate box. • The number of hours worked and the amount retirees are allowed to earn are limited. Click here for more information.
Direct Deposit Question <i>(If an employee does not have a bank account, his/her pay will be deposited to a Compass Bank PaySource card.)</i>	<ul style="list-style-type: none"> • All employees <u>except work-study students</u> are required to direct deposit their pay. • A PA form for a new employee should have a Direct Deposit Form attached along with a voided check. • If the employee has had a previous assignment with the University the direct deposit information already on file may be used by checking the box located on line 29 of the PA form. See below. <div style="text-align: right;">or use the deposit info currently on file. <input type="checkbox"/></div> • The employee's signature is required on the Payroll Direct Deposit form. • New employees will need to pick up their first check at the HR Service Center .

C) Assignment Information:

(I) From: Use this section for any change in assignment information for existing employees.

Note: This section should be completed for all employees who resign, retire, are terminated or will be temporarily removed from pay status.

Field on PA	Instructions
Position Number	Enter the position number that is being changed or terminated. Contact your departmental budget manager if you have questions.
Official Title/Rank	Displays the position title or rank of present assignment (Professor, Electrician I, Accountant II, Groundskeeper, etc). Note: The Official Title Rank will be displayed when the Position Class is entered. If “#N/A” displays, see Position Class instructions below.
Organization Name	Displays the Organization Name of present assignment. Note: The Organization Name will be displayed when the Organization No. is entered. If “#N/A” displays, see Organization No. instructions below.
Organization No.	Enter the Organization No. of the current assignment. Note: The Organization Name will be displayed when the Organization No. is entered. If “#N/A” displays in the Organization Name field, check the bottom of the “Acct & Prog” tab to verify that the correct Organization Number has been entered. If the Organization Number is not found, download the latest version of the PA form from the Payroll website. If the Organization Number is not in the current version of the PA form, notify your HR Partner.
Employee Class	Select the appropriate Employee Class for this position from the dropdown list. Note: See the “ECLS Code” tab on the bottom of the PA form for help in determining the proper employee class. It contains an Employee Class Matrix to help you determine the proper employee class in which to place the employee for the assignment being established or changed. Employee class determines the type of employee and their eligibility for University benefits. At the bottom of the matrix is a description of how to identify if an employee is Regular or Temporary and Full Time or Part Time, as well as a more detailed explanation of Faculty ECLS codes. As you begin working with the new ECLS codes you should see the logic involved in defining the codes.
Position Class	Enter the 5 character Position Class that corresponds to the Official Title/Rank for the position. <ul style="list-style-type: none"> If you do not know the Position Class code, search the “Posn Class” tab on the bottom of the PA form for an alphabetic listing of all job titles with their corresponding Position Class. Note: The Official Title Rank will be displayed when the Position Class is entered. If “#N/A” is displayed in the Official Title/Rank field, check the “Posn Class” tab to verify that the correct Position Class has been entered. If the Position Class is not found, download the latest PA form from the Payroll website. If the Position Class is not in the current version of the PA form, notify your HR Partner.
Total Salary	Enter Total Salary before the change. <ul style="list-style-type: none"> Regular Employees – Annual salary Temporary Employees – Total salary to be paid for that appointment
Monthly or Hourly Rate	Enter Monthly or Hourly Rate of pay before change. <ul style="list-style-type: none"> Partial Month pay for Monthly Employees: For monthly staff, including faculty members, pay for part of a month is calculated by dividing the number of workdays (Monday through Friday) an employee was in “paid status” in that month by the total number of workdays in that month. This fraction, consisting of “workdays in paid status” divided by “total work days in that month,” is multiplied by the employee’s normal pay for a full month. The result will be the employee’s pay for the partial month. ***There is one important exception to the explanation above. Faculty and Graduate Assistant pay for August and May of the regular academic year is calculated differently. They are paid exactly half of a month’s salary for August 16-31 and another half of a month’s salary for May 1-15.***

Distribution FTE	Enter the percentage of each existing distribution amount in relation to the entire amount.
FOAP	Enter the Fund, Organization, Account and Program numbers for the existing appointment before change is made. The list of FOAP's can be found on the Finance website, http://financialaccounting.ua.edu/ .

(II) Appoint, Reappoint, or Change To: Use this section for new employees or changes to existing employees.

Field	Instructions
Position Number	Enter the Position Number that is being changed or added to the employee. Contact your departmental budget manager if you have questions.
Official Title/ Rank	Displays the position title or rank of new assignment (Professor, Electrician I, Accountant II, Groundskeeper, etc). Note: The Official Title Rank will be displayed when the Position Class is entered. If "#N/A" displays, see Position Class instructions below.
Organization Name	Displays the Organization Name of new assignment. Note: The Organization Name will be displayed when the Organization No. is entered. If "#N/A" displays, see Organization No. instructions below.
Organization No.	Enter the Organization No. of the assignment being added or changed. Note: The Organization Name will be displayed when the Organization No. is entered. If "#N/A" displays in the Organization Name field, check the bottom of the "Acct & Prog" tab to verify that the correct Organization Number has been entered. If the Organization Number is not found, download the latest version of the PA form from the Payroll website. If the Organization Number is not in the current version of the PA form, notify your HR Partner.
Assignment/ Leave Dates	Begin: Enter the date this appointment or change becomes effective (effective at the beginning of work day of stated day unless otherwise noted). End: Enter end date of appointment or funds. <ul style="list-style-type: none"> • If there is no End Date because it is a regular appointment, enter "FN" for Further Notice. • If end date is for funds only, attach another Personnel Action form in order to continue appointment.
TIP	<i>For HR Use Only</i> – used to prompt an action in Banner to track an employee's time in position.
Composite FTE	Indicate employee's appointment in relation to full time employment for a particular position. 1.00000 – Full Time 0.75000 – Three Quarter Time 0.50000 – One Half Time 0.25000 – One Quarter Time OR, any percentage that accurately indicates the employee's expected participation in a job. <i>Note: Composite FTE is based on the regular number of hours a full-time employee is normally scheduled to work in a week for your department (40.00 hours or 38.75 hours).</i>
Hours in a Work Week	Enter the number of hours the employee is expected to work in a normal work week.
Total Salary	Enter Total salary <ul style="list-style-type: none"> • Regular Employees – Annual salary • Temporary Employees – Total salary to be paid for that appointment
Monthly or Hourly Rate	Enter the monthly rate of pay or hourly rate of pay depending on the employee's job code. Note: Monthly or Hourly Rate, Distribution FTE, and the Distribution Rate are entered in

	<p>the “Labor Distribution” tab on the PA form.</p> <ul style="list-style-type: none"> • Partial Month pay for Monthly Employees: For monthly staff, including faculty members, pay for part of a month is calculated by dividing the number of workdays (Monday through Friday) an employee was in “paid status” in that month by the total number of workdays in that month. This fraction, consisting of “workdays in paid status” divided by “total work days in that month,” is multiplied by the employee’s normal pay for a full month. The result will be the employee’s pay for the partial month. <p>***There is one important exception to the explanation above. Faculty and Graduate Assistant pay for August and May of the regular academic year is calculated differently. They are paid exactly half of a month’s salary for August 16-31 and another half of a month’s salary for May 1-15.***</p>
Position Class	<p>Enter the 5 character Position Class that corresponds to the Official Title/Rank for the position.</p> <ul style="list-style-type: none"> • If you do not know the Position Class code, search the “Posn Class” tab on the bottom of the PA form for an alphabetic listing of all job titles with their corresponding Position Class. <p>Note: The Official Title Rank will be displayed when the Position Class is entered. If “#N/A” is displayed in the Official Title/Rank field, check the “Posn Class” tab to verify that the correct Position Class has been entered. If the Position Class is not found, download the latest PA form from the Payroll website. If the Position Class is not in the current version of the PA form, notify your HR Partner.</p> <p>A complete list of Position Class codes and job titles can also be found on the Human Resources web site at www.hr.ua.edu. Select Compensation. Select Job Title & Class Codes.</p>
EEO Code	<p>Displays the EEO code that corresponds to the Official Title/Rank for the position.</p> <p>Note: The EEO Code will be displayed when the Position Class field is entered.</p> <p>A complete list of EEO codes and their job titles can be found on the Human Resources website at www.hr.ua.edu. Select Compensation. Select Job Title & Class Codes.</p>
Employee Class	<p>Select the appropriate Employee Class for this position from the drop down list.</p> <ul style="list-style-type: none"> • See the “ECLS Code” tab on the bottom of the PA form for help in determining the proper employee class. It contains an Employee Class Matrix to help you determine the proper employee class in which to place the employee for the assignment being established or changed. Employee class determines the type of employee and their eligibility for University benefits. At the bottom of the matrix is a description of how to identify if an employee is Regular or Temporary and Full-Time or Part-Time as well as a more detailed explanation of Faculty ECLS codes. As you begin working with the new ECLS codes you should see the logic involved in defining the codes.
Regular Employee with No Permanent Budget	<p>All Regular Full-Time and Regular Part-Time employees should be supported by a permanent budget.</p> <ul style="list-style-type: none"> • If employees classified as <u>Regular</u> have no permanent budget, then the box labeled “Regular Employee with No Perm Budget” should be checked. • Only employees where <u>prior approval has been granted</u> will be allowed to be classified as <u>Regular</u> with no permanent budget. • Approval for employees in Academic Affairs should be requested from the Provost Office. • Approval for all other employees should be requested from the Budget Office.
Distribution FTE	<p>Enter the percentage of each existing distribution amount in relation to the entire amount. The total of all distributions must equal 1.00000.</p> <p>Note: Monthly or Hourly Rate, Distribution FTE, and the Distribution Rate are entered in</p>

	the Labor Distribution tab of the PA form.
FOAP	Enter the Fund, Organization, Account and Program numbers for the existing appointment before change is made. The list of FOAP's can be found on the Financial Affairs website, http://financialaccounting.ua.edu/ .
Monthly Or Hourly Rate	<i>Note:</i> Monthly or Hourly Rate, Distribution FTE, and the Distribution Rate are entered in the Labor Distribution tab of the PA form.
SS - Summer School ONLY	This column is to be used only for summer school PA's. Enter the code for the summer school term next to the appropriate account distribution. You may also use a separate PA form for each term of summer school.
Other Amount	Indicate Supplemental Pay amount for one-time payment including summer school payments. <i>This should not be completed for regular appointments.</i> An Approval Request for Supplemental or Occasional Pay Form must be attached to the PA form.

D) For Separation Use Only: Complete this section when an employee resigns, retires, is terminated, or will be removed from pay status for any reason. *For Family Medical Leave, Military Leave & Other Leave, Termination Date is the only field required in this Section.*

Field	Instructions
Termination Date	Enter the last date through which the employee is to be paid. The payroll department will calculate amounts due the employee and issue appropriate payment. <ul style="list-style-type: none"> • If the employee is retiring, you may extend the termination to include annual leave days and keep the employee on the payroll during that time as long as the date does not exceed the 1st date of retirement. • If the employee is going off payroll due to an approved leave, use the date of the last day in a paid status. • If an employee does not return from an approved unpaid leave, the termination date will be the date the employee notified us they were not returning or the date of last day of the approved unpaid leave – whichever comes first.
Annual Leave Balance	Enter the amount of annual leave to which the employee is entitled.
Sick Leave Balance	For hourly employees only. Enter the amount of sick leave to which the employee is entitled. See Staff Handbook for payout guidelines.
Compensatory Time Balance	For hourly employees only. Enter the amount of compensatory time to which the employee is entitled. See Staff Handbook for limits on Compensatory Time accrual.
Forwarding Address	Enter the address to mail the employee's last paycheck, any subsequent correspondence, including the employee's W-2 Form, and all benefit eligibility information.

E) Comments: Enter any comments or instructions that will clarify the intent of the Request for Personnel Action. A complete explanation is required in this section for all Supplemental and Occasional Pay. Summer school appointments require course listings and/or administrative FTE in this section.

E(I) Time and Attendance Approvers and Timekeepers: Complete the section below for all new and transferred **non-exempt employee** assignments that are paid on the bi-weekly payroll. Enter the person who is responsible for approving the employee's work and leave time in the Approver slot. If your department also has timekeepers who are responsible for insuring that employee time is correct before it is approved, enter that person in the Timekeeper slot. *Note:* Timekeepers are optional.

Time and Attendance Approvers and Timekeepers - Complete for all NEW and Transferred Non Exempt Employee Assignments					
Approver: CWID	_____	Name	_____	Posn Nbr	_____
Timekeeper: CWID	_____	Name	_____	Posn Nbr	_____

E(II) Degree Information:

The Degree Information section of the Personnel Action form is to be completed for all **NEW FACULTY** (regular and temporary, full-time and part-time) and for any current **FACULTY** member who completes another degree. This data will be used by the University for reporting purposes. At this time it is not necessary to complete this section for any staff or student employees.

The fields to be completed to report Highest Earned Degree information are:

- **Highest Earned Degree:** When this field is selected click the down arrow ▼ to display the list of valid degrees that will be accepted. Select the highest earned degree from this list. The degrees listed in this drop down box are the only valid degrees that will be accepted.
- **Year Received:** Enter the year in YYYY format that the faculty member earned the degree.
- **Terminal Degree:** If the highest earned degree for this faculty member is a terminal degree check "Yes."
Note: The general rule is that doctorates and professional degrees (J.D. and M.D.) are considered terminal degrees. For all other degrees, consult with the respective Dean's office.
- **Tenure Status:** For Faculty ONLY. The Tenure Status check boxes near the bottom of the form are activated for information purposes only.

E(III) PA Prepared By: Enter name and contact information for person completing the PA form. *This information is vital to process the form timely.*

F) Approvals: All Requests for Personnel Action must be signed and dated by any department management responsible for authorizing payroll changes.