

# Instructions for Personnel Action Form (PAF)

Last Updated 20-MAR-2009

The PAF form is a web based application. The Oracle database is accessed to provide Lists of Values (LOVs) for various fields and to auto populate other fields. The PAF is being designed for future electronic routing, using Oracle Workflow. However, initially all PAFs will be printed and manually routed. Human Resource Services will prepare PAFs for Merit and P&S employees after receiving the required information from the departments.

Social security numbers are no longer used on the PAF. The Employee's University Identification Number (UID) is used to uniquely identify each employee. The UNI Username/UID Search transaction (WW19) can be used to look up UID's. If not found during the lookup process, contact Human Resource Services at 3-2422. To request the PAF transaction (MW04) and the Username/UID Search transaction (WW19), you need to complete the form titled, "Online Transactions Authorization," and send it to Human Resource Services, mail code 0034. This form is available in the Forms Repository.

Four versions of the PAF currently exist: New Appointment, Reappointment/Change Assignment, End Appointment and Special Compensation. The Summer Appointment PAF is still in development.

For **Special Compensations**, use the Special Compensation (available November 8, 2007). Please refer to the Special Compensation instructions document.

For **Summer Appointments**, refer to Instructions for Summer Session Personnel Action Forms, which are found on the MEMFIS and HR web sites.

For **employees with more than 1 assignment**, a separate PAF is needed for each assignment. If the employee has an assignment in one organization and now also has an appointment in another organization, use the New Appointment PAF. For example, if an employee taught in Physics and now also teaches in Biology, use the "New Appointment" PAF to add Biology. Using the "Reappointment/Change Assignment" PAF could incorrectly end the assignment in Physics.

If an employee's assignment stops at the end of the academic semester, use the "**Reappointment/Change Assignment**" PAF to reappoint the employee for the next semester. When completing this PAF version, current assignment information will display on the left side of the form and appropriate changes are entered into the "proposed" column. Because employment for Graduate Assistants is ended at the end of the spring semester, the New PAF version will need to be used for Graduate Assistants.

If the PAF is a **revision**, add a comment stating this PAF is a revision of PAF #. Do not reuse the original PAF. When preparing a PAF that is **retroactive**, describe in detail what needs to occur.

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**E) Special Compensation (refer to Special Compensation Instructions document)**

## A) Create New Appointment PAF

Log in to MyUniverse/My Transactions/Personnel Action Form (PAF). You must be authorized for transaction MW04 to access this form.

### Person Information

1. CLICK New Appointment Submit Button.
2. Enter Employee UID.
3. Enter Effective Date of action (hire date, etc.).
4. Create PAF.
5. Employee Name will appear.
6. If the name is spelled differently, Click on the box “Check here if name does not match current name” and enter the correct name. If the name is totally different from the name that appears, verify that you have entered the correct UID. If the UID was entered correctly, contact Human Resources for assistance.
7. Save, Go to Next.

**Note: The purple tabs can be used for navigation, but data will not be saved. You should use the Save buttons at the bottom of the form to create the PAF. Entering the Organization, Job Category, Position, and Salary Basis determine the values of other fields on the form. If you enter these incorrectly, you may need to create a new PAF to get the proper results.**

### Assignment Information

8. Enter Organization from List of Values (LOVs).
9. Effective Start Date will auto populate, but can be changed if the default is not correct.
10. Select Job Category from LOVs (Faculty, Faculty Non-Unit, Grad Asst (Dept), or Grad Asst (College), etc.) **Unit Faculty definitions can be found by clicking on the question mark.**
11. Save, Go to Next.
12. Select Position Title from LOVs. (The LOVs will be restricted by Organization and Job Category selected. Some Job Categories, such as Graduate Assistants do not have Positions).
13. Save, Go to Next.
14. If a Position has been selected, the following fields will default:
  - Grade (P&S and Merit only)
  - Job Title (P&S and Merit only)
  - Payroll (Monthly) (Biweekly is only for students)
  - Bargaining Unit (Unit Faculty, AFSCME, or blank)
  - Location (can select from LOVs)
  - Salary Basis
  - Supervisor (can select from LOVs)

15. For Job Categories that do not have related Positions (such as graduate assistants), select the following:
- Payroll is always Monthly (Biweekly is only for students).
  - Location defaults to Location of Organization (can select from LOVs).
  - Salary Basis (Select from LOVs).
  - Supervisor will default for the organization, but can change from LOVs.
16. Select Timecard Approver from LOVs (optional). If the time card approver is the same as the supervisor, the Timecard Approver should not be entered.
17. **Select Appointment Status from LOVs**
18. Enter Appointment Status Date
19. Select Assignment Category from LOVs (NT = non temporary and T = temporary). **Click on question mark for definitions**, which are also listed in the following table. If T Other is chosen, you must enter the specific pay schedule in the Additional Information section.

Assignment Category	Description
<b><i>Non Temporary</i></b>	
NT Calendar	Non Temporary Calendar Appt Paid in 12 Checks
NT AY 11 Pd 12	Non Temporary Academic Year (11 month) Appt Paid in 12 Checks
NT AY Pd 10	Non Temporary Academic Year (9 month) Appt Paid in 10 Checks (August - May)
NT AY Pd 12	Non Temporary Academic Year (9 month) Appt Paid in 12 Checks (Not an option for new hires)
NT AY 10 Pd 10	Non Temporary Academic Year (10 month) Appt Paid in 10 Checks (Aug-May)
NT AY 10 Pd 12	Non Temporary Academic Year (10 month) Appt Paid in 12 Checks (Not an option for new hires)
NT Hourly	Non Temporary Hourly
NT Fall	Non Temporary Fall Semester
NT Spring	Non Temporary Spring Semester
<b><i>Temporary</i></b>	
T Calendar	Temporary Calendar Appointment
T AY 11 Pd 12	Temporary Academic Year (11 month) Appt Paid in 12 Checks
T AY Pd 10	Temporary Academic Year (9 month) Paid 10 Paychecks (August - May)
T AY 10 Pd 10	Temporary Academic Year (10 month) Appt Paid in 10 Checks (Aug-May)
T Fall	Temporary Fall Semester
T Spring	Temporary Spring Semester
T Other	Temporary Other Schedule

20. Save, Go to Next.
21. Appt Length will auto populate based on Assignment Category for all Assignment Categories except T Other. For T Other, enter number of months from LOVs.
22. Assignment Status will usually be Active for all New appointments.
23. Enter Additional Assignment Information. Each PAF will have a unique PAF ID number. If you revise a PAF, please type “this is a revision of PAF xxx” in this section.
24. Save, Go to Next.
25. **Select Rank from LOVs.** (Non Applicable can only be used for Grad Assistants, Merit, and P&S.)
26. Enter Appt Expiration Date if appointment status = temporary, term, contract, or provisional.
27. **Enter Percent of Time or hours worked.** This number needs to be accurate because it is used for reporting and benefit eligibility. If you do not know the percent of time for academic appointments, check with the Provost Office for assistance. For graduate assistants, 10 hours equals 50% time and 20 hours equals 100% time.
28. Enter Appointment Salary or Hourly Rate.
29. Enter Additional Information. (If Assignment Category = T Other, the salary payments need to be included, i.e. pay \$2,000 in January and February and \$1,000 in March.)
30. Save, Go to Next.

### **Labor Distribution Schedule**

- The Labor Distribution Schedule must add up to 100%.
- This schedule indicates which account(s) will be charged, if the employee receives pay during pay periods which include the LD Start and End Dates. The LD Start and End Dates are not the same as the employee’s appointment Start and End Dates. For example, an employee’s appointment is 15-Jan-xx through 6-May-xx. The LD Schedule Start and End Dates are 15-Jan-xx through 31-May-xx. If the Labor Schedule is entered with an End Date of 6-May-xx, the Default LD Schedule for the organization will be charged 100% for the time period 7-May-xx through 31-May-xx.
- Because hourly employees frequently receive their final pay in the month following their last day, the End Date should also be the end of the month after their last day of work.

### **Using the Default Labor Distribution Schedule**

31. Default Labor Distribution Schedule will be populated based on Organization and Job Category. To accept the default schedule, click Save, Go to Next.

### **Using an Alternate Labor Distribution Schedule**

32. If an Alternate LD Schedule is required, click on the Create Alternate LD Section button. The Default LD Schedule will be copied into the Alternate LD Section. You can Edit this line or Delete the line completely. To edit a line, click the Edit button, enter the changes and click the Save button. To delete a line, click on the Delete button.
33. If the LD Schedule requires more than one line, enter the LD Schedule and click on the Add button. Continue adding lines as needed. All accounts must have the same end dates.

34. Click Save, Go to Next.

35. In the example below, the employee's salary is paid 25% from the 1<sup>st</sup> account and 75% from the 2<sup>nd</sup> account from 15-Jan-xx to 30-Apr-xx. Beginning 01-May-xx, 100% of the employee's salary is paid from the 1<sup>st</sup> account.

								<b>Percent</b>	<b>Start Date</b>	<b>End Date</b>
0011	00	22601	50210	0000	11	0000	000	25	15-Jan-xx	30-Apr-xx
4712	00	22601	50201	0000	31	0000	000	75	15-Jan-xx	30-Apr-xx
								100		
0011	00	22601	50210	0000	11	0000	000	100	01-May-xx	

36. LD Schedules are checked for valid combinations when saved. If the screen turns red, please make sure the combination you entered is correct. If you entered the account correctly and still receive the red error message, contact Tonya in Financial Accounting and Reporting Services at 3-6520. For grant accounts, contact Michele in Sponsored Programs at 3-6418.

### Foundation/Alumni Account

If the Fund is 9404, 9405, 9407 or 9409, you need to complete this section.

- 37. Enter Fund.
- 38. Enter Foundation/Alumni 6-digit account number.
- 39. Enter Amount.
- 40. Add.
- 41. Enter as many additional lines as needed.
- 42. Click Save, Go to Next.

### Educational Information

Educational Information is required by the Provost Office for all academic appointments.

- 43. Enter Degree, Institution, and Year.
- 44. Click Add Button.
- 45. Repeat for as many lines as needed.
- 46. Click Save, Go to Next.

### Approvals/Routing

47. Enter the approval names:

Every PAF should include the name of the Department Head or Director, whichever is appropriate. All academic departments should include the appropriate Dean for approval. Every PAF should include the appropriate Division Head. All **Graduate Assistants** should include the name Sue Joseph for Graduate College approval. For **Grants & Contracts**, which includes all funds 4000-6900, include the name of the Principal Investigator, and the name Michele Mullings-Shand for Grants & Contracts

Office approval; For UNI **Alumni Association**, fund 9404, include the name Mark Jastorff for approval; For **UNI Foundation**, funds 9405, 9407, & 9409, include the name Molly Wilson for approval.

48. Click on the Print Preview button and review before printing.

### **Print PAF**

49. **Print the PAF form on one sheet of paper (front/back)** and manually route for signatures (in an ink other than black.) If you do not have a duplex printer, please use your copier to make a duplex copy before routing.
50. After printing the PAF, click on the Back button to return to the PAF application. To complete another PAF, click on the Menu tab. To exit, click on the Back button and log out of MyUniverse.

## **B) Reappointment/Change Assignment**

Log in to MyUniverse/My Transactions/Personnel Action Form (PAF).

### **Person Information/Assignment Information**

1. Enter Employee UID and click Submit button.
2. Enter Effective Date of action.
3. Select the correct assignment if more than one is in the Assignment drop down box.
4. Create PAF.
5. Click Save, Go to Next.

The current assignment information will display in both the current and proposed columns. If the fields do not pre-populate, you will need to use the New Appointment PAF. Note: the application is displaying the wrong percent of time for graduate assistants. For graduate assistants working 20 hours (which is 100% time), only 50% is displayed. Please write the correct percentage after printing the form.

6. Enter information in the proposed fields only if the information is different than the information displayed in the current fields. Continue through the application, entering changes, as needed, and clicking Save, Go to Next. Note: The Appointment Status Date in most cases will not change. The Appointment Status Date should be changed when the Appointment Status changes (i.e. temporary to term). Changes which will usually need to be changed for temporary reappointments are: Assignment Category and Appointment Expiration Date.

### **Labor Distribution Schedule**

- The Labor Distribution Schedule must add up to 100%.
- This schedule indicates which account(s) will be charged, if the employee receives pay during pay periods which include the LD Start and End Dates. The LD Start and End Dates are not the same as the employee's appointment Start and End Dates. For reappointments, the LD Start Date must be the 1<sup>st</sup> day of the month and the LD End Date must be the last day of the month. For example, an employee's reappointment is 8-

Jan-xx through 4-May-xx. The LD Schedule Start and End Dates are 1-Jan-xx through 31-May-xx. If the Labor Schedule is entered with an End Date of 4-May-xx, the Default LD Schedule for the organization will be charged 100% for the time period 5-May-xx through 31-May-xx.

- Because hourly employees frequently receive their final pay in the month following their last day, the End Date should also be the End of the month after their last day of work

**Using the Default Labor Distribution Schedule**

7. If Current Labor Distribution Schedule is correct, no action is needed. The Default Labor Distribution is for informational purposes only.

**Using an Alternate Labor Distribution Schedule**

8. If Current Labor Distribution Schedule is **not** correct, Create Alternate LD Section. Click on the Create Alternate LD Section button. The Default LD Schedule will be copied into the Alternate LD Section. You can Edit this line or Delete the line completely. To edit a line, click the Edit button, enter the changes, and click the Save button. To delete a line, click on the Delete button.
9. If the LD Schedule requires more than one line, enter the LD Schedule and click on the Add button. Continue adding lines as needed. All accounts must have the same end dates.
10. Click Save, Go to Next
11. In the example below, the employee’s salary is paid 25% from the 1<sup>st</sup> account and 75% from the 2<sup>nd</sup> account.

								Percent	Start Date	End Date
0011	00	22601	50210	0000	11	0000	000	25	15-Jan-xx	30-Apr-xx
4712	00	22601	50201	0000	31	0000	000	75	15-Jan-xx	30-Apr-xx
								100		

12. LD Schedules are checked for valid combinations when saved. If the screen turns red, please make sure the combination you entered is correct. If you entered the account correctly and still receive the red error message, contact Tonya in Financial Accounting and Reporting Services at 3-6520. For grant accounts, contact Michele in Sponsored Programs at 3-6418.

**Note:** PAFs to change LD Schedules need to be done before they expire. When PAFs are created after the LD Schedule expiration date, the default LD account for the organization will appear in the current LD Schedule section. For example, if the LD schedule ends on 31-Dec-xx, and the PAF is created after 31-Dec-xx, the alternate LD Schedule will not be displayed in the Current LD Section because it has expired. If the PAF is created prior to 31-Dec-xx, the schedule will be displayed in the Current LD Schedule section of the PAF.

13. If the employee is currently paid from an Alternate Account and will now be paid from the default account, create an alternate account and enter the default account number.

### Foundation/Alumni Account

If Fund = 9404, 9405, 9407 or 9709, you need to complete this section.

14. Enter Fund
15. Enter Foundation/Alumni 6-digit account number
16. Enter Amount
17. Add
18. Enter as many additional lines as needed
19. Click Save, Go to Next

### Educational Information

Educational Information is required by the Provost Office for all academic appointments.

20. Enter Degree, Institution, and Year
21. Click Add Button
22. Repeat for as many lines as needed
23. Click Save, Go to Next

### Approvals/Routing

24. Enter the approval names:

Every PAF should include the name of the Department Head or Director, whichever is appropriate. All academic departments should include the appropriate Dean for approval. Every PAF should include the appropriate Division Head. All **Graduate Assistants** should include the name Sue Joseph for Graduate College approval. For **Grants & Contracts**, which includes all funds 4000-6900, include the name of the Principal Investigator, and the name Michele Mullings-Shand for Grants & Contracts Office approval; For **UNI Alumni Association**, fund 9404, include the name Mark Jastorff for approval; For **UNI Foundation**, funds 9405, 9407, & 9409, include the name Molly Wilson for approval.

25. Click on the Print Preview button and review before printing

### Print PAF

26. Print the PAF form on **one sheet of paper (front/back)** and manually route for signatures (in an ink other than black.) If you do not have a duplex printer, please use your copier to make a duplex copy before routing.
27. After printing the PAF, click on the Back button to return to the PAF application. To complete another PAF, click on the Menu tab. To exit, click on the Back button and log out of MyUniverse.

## C) End Appointment

Log in to MyUniverse/My Transactions/Personnel Action Form (PAF)

### Person Information/Termination Information/Approvals

1. Enter Employee UID and click Submit button
2. Enter Effective Date of action
3. Select the correct assignment if more than one is in the Assignment drop down box
4. Create PAF
5. Employee's name will be displayed. If correct, Click Save, Go to Next
6. Select Termination Reason from LOV's
7. Termination Date will default from Effective Date of action
8. Enter Last Day Worked. This will be different than the Termination Date for employees who have been on leave of absence.
9. Enter Termination Comments, as needed
10. Click Save, Go to Next
11. Enter the Approvals/Routing Section
12. Click on the Print Preview button and review before printing

### Print PAF

13. Print the PAF form on **one sheet of paper (front/back)** and manually route for signatures (in an ink other than black.) If you do not have a duplex printer, please use your copier to make a duplex copy before routing.
14. After printing the PAF, click on the Back button to return to the PAF application. To complete another PAF, click on the Menu tab. To exit, click on the Back button and log out of MyUniverse

## D) Labor Schedule Only

- The Labor Distribution Schedule must add up to 100%.
- This schedule indicates which account(s) will be charged, if the employee receives pay during pay periods which include the LD Start and End Dates. The LD Start and End Dates are not the same as the employee's appointment Start and End Dates. For example, an employee's appointment is 15-Jan-xx through 6-May-xx. The LD Schedule Start and End Dates are 15-Jan-xx through 31-May-xx. If the Labor Schedule is entered with an End Date of 6-May-xx, the Default LD Schedule for the organization will be charged 100% for the time period 7-May-xx through 31-May-xx.
- Because hourly employees frequently receive their final pay in the month following their last day, the End Date should also be the end of the month after their last day of work.
- PAFs to change LD Schedules need to be done before they expire. When PAFs are created after the LD Schedule expiration date, the default LD account for the organization will appear in the current LD Schedule section. For example, if the LD

schedule ends on 31-Dec-xx, and the PAF is created after 31-Dec-xx, the alternate LD Schedule will not be displayed in the Current LD Section because it has expired. If the PAF is created prior to 31-Dec-xx, the schedule will be displayed in the Current LD Schedule section of the PAF.

1. Log in to MyUniverse/My Transactions/Personnel Action Form (PAF)
2. Use Reappointment/Change Assignment PAF version
3. Enter Employee UID and click Submit button
4. Enter Effective Date of action
5. Select the correct assignment if more than one is in the Assignment drop down box
6. Create PAF
7. Employee's name will be displayed. If correct, Click Save, Go to Next
8. Click on the Assign Info Tab
9. Enter Assignment Change Reason = Labor Distribution
10. Click on LD Tab

Current LD Schedule indicates what is currently in effect. Default Labor Distribution is for informational purposes only. In the example below, the employee's salary is paid 56% from the 1<sup>st</sup> account and 44% from the 2<sup>nd</sup> account from 01-Aug-xx to 31-Dec-xx.

Current Labor Distribution										
								Percent	Start Date	End Date
3155	00	23601	50210	0000	91	0000	000	56	01-Aug-06	31-Dec-06
0011	00	23601	50210	0000	11	0000	000	44	01-Aug-06	31-Dec-06
								100		
Default Labor Distribution										
0011	00	23601	50210	0000	11	0000	000	100	21-Aug-06	

11. Click on the Create Alternate LD Section button. The Default LD Schedule will be copied into the Alternate LD Section. You can Edit this line or Delete the line completely. To edit a line, click the Edit button, enter the changes and click the Save button. To delete a line, click on the Delete button.

12. In the example below, we have created an Alternate LD Schedule to charge the 1st account 100% effective 1-Dec-xx

Current Labor Distribution										
								Percent	Start Date	End Date
3155	00	23601	50210	0000	91	0000	000	56	01-Aug-06	31-Dec-06
0011	00	23601	50210	0000	11	0000	000	44	01-Aug-06	31-Dec-06
								100		
Default Labor Distribution										
0011	00	23601	50210	0000	11	0000	000	100	21-Aug-06	
Alternate Labor Distribution										
3155	00	23601	50210	0000	91	0000	000	100	01-Dec-xx	31-Dec-xx

13. LD Schedules are checked for valid combinations when saved. If the screen turns red, please make sure the combination you entered is correct. If you entered the account correctly and still receive the red error message, contact Tonya in Financial Accounting and Reporting Services at 3-6520. For grant accounts, contact Michele in Sponsored Programs at 3-6418.
14. If the LD Schedule requires more than one line, enter the LD Schedule and click on the Add button. Continue adding lines as needed.
15. All accounts must have the same end date. If one account number ends, end all of the accounts. Click on Create Alternate LD Section again and enter the LD schedule for the next Start and End dates.
16. Click Save, Go to Next

### Foundation/Alumni Account

If Fund = 9404, 9405, 9407 or 9709, you need to complete this section.

17. Enter Fund
18. Enter Foundation/Alumni 6-digit account number
19. Enter Amount
20. Add
21. Enter as many additional lines as needed
22. Click Save, Go to Next

### Approvals/Routing

23. Enter the approval names:  
 Every PAF should include the name of the Department Head or Director, whichever is appropriate. All academic departments should include the appropriate Dean for approval. Every PAF should include the appropriate Division Head. All **Graduate**

**Assistants** should include the name Sue Joseph for Graduate College approval. For **Grants & Contracts**, which includes all funds 4000-6900, include the name of the Principal Investigator, and the name Michele Mullings-Shand for Grants & Contracts Office approval; For UNI **Alumni Association**, fund 9404, include the name Mark Jastorff for approval; For **UNI Foundation**, funds 9405, 9407, & 9409, include the name Molly Wilson for approval.

24. Click on the Print Preview button and review before printing

#### **Print PAF**

25. Print the PAF form on **one sheet of paper (front/back)** and manually route for signatures (in an ink other than black.) If you do not have a duplex printer, please use your copier to make a duplex copy before routing.

26. After printing the PAF, click on the Back button to return to the PAF application. To complete another PAF, click on the Menu tab. To exit, click on the Back button and log out of MyUniverse

For questions regarding PAF preparation, send a message to [paf-support@uni.edu](mailto:paf-support@uni.edu)