

# Instructions for Summer Session Personnel Action Form (PAF)

Last Updated 20-MAR-2009

A new PAF should be completed for each summer session an employee works. Faculty paid from the "summer budget" (0011 00 20011 object code 1040 11 0000, previously 00284) do not require a PAF for their salary unless they did not teach during the Spring semester. Faculty paid from funds other than the "summer budget" require a PAF for only the salary being paid from other funds, i.e. grant or departmental funds. Including the summer budget portion of their salary on this PAF may cause the summer budget to be charged twice! Employees with an academic year appointment cannot exceed 3/9's of their academic year salary for the summer (May-June-July).

**Effective 2008, the July administrative pay for Department Heads will need to be activated by a PAF prepared by each organization's secretary by June 1.**

PAFs are required for P&S summer appointments. The information for P&S employees should be submitted to Joan Johannes. (Joan.Johannes@uni.edu)

## **Instructional Guide: *Summer Session 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. Enter Employee UID.
2. Enter Effective Start Date of summer session appointment.
3. Create PAF.
4. Employee Name will be displayed. If correct, Click Save, Go to Next.

### **Summer Appointment Section**

5. Enter the following information in the Summer Appointment Section:
  - Total Amount (summer appointment salaries are based on the previous academic year salary)
  - Session Date\*
  - Percentage of Time
  - Organization paying Summer Appointment salary
  - Description of course and how the amount was calculated.
  - Click Save, Go to Next

\*Other Summer Appointment should be chosen only for summer appointments with start and end dates that do not match the standard sessions. In the Additional Assignment Information Section, enter the Begin and End dates, the Amount to be paid during each month, and how it was calculated. Summer Appt MJ6 and Summer Appt JJ6 should not be used for Grant Accounts, due to Effort Reporting.

## Labor Distribution Schedule

The Labor Distribution Schedule must add up to 100%. For Summer Appointment payments, the LD Start Date is the 1st day of the month the Summer Appointment is expected to be paid. The LD End Date is the last day of the month the Summer Appointment is expected to be paid.

6. The Summer Appointment Labor Distribution will default to the organization selected. If this is correct, Click Save, Go to Next. You do not need to enter the LD End Date. The Default Labor Schedule should only be used in the few instances where the summer appointment is charged to the employee's departmental account.
7. If the default is not correct,
  - Click Create Alternate LD Section.
  - The Default LD Schedule will be copied into the Alternate LD Section for you to edit.
  - To edit a line, click Edit, enter the changes and click Save.
  - If the LD Schedule requires more than one line, enter the LD Schedule and click Add. Continue adding lines as needed.
  - Click Save, Go to Next.

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 Gerbracht, 3-6520, in Financial Accounting and Reporting Services for assistance, [tonya.gerbracht@uni.edu](mailto:tonya.gerbracht@uni.edu) For grants accounts, contact Michele Mullings-Shand, 3-6418, in Sponsored Programs for assistance, [michele.mullings-shand@uni.edu](mailto:michele.mullings-shand@uni.edu)

## Foundation/Alumni Account

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

8. Enter the Fund.
9. Enter the Foundation/Alumni 6-digit account number.
10. Enter Amount.
11. Click Add.
12. Enter as many additional lines as needed.
13. Click Save, Go to Next.

## Approvals/Routing

14. Enter the approval names:
  - Summer Appointment Organization Manager (organization paying Summer Appointment).
  - Save.
  - Employee's Supervisor (click on the Assign Info Tab to see the employee's supervisor).
  - Principal Investigator (if grant account) Include the name of the Principal Investigator.
  - Dean or Director (for organization paying the Summer Appointment).
  - Foundation (if Fund = 9404, 9405, 9407 or 9409) For UNI Alumni Association, fund 9404, enter the name Mark Jastorff for approval; for UNI Foundation funds 9405, 9407, & 9409, enter the name Molly Wilson for approval.

- Graduate College (if grad assistant). Enter the name Sue Joseph for approval.
  - Grants & Contracts (if Fund = 4000-6900). Enter the name Michele Mullings-Shand for approval.
  - Budget (Mary Prenosil).
  - Division Head (for organization paying Summer Appointment).
15. Click on Print Preview and review before printing.

### **Print PAF**

16. 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.
17. 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.

### **Revised Appointments:**

If a PAF needs to be revised, open the original one submitted, make the changes, and submit for approval. Be sure to write "REVISED" on the top after printing.

To revise a salary or make a change to the "summer budget," submit a "revised" summer session sheet to the Provost Office.

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