

General Procedures for Processing Personnel Action Forms

Applies To All Regular Full-Time, Part-Time and Temporary Employees - Revised as of 10-15-09

Covers the following topics:

- 1. Position numbers, FOAPALs, and the Budget Office**
- 2. Process for arranging pay and benefits for new employees**
- 3. Student employees**
- 4. Miscellaneous notes**
- 5. Questions and Answers**

Position numbers, FOAPALs, and the Budget Office

- For all employees entering a position, the Budget Office must approve the position and the budgeted salary amount for the position prior to the PA arriving in HR. Regular position numbers are unique 6 digit numbers for each position beginning with a 9. New position numbers are created by the Budget Office.
- All regular positions will need to be funded prior to the completion of the PA form. Regular positions not funded, will be initially funded from the appropriate VP's departmental account by the Budget office. VP offices will then work with their departments to transfer funds from the appropriate sources
- Pooled positions use unique 6 alpha numeric characters for each expense FOAPAL (Fund, Organization, Account, Program, Activity, Location). Refer to Crosswalk to determine the type of pooled position number to use on the PA. Crosswalk can be found at <https://www.murraystate.edu/crosswalk/>. The Crosswalk links pooled position numbers to various types of positions (e.g. EAxXX- Adjunct, EExxx- Exempt Extra Comp, ENxxx- Non-exempt extra comp, etc.)
- For questions regarding position numbers contact the Budget Office at 3496.
- Attach documentation to the PA that explains how the position is to be funded.

Process for arranging pay and benefits for new employees

- Personnel Action Forms are available at http://campus.murraystate.edu/administ/accounting/luminis/Regular_Hire_PA.pdf
- PA's are due in HR before the dates listed on the Payroll calendar. The calendar includes the following: schedules per pay period for time report submission, approval completion, leave report submission, PA for completion and pay dates. Payroll calendars can be found on myGate under the Employee tab, Procedures Central.
- Mandatory forms required:
 1. I-9 Form (Mandatory within 3 working days of new employee's start date)
 2. W-4 & K-4 forms for federal and state withholding allowances and exemptions
 3. Direct Deposit (Mandatory)
- These and other forms are available on myGate Forms Central:
 1. Time Sheet Correction Form
 2. Late Time Sheet Request Form
 3. New or Changed Alternate Approver Form
 4. Notice of Personnel Action (PA) Form and instructions
 5. Student and Graduate Assistant Personnel Action Form and Instructions
- These and other procedures & schedules are available on myGate Procedures Central:
 1. Payroll Calendars – Biweekly and Monthly Payroll Calendar
 2. Pooled Positions crosswalk
 3. HR/Payroll System Contact lists
 4. Procedures Change List
 5. General Procedures for Processing Personnel Action forms

- Refer to the Instructions for completing a “Notice of Personnel Action” form on Forms Central.
- A Network Request form must be completed for new employees to logon to the Murray State network. <http://www.murraystate.edu/info/Network%20Request%20Form.pdf>
- myGate Login information can be obtained by contacting the Help Desk at 809-2346 or by clicking on the following link for instructions: <http://campus.murraystate.edu/mygate/support/accountassistant.htm>
- Allow 24-36 hours for login information to be available after the Personnel Action form has been entered into Banner.
- A timesheet approver must be included on the PA being processed. This approver is the person that will be approving time for the new employee indicated on the PA being processed. This approver can sometimes be different than the employee’s regular approver if he or she is doing extra work in another department.
- Extra Compensation – Full-time employees doing extra work should be marked for “Special Project” not “Appointment”. Also, before routing the PA for signatures, contact the Budget Office to acquire a Position number for employees doing extra work. Usually, these Position numbers for extra work begin with an Exxx. A regular employee should not be put into a position number that begins with a Txxx, which are for temps only.
- PA’s that have ending dates may now cross fiscal years. Previously, two PA’s were required; one for each fiscal year.

Student employees

- All students, including GA’s and federal work-study, are paid on Student Personnel Action forms. These forms are processed by the student employment area of the Student Financial Aid Department.
- All student payments will be paid on an hourly basis, except monthly-paid GA’s.

Miscellaneous notes

- New temporary employees must complete the full set of documents and instructions available online at <http://www.murraystate.edu/indir/hr/Temp%20instructions-forms%20after%20hire%2012%20pages%204-7-09.pdf>
- New regular hire checklist for setting up an employee: <http://www.murraystate.edu/indir/hr/New%20Hire%20Checklist%2012-5-08.pdf>
- Start dates for changes such as pay changes and transfers to a position must be effective on the 1st day of the next pay period. Persons newly hired to MSU can start anytime
- For a list of definitions for employment status please review the following policy: <http://www.murraystate.edu/indir/hr/p/NEWIIB.htm>
- For a list of the benefits based on HR status at: <http://www.murraystate.edu/indir/hr/benefits%20based%20on%20hr%20status%209-18-09.pdf>
- Faculty information (tenure, rank, etc.) is not tracked by HR.
- All adjunct payments, **employee or non-employee**, must be paid monthly during the semester.
- The Budget Office establishes and maintains position numbers.

A Few Questions and Answers

1. Who determines when someone will receive benefits and what benefits do they get? Is this strictly an HR decision and not the ones who start the process of the paperwork?

- The decision is based on the status of the position approved in the budget. The position status determines the benefits. (e.g., Regular part-time staff receive pro-rated sick and vacation pay but no medical insurance, and

temporaries receive no time off pay or any other benefit.) A chart is on-line that shows the various types of benefits available to persons working in various employment roles.

<http://www.murraystate.edu/indir/hr/benefits%20based%20on%20hr%20status%209-18-09.pdf>

2. Do we need to start attaching a copy of the "Request to Extend an Offer of Employment" to the PA so it is clear on the details, benefits, org, etc for everyone who has to sign the PA?

Good idea. Any info that would help us set up a job would be useful. Any odd characteristics or exceptions made to a typical job MUST be described in a document that accompanies the PA.

3. What do we need to do on all other PA'S where a search has not been done, what is the account- TE or TN and how long can they be employed for as a temporary? Do temporary full time get benefits?

Six months is the maximum number of months for staff temporaries (persons in TExXXX or TNXXX positions) unless an exception is made according to our policy. These persons are not eligible for benefits. One year hire faculty members (HR staff don't call these people "temporaries") can work for one academic year. They receive all the benefits available to regular faculty members

4. Academics is trying to include the new position numbers (999XXX), but we don't have access to the system. We were looking them up in the budget book, but recently found out not all the position numbers are in the budget book and some are incorrect. Should we leave off the position number and let HR fill that in?

No. Please do not leave off the position number. HR only inserts position numbers that are provided on PA's. The budget office handles position number assignments. Please contact the budget office if you are uncertain about a position number prior to creating the PA. Our goal is to have PORG available to VP and Deans' offices within the next 2 or 3 months, so that you can see your position numbers in real-time. Also, position numbers are not necessary (but they are helpful) when creating a PA for pooled positions (temps & student jobs) and grant-related jobs.

5. If a person is hired in an org that does not have a TE or TN line, does a BTR (Budget Transfer Request) need to be processed to move money to establish a TE or TN line before the PA is processed or as long as the salary is in the 601 they don't have to?

Position numbers will be created for any pooled position number, regardless if there is a funding source. Therefore a BTR is not needed to get a pooled position number created. However, departments are responsible for making sure adequate funding is available in each pooled position number.

6. There have been some problems with people getting paid. When an employee figures out they are paid wrong, they contact Payroll. The employees call payroll again to see what happened, are told it was coded wrong, and they have to have a memo from HR to tell Payroll to pay them. If payroll can see there was a mistake why does the employee have to get a memo from HR to get the amount paid to them? Can't HR and Payroll work this out between themselves?

If a paycheck has an error, Payroll should be contacted. We can not think of any circumstance when an employee would be asked to create a memo and send it to Payroll.

When errors occur, Payroll and HR need written documentation to account for changes made in the Payroll system. Either Payroll, HR, or the department administrative staff will arrange for documentation such as preparing a memo or having a new PA created.

7. We cannot check to see if employees are being paid correctly or if they are in the correct org number because there is no detail on the Payroll anymore. All we see in banner is a payroll summary. Who can we get the detail from? The account manager is responsible for balancing their account, but they can't see who or what they paid them.

Functional Departments and IT have had a difficult time getting this exact report together. However, Accounting is working to get an INB form tested and ensure security is working properly to make this info available for departments.

8. Several have had questions about incorrect postings to their account on scholarships, but wait months for answers, as they cannot get any detail to see who is hitting their scholarship accounts.

Scholarship details were not available in our legacy systems. However, with the student account portion of Banner going live for the fall 2009 semester, we hope to be able to make scholarship details available to select campus users during the next semester. This will most likely not be something available to the entire campus, but VP offices and/or select super users.

9. If changes are made anytime during the PA process, should the PA be sent back through again so everyone can see the changes?

Any changes greater than a minor one should require the PA to be sent through again. Minor changes are ones that do not cause any department to change their records of the transaction.

This procedure listing is a work in progress and will be updated or changed as needed. Changes to HR procedures will be posted on Personnel Matters.