Appointment Letters, PAFs, Employment Paperwork
Basic Timetable 2016-17

The following timetable is to help you remember when to fill out personnel paperwork and forms.

Fall Intersession (before Fall Semester)

March – Complete appointment letters and PAFs. Make copies for department files and forward originals to the Dean's office.

Census Date – 3rd Day of Class – Prepare PAFs for faculty teaching online classes.

Fall Semester

March – Instructor Reappointments – Complete reappointment memos and PAFs. Make copies for department files and forward originals to the Dean's office. Deadline is **March 15th.**

May – Complete appointment letters and PAFs. Complete I-9 form for **Per Course** faculty who did not teach the previous semester. For **new faculty and instructors**, you will need complete Federal & State W-4's, I-9 form, and Direct Deposit form. Make copies of letters and PAFs for department files and forward originals to Dean's office.

Census Date – September 19th – Prepare PAFs for faculty teaching online classes.

Second Block Census Date – October 26th – Prepare PAFs for faculty teaching online classes.

Spring Intersession (before Spring Semester)

October – Complete appointment letters and PAFs. Make copies for department files and forward originals to the Dean's office.

Census Date – 3rd Day of Class – Prepare PAFs for faculty teaching online classes.

Spring Semester

November – Complete appointment letters and PAFs. Complete I-9 form for **Per Course** faculty who did not teach the previous semester. For **new faculty and instructors**, you will need to complete Federal & State W-4's, I-9 form, and Direct Deposit form. Make copies of letters and PAFs for department files and forward originals to Dean's office.

Census Date – February 13th – Prepare PAFs for faculty teaching online classes.

Second Block Census Date – March 31st – Prepare PAFs for faculty teaching online classes.

Summer Intersession (before Summer Semester)

March – Complete appointment letters and PAFs. Make copies for department files and forward originals to the Dean's office.

Census Date – 3rd Day of Class – Prepare PAFs for faculty teaching online classes.

Summer Semester

April – Complete appointment letters and PAFs. Complete I-9 form for **Per Course** faculty who did not teach the previous semester (fall/spring). For **new faculty and instructors**, you will need to complete Federal & State W-4's, I-9 form, and Direct Deposit form. Make copies of letters and PAFs for department files and forward originals to Dean's office.

Census Date – June 22nd – Prepare PAFs for faculty teaching online classes.

Second Block Census Date – July 13th – Prepare PAFs for faculty teaching online classes.

Personnel Action Form

Top Left Corner
*Appointment – check box for any hire in department or special payment
*Reappointment – check box for returning instructor
*Change of Status – check box for tenure and/or promotion
*Separation/Termination – check box for voluntary or involuntary termination and retirement

Section 1
*Last Name, First Name MI – fill in full, legal name   * SSN – for new hires; BearPass # – for all others
*Home Address – only on new hires   *Date of Birth – do no fill out
*Campus Address – use faculty/staff office address   *Campus Phone – use faculty/staff office phone
*Department Name/Dept Org# – use home department/dept Org#
*Previously Employed – if you don't know, call Payroll to find out semester and year
*Check box for New Position/Replacement/Part Time if applicable

Section 2
*Proposed Rank – most used titles listed below
    Distinguished Professor – (mark faculty/tenure eligible)
    Professor – (mark faculty/tenure eligible)
    Associate Professor – (mark faculty/tenure eligible)
    Assistant Professor – (mark faculty/tenure eligible)
    Senior Instructor – (mark faculty/non-tenure eligible)
    Instructor – (mark faculty/non-tenure eligible)
    Staff – use university title for staff member – (mark support staff or administrative/professional)
    Non-Student Part-Time – (mark support staff)
    Supervisor of Clinical Experience (student teacher supervisors) – (mark faculty/non-tenure eligible)
    Per Course Faculty – (mark faculty/non-tenure eligible
    Graduate/Teaching/Research Assistant – (mark appropriate box)
*Effective Date – first day of work (FT faculty – week before semester starts). Fill this in if there is no end date to the appointment

Section 3
*Assignment Status – must check type of appointment and periodicity of appointment
*Fill in FTE% (Full Time Equivalent) – based on a 40 hour work week or 12 credit hour semester
*Period of Appointment – fill in if there is an end date to the appointment

Section 4
*Nature of Action – check all boxes that apply – Appointment; Reappointment; Change of Status; Leave; Separation/Termination; Compensation

Section 5
*Form Completion Date – date you filled out form   *New or revised form (if revised, explain)
*Person Completing Form – fill in your name

Section 6
*Time/Leave Approval – fill out only if employee will have a timesheet or leave report
*TS Org# – Employee's supervisor (if you don't know the number, call Payroll)

Section 7
*Compensation Amount – must have hourly rate on all non-exempt employees, check correct box
*Fill in FOAP and % for compensation amount (account codes are listed at the end of manual)

Section 8
*Comments – explanation of employee job; explanation of compensation if needed; letter(s) attached

Payroll Deadline: For payment on the 15th of the month, PAF is due to HR by the 20th of previous month
For payment at the end of the month, PAF is due to HR by the 5th of the month

Per Course BearPAF

If you need training on this, please go to a session. I'm just going address a few things specific to COAL. The COAL executive assistant will print out a copy of each Per Course BearPAF that comes to COAL, and will have those available in case you need a copy for your own records.

While the Per Course BearPAF is in process (before it is finalized by HR), approvers have no access to the Per Course BearPAF Argos reports, and don't receive notification when a Per Course BearPAF has been rejected or canceled. It is vital that you send notification to the COAL executive assistant when one is rejected or canceled. Forwarding the email you receive is sufficient for notification.

Once a Per Course BearPAF has been finalized by HR, you will have to submit a paper PAF to make changes or cancel the appointment.

You will have to submit a paper PAF to appoint staff to teach, non-student part time employees to teach, as well as student teaching supervisors to work. Staff that teach have a separate account code (61101), and non-student part time employees, as well as student teaching supervisors have to be coded as non-student part time (63000). Note that the correct title to use, per HR, for student teaching supervisors is "Supervisor of Clinical Experience". Supervisors of Clinical Experience will be set up with a timesheet to record their hours for tracking purposes, but they will be paid monthly like per course.

Graduate Assistant BearPAF

This is a much simpler process because approvers have the ability to go back to their history tab to see what is being/has been done with GAs. The COAL executive assistant gets a notification when a change has been made to a GA BearPAF, so you don't need to forward anything.

Graduate assistants have three account codes that can be used to appoint them (see account codes at the end of manual). Make sure that you code them appropriately. If a GA is teaching and also doing research or general GA work, make sure you put the whole amount of the stipend for the semester/year, and split the budget lines to 50% on one code and 50% on the other code.

For example, if a GA is teaching and doing research, and you are hiring them for a full academic year, you would put the full yearly stipend amount on the PAF, and then the first budget line would be at 50% for account code 63201 (teaching) and the second budget line would be at 50% for account code 63202 (research).

Student Stipend PAF for Online Teaching

The dates on the student stipend PAFs should be the start and end date for the semester
Check supplemental compensation box for full time faculty only; this is not supplemental for per course
Please make sure you use the following rates for your student stipend PAFs:

> One credit hour - $18.33 x number of students
> Two credit hours - $36.67 x number of students
> Three credit hours - $55.00 x number of students
> Four credit hours - $73.33 x number of students

Make sure you check the semester pay box for these stipends, not the one payment box
Make sure you put the calculation of the total pay in the comment section
For multiple classes on one PAF, separate the calculations out in the comment section for each class

Appointment Letters

New Assistant Professor and Instructor – Provost prepares letter
Artist in Residence/Visiting Professor – Provost prepares letter
Tenure & Promotion – Provost prepares letter
Sabbatical/Award – Dean prepares memo
Equity Adjustments – Dean prepares memo
Instructor Reappointment – Department Head prepares memo
Visiting Instructor – Department Head prepares memo

Dean's office will prepare PAFs for Department Heads, Administrative Assistants, COAL Staff, MFAA

New Tenure Track Faculty and Instructors

Follow search procedures and monitor application paperwork coming in
Once the candidate has been selected for hire, turn in hiring folder to COAL
Hiring folder should include the following paperwork:

> Position Announcement
> Candidate Application
> All uploaded documents from applicant
> Letters of recommendation (if required)
> All documentation of reference calls
> Hiring Guidelines for candidate

The official transcripts and background check paperwork does not need to be included with the folder.
Make sure the transcripts are submitted to the Provost Office. I will get copies for COAL personnel files.
Once you receive a copy of the signed contract letter from the Provost Office, prepare PAF
Send PAF and contract letter to COAL.

Employment Paperwork

Federal and State W-4 Forms – make sure forms are filled out correctly
For out of state employees teaching online, make sure you have them fill out their state W-4
I-9 Form – employee fills out first page
       Employer fills out second page
       Copies of identification must be included
       COAL executive assistant does all E-Verify (unless out of office, then budget officer can do it)
Direct Deposit Form – must have voided check or deposit slip with form

Do not hold up PAFs for employment paperwork. PAF and appointment letter can be turned in to COAL before doing employment paperwork.

COAL budget numbers

       A02000-102000-046: COAL Operating
       A02000-102000-61200-011: COAL Summer Instruction
       A02000-102000-61201-022: COAL Summer Research
       A02000-102000-61202-046: COAL Summer Supplemental
       A02000-102043-011: Online Stipend – Per Course and Summer School
       (If summer school, use account# 61200; if fall/spring semester, use account# tied to job title)

Account Codes for PAFs and BearPAFs

61000   Distinguished Professor
61001   Professor
61002   Associate Professor
61003   Assistant Professor
61004   Instructor
61005   Senior Instructor
61006   Visiting Faculty
61007   Research Faculty
61010   Supplemental – Faculty
61011   Faculty Administrator
61100   Per Course Faculty
61101   Staff Instruction
62001   Other Professional
62002   Technical and Paraprofessional
62003   Clerical or Secretarial
62004   Skilled Crafts
62006   Supplemental – Staff
63000   Non Student Part Time
63200   Graduate Assistant – non teaching
63201   Graduate Assistant – teaching
63202   Graduate Assistant – research