HRS Forms Training
Regular Payroll Processing

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HRS Forms Training

- General Overview
  - Types of Payrolls at MTSU
  - Personnel Appointment Form
  - Personnel Event Form
  - Questions and Answers

HRS Forms Training

- You need to know what kind of employee you are paying:
  - Types of Payrolls at MTSU
    - **Exempt Payroll** – (Monthly Salary) – Pays current (ex: 9/1 – 9/30 paid on 9/30).
      - Faculty, Administrative, Adjunct, Graduate Assistants, Extra Compensation and Summer School.
    - **Non-Exempt Payroll** (Monthly Hourly) – Pays with 2 week hold back (ex: 8/16 through 9/15 paid on 9/30).
      - Pays non-exempt employees who report hours in order to be paid. Ex: Classified, Students, Temporary Hourly employees.

HRS Forms Training

- Forms to use:
  - Personnel Appointment Form - PAF
    1. The PAF is an employment contract. All regular employees must agree to the terms and conditions outlined on the PAF agreement.
    2. Electronic PAFs are generated through the employment hiring process (positions that have been advertised) for regular administrative positions (exempt), classified positions (non-exempt) and faculty positions.
    3. Paper PAFs are generated at the department level when there is a hire without a search or internal transfer.

Appointment Form - PAF Completion Requirements

- What should accompany the PAF:
  - Faculty –When processing hire without a search
    - Academic Contract
  - Promotions
    - Supporting documentation with signatures
  - Transfers
    - Position support documentation
  - Athletic Coaches – When processing hire without a search
    - Athletic Contract - separate

Appointment Form – PAF
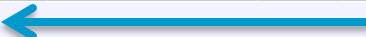## Only Used for Hires without Search

- PPAIDEN

Banner ID or SSN (last 4 digits) M	LAST NAME		FIRST NAME		MIDDLE	PREFIX	SUFFIX

	Street Address			City, State, Zip Code		Home Telephone	
PPAIDEN	MTSU Box No. (if any)		Building Code (see page 3)	Room Number		Campus Telephone	
	Sex: ○ Male ○ Female	Birthdate	Citizenship Select One:	Ethnicity: Hispanic/Latino ○ Yes ○ No		Edison ID (HR Only)	

Employee's Personal Email _____ Division Select one: _____
Department contact name _____ Department contact no. _____
Box no. _____ Contact e-mail _____ Department name _____

- Complete all sections.

Appointment Form – PAF
Only used for Hires without Search

- PEAEMPL

PEAEMPL	EMPLOYEE INFORMATION Select one:			
	Current Hire Date (First Work Date):		Home Dept. Org.:	Timekeeping Org.: **T**
	FOR HR USE ONLY			
	Adjusted Service (Accrual Date) Date:		Seniority (Longevity) Date:	
	First Worked Date (Local Experience Date):		IPEDS:	

- Use dropdown to select Hire or Rehire next to Employee Information.

- The home department org code and the timekeeping org code are not the same. The timekeeping org has a "T" in front of it and determines where the web time entry time sheet or leave report is housed and who can approve.

- Disregard the Adjusted Service, Seniority, First Worked Date and IPEDS.

Appointment Form – PAF
Only for Hires without a Search

■ PPAGENL

DEGREE INFORMATION: Enter for each degree earned (required for initial faculty, adjunct, or new degree)					
SBGI Code:		SBGI Code:		SBGI Code:	
Institution Name:		Institution Name:		Institution Name:	
Degree:	Deg. Date	Degree:	Deg. Date	Degree:	Deg. Date
Major:		Major:		Major:	
EXPERIENCE INFORMATION VPAA:		Other Higher ED:	Related Exp.:		CIP CODE: AA USE ONLY

❑ This section houses degree information and must be included for faculty. This information is used by Academic Affairs.

       SBGI Codes - can be located at the HRS website:
       http://hrs.web.mtsu.edu/BANNER%20CODES/index.html

Appointment Form – PAF
Only use for Hires without a Search

- NBAJOBS – *The most important kid on the block!*

JOB AND PAY INFORMATION						
Other				Faculty Part-Time		
Job Title:						

	Pay Dates		Position	Suffix	FTE	Monthly Salary	Annual Salary
NBAJOBS	Begin	End					

LABOR DISTRIBUTION: (Information purposes only - required for Academic Affairs)

INDEX #	AMT/PCT	INDEX #	AMT/PCT	INDEX #	AMT/PCT

- Use the "Other" dropdown to select transaction type.
- Do not use the "Faculty Part-Time Drop down. The position number will provide this information to HR.

Appointment Form – PAF

Let's take this next section piece by piece.
This section drives the payroll and how the individual is paid!

- NBAJOBS – *Pay Dates Rule!*

Job Title:						

NBAJOBS	Pay Dates Begin	End	Position	Suffix	FTE	Monthly Salary	Annual Salary

LABOR DISTRIBUTION: (Information purposes only - required for Academic Affairs)

INDEX #	AMT/PCT	INDEX #	AMT/PCT	INDEX #	AMT/PCT

- ❖ Enter the Job Title
- ❖ Enter the pay effective date in "Begin" date MM-DD-YYYY. Only enter an end date if the position is ending. Regular positions do not generally have end dates.
- ❖ For new regular employee contracts, you will always use the hire date as the begin date.
- ❖ Enter the position number, the monthly salary and the annual salary.
- ❖ Human Resources does not enter Labor Distribution information. That is done with the Budget office and controlled by the position number.

Appointment Form – PAF
Only used for Hires without Search

- Remarks – the more the better!

Remarks

- The remarks section can be used to clarify your payment intent. Any information that could be helpful to processing the payment is always encouraged.

✓ PAF – Block by Block

Contract Language – the individual is agreeing to the terms and conditions of employment. Mark the appropriate radio box, complete any blank sections.

Name _____ _____ _____ M# _____

⭕ **Contract for Administrative/Classified Employees:** In consideration of the stated salary, the appointee agrees to perform such duties at such times and places and in such manner as the institution through its representatives may from time to time direct. You further agree to faithfully perform the duties assigned to you to the best of your ability and to devote your full time to the institution, subject to the general supervision and pursuant to the orders, advice, and direction of the State of Tennessee and the policies and requirements of this institution. This appointment is made subject to the laws of the State of Tennessee and the policies and requirements of this institution. This appointment is for an unspecified period unless otherwise indicated and shall continue for such time as the institution is in need of or desirous of your services. This agreement may be terminated at any time during the first (6) six months of initial employment, and thereafter either the institution or the appointee may terminate this agreement without cause at any time upon _____ days notice. The institution reserves the right to impose a probationary period at any time during employment, during which prior notice of termination would not be applicable. The stated salary is payable in accordance with institutional policies.

It is a Class A misdemeanor to misrepresent academic credentials.

I agree to abide by the terms of the Drug-Free Workplace Act of 1988 as defined in published institution statements and policy. I also agree to notify the Human Resource Services Office of any criminal drug conviction for a violation occurring in the workplace no later than five days after such conviction.

I agree to comply with all applicable laws, policies, and guidelines including, but not limited to, those regarding the use of information technology resources and the confidentiality and integrity of information assets.

I agree to abide by the policies of Middle Tennessee State University regarding Intellectual Property and hereby acknowledge my responsibilities under those policies to disclose and possibly assign (as required under policy) Intellectual Property rights developed by me, either solely or jointly with others, during the term of my employment, and to otherwise assist MTSU as required by policy in protecting rights it may have in that Intellectual Property.

✓ PAF – Block by Block

❖ Contract Language – the individual is agreeing to the terms and conditions of employment. The individual must indicate whether or not they are employed by another State of Tennessee agency or TBR institution. This applies to regular benefited positions at another agency.

I ○ am ○ am not employed as a regular part-time or regular full-time employee at another state agency or institution (NOT local education or local government).
In order to process a payroll check, federal regulations require disclosure of your retirement system(s). If employed, where _____
I accept this appointment under the conditions described above. I understand that this appointment is not approved until all signatures have been obtained.
If I am granted access to Student Records in the course of my employment, I agree to comply with the provisions of MTSU Policy 500 Access to Educational Records, and I will complete the FERPA tutorial, http://www.mtsu.edu/resources/staff/ferpa/ within 30 days of the date of my signature.
Appointee's Signature_____ Date _____

❖ The employee would sign and date.

PAF Signature Requirements

AUTHORIZATION

Department Head*	Date	President	Date
PI	Date	Graduate Dean	Date
Dean	Date	Institutional Equity and Compliance	Date
Vice President	Date	Human Resource Services	Date

*For teaching assignments, signature denotes appointee meets MTSU and SACS requirements for English proficiency.

- Signatures Required
  - Administrative
    - Employee, Department Head, Dean (if applicable), VP
  - Classified
    - Employee, Department Head, Dean (if applicable), VP
  - Grant Positions
    - Employee, Department Head, Sponsored Programs, Dean (if applicable) and VP
  - Housing RA's
    - Employee, Department Head, Associate VP, VP

PAF Signature Requirements Continued

- Promotions – Classified and Administrative
  - Employee, Department Head, Dean (if applicable), VP
- Transfers
  - Employee, Department Head, Dean (if applicable), VP
- Athletic Coaches
  - Employee, Athletic Director, Athletic Business Manager and President
- Faculty
  - PAF – Department Head, Dean and VP

Electronic PAF – Page Up

- After advertisement, applicant pool, interviews, etc. are complete, the hiring manager completes information on the Offer Card regarding the candidate who has been selected.

- HR initiates a background check on the candidate and once complete, submits the offer to Equity and Compliance for approval.

- The hiring manager is notified once all approvals have been obtained and makes an employment offer.

- If accepted, the hiring manager changes the applicant selected status to accepted and HR will initiate the electronic contract for the candidate. The contract and offer letter are submitted to the candidate for "official" acceptance.

- Once accepted, HR Benefits sends out link for benefits processing and the candidate completes new hire form and onboarding tasks.

HRS Forms Training

- Forms to use:
  - Personnel Event Form - PEF
    1. The PEF is NOT an employment contract. The PEF is used for specific payments and changes.
    2. The PEF is used to terminate regular positions.
    3. The department will initiate the PEF, attach the required supplement forms and send through for signatures. HR should receive the executed PEF.

Personnel Event Form – PEF

- When to use the PEF
  - Terminations
  - Faculty Transactions
    - Faculty Promotions
    - Stipends
    - Rank Changes
    - Tenure Changes
    - Medical Leave of Absence – will be out for an extended time on sick leave
  - Other Changes
    - Housing Allowances
    - Coach Allowances
    - CAP Raises
    - Award Payments
  - Degree Changes
  - Extra Compensation

Personnel Event Form - PEF Completion Requirements

What should accompany a PEF?

- Faculty and Administrative Employee Terminations
  - A copy of the resignation letter or supporting documentation for termination
- Classified Employees
  - A copy of the resignation letter or supporting documentation for termination.
- Extra Compensation
  - Extra Compensation Payment Authorization Form
- Summer School
  - Should be processed through Continuing Studies

Personnel Event Form – Continued

- **What should accompany other PEFs?**
  - Faculty Transactions
    - Stipends/Rank/Tenure Changes – any support requesting the change
    - Medicare LOA – the employees written request
  - Housing Allowance
    - Housing Agreement
  - Coach Allowance
    - Contract agreement
  - Certified Administrative Professional (CAP) Increase
    - Official notification letter or email that includes membership number and notification date.
  - Awards
    - Must obtain a special position number from the Budget Office
    - Must request the funds be moved from Foundation to departmental restricted index.
    - Attach any support of above actions to PEF

Personnel Event Form- PEF Completion

Banner ID M		LAST NAME	FIRST NAME	MIDDLE	PREFIX	SUFFIX
Department contact name			Department contact no.	Department box no.		
Department contact e-mail		Department Name		Division Select one:		

- Complete all sections

JOB AND PAY INFORMATION

Action: Extra Compensation

NBAJOBS	PAYROLL DATES		Position	Suffix	Monthly Salary	Annual Salary
	Begin	End				

LABOR DISTRIBUTION: (Informational only—Contact Budget Office for changes)

Index #	Amt/Pct	Index #	Amt/Pct	Index #	Amt/Pct

Personnel Event Form- PEF Block by Block

- NBAJOBS – determines how the individual will be paid!

	JOB DATES		Position	Suffix	FTE	Hourly Rate (if applicable)	Monthly Salary	Annual Salary
	Begin	End						

JOB AND PAY INFORMATION

Action:
Select one:

(Row label: NBAJOBS)

- Banner processes payments based on the dates used. If you want someone to receive the full payment, you must use whole month dates. Ex: 8/1 – 8/31
- You must use the correct position number.
- If terminating a position, you only need to put the end date.

Personnel Event Form- PEF Block by Block

- PEAEMPL – Used for terminations

PEAEMPL	EMPLOYEE INFORMATION		
	Last Day Worked:	Termination Date (last date paid):	Termination Reason: Select one:

- Include the last day the employee physically worked. HR will calculate the last paid date.

Personnel Event Form- PEF Block by Block

- **Remarks – the more the better!**

Remarks

❖ The remarks section can be used to clarify your payment intent. Any information that could be helpful to processing the payment is always encouraged.

Personnel Event Form - PEF Signatures

- *Termination* PEF Signature Requirements
  - Faculty
    - Department Head, Dean and VP
  - Administrative
    - Department Head, Dean (if applicable) and VP
  - Classified
    - Department Head, Dean (if applicable) and VP
  - RA's
    - Department Head, Associate VP and VP

Personnel Event Form Pay Changes Signature Requirements

- **Housing Allowances**
  - Department Head and VP
- **Coach Allowances**
  - Athletic Director, Athletic Business Manager, President
- **CAP Raises**
  - Department Head, Dean (if applicable) and VP
- **Degree Changes**
  - Classified/Administrative
    - Department Head
  - Faculty
    - Department, VP
- **Summer Pay**
  - Department Head, Dean, Continuing Studies and VP
- **Extra Compensation**
  - Department Head, Dean (if applicable) and VP and VPAA
- **Award Payments**
  - Department Head, Dean (if applicable) and VP and VPAA

Regular Payroll Processing

- Questions and Answers

Thank You For Attending!

  - Contact Information
    - Human Resource Services Staff
      - Belinda Pate - 5713
      - Wendy Brown - 5134
      - Lisa Batey – 5712