

PERSONNEL ACTION FORM INSTRUCTIONS

The purpose of this form is to gather all information needed to make changes or additions of duty to current employees in one form for use by the following campus offices: Hiring Department, Departmental Chair/Supervisor, Departmental Dean/Director, Associate Vice President of Academic Support Services, Division Vice President, Vice President for Business Affairs, Controller, Human Resources Office and the Office of the President. This form will replace the following forms:

- *Staff/Service Hiring Request*
- *Departmental Appointment Request*
- *Departmental Appointment Change Request*
- *Instructional Staff Report Form*
- *Overload Form*
- *Independent Study Form*
- *Faculty Payment Contract*
- *Honors Course Payment Contract*

SECTION 1 (Personal Information):

Enter personal information for the proposed employee. All blanks are required, if known.

SECTION 2 (Reason for Action):

Please check all that apply. Glossary of terms listed below.

Glossary of Terms:

- Appointment (Continuous) – An appointment with an open-ended contract. (Ex.: exempt employee or faculty employee)
- Terminal Appointment – An appointment with a contract end-date. (Ex.: part-time temporary, or full-time temporary)
- Adjunct Appointment – An adjunct appointment for one semester.
- Promotion – An appointment of a current employee to a position with a higher grade than that of their current position.
- Demotion – An appointment of a current employee to a position with a lower salary grade than that of their current position.
- Tenure Granted – A status granted to a faculty member indicating that their position or appointment is permanent.
- Contract Extension – An extension of a terminal appointment.
- Resignation – To give up an office or position within the University.
- Labor Distribution Change – A change in the budget line for the position.
- Transfer – A change from one position to another in the same pay grade.
- Salary Change – A change in a salary other than a university-wide cost-of-living increase

Start Date – The proposed effective date of change or addition of duties for current employees.

End Date – The end of contract date (for Terminal Appointments, Contract Extensions, and Extended Leave only).

SECTION 3 (Payments):

Please check all that apply from a, and b. Glossary of terms listed below.

Glossary of Terms:

- Continuing Studies (CTST) – Compensation for teaching a Continuing Studies & Outreach course.
- Research Professional (RP) – Compensation as a Research Professional in the College of Business.
- Chair Supplement (CHRSP) – Compensation for faculty member who holds Department Chair status.
- Stipend (STIP) – A supplement to a faculty or staff contract for payment of other duties as assigned.
- One-Time Payment (OTP) – A payment for services rendered or a supplement paid in one payment.
- Independent Study (IND) – Compensation for teaching a course as an Independent Study.
- Clinical Assistant (CAST) – Compensation for assisting with a course in the College of Business.
- Honors Course (HNRS) – Compensation for teaching an Honors course.
- Instructional Staff (ISTF) – Compensation for staff members teaching as adjunct.
- Learning Communities (LRCM) – Compensation for teaching a Learning Communities course.
- Overload (OVLN) – Compensation for teaching an overload.

Start Date – The proposed effective date of change or addition of duties for current employees.

End Date – The end of contract date for each payment selected. (For tenure-track, no end date is required.)

SECTION 4 (Class Information):

If a selection was made in Section 3b, please enter class information here. Glossary of terms listed below.

- **Payment Type:** Please enter the payment type abbreviation here. Most payment type abbreviations correspond to choices in Section 4g. Abbreviations are listed below.

PAYMENT TYPE ABBREVIATION CODES	
ABBREVIATION	PAYMENT TYPE
BASE	Base Salary
CAST	Clinical Assistant
CTST	Continuing Studies
HNRS	Honors Course
LRCM	Learning Communities
RP	Research Professional
CHRSP	Chair Supplement
STIP	Stipend
OTP	One-Time Payment
OTHR	Other
IND	Independent Study
ISTF	Instructional Staff
OVLN	Overload
ADJFS	Adjunct-Fall/Spring
ADJSUM	Adjunct-Summer
GRNT	Grant

- **Course Number:** Please enter the course number for each payment type listed (only for payment types of Continuing Studies, Honors Course, Learning Communities, Independent Study, and/or Overloads).
- **# of Students:** Please enter the number of students for each payment type listed (if applicable).
- **Credit/Contact Hours:** Please enter the number of credit/contact hours for each payment type listed.
- **Payment Amount:** Please enter the monetary amount of pay for each payment type listed.

SECTION 5 (Proposed Employee Status):

Please complete this section **only** if requesting a change to the current employee’s status. Check one from a, b, and c.

Glossary of Terms:

- **Regular** – A proposed employee whose appointment is indefinite.
- **Temporary** – A proposed employee whose contract has an end-date. Enter number of hours worked, if selected. Assignment may be full-time or part-time. If full-time, health insurance must be offered if contract exceeds 60 days. If part-time, health insurance is not available.
- **Full-Time** – A proposed employee who will work at least 40 hours per week for 12 months per year (equal to 2,080 hours per year).
- **Part-Time** – A proposed employee who will work 19 hours or less per week. Enter number of hours worked, if selected.
- **Half-Time** – A proposed employee who will work 20-29 hours per week. Enter number of hours worked, if selected.
- **Staff Exempt** – An employee who is not subject to the time keeping and other provisions of the Fair Labor Standards Act (FLSA) because of the salary level and the nature of the work. (Exempt employees are not compensated for overtime.)
- **Staff Non-Exempt** – An employee who is subject to the time keeping and other wage and hour provisions of the FLSA. (Non-Exempt employees are compensated for overtime.)

SECTION 6 (Proposed Faculty Type):

Please complete this section **only** if requesting a change to the current employee's status. Please check one from sections e, f, and g if Faculty was selected in Section 5c. **If employee is adjunct, no selection is necessary.** Glossary of terms listed below.

Glossary of Terms:

- **Tenure-Track** – An appointment for a full-time faculty position subject to university policy on tenure and any provision in an individual contract of employment. Regular faculty have full entitlement to the rights, privileges, and benefits accorded faculty by the University.
- **Non-Tenure Track** – An appointment for a faculty position (full-time, half-time, or part-time) for a limited period of time--normally one term or one academic year--with the appointment terminating automatically at the end of the period specified. Non-tenure track faculty are not eligible for promotion or tenure, but do share-- during the period of employment-- the general responsibilities, privileges, and benefits accorded regular faculty.
- **Tenured** – An appointment for a full-time faculty position with a status of tenure included in the contract. Tenured faculty have full entitlement to the rights, privileges, and benefits accorded faculty by the University.
- **9 month** – A faculty contract that covers a nine-month period of time.
- **12 month** – A faculty contract that covers a twelve-month period of time.
- **Adjunct** – An appointment for a part-time faculty position specifying both the part-time workload and the period of time--normally one term--with the appointment terminating automatically at the end of the period specified. Adjunct appointments are limited to less than a full-time teaching load. Adjunct faculty are not eligible for promotion or tenure.
- **Half-Time** – A faculty contract for an appointment that is equal to half the teaching load of regular (tenure-track or non-tenure track) faculty positions. All half-time faculty positions will be considered non-tenure track. The contract will be for half-time of one school year (9 months) or full-time for one semester only.
- **Summer** – A summer faculty contract for current 9 month faculty employees only.
- **Administrator with Faculty Rank** – A faculty member with administrative responsibilities which includes: Dean of the College of Arts and Sciences, Dean of the College of Business, Dean of the College of Education, Dean of the College of Nursing and Allied Health, the Vice President for Academic Affairs and Provost, and the President of the University.
- **General Instructional Faculty** – Full-time faculty in the Colleges of Arts and Sciences, Education, and Nursing and Allied Health.
- **International Program Faculty** – Full-time, part-time, or half-time faculty in the Center for International Programs.
- **Kilby Faculty** – Full-time faculty in the College of Education who teach in the Kilby Laboratory School on campus.
- ***COB Acad Qual Participating** – College of Business academically qualified participating faculty member
- ***COB Prof Qual Participating** – College of Business professionally qualified participating faculty member
- ***COB Other Participating** – College of Business other participating faculty member
- **Ed Tech/Collier Faculty** – full-time positions in Educational Technology or Collier Library that hold faculty rank.
- ***COB Acad Qual Supporting** – College of Business academically qualified supporting faculty member
- ***COB Prof Qual Supporting** – College of Business professionally qualified supporting faculty member
- ***COB Other Supporting** – College of Business other supporting faculty member

**Definitions according to the University of North Alabama College of Business AACSB Faculty Qualifications document*

SECTION 7 (Proposed Position Information):

Please enter information in each blank, if known. Glossary of terms listed below.

Glossary of Terms:

- **Position Title** – The title of the position.
- **Department/Office Name** – The name of the current or proposed department or office of the current employee.
- **Rank (if Faculty)**: The rank of the proposed faculty member. Please choose your selection from the drop-down menu.
- **Name of Time/Leave Approver**: The name of the employee who will review and approve the time sheet or leave report of the proposed employee.
- **Total Annual Salary (Exempt/Faculty)**: The total amount of salary to be paid to the proposed employee over a time period of one year.

- **Hourly Rate (Non-Exempt):** The total amount of yearly salary to be paid to the proposed employee divided by the number of hours worked per year (2,080).
- **Grade (if Staff Exempt or Non-Exempt):** The salary grade as listed in the posting information. For a list of salary grades, please visit the HR Website at <http://www.una.edu/humanresources/files/forms-links/2008%20Pay%20Plan.pdf>.

SECTION 8 (Salary):

Please enter the base salary of the proposed employee. This will be the salary not including any supplements, stipends, etc. If table does not have enough lines, please continue the base salary in Section 9. Definitions of account types listed below in Section 9.

SECTION 9 (Additional Salary Components):

Please enter any additional salary components in this area.

Shift Differential: Please check yes or no to indicate if the proposed employee will be receiving a shift differential (to be used only for those positions that are regularly assigned to second or third shift).

Banner Salary Line Amount: Please enter the amount of money that is listed in the budget line for this position.

Banner Information Table:

- **Payment Type:** Please enter the payment type abbreviation here. Choose the correct payment type from the drop-down list. If a portion of the salary is being paid from a grant, please use the GRNT payment type.
- **FUND:** Please enter the Banner fund account number from which the payment for each payment type listed will be paid. *(Please leave blank if unknown.)*
- **ORGN:** Please enter the Organization code account number from which the payment for each payment type listed will be paid. *(This is a REQUIRED field).*
- **ACCT:** Please enter the Account code account number from which the payment for each payment type listed will be paid. *(This is a REQUIRED field).*
- **PROG:** Please enter the Program code account number from which the payment for each payment type listed will be paid. *(Please leave blank if unknown.)*
- **% EMP SALARY:** This section will be automatically calculated.
- **DOLLAR AMOUNT:** Please enter the dollar figure associated with each payment type.
- **TOTALS:** This section will be automatically calculated.

SECTION 10 (Approvals):

This section will be used by the different approval levels across campus. Approval levels are indicated by a numeral in parentheses (1) following a REASON FOR ACTION in Section 2 or a PAYMENT in Section 3. The definitions for Approval levels 1-3 are below. After signing the line that corresponds to your job title, please forward the Personnel Action Form to the next level for approval based on the approval level that corresponds to the action being taken.

Approval Level 1: REASONS FOR ACTION or PAYMENTS that have a (1) following will require approval signatures 1-9.

Approval Level 2: REASONS FOR ACTION or PAYMENTS that have a (2) following will require approval signatures 1-8.

Approval Level 3: REASONS FOR ACTION or PAYMENTS that have a (3) following will require approval signatures 1-3 and 6-8.