HRS Forms Training
Regular Payroll Processing
2019

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MTSU Human Resource Services
Sam H. Ingram Building, Box 35

Revised 10-2019
HRS Forms Training

- General Overview – What we plan to cover!
  - 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
  1. Exempt Payroll – known as the monthly payroll – pays exempt employees. Ex: Faculty, Administrative, Adjunct, Graduate Assistants, Extra Compensation and Summer School. The monthly payroll pays current.
  2. The Non-Exempt Payroll – known as monthly hourly payroll – pays non-exempt employees who report hours in order to be paid. Ex: Classified, Students, Temporary Hourly employees. Has a 2 week hold back.
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 outline on the PAF agreement.

2. The department will initiate the PAF, have the employee sign and send through for signatures. HR should receive the executed PAF.
Appointment Form - PAF

- When to use the Appointment Form - PAF:
  - New Hires
    - Administrative
    - Classified
    - Adjunct Faculty
    - Housing Resident Assistants (RA’s)
    - Promotions for Classified/Administrative
    - Transfers – If there is a pay change or change to another department
    - Athletic Coaches with Athletic Contract
    - Faculty with Faculty Contract
Appointment Form - PAF
Completion Requirements

What should accompany the PAF:

- Faculty
  - Academic Contract
- Promotions
  - Supporting documentation with signatures
- Transfers
  - Position support documentation
- Athletic Coaches
  - Athletic Contract
- Housing Resident Assistants
  - Resident contract
NOTE: If you do not have a Banner ID (M#), you can put the last 4 digits of the SSN or leave blank.
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.
### PPAGENL

<table>
<thead>
<tr>
<th>PPAGENL</th>
<th>Rank:</th>
<th>Tenure Date:</th>
<th>Tenure Status:</th>
<th>CP CODE AA USE ONLY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tenure</td>
<td></td>
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<tr>
<td>Information:</td>
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<tr>
<td>PEFACT</td>
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<tr>
<td>EEO Rank:</td>
<td></td>
<td></td>
<td>Rank Hire:</td>
<td></td>
</tr>
</tbody>
</table>

#### DEGREE INFORMATION

- Enter for each degree earned (required for initial faculty, adjunct, GA hire or new degree)

<table>
<thead>
<tr>
<th>SBGI Code:</th>
<th>SBGI Code:</th>
<th>SBGI Code:</th>
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<table>
<thead>
<tr>
<th>Institution Name:</th>
<th>Institution Name:</th>
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<table>
<thead>
<tr>
<th>Degree:</th>
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<th>Deg. Date</th>
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<th>Deg. Date</th>
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<tr>
<th>Major:</th>
<th>Major:</th>
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#### EXPERIENCE INFORMATION

<table>
<thead>
<tr>
<th>Other Higher ED:</th>
<th>Related Exp.:</th>
<th>MTSU Exp.:</th>
</tr>
</thead>
</table>

- This section houses degree information and must be included for faculty and adjunct contracts. 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](http://hrs.web.mtsu.edu/BANNER%20CODES/index.html)

- Administrative and Classified Human Resource Services Calculation
Appointment Form – PAF Block by Block

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

<table>
<thead>
<tr>
<th>JOB AND PAY INFORMATION</th>
</tr>
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<tbody>
<tr>
<td>Select job information:</td>
</tr>
<tr>
<td>Select pay information:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NBAJOBS</th>
<th>Pay Dates</th>
<th>Position</th>
<th>Suffix</th>
<th>FTE</th>
<th>Hourly Rate (if applicable)</th>
<th>Monthly Salary</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Begin</td>
<td>End</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>LABOR DISTRIBUTION: (Information purposes only - required for Academic Affairs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>INDEX #</td>
</tr>
<tr>
<td>---------</td>
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<tr>
<td></td>
</tr>
</tbody>
</table>

- Let’s take this section piece by piece. This section drives the payroll and how the individual is paid!
NBAJOBS – *Pay Dates Rule*

<table>
<thead>
<tr>
<th>NBAJOBS</th>
<th>Pay Dates</th>
<th>Position</th>
<th>Suffix</th>
<th>FTE</th>
<th>Hourly Rate (if applicable)</th>
<th>Monthly Salary</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Begin</td>
<td>End</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- The Banner payroll system uses pay dates to calculate or pro-rate pay. If you want someone to receive a flat payment, you must use whole month dates for the full payment to process. Example (8/1 – 8/31).
- If you use 8/15 – 8/31, Banner will prorate the payment amount.
- If you cross months, Banner will pay in both months. Example (8/15 – 9/15)
- For new regular employee contracts, you will always use the hire date as the begin date.
Remarks – the more the better!

- 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.

**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.

**Contract for Adjunct Faculty:** You are hereby appointed as an adjunct faculty member subject to the approval of the President and the conditions stated herein. This appointment is subject to the laws of the State of Tennessee and policies, rules, and regulations of Middle Tennessee State University. This contract is not binding until executed by both the appointee and Middle Tennessee State University and is contingent upon adequate funding and adequate enrollment in the sections you are projected to teach. This agreement may be terminated by the university without advance notice. Classes will begin on __________, 20___ and will end on __________, 20____, including examinations. In the event you cannot meet the class(es) at any scheduled time, you must immediately contact your department head. Any absenteeism will be reflected in your rate of pay. Adjunct faculty are paid in three payments in Fall beginning October 31 and three payments in Spring beginning February 28, with the last payment being made after all obligations to the University have been discharged. Payment for S1–May Term and Summer is made at the end of the month following the session taught after all obligations to the University have been discharged. Employees of other state agencies will be paid in accordance with agreement between MTSU and the other state agency.

Level of Appointment __________________________ Rate per credit hour $ __________________________ - # of credit hours __________
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.
# PAF Signature Requirements

**Signatures Required**

- **Administrative**
  - Employee, Department Head, Dean (if applicable), VP

- **Classified**
  - Employee, Department Head, Dean (if applicable), VP

- **Adjunct Faculty**
  - Employee, Department Head, Dean and VP

- **Grant Positions**
  - Employee, Department Head, Sponsored Programs, Dean (if applicable) and VP

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### Signature Requirements Table

<table>
<thead>
<tr>
<th>Department Head*</th>
<th>Date</th>
<th>President</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI</td>
<td>Date</td>
<td>Graduate Dean</td>
<td>Date</td>
</tr>
<tr>
<td>Dean</td>
<td>Date</td>
<td>Institutional Equity and Compliance</td>
<td>Date</td>
</tr>
<tr>
<td>Vice President</td>
<td>Date</td>
<td>Human Resource Services</td>
<td>Date</td>
</tr>
</tbody>
</table>

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

- Housing RA’s
  - Employee, Department Head, Associate VP, VP
- Promotions – Classified and Administrative
  - Employee, Department Head, Dean (if applicable), VP
- Transfers
  - Employee, Department Head, Dean (if applicable), VP
- Athletic Coaches
  - Athletic Contract is separate from PAF
  - Employee, Athletic Director, Athletic Business Manager and President
- Faculty
  - Faculty Contract is separate from PAF
  - PAF – Department Head, Dean and VP
Job begin and end date

- **Adjunct Faculty** – Paid in three month contracts (10/1 - 12/31) or (2/1 – 4/30).
- **Suffix Number** – HRS entry - always 00 unless paying two different rates under the same position number for the same time period. Each additional rate would be next suffix (01, 02 etc.).
- **FTE** – Percentage of full-time – not needed for adjunct payment
- **Salary** – this is the total amount to be paid to the individual. The salary is divided by the number of payments indicated in the pay dates section.
- If making a payment that is not attached to credit hours, you must include an Hours Verification Form located on the HRS web page. All payments made by MTSU must have an hours attachment for ACA tracking.
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
  - Summer Pay
  - 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
  - Certified Administrative Professional (CAP) Increase
    - Official notification letter or email that includes membership number and notification date.
Personnel Event Form – Completion Requirements

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.

- Extra Compensation
  - Extra Compensation Payment Authorization Form

- 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

- Summer School
  - Should be processed through Continuing Studies
Personnel Event Form - PEF
Block by Block

<table>
<thead>
<tr>
<th>Banner ID M</th>
<th>LAST NAME</th>
<th>FIRST NAME</th>
<th>MIDDLE</th>
<th>PREFIX</th>
<th>SUFFIX</th>
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<tbody>
<tr>
<td>Department contact name</td>
<td>Department contact no.</td>
<td>Department box no.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department contact e-mail</td>
<td>Department Name</td>
<td>Division</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select one:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Personnel Event Form- PEF Block by Block

- NBAJOBS – determines how the individual will be paid!

- 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

<table>
<thead>
<tr>
<th>EMPLOYEE INFORMATION</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Day Worked:</td>
<td>Home Dept Org:</td>
</tr>
<tr>
<td>Termination Date (last date paid):</td>
<td>Timekeeping Org:</td>
</tr>
<tr>
<td>Termination Reason (see page 2):</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Select one:</td>
</tr>
</tbody>
</table>

| FOR HRS USE ONLY                     |               |
| Adjusted Service Date:               | Seniority (Longevity) Date: |
| Local Experience Date:               |               |

- Include the last day the employee physically worked. HR will calculate the last paid date.
Remarks – the more the better!

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
Regular Payroll Processing

Questions and Answers

Thank You For Attending!

Contact Information

- Human Resource Services Staff
  - Belinda Pate - 5713
  - Becky Young – 7627
  - Wendy Brown - 5134
  - Lisa Batey – 5712