





## WINSTON-SALEM STATE UNIVERSITY

### Instructions for completing the Personnel Action Form

- Undergrad Hourly – Any student (undergrad and graduate) working for hourly pay.
- Undergrad Flat- Any student (undergrad and graduate) working for a flat rate of pay.
- Full time – An employee working at least 30 hours per week.
- Part time – An employee working 29 or less hours per week.
- Non-Student Temporary Salaried – A non-permanent employee working for a flat rate.
- Non-Student Temporary Hourly – A non-permanent employee working for an hourly rate.
- Work Study- Any student awarded monies for Federal Work Study work for hourly pay.
- Affiliate - An individual not directly employed by the University but is granted access to confidential information to perform services for the University.
- Graduate Assistant- A graduate student that has been hired as a teaching or research assistant related to their field of study.

#### Section III: Assignment Status

**Action request:** Insert a  in the appropriate box that describes the action requested for the employee(s).

- Permanent- Employee who is leave/benefit earning.
- Temporary- A non-permanent employee
- Time limited- A permanent employee but is only employed for a specified time period.

**Action request:** Insert a  in the appropriate box that describes the action requested for the employee(s).

- Full time – An employee working at least 30 hours per week.
- Part time – An employee working 29 hours or less per week.

#### Number of Hours Per Week

Specify how many hours per week the employee will work.

**Effective Date of Appointment/Service.** Enter the effective date on which the change will occur for the employee. Enter effective date if a change, or both begin and end date for work assignment periods.

#### Section IV: Nature of Action

**Action request: Check all that apply**

- Appointment
- Reappointment
- Change of Status: a possible employee class or type change (i.e., Permanent to Temporary)

**Action request:** Insert a  in the appropriate box that describes the action requested for the employee(s).

#### Compensation

- Supplemental
- One-time payment
- Retention Bonus: a one-time bonus paid to retain an employee.



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### Section V: Form Information

The person completing the form should provide their name.  
Check if this is a new form or a revised form (changing an existing assignment).  
Add form completion date.

### Section VI: Reporting Information

**\*\*\*Only complete this section if it is for a New Hire or Promotion\*\*\***

Add Supervisor Name, Banner ID, and Position Number.

### Section VII: Time and leave Reporting and Approval

Add timesheet/Leave Approver name here.  
Add timesheet org number. (Typically, this information is your department org number or a sub department under your division)

**\*\*\*If you are a new supervisor a Ram Tech ticket for Banner access will need to be completed. This allows you to be set up in Banner to gain access to your employee(s) timesheet/leave report. \*\*\***

### Section VIII: Salary, Budget, Contracts & Grants, Title III Information/Foundation

- What is the total amount to be paid per pay period?
- How is the employee being compensated? (Choose one) Hourly, Monthly, One-Time Payment
- What is the total budgeted amount for the position?

### Funding

Enter the FOAP (Fund, Organization #, Account #, Program) Activity Code may be required.  
Enter the percentage to be paid from each FOAP

**\*\*\*If you do not know the account and program number it will be entered by the campus funding office\*\*\***

*Routing for funding initials will depend on where your funds are coming from, reach out to the dept. to ensure you route to the correct person.*

### Examples:

State Funds will route to the Budget department.  
Grant Funds will route to the Contracts and Grants department.  
Title III Funds will route to the Title III department, **then** to the Contracts & Grants department.  
Foundation funds will be routed to the Foundation department, **then** to the Budget department.  
Board Action Required will be checked if the action has to receive Board of Trustee's approval (i.e. interim appointments)



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Make sure the necessary department approvals are on your form. HR is not responsible for knowing who in your department should approve the form. If the signature and information is correct, we will process the form unless told otherwise.

### Section IX: Justification and Comments

Add the detailed justification for the action and any additional information that HR or anyone in the routing queue should know. **IF** this is **funded through foundation** you **MUST PROVIDE** the Name & Account # of the fund in this section. Please attach any additional documentation about this action in the box indicated. (Signed contracts, etc...)

### Approval:

**Hiring Official** - is the supervisor of the position, not necessarily the initiator of the form.

**Department Head/Director** – This could be the head of the department or the departmental budget approver.

**VC/Dean** – Route to the VC or Dean if they request to approve or is the hiring official’s direct report.

**Office of Human Resources** – the action will be routed to the appropriate person that is responsible for the hiring of that employee type.

**NOTE: Federal Work Study, UG, and Temp actions ONLY require the Hiring Official, Department Head, the Campus Budget Office, and the Office of Human Resources approval.**

The “Submit” button will only show up once all required fields are entered.

See screenshots below to complete the routing queue.

### Assign to next participants

To complete the form please enter the information for the next participant. They will receive an email to complete this form.

#### Participant 2

This participant will sign on the "Hiring Official" line.

This will give you guidance on who this will send to

First name

Last name

Enter first name

Enter last name

Email address

Confirm email address

Enter email address

Enter email address

+ Add Message

You can add messages to the recipient here



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**Each Participant Line will indicate who that will need to route to. For Ex. Participant 4 is set up for Title III/Foundation**

Participant 4

Signature

This participant will sign/initial in the "Grants & Contracts", "Title III", or "Foundation" Box. AND they may add the FOAP information.

First name

Last name

Email address

Confirm email address

[+ Add Message](#)

**You can add notes to this specified recipient here**

After everyone has approved the document, a final email will be sent from adobe sign with the completed document attached. IF you need to CANCEL the form, it can only be cancelled by the person whose queue it is in OR contact the OHR office to cancel.