

Personnel Action Form (PAF) and Position Requisition (PR)

Interim Procedure for Processing

Presented by the Office of Human Resources

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Personnel Action Form (PAF)

Why this is Necessary

- ❑ The Hiring Database has collapsed and cannot be used in its current state. IT and HR are creating a replacement application through the University Banner system at this time.
- ❑ However PAFs must still be initiated and processed. This session is an introduction to the interim process for initiating and routing PAFs. Topics to be covered during this presentation:
 - Where to find the form
 - Completing the form
 - Routing instructions

This process will require us all to work together to accomplish the desired results.

To Access the Interim Personnel Action Form

A fillable PDF form has been prepared that is reflective of the PAF in the Hiring Database. To access this form:

- ❖ Go to www.desu.edu
- ❖ Click on Staff
- ❖ Under the Human Resources heading, click on HR Forms
- ❖ Select Interim PAF
- ❖ Click on 'File' (up at the toolbar)
- ❖ Select 'Save As'
- ❖ Name the document and save it to your department share drive or your personal drive to create a template for future use.

What's New?

- ❖ The Office of Human Resources will not have the capability to track the documents for you. Each initiator will have to develop a numbering system, maintain a log and make copies of the PAFs internally for tracking purposes.
- ❖ The interim form is a two-page document
- ❖ The **Reason for Action** field has additional options in the drop-down list
- ❖ The **Comments** section is now located on the second page
- ❖ Routing of the PAF is now transmitted via email

Note: Not all functionalities of the Hiring Database exist for the interim version of the Personnel Action Form.

Completing the PAF

Delaware State University Personnel Action Form Faculty / Unclassified Employees

Form Number:		Reason for Action:	Appointment
Request Date :		Requested By:	
Department:		Division:	
School:			

- Form Number:** If you are initiating/creating the form, use your first name, last name and start a numbering system, i.e., John Doe - PAF 00001. Keep the numbering system chronologically each time you create a new PAF (example: John Doe – PAF 00002, John Doe - PAF 00003, etc.)
- Complete all pertinent areas at the top of the form. All areas on the form **in red** are required (if applicable):
 - Request Date:** the date you are creating the form, i.e., 7/24/2020
 - Department:** department where initiator is assigned
 - Reason for Action:** select from the drop-down list (New Hire, Appointment, Transfer, Stipend, Change of Status, Retirement, Voluntary Separation, Title Change)
 - Requested by:** enter your name only
 - School:** enter the applicable college

IT IS IMPERATIVE THAT YOU KEEP TRACK OF YOUR OWN NUMBERING SYSTEM BY MAINTAINING A LOG, MAKE A COPY OF THE FORM FOR YOUR RECORDS, AND EMAIL THE INITIAL COPY TO HR .

Completing the PAF

Delaware State University Personnel Action Form Faculty / Unclassified Employees

Employee Information

Employee Name

Current Information (Change From)

New Information (Change To)

Current Title:		Current Title:	
Position Type :		Position Type :	Part-Time Hourly
Temp. Duration:		Temp. Duration:	
Permanent Mos:		Permanent Mos:	
FTE:		FTE:	.50 (20 Hours)
Annual Base Salary		Annual Base Salary	
Position Number		Position Number	

- Employee name: first name, last name – John Doe, Jr.
- Current Title (Current Information): title of employee's existing position
- Current Title (New Information): title of the employee's new position
- Position Type: select from the drop-down list (Faculty, Professional, Classified, Part-time, Hourly)
- Temp Duration: Type in duration of the temporary employment only if not full-time, i.e., 2 weeks, 4 months, 6 months, etc.

Completing the PAF

Delaware State University Personnel Action Form Faculty / Unclassified Employees

Employee Information

Employee Name

Current Information (Change From)

New Information (Change To)

Current Title: Position Type : Temp. Duration: Permanent Mos: FTE: Annual Base Salary Position Number		Current Title: Position Type : Temp. Duration: Permanent Mos: FTE: Annual Base Salary Position Number	Part-Time Hourly .50 (20 Hours)
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- f. Permanent Months: Type in full time number of 9 months, 10 months, or 12 months (whichever applies to this position)
- g. FTE: this is the equivalent for hours the employee will be working, i.e., 29.5 hours, 15 hours, 35 hours, 40 hours, etc.
- h. Annual Base Salary: annual base salary to reflect full-time position or total amount for part-time employment for the timeframe specified on the PAF
- i. Position Number: enter the full or part-time position number

Completing the PAF

Delaware State University Personnel Action Form Faculty / Unclassified Employees

Current Salary Funding Information (Distribution)

Account	Account Name	Fund Type	Effective Dates		FTE	Salary
			From	To		
					Total Salary	\$ 0.00

Proposed Salary Funding Information (Distribution)

Account	Account Name	Fund Type	Effective Dates		FTE	Salary
			From	To		
					Total Salary	\$ 0.00

Teaching Overload?						
Account	Account Name	Fund Type	Semester	Credit Hours	Salary	

One Time Payment?						
Account	Account Name	Fund Type	Effective Dates	Salary		
			From	To		

Current/Proposed Salary Funding Distribution

- j. Current Salary Funding Distribution: complete this section if employee is currently working
- k. Proposed Salary Funding Distribution: complete this section in accordance with the purpose of PAF
- l. Teaching Overload: complete blocks as indicated
- m. One-time Payment: complete blocks as indicated

Signatures

- ❑ Type your full name and date in the “Initiator Signature and date” block
- ❑ All other authorized approvers will sign appropriately in the respective area(s).

PHRST and Banner Coding

This section will be completed by Finance, Restricted Accounting, or the Office of the Provost

Comments

- ❑ Located on Page 2 of the interim PAF
- ❑ Include as much information as needed to ensure clarity for the purpose(s) of the document

Routing the Interim PAF

- ❖ For this new process, attach the completed PAF form to an email that will be routed for approvals. **PLEASE DO NOT BREAK THIS EMAIL CHAIN.**
- ❖ Maintain one email chain for authorized signatures
 - Principal Investigator for Grants (if applicable)
 - Department Chair
 - Dean/Department or Division Administrator
 - Office of Sponsored Programs (if applicable)
 - Title III (if applicable)
 - Finance/Restricted Accounting
 - Office of the Provost
 - Human Resources
- ❖ The initiator of the form needs to put the routing sequence in the email, so each signing authority knows who to send it to next.
- ❖ Each approver after signing off, must save the PAF. The saved PAF with the most recent approver signature, must be attached when routing the email to the next level approver.

Routing the Interim PAF

Record-Keeping

- ❖ Each approver must save a copy of the PAF after signing off. This would assist in recovery should a document get lost in the routing process.
- ❖ The Initiator must send a copy of the PAF to Human Resources at the time of creation.
- ❖ Human Resources will send a copy of the completed PAF to the initiator upon receipt.

Critical Takeaways

- ❖ *It is imperative that you keep track of your individual numbering system by maintaining a log.*
- ❖ *Make copies of the forms for your records; send a copy to HR at the time of creation and once completed.*
- ❖ *The initiator of the form needs to put the routing sequence in the email, so each signing authority knows who to send it to next.*
- ❖ *Please do not break the email chain when routing the PAF.*
- ❖ *Human Resources will send a copy of the completed PAF to the initiator upon receipt.*
- ❖ *Not all functionalities of the Hiring Database exist for the interim version of the Personnel Action Form.*
- ❖ *This process will require us all to work together to accomplish the desired results.*

Position Requisition (PR)

Position Requisition (PR)

- ❑ The interim PR is reflective of the same form located in the Hiring Database
- ❑ Each initiator must maintain the same type numbering and tracking system as outlined for the Personnel Action Form.
 - ❑ **Requisition ID:** If you are initiating/creating the form, use your first name, last name followed by a dash, the letters “PR” and start a numbering system, i.e., JD-PR 0001. Keep the numbering system chronologically each time you create a new PR (example: JD-PR 0002, JD-PR 0003, etc.)
- ❑ Route in the same manner as the Personnel Action Form

Questions?

THE SLIDE MAN – QUESTION MARK

