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# Personnel Action Smart Form

A Payroll Authorization Smart Form (PASF) is used for beginning employment (new hires, re-hire, re-appointment and additional assignments), changes to existing employment (changes to position, title changes, pay rates, grade level changes, employment status and classification, promotions, transfers, FTE changes etc.) and ending employment (terminations, end assignment and retirement) and transfers to or from another department within the College, additional payments, and all changes for graduate students, including labor distribution changes.

If the Finance Center is going to create the PASF, identify the action and provide required information. The Finance Center will contact the submitter if any of the required information is missing or incomplete, or if they have any questions.

Requests should be submitted through an OnBase form as a ‘General Request’ with a Request Type of ‘HR/Payroll/Tax Reporting Submittal’ <http://www.dartmouth.edu/~fincenter/forms.html>

Date of Birth and Social Security Number should only be entered in the fields provided on the OnBase form. This information should not be sent via e-mail or included in attachments.

From this information and DORR the Finance Center will prepare the PASF

Request approval from the department chair and/or Wesley Benbow or Faith Goodness as needed

Send off for review and approval

Then to data entry into HRMS

If the department is creating the PASF, identify the action and enter the required information.

Identify Action(s): for a combination of actions refer to single action info and provide the needed information for all of the actions

All PASFs need approval from the Department Chair

Before logging out of PASF, please return to PA Home.

## New Hire:

(No other actions are required)

Begin Date (Effective Date)

Legal Name with Middle Initial

Gender

Hinman Box

Citizenship

Visa Type

E-mail Address (Non-Dartmouth)

Payroll Mailing Address

Legal Residence Address (Can’t be a PO Box)

Legal Mailing Address

Organization

People Group (Non-Exempt Staff, Exempt Staff, Faculty, Fellow, Research Associate A, Research Associate B or Research Associate C)

Position Number or Title

Grade

Office Location (Building & Room)

Regular or Temporary

FTE

Hours (if different than DORR)

Months (if different than DORR)

Salary

Funding (if different than DORR)

Default iExpense String (GL Only)

Will need either a position in DORR or a DAB

Date of Birth and Social Security Number should only be entered in the fields provided on the OnBase form. This information should not be sent via e-mail or included in attachments.

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment begin date on new assignment
* If citizenship is not USA, the visa needs to be completed
* If not US citizen and does not have a SSN yet, put in zero’s and make a comment that they have applied for a SSN
* Will need either a position in DORR or a DAB
* If position is in DORR, title and grade need to match what is in DORR.
* FTE is not required for exempt & non-exempt employee
* Temp assignment with 20 or more hours a week needs to be less than 9 months. If 9 months is used, the employee will be considered regular PTO and earn vacation and sick time.
* For a Non-Faculty Appointment use position number 0000000, this field will be completed by Geisel Finance Center when the employee is added to HRMS
* Previous assignment is not needed
* At the end of a temporary or term assignment a termination PASF should be completed
* Non-Exempt employees pay needs to be entered as an hourly rate
* Approval needs to include employee, start date, pay amount and account strings(s)
* If pay amount is higher than HR recommend, it must be approved by Faith Goodness

## Re-Hire:

(No other actions are required)

Begin Date (Effective Date)

Legal Name with Middle Initial

Gender

Hinman Box

\*\* Last four digits of SS#

Dart ID

Citizenship

Visa Type

E-mail Address (Non-Dartmouth)

Payroll Mailing Address

Legal Residence Address (Can’t be a PO Box)

Legal Mailing Address

Organization

People Group (Non-Exempt Staff, Exempt Staff, Faculty, Fellow, Research Associate A, Research Associate B or Research Associate C)

Position Number or Title

Grade

Office Location (Building & Room)

Regular or Temporary

FTE

Hours (if different than DORR)

Months (if different than DORR)

Salary

Funding (if different than DORR)

Default iExpense String (GL Only)

Will need either a position in DORR or a DAB

Date of Birth and Social Security Number should only be entered in the fields provided on the OnBase form. This information should not be sent via e-mail or included in attachments.

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment begin date on new assignment
* If citizenship is not USA, the visa needs to be completed
* If not US citizen and does not have a SSN yet, put in zero’s and make a comment that they have applied for a SSN
* Will need either a position in DORR or a DAB
* If position is in DORR, title and grade need to match what is in DORR.
* FTE is not required for exempt & non-exempt employee
* Verify natural class
* Temp assignment with 20 or more hours a week needs to be less than 9 months. If 9 months is used, the employee will be considered regular PTO and earn vacation and sick time.
* Previous assignment is not needed
* Non-Exempt employees pay needs to be entered as an hourly rate
* At the end of a temporary or term assignment a termination PASF should be completed
* Approval needs to include employee, start date, pay amount and account strings(s)
* If pay amount is higher than HR recommend, it must be approved by Faith Goodness

## Additional Assignment:

(No other actions are required)

Begin Date (Effective Date)

Legal Name with Middle Initial

Gender

Hinman Box

Dart ID

Organization

People Group (Non-Exempt Staff, Exempt Staff, Faculty, Fellow, Research Associate A, Research Associate B or Research Associate C)

Position Number or Title

Grade

Office Location (Building & Room)

Regular or Temporary

FTE

Hours (if different than DORR)

Months (if different than DORR)

Salary

Funding (if different than DORR)

Will need either a position in DORR or a DAB

Date of Birth and Social Security Number should only be entered in the fields provided on the OnBase form. This information should not be sent via e-mail or included in attachments.

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment begin date on new assignment
* Will need either a position in DORR or a DAB
* If position is in DORR, title and grade need to match what is in DORR.
* FTE is not required for exempt & non-exempt employee
* Previous assignment is not needed
* Verify natural class
* Temp assignment with 20 or more hours a week needs to be less than 9 months
* At the end of a temporary or term assignment a termination PASF should be completed
* If pay amount is higher than HR recommend, it must be approved by Faith Goodness
* Approval needs to include employee, start date, pay amount and account strings(s)

## End Assignment:

(When an employee has more than one assignment)

(No other actions are required)

End Date (Effective Date)

Legal Name with Middle Initial

Assignment #

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment end date on previous assignment
* Should be marked as previous assignment. New assignment is not needed.
* The most recent previous assignment is needed; all others need to be deleted.
* Lookup the employee in the IRA LD assignment distribution report, verify pay amount & funding match on the PASF match IRA.
* Approval needs to include employee, end date and reason for end assignment

## Transfer From:

Same criteria as [End Assignment:](#_End_Assignment:)

Helpful Reminders for Building PASF:

* New assignment is needed if both Transfer From & Transfer To actions are in the same PASF.
* Transfer From & Transfer To are used for employees that have a change in positions that have an Organization change.
* The Transfer From department will complete the entire transfer PASF (PASF will include Transfer To). Geisel Finance Center can obtain the Transfer To information.
* Transfer From and Transfer To actions covers all actions, no other actions are required.
* If Transfer From and Transfer To actions are on the same PASF, approvals from both department chairs are needed.

## Transfer To:

Same criteria as a [New Hire:](#_New_Hire:)

Helpful Reminders for Building PASF:

* Previous assignment is needed if both Transfer From & Transfer To actions are in the same PASF. If not on same PASF, a previous assignment is not needed.
* Transfer From & Transfer To are used for employees that have a change in positions that have an Organization change.
* The Transfer From department will complete the entire transfer PASF (PASF will include Transfer To). Geisel Finance Center can obtain the Transfer To information.
* Transfer From and Transfer To actions covers all actions, no other actions are required.
* Verify natural class
* If Transfer From and Transfer To actions are on the same PASF, approvals from both department chairs are needed.

## Organization Change:

(Only use if Organization is the only change. If other actions are needed, use [Transfer From:](#_Transfer_From:) & [Transfer To:](#_Transfer_To:) actions.)

Begin Date (Effective Date)

Organization

Assignment #

Office Location (Building & Room)

Default iExpense String (GL Only)

Will need either a position in DORR or a DAB

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment begin date on new assignment
* Will need either a position in DORR or a DAB
* The most recent previous assignment is needed; all others need to be deleted.
* Lookup the employee in the IRA LD assignment distribution report, verify pay amount & funding match on the PASF match IRA.

## Status Change:

(Temporary to Regular or People Group change)

(No other actions are required)

Begin Date (Effective Date)

Legal Name with Middle Initial

Position # or Title

Salary

If needed

People Group (Non-Exempt Staff, Exempt Staff, Faculty, Fellow, Research Associate A, Research Associate B or Research Associate C)

Grade

Office Location (Building & Room)

Regular or Temporary

FTE

Hours

Months

Funding

Will need either a position in DORR or a DAB

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment begin date on new assignment
* Will need either a position in DORR or a DAB
* If position is in DORR, title and grade need to match what is in DORR.
* FTE is not required for exempt & non-exempt employee
* Verify natural class on new assignment
* The most recent previous assignment is needed; all others need to be deleted.
* Lookup the employee in the IRA LD assignment distribution report, verify pay amount & funding match on the PASF match IRA.
* If pay amount is higher than HR recommend, it must be approved by Faith Goodness
* A Graduate Student changing to an employee would be a new hire action

## Promotion:

(No other actions are required)

Begin Date (Effective Date)

Legal Name with Middle Initial

Position # or title

Salary

Default iExpense String (GL Only)

If needed

People Group (Non-Exempt Staff, Exempt Staff, Faculty, Fellow, Research Associate A, Research Associate B or Research Associate C)

Grade

Office Location (Building & Room)

Regular or Temporary

FTE

Hours

Months

Funding

Will need either a position in DORR or a DAB

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment begin date on new assignment
* Will need either a position in DORR or a DAB
* If position is in DORR, title and grade need to match what is in DORR.
* FTE is not required for exempt & non-exempt employee
* The most recent previous assignment is needed; all others need to be deleted.
* Lookup the employee in the IRA LD assignment distribution report, verify pay amount & funding match on the PASF match IRA.
* Verify natural class on new assignment
* If pay amount is higher than HR recommend, it must be approved by Faith Goodness
* Approval needs to include employee, title, start date, pay amount and account strings(s)

## Termination/Retirement:

(No other actions are required)

Last Day Worked

Legal Name with Middle Initial

Forwarding Address

Reason for Termination

Resignation Letter Received Y/N

Unused Vacation Days (Exempt): Please enter the number of unused days remaining from this year’s allotment of available days. For example, a full time person has 22 days available and used 10 so enter 12 as unused\*. A part time person’s days need to be based on their scheduled hours per week. If a person’s scheduled hours per week is 10, the policy allots them 22, 2 hour days (10 hours a week over 5 work days = 2 hours per day). If, based on their actual work schedule, they used 24 hours then enter 10 days unused (44 total hours available (22 days \* 2 hours per day) – 24 hours used = 20 hours. 20 hours across 2 hour days (20 hours/ 2 hours per day) = 10 days). \*Accrued time should not be added to this number. If a person borrowed against accrued time, please enter 0 unused days and note the number of borrowed days in the comments section.

Helpful Reminders for Building PASF:

* Action effective date, last day worked, and assignment end date must match.
* Should be marked as previous assignment. New assignment is not needed.
* At the end of a temporary or term assignment a termination PASF should be completed.
* Reason for Termination is required.
* Approval needs to include employee, last day worked and reason for termination.
* Research Associate B are entitled to 14 days of vacation per year.

## Additional Payments:

(No other actions are required)

Begin Date (Effective Date)

Legal Name with Middle Initial

Hinman Box

Dart ID

Office Location (Building & Room)

Begin and End Dates

Salary – (Total not Monthly)

Funding

Comments as to why additional payment

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment begin date on new assignment
* To determine employment status, lookup the employee in the IRA LD assignment distribution report. Employment status is located in the category field. If the employee is not visible, contact Geisel Finance Center.
* Previous assignment is not needed.
* Any copied previous assignments should be deleted.
* If a previous PASF is used to copy forward, remove any information on the assignment screen related to the position.
* Verify natural class
* Additional Payment PASF must be approved by Wesley Benbow. **NO EXCEPTIONS**
* Additional payments for Non-Exempt will also need to complete 'Lump Sum Questions for Payout' form and attach to preparers comments. Please contact Geisel Finance Center for a copy of the form.
* The approvals for additional payments need to be from Wesley Benbow and the department chair.
* Approvals need to include the employee, reason for additional payment, the start and end dates, the amount and account string(s).
* Employee # and Dart ID need to match IRA

## FTE Change:

(Faculty, Research Associate, or Fellow)

Begin Date (Effective Date)

Legal Name with Middle Initial

Assignment #

Office Location (Building & Room)

New FTE

Salary

Funding

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment begin date on new assignment
* The most recent previous assignment is needed; all others need to be deleted.
* Lookup the employee in the IRA LD assignment distribution report, verify pay amount & funding match on the PASF match IRA.
* A FTE change may also require a [Revised Pay Rate:](#_Revised_Pay_Rate:) action
* FTE increase must be approved by Faith Goodness.

## Hours Change:

(Exempt or Non-Exempt)

Begin Date (Effective Date)

Legal Name with Middle Initial

Assignment #

Office Location (Building & Room)

New Hours

Salary

Funding

May require a DORR change

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment begin date on new assignment
* May require a DORR change
* If position is in DORR, title and grade need to match what is in DORR.
* The most recent previous assignment is needed; all others need to be deleted.
* Lookup the employee in the IRA LD assignment distribution report, verify pay amount & funding match on the PASF match IRA.
* An Hours change may also require a [Revised Pay Rate:](#_Revised_Pay_Rate:) action
* An increase in Hours must be approved by Faith Goodness.

## Grade Change:

(Exempt or Non-Exempt)

Begin Date (Effective Date)

Legal Name with Middle Initial

Assignment #

Office Location (Building & Room)

New Grade

Salary

Funding

DORR change

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment begin date on new assignment
* DORR change is needed
* If position is in DORR, title and grade need to match what is in DORR.
* The most recent previous assignment is needed; all others need to be deleted.
* Lookup the employee in the IRA LD assignment distribution report, verify pay amount & funding match on the PASF match IRA.
* Grade change may also require a [Revised Pay Rate:](#_Revised_Pay_Rate:) action

## Title Change:

Begin Date (Effective Date)

Legal Name with Middle Initial

Assignment #

Office Location (Building & Room)

New Title

Will need either a position in DORR or a DAB

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment begin date on new assignment
* Will need either a position in DORR or a DAB
* The most recent previous assignment is needed; all others need to be deleted.

## Account Change:

Can only be done if making another change unless it is for a graduate student

If the only action is account change, it is a MYLS transaction

Begin Date (Effective Date)

Legal Name with Middle Initial

Assignment #

Office Location (Building & Room)

Funding

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment begin date on new assignment
* The most recent previous assignment is needed; all others need to be deleted.
* Lookup the employee in the IRA LD assignment distribution report, verify pay amount & funding match on the PASF match IRA.

## Revised Pay Rate:

Begin Date (Effective Date)

Legal Name with Middle Initial

Assignment #

Office Location (Building & Room)

Salary

Reason for pay rate change

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment begin date on new assignment
* The most recent previous assignment is needed; all others need to be deleted.
* Lookup the employee in the IRA LD assignment distribution report, verify pay amount & funding match on the PASF match IRA.
* An out of cycle increase must be approved by Faith Goodness. **NO EXCEPTIONS**

## Special Rate:

Contact the Finance Center prior to using this action.

## FRO:

Contact the Finance Center prior to using this action.

## Continuation of Prior PA:

Contact the Finance Center prior to using this action.

## Revised:

Begin Date (Effective Date)

Legal Name with Middle Initial

Office Location (Building & Room)

Explanation of what is changing

Helpful Reminders for Building PASF:

* Previously submitted assignment is needed as the previous assignment
* The previous assignment should not be changed

## Graduate Student:

Dart ID

Begin Date (Effective Date)

End Date

Legal Name with Middle Initial

Gender

Hinman Box

Citizenship

If they are here on a visa, what visa type

Office Location (Building & Room)

Salary (monthly)

Account String(s)

If partial month payment, please provide the exact pay amount for that month. The calculation for a partial month is the full monthly amount divided by the number of working days per month (Monday - Friday including holidays) multiply the answer by the number of workings days being paid to obtain the pay amount for the partial month. (Ex. using a start date of June 16, 2016 - 2351.67 / 22 = 106.89 \* 11 = 1175.83)

Helpful Reminders for Building PASF:

* Action effective date needs to match assignment begin date on new assignment
* If citizenship is not USA, the visa needs to be completed
* If not US citizen and does not have a SSN yet, put in zero’s and make a comment that they have applied for a SSN
* Organization should be Students
* Assignments for students need to have start and end dates.
* If partial month payment, please provide the exact pay amount for that month. The calculation for a partial month is the full monthly amount divided by the number of working days per month (Monday - Friday including holidays) multiply the answer by the number of workings days being paid to obtain the pay amount for the partial month. (Ex. using a start date of June 16, 2016 - 2351.67 / 22 = 106.89 \* 11 = 1175.83)
* The most recent previous assignment is needed; all others need to be deleted.
* Previous assignment is not needed if a new student. Previous assignment is needed for all other.
* Verify natural class
* Lookup the student in the IRA LD actuals report, verify pay amount & funding match on the PASF match IRA.
* The approval for graduate students needs to be from the department chair(s) that are funding the position.
* Approvals need to include student, pay amount, start and end dates & account string(s)
* Graduate Students can only be seen on IRA LD actuals report

## Graduate Student Termination:

(Graduate Student termination only needs to be done if end date is different than originally submitted)

Dart ID

Last Day Worked (Effective Date)

Legal Name with Middle Initial

Forwarding Address

If terminating in the middle of the month, provide the prorated pay amount for the month

If partial month payment, please provide the exact pay amount for that month. The calculation for a partial month is the full monthly amount divided by the number of working days per month (Monday - Friday including holidays) multiply the answer by the number of workings days being paid to obtain the pay amount for the partial month. (Ex. using a last day as June 15, 2016 - 2351.67 / 22 = 106.89 \* 11 = 1175.83)

Helpful Reminders for Building PASF:

* Organization should be Students
* If partial month payment, please provide the exact pay amount for that month. The calculation for a partial month is the full monthly amount divided by the number of working days per month (Monday - Friday including holidays) multiply the answer by the number of workings days being paid to obtain the pay amount for the partial month. (Ex. using a last day as June 15, 2016 - 2351.67 / 22 = 106.89 \* 11 = 1175.83)
* Action effective date, last day worked, and assignment end date must match.
* The most recent previous assignment is needed; all others need to be deleted.
* Lookup the student in the IRA LD actuals report, verify pay amount & funding match on the PASF match IRA.
* Graduate Students can only be seen on IRA LD actuals report
* Approval needs to include student, last day worked and reason for termination.

## Non-Exempt Student:

Effective Date

Dart ID

Name

JobNet Number

Organization

Estimated Hours/Week

Salary (Hourly Rate)

Supervisor

Back-up Supervisor

Funding (Only one account string is allowed)

Has the student completed an I-9?

Should the JobNet Websearch remain active or should it be removed?

When the student has completed the assignment, submit a request to end the assignment.

## Approvals:

All PASFs need approval from the Department Chair and/or Wesley Benbow or Faith Goodness as needed

|  |  |
| --- | --- |
| Additional payments | Department Chair and Wesley Benbow |
| PASFs for department chairs/directors | Wesley Benbow |
| PASFs for fiscal office | Wesley Benbow |
|  |  |
| FTE increase for faculty | Department Chair and Faith Goodness |
| Hours increase for staff | Department Chair and Faith Goodness |
| Out of cycle increases | Department Chair and Faith Goodness |
| Salaries for new hires that are above the HR recommendation | Department Chair and Faith Goodness |
|  |  |
| PASFs for IQBS | Megan Tompkins |

## For completed PASF:

Submit to the Finance Center for review and approval

* Faculty new hire – The Finance Center will contact the Deans Office to verify that a DAB has been completed before it is approved by the Finance Center.
* Non-Faculty Appointment new hire – The Finance Center will contact the Deans Office to verify that a DAB has been completed before it is approved by the Finance Center.
* All other new hires should be found in DORR.

Then to data entry into HRMS