First Session Topics

1. Introduction
   • Review/audit PNFs for BOR employees
   • Processing/Auditing for Executive/Managerial employees
   • Special handling PNFs to Payroll Office
   • Minimize Record Numbers

2. Mandatory Action/Reasons for UH Payroll purposes

3. Effective date sequence number and impacts

4. Creating multiple rows with same effective date

5. Hire / Termination Changes

6. Reduce FTE, Part-Time Sabbatical Leave

7. Partial Day Pay; Partial LWOP

8. Return to Duty for All Leave Actions

9. Generic Position Numbers

10. Different Job titles and FTE

11. Maximum Lecturer Salary allowed on PNF

12. Remarks on PNF

13. Closing
   • Data police / corrections
   • Invalidating and voiding PNFs
   • Upcoming action/reminders
Reviewing and auditing the Payroll Notification Form (PNF) for BOR employees

The PeopleSoft (P/S) Payroll Notification Form (PNF) reflects authorized personnel actions that affect payroll functions.

When generating actions in P/S, ensure that there are appropriate supporting documents if necessary as backup documentation. For example: approval to hire, SF-1, offer letter, leave without pay request, E/M appointment letter, sabbatical request, etc…

Reading the PNF

Section 1 – Personal/home base information relating to the person and or position
Note: Section 1 data is obtained from the home base record only
Section 2 – Personnel action/reason relating to the effective date

Link: OHR web site / HR Info Systems/ Systemwide Processing Instructions / Specific Personnel Action Reason Situations

Section 3 – Current home base employing agency code
Section 4 – “From” (left side of PNF) and “To” (right side of PNF) information

1. New employee = TO side only
2. Separation = FROM side only
3. LWOP = FROM side only
4. Return from LWOP = FROM and TO sides
5. LWOP and Return on the same day = FROM and TO sides
6. Separation while on LWOP = FROM side only
7. Changes while on LWOP:
   If LOA 686 (Changes While on LWOP-Other) is used = FROM side only
   If DTA or Earnings Distribution or other action that doesn’t affect status is used = FROM and TO sides
8. All other actions = FROM and TO sides

Section 5 – Account codes to charge for salary and stipends/differentials

For LWOPs and Separations, the PNF reflects the account code from the day before the current row. Therefore if the account code is changed effective the date of LWOP/separation, the account code will be incorrect. The logic behind this is that the employee is going from a paid to no pay status. To print the correct NTE date on the PNF, refresh the NTE date of the row before, then generate another PNF.

Section 6 – Remarks
Section 7 – Signatures
minimum of two (2) signature required – Fiscal Authority & Appointing Officer

Reviewing the PNF

Link: OHR web site / HR Info Systems / Systemwide Processing Instructions / PNF Auditing Tips

After entering the action in P/S, carefully review the PNF for accuracy before routing for signatures. Check the PNF for correct information. The employee’s name and social security number should be verified against the employee’s social security card. This is critical as an error will impact other applications (i.e. UHIMC, W-2 printing, IRS, etc…) and require a memo to be written to Payroll Office with a photocopy of the Social Security card.

- If new appointment, check name and last four digits of the SSN on the PNF.
  - Name should match name on social security card
  - Verify social security number with social security card
  - Note: incorrect social security may impact other systems (eg. UHIMC, W-2 printing, IRS, etc.)
- Check salary information ensuring both the “From” and “To” sections are accurate
- FTE is also critical as this will impact pay
• Appointment period – indicates the beginning and end dates of the appointment or temporary position. For tenured faculty and secured APT (permanent positions only) the dates are blanked out.

- Appointment Period – Blanked out if the faculty is tenured or has APT security and is paid solely from “G”, “R” or “S” funds and is in a permanent position (e.g., the position number does not end with “T”, “X” or “V”). Appointment period will be used for temporary appointments (e.g., probationary periods, account codes, Chair appointments, etc.)
  o If a tenured faculty becomes chair, the appointment period must be filled in with the duration of the chair appointment.
  o If a tenured faculty becomes an Executive/Managerial, the appointment period must reflect the duration of the Executive/Managerial appointment.
  o If a General funded faculty becomes solely or partially paid from extramural funds, the appointment period should reflect the duration of the funding.
  o All probationary faculty and APT employees should have the appointment period reflecting the year to year appointment.
  o The appointment period for all temporary employees should reflect the duration of the temporary appointment.

- Appointment Period From - Indicates the beginning date of the appointment for BOR employees. For Civil Service employees, this date represents the UH hire date. For tenured faculty, this date represents the date on which tenure was received. For non-G funds, should be the starting date of the contract. For APT, should be the start of the fiscal year.

- Retirement/FICA code: VERY IMPORTANT – to avoid erroneous assessment.
- For correction documents: The PNF document number and what’s being corrected should be in the PNF remarks
- PSP field – the prorata summer pay end date. For example, for a 9-month faculty hired on 08/01/xx the PSP field should be “07/31”. This value may change depending on the the prorata summer pay calculations.

Auditing the PNF
- Review PNF against supporting documents
- Review PNF against previous PNF – “From” side of current PNF should match “To” side of the previous effective date PNF
- If doing a correction PNF, review the PNF against the corrected PNF and the previous PNF. The information on the PNF should be the same except for the fields that you are correcting.

Deadlines for the PNF documents are critical for timely processing of payroll action. Ensure that appropriate payroll deadlines are met. If a payroll deadline is missed and an overpayment will occur, inform the Payroll Office ASAP to see if something can be done to prevent the salary overpayment.
SAMPLE PNF

University Of Hawaii
Payroll Notification Form

SSN: XXX XXXX
Name: 

FIR: D89
WD: 

Sex: F
Marital status: Single
Fed Exempt: D
State Exempt: 
Pay class: 

Rec/FICA: 11
HO: 2
Visa: 
Tenure: AES 2010

PF: 

PNF Date: 10/12/2014
Doc No: 645104
EmpID: 

Appointment period from: 12/12/2014 To: 
Partial Day Pay represents partial payment for one day. LWOP 5 hours. Pay for 3 hours on

P/A
LOA 610
LWOP - Personal Reasons

Effective Date
12/12/2014
Partial
375

Section 1:
Personal/Home Base Information

Section 2:
Personnel Action/Reason relating to the Effective Date

Section 3:
Current Home Base EAC

Section 4:
“From” and “To” Information

Section 5:
Account Codes to charge for salary and stipend/differentials

Section 6:
Remarks

Section 7:
Signatures

Section 8:

Remarks: First day. Partial Day Pay represents partial payment for one day. LWOP 5 hours. Pay for 3 hours on
The above appointment is contingent on the availability of funds, and visa provisions when applicable. It is certified that the
appointment is in compliance with Board of Regents policies and applicable statutes and regulations. In the event that service
does not continue throughout the term if any be specified, the salary due will be based upon the period of actual service.

I certify that, to the best of my knowledge, the appointment or personnel transaction(s) shown above is/are in compliance
with Board of Regents policies and all applicable statutes and regulations.

Appointing Officer Signature / Date

Page 3
Processing/Auditing for Executive/Managerial (E/M) Employees

• Transfer from faculty to E/M will cause a change in Payroll number. If the employee is hired on or after 7/1/98, the employee will be moving from a 5-day lag to an after-the-fact schedule which will affect the timing of pay received.

• Appointment periods required only for multi-year or interim appointments (may be used in instances that track employment eligibility; e.g. – keep track of renewals required for VISA's). At the end of multi-year appointments, blank out appointment period unless a multi-year reappointment is approved.

• BOR Title - should reflect the titles recognized by BOR (http://www.hawaii.edu/ohr/bor/emcompp.htm) unless indicating "Interim" and/or tenured faculty title (abbreviate as necessary due to character limit)

• Do NOT touch/update the position panels for E/M positions. Approved SF-1 should be routed to OHR to update the position information in PeopleSoft.

• Prior to processing any personnel action, ensure that it has been approved by the appropriate authority according to Delegation of Authority for Personnel Actions - EP 9.112; for actions delegated to the Chancellor, check with your campus HR office to determine if any further delegation has been approved.

• Supporting documentation for “LWOP - personal reasons” for E/M personnel does not need to be UH Form 62 (Attachment – 1 http://www.hawaii.edu/policy/archives/apm/pers/a9420.pdf). A signed memo by the appropriate approving authority will suffice. Any supporting documents regarding health can be stored separately at the field level.

• E/M PNFs minimally require the Fiscal Authority (FA) signature and OHR Director's signature. Field Units should not press the “Send to Payroll” button; OHR will press that button after all signatures are obtained. For change in tax exemptions, HR representative signature is appropriate rather than the FA.

• PNFs that need to go to ERS will be sent by OHR, except for new appointments/hires.
Special Handling PNFs to Payroll Office

PNFs requiring special handling WILL NOT require a hardcopy PNF from the department/campus to the Payroll Office. Instead, click the "Send PNF to Payroll" button AND send an email to 'payroll@hawaii.edu' with a subject line "Special Handling".

When sending Special Handling emails to the Payroll Office, include the following information on ALL emails:

1) Employee Name  
2) Employee UH ID #  
3) Payroll #/ Warrant Distribution Code  
4) PNF Doc #  
5) Effective Date of Action  
6) Reason for Special Handling

By providing the above information, this will assist the Payroll Office in processing PNFs accordingly.

Types of PNFs considered special handling are:

1) Overpayment – CALL PAYROLL IMMEDIATELY  
2) salary changes after payroll deadline  
3) Employee separating with lump sum payment  
4) One-time special payments paid via PNF “Remarks”  
5) Change in hire or termination date  
6) Late notification of LWOP  
7) Cancel LWOP

Any questions? Call the Payroll Office 956-7444

Amy: F67, F68, F69, F6N, F6O  
Char: F94, F95, SCOPIS, D60s  
Janie: F57, F58, F59, BOR Fringe  
Lauren: F65, F66, F77, F78, F65/F77 Fringe  
Verna: F53, F54, F55, F66/F78 Fringe
Minimize Record Numbers

While record numbers are free for the taking, minimizing the number of records numbers created for an employee is still a critical factor. The benefits are:

- easier to resolve problems
- record number limitations on the printing of the PNF (only the first 5 record numbers with active appointments will print on the PNF)

Check the "Multiple Appointment Inquiry" screen prior to clicking "Assign Additional Job" when searching for additional appointments.

If the home base will change, coordinate Multiple Appointments with the other college/department sharing the employee prior to calling OHR to switch the home base record.
Mandatory Action/Reasons for UH Payroll purposes

Mandatory action/reasons which must be entered into PeopleSoft to effectuate the Electronic Payroll Change Schedule (ePCS)

Background
With the creation of the ePCS, most data is fed to Payroll electronically with information derived from the PNF. However, certain information will not update the ePCS unless specific action/reasons are entered.

Process
For the following reason codes, use action Data Change or Data Change – Correction as applicable. These actions must ALWAYS be reflected on the PNF as separate action/reasons and effective dates (even on a new hire or transfer action)

- Change in Marital Status: 908
- Change in Tax Exemptions: 907
- Change of Name: 900
- Change of Social Security Number: 910

Note: The above four actions will be effectuated on the pay cycle that the PNF is processed by the Payroll Office.

Example: an employee was re-employed under a different name from his previous UH employment.
The Hire PNF should reflect:
Hire 009
Data Change 900

Note
When a transfer action is done; e.g., Transfer 291 (Different Appointment in Different Employing Agency), then changes associated with a transfer action, other than the four listed above, can but need not be reflected as an action/reason along with the transfer action/reason on the PNF.

Examples are: changes in bargaining unit, payroll number, warrant, salary, FICA, account code. If the unit chooses not to add separate action/reasons for these, then they should be included in remarks.
Example

The following PNF was generated for an employee who transferred from an APT to a faculty position. The unit is also reporting a change in tax exemptions. Because the tax exemption must be reported as an action/reason, there are two action/reasons, the transfer and the tax exemption change.

The other changes associated with the transfer can be noted in remarks (unless the unit chooses to add these as separate action/reasons):

Remarks: Also, change in account code, warrant, payroll number, BU, salary, FICA.
Effective Sequence Number and Impacts

Background

The effective sequence number is displayed to the right of the effective date on the Peoplesoft Job Data/Work Location Panel. This number indicates whether the employee has multiple actions effective the same date. The system defaults this field to "0" for the employee’s first Effective Sequence # and thereafter assigns incremental values for each subsequent action on the same effective date starting with the value "1"; e.g., 0, 1, 2, 3, 4, etc.

The actions are printed on the PNF starting with the action with the highest sequence number at the top, followed by the rest in descending sequence number order.

A maximum of 8 actions can be printed on the PNF; if more than 8 actions are entered in PeopleSoft, then lower sequence numbers are not reflected and only the higher sequence numbers are printed.

Process Examples

The sequence that the actions are done can have important consequences

- When an employee is going on leave, that leave row should have the highest sequence number. If not, there is a possibility that the employee status will change to “active” with a subsequent action and when the unit attempts to return the employee, an error message will result: “Return from Leave action is valid only if employee status is On Leave.”

  To correct this, using Correct History mode, change the sequence number of the Leave row to the highest available sequence number.

- When the employee is returning from leave, that return from leave row should be the lowest sequence number, followed by any pay or other actions. If not, the same error message may result.

- Hire rows should be entered first.

- Separation rows should be entered last.
Creating Multiple Rows with Same Effective Date

Background
Simplify the process of making multiple changes to a record on the same effective date. It is not necessary to make the data change on the row specifying the action reason. Make all the data changes on one row and subsequently enter each action/reason row.

Process

1. Example: The employee has four actions on the same day:
   - A pay adjustment
   - Change in tenure status
   - Additional Stipend
   - Change in title

2. Review ahead of time all the changes that will happen. For the above example:
   - Salary will change
   - Tenure status will change
   - Stipend will be added
   - Title will change

3. Insert a first row, add appropriate effective date, and enter all changes on this first row; e.g., changing salary, tenure status, stipend, and BOR title.

4. Insert a second row and add the second action reason and effective date. Insert a third and fourth row with the action reason and effective date. Then press “Save” after all action/reason and effective date rows have been entered.

Example:

First row - sequence 0: PAY 406 (Special Salary Adjustment): change title, salary, stipend, tenure status.
Second row - sequence 1: DTA 940 (Change in Record-Tenure Status)
Third row - sequence 2: PAY 457 (Additional Stipend/Differential)
Fourth row - sequence 3: DTA 520 (Change in Title)

By updating the first row (PAY 406) with all the changes, each subsequent row will be a duplicate of the row below so that the only data that changes on subsequent rows is the action/reason and effective date.
Reference – Order of salary adjustments on same effective date
Faculty: Article XXI.B.3 – Salary Adjustments
APT: Administrative Procedure: A9.210 – Section II - IV.B – Multiple Personnel Actions

Example of PNF:

<table>
<thead>
<tr>
<th>P/A</th>
<th>Description</th>
<th>Effective Date</th>
<th>Partial</th>
<th>Position Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTA</td>
<td>Change in Title</td>
<td>10/01/2014</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY</td>
<td>Add Stipend/Differential</td>
<td>10/01/2014</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DTA</td>
<td>Change in Record-Tenure Statu</td>
<td>10/01/2014</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY</td>
<td>Special Salary Adjustment</td>
<td>10/01/2014</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>From Position Title</th>
<th>To Position Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>JR SPECIALIST, UHM, 11-MO</td>
<td>JUNIOR SPECIALIST &amp; DIRECTOR</td>
</tr>
<tr>
<td>0082864 S2M11</td>
<td>0082864 S2M11</td>
</tr>
<tr>
<td>5,000.00 1.00000 07</td>
<td>6,000.00 1.00000 07</td>
</tr>
</tbody>
</table>

Annual: 60,000.00
Semi-mo: 2,500.00

Annual: 72,000.00
Semi-mo: 3,000.00
BU: 07
FTE: 1.00000

Pay Type | Account Code | Percent | Semi month amt | NTE Date | Position Number |
---------|--------------|---------|----------------|----------|-----------------|
BASER    | MA 1123352   | 1.00000 | 3,000.00       |          |                 |
STADM    | MA 1123352   | 1.00000 | 150.00         |          |                 |

Remarks: Appointed Director of Lanuage Labs 10-01-2014 to 06-30-2015.
Hire Changes

NOTE: Any changes to Hire rows should be sent to Payroll using the “Special Handling” procedure

Cancel the Hire action

- If a class is canceled or a person does not show up for work on the first day, the Hire action can be voided

1. After logging into PeopleSoft, Click on UH Menu
2. Click on Job Data
3. Search for the employee
4. Make sure the Hire action is in suspense. If not in suspense, go to the UH Menu and Click on PNF Maintenance. Search for the Document Number and Invalidate the PNF. Click Save. If the PNF cannot be invalidated or voided by Payroll, skip to #5.
   a) If in PNF Maintenance, go back to Job Data
   b) Insert row on top of the Hire action
   c) Change effective date to the date of the original Hire action
   d) Change the action to Hire – Void with the same reason code as the original hire row
   e) Click Save
   f) Call OHR to approve Hire and Hire – Void rows
   g) Stop here
5. If the Hire action has already been processed by Payroll and PNF cannot be invalidated or voided by Payroll
   a) Insert row on top of the Hire action
   b) Change effective date to the date of the original Hire action
   c) Change the action to Hire – Void and use the same reason code as the original Hire action
   d) Click Save
   e) Generate PNF
   f) Click on PNF Maintenance – UH PNF Data 3 tab: enter comments correcting document number xxxx
   g) Special handle to Payroll
**Change effective date of a Hire to an earlier date**
1. After logging into PeopleSoft, click on UH Menu
2. Click on Job Data
3. Search for the employee
4. Click on Correct History
5. Change the effective date of the Hire row to the earlier date
6. Insert a row on top of the Hire row
7. Enter the earlier effective date for this row
8. Change the action to Hire – Correction
9. Use the same reason code that was used for the Hire
10. Click Save
11. Generate PNF
12. Click on PNF Maintenance – UH PNF Data 3 tab: enter comments correcting document number xxxx
13. Special handle to Payroll

Example: Original hire date was on 03/01/14, but actual start date was 02/24/14
Change effective date of a Hire to a later date
1. After logging into PeopleSoft, click on UH Menu
2. Click on Job Data
3. Search for the employee
4. Insert row on top of the Hire row
5. Change effective date to the later date
6. Change action to Hire – Correction use same reason code as the Hire row
7. Click save
8. Generate PNF
9. Click on PNF Maintenance – UH PNF Data 3 tab: enter comments correcting document number xxxx
10. Special handle to Payroll
Termination Changes

NOTE
Any changes to Term rows should be special handled to Payroll. If a PNF was already processed by Payroll, the PNF can still be returned (voided) within 5 to 7 days after the Payroll deadline. Call Payroll to return the PNF if the PNF meets certain conditions:
1. PNF sent to Payroll has an effective date within the pay period that Payroll is currently working on. Example: For pay period 11/16/14 – 11/30/14, PNFs submitted to Payroll with effective dates within 11/16/14 – 11/30/14 could be returned from the Payroll Office

Or

2. PNF sent to Payroll during the current pay period with a retroactive effective date. Example: For pay period 11/16/14 – 11/30/14, the effective date of action is 07/01/14, but PNF was sent to Payroll on 11/20/14 (within the current pay period)

Cancel Termination (Termination rows that have been processed by Payroll)
1. After logging into PeopleSoft, click on UH Menu
2. Click on Job Data
3. Search for the employee
4. Insert row (Figure 1)
5. Change the effective date to the date of the original termination (Figure 2)
6. Action/Reason is Hire – Correction/010 (Cancel Separation)
7. The Employee Status (upper left-hand corner) changes from “Terminated” to “Active”
8. Click Save
9. Generate PNF
10. Click on PNF Maintenance – UH PNF Data 3 tab: enter comments correcting document number xxxx
11. Special handle to Payroll

Figure 1: Termination row processed by Payroll
Figure 2: Insert Cancel Separation
**Change effective date of Termination to a later date**

- Because Payroll is based on pay periods, determine if the correction is within the same pay period or not.
  1. After logging into PeopleSoft, click on UH Menu
  2. Click on Job Data
  3. Search for the employee
  4. Insert a row (Figure 1)
  5. If changes to the termination action is within the same pay period (Figure 3). If not, skip to #6.
    a. Change the effective date to the later date
    b. Action will be Termination – Correction, use the same reason code as Termination row
    c. Continue on to Step # 7
  6. If changes to the termination action is not within the same pay period
    a. Change the effective date to the same date of the original termination (same as Figure 2)
    b. Action/Reason is Hire – Correction/010 (Cancel Separation) (same as Figure 2)
    c. Insert a row (Figure 1)
    d. Change the effective date to the new termination date
    e. Change the action to Termination with the appropriate reason code
  7. Click Save
  8. Generate PNF. (NOTE: #6 requires a PNF for the Hire – Correction and another PNF for the new Termination action)
  9. Click on PNF Maintenance – UH PNF Data 3 tab: enter comments correcting document number xxxx
  10. Special handle to Payroll

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**Figure 3: Termination Change Within Same Pay Period**
Change effective date of termination to an earlier date
1. After logging into PeopleSoft, click on UH Menu
2. Click on Job Data
3. Search for the employee
4. Click on Correct History
5. Change the effective date of the approved termination row to the earlier effective date
6. Insert a row
7. Change the effective date to the same date as the corrected termination row
8. Change the Action to Termination – Correction (use the same reason code as the termination row)
9. Click Save
10. Generate PNF
11. Click on PNF Maintenance – UH PNF Data 3 tab: enter comments correcting document number xxxx
12. Special handle to Payroll
<table>
<thead>
<tr>
<th>Work Location</th>
<th>Job Information</th>
<th>Payroll</th>
<th>Salary Plan</th>
<th>Compensation</th>
<th>UH CIS Data</th>
<th>NTE Job</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Status:</strong> Terminated</td>
<td><strong>UH Eff Dt</strong> 07/31/2013</td>
<td><strong>Action Date:</strong> 10/16/2014</td>
<td><strong>Job Ind:</strong> Primary Job</td>
<td><strong>SUS</strong></td>
<td><strong>823</strong></td>
<td><strong>Current</strong></td>
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<tr>
<td><strong>Action / Reason:</strong> Termination - Correction</td>
<td><strong>PSP:</strong></td>
<td><strong>Position Management Record</strong></td>
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Reduce FTE

Reduce FTE: Nature of position changes resulting in a change in FTE (e.g. workload increase/decrease, funding increase/decrease, etc.). Normally an employer change; not an employee change.

Partial LWOP: Employee is put on a partial LWOP (e.g. personal reasons)

ACTION: Reduce FTE

Example: Position FTE changes from 100% to 50% due to decrease in funding effective 06/01/11. (Note: For APT employees, review Collective Bargaining Agreement, Article 14.I, notification to the union may be required).

Position Panel:
1. Click on ADD/UPDATE POSITION INFO
2. Search for position number
3. Add a row
4. Enter Effective Date: 06/01/2011
5. Enter Reason: “UPD” - POSITION DATA UPDATE
6. Click REMARKS and enter description of the change (e.g. Change in FTE due to decrease in funding).
7. Go to Specific Information panel, update Position FTE: 0.50000
8. SAVE
Job Data:
9. Click on JOB DATA
10. Search for the employee
11. Go to WORK LOCATION
12. Add a row
13. Enter the **UH Eff Dt**: 06/01/2011
14. Action / Reason: “Data Change” and “521” – Change in Fte
15. Go to JOB INFORMATION
16. Update Person FTE: 0.50000
17. SAVE
18. Click GENERATE PNF
19. Enter SUS actions Date from: 06/01/2011
20. SAVE, PRINT and SEND to Payroll
**University Of Hawaii**  
**Payroll Notification Form**  

<table>
<thead>
<tr>
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<th>XXX-XX</th>
<th>Name:</th>
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<th>WD</th>
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<th>Doc No</th>
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<th>PNF date:</th>
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**22103300  
CHANCELLOR, UH MANOA / MANOA HUMAN RES MGMT /**

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<th>F/T Mon</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Pos No</td>
<td>Pos No</td>
<td>Grade Stp</td>
<td>Grade Stp</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Percent Bu</td>
<td>Percent Bu</td>
</tr>
<tr>
<td>INSTITUTIONAL SUPPORT</td>
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<tr>
<td>BASEE</td>
<td>MA</td>
<td>1.00000</td>
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</table>

---

Remarks:
The above appointment is contingent on the availability of funds, and visa provisions when applicable. It is certified that the appointment is in compliance with Board of Regents policies and applicable statutes and regulations. In the event that service does not continue throughout the term if any be specified, the salary due will be based upon the period of actual service.

I certify that, to the best of my knowledge, the appointment or personnel transaction(s) shown above is/are in compliance with Board of Regents policies and all applicable statutes and regulations.

---

Approving Officer Signature/Date  
Approving Officer Signature/Date  
Fiscal Authority Signature/Date  
Appointing Officer Signature / Date
Part-Time Sabbaticals

References

A9.400 GUIDELINES FOR SABBATICAL LEAVE FOR FACULTY

Example: .50 Sabb for one year 1/1/12-12/31/12

1. Click on JOB DATA
2. Search for the employee
3. Go to WORK LOCATION
4. Add a row
5. Enter the UH Eff Dt: 01/01/2012
6. Action / Reason: “Paid Leave of Absence” and “490” – Sabb/Prof Improvement Leave
7. SAVE

8. Click GENERATE PNF
9. Enter SUS actions Date from: 01/01/2012
10. Save
11. Click PNF MAINT
12. Enter Partial Day Pay Code 500

13. Go to UH PNF DATA 3, enter remarks: “On-going. Partial Day Pay represents partial payment for the entire duration of this action. Employee on .50 Sabbatical from 01-01-12 through 12-31-12.”
14. SAVE, PRINT and SEND to Payroll
15. Send Special Handling email to the Payroll office.

**.50 Sabbatical leave remarks continue to be entered on all subsequent PNFs until employee returns.
University Of Hawaii

Payroll Notification Form

PNF date: 06/13/2014
Doc No: 619525
EmpID:

SSN XXX-XX Name: 
P/R: F54 WD: 
Sex: F Marital status: M Fed Exempt: 0 State Exempt: -7 Pay class: SM
Ref/FICA: 11 HD Ist: 2 Visa:
Appointment period from: To: 
PSP:

UH Appt dt: 12/03/1060

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<th>P/A</th>
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22103300
CHANCELLOR, UH MANOA / MANOA HUMAN RES MGMT /

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<th>F/T Mon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pos No</td>
<td>Grade Stp</td>
<td>Percent</td>
<td>Bu</td>
</tr>
<tr>
<td>RESEARCHER, 11-MO</td>
<td>R5M11</td>
<td>0.007.00</td>
<td>1.00000</td>
</tr>
</tbody>
</table>

Annual: 80,004.00 Annual: 80,004.00 BU: 07
Semi.mo: 3,333.50 Semi.mo: 3,333.50 FTE: 1.00000

Pay Type Account Code Percent Semi month amt NTE Date Position Number
BASER MA 1.00000

On-going. Partial Day Pay represents partial payment for the entire duration of this action. Employee
Remarks: On 50 Sabbatical from 01-01-12 through 12-31-12
The above appointment is contingent on the availability of funds, and visa provisions when applicable. It is
certified that the appointment is in compliance with Board of Regents policies and applicable statutes and
regulations. In the event that service does not continue throughout the term, if any be specified, the salary due
will be based upon the period of actual service.

Approving Officer Signature/Date

Approving Officer Signature/Date

Fiscal Authority Signature/Date

Appointing Officer Signature / Date
Partial Day Pay

Note
No change to position panels required.

References
A9.420 LEAVE WITHOUT PAY FOR BOR PERSONNEL

Background
Pay employee a portion of full day’s pay on a particular date due to insufficient paid vacation or sick leave hours.

Action
Employee is filing for vacation leave for the period of December 1 – 12, 2014 (10 work days = 80 vacation hours). Employee has 75 hours of accrued vacation hours as of November 30, 2014. Employee will exhaust 75 hours of vacation and has been approved for 5 hours of LWOP for personal reasons.

1) Click on JOB DATA
2) Search for the employee
3) Click WORK LOCATION tab
4) Add a row
5) Enter UH Eff Dt – 12/12/2014
6) Action/Reason: “Leave of Absence” and “610” LWOP – Personal Reasons
7) SAVE

![Image of Work Location tab in a software interface]
8) Click GENERATE PNF
9) Enter the **SUS actions Date from** – 12/12/2014
10) Click SAVE to generate Doc No.
11) Click PNF MAINT
12) Click UH PNF DATA 1 Tab

13) Enter PARTIAL PAY amount here
   
   - To calculate fraction of day to be paid, employee is using 75 hours vacation leave for the period of December 1 -12, 2014.
     - December 1 – 11 = 8 hours/day = 72 hours of vacation leave
     - December 12 = 3 hours of vacation leave and 5 hours LWOP
     - 3 hours vacation leave ÷ 8 hours (daily work hours) = 0.375
     - Partial Pay amount = 375 (enter 3 digits with no decimal)

14) Click SAVE

15) Click PRINT PNF
Include REMARKS to confirm PARTIAL PAY amount to Payroll to avoid over/under payment.

First day. Partial Day Pay represents partial payment for one day only. LWOP 5 hours. Pay for 3 hours on 12/12/14.

The above appointment is contingent on the availability of funds, and visa provisions when applicable. It is certified that the appointment is in compliance with Board of Regents policies and applicable statutes and regulations. In the event that service does not continue throughout the term, any fees specified, the salary due will be based upon the period of actual service.

I certify that, to the best of my knowledge, the appointment or personnel transaction(s) shown above is/are in compliance with Board of Regents policies and all applicable statutes and regulations.
Example

Ongoing Partial LWOP with starting day FTE different from ongoing FTE (requires 2 separate PNFs)

6 hours LWOP on 4/11/11; 4 hours LWOP for the period 4/12/11-5/12/11

1st PNF
1. Click on JOB DATA
2. Search for the employee
3. Click WORK LOCATION tab
4. Add a row
5. Enter *UH Eff date: 04/11/2011*
6. Action / Reason: “Data Change” and “523” – PARTIAL LWOP
7. SAVE

8. Click GENERATE PNF
9. Enter *SUS actions Date from* – 04/11/2011
10. Click SAVE to generate Doc No
12. Click PNF MAINT
13. Enter Partial Day Pay Code: 250

14. Go to UH PNF Data 3, enter remarks: “First day. Partial Day Pay represents partial payment for one day only. Pay 2 hours on 04-11-11.”
15. Save, print and send to Payroll. Send Special Handling email to the Payroll office.
Payroll Notification Form

SSN      XXX-XX
P/R:     F60
Sex:    F
Ret/FICA: 11
Visa: 2
Fed Exempt: 0
State Exempt: 7
PSP: ANP 2003

Appointment period from: DTA 523
TO: PARTIAL LWOP 04/11/2011 250

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CHANCELLOR, UH MANOA / MANOA HUMAN RES MGMT /

<table>
<thead>
<tr>
<th>From: Position Title</th>
<th>F/T Mon</th>
<th>To: Position Title</th>
<th>F/T Mon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pos No</td>
<td>Grade Stp</td>
<td>Percent Bu</td>
<td>Pos No</td>
</tr>
<tr>
<td>INSTITUTIONAL SUPPORT</td>
<td>PBA</td>
<td>1.00000</td>
<td>78</td>
</tr>
</tbody>
</table>

Annual: | Semi-mo: | BU: 78 | FTE: 1.00000 |
| Pay Type | Account Code | Percent | Semi month amt | NTE Date |
| BASER | MA | 1.00000 | | |

Remarks: First day. Partial Day Pay represents partial payment for one day only. Pay 2 hours on 04-11-11. The above appointment is contingent on the availability of funds, and visa provisions when applicable. It is certified that the appointment is in compliance with Board of Regents policies and applicable statutes and regulations. In the event that service does not continue throughout the term, if any be specified, the salary due will be based upon the period of actual service.

I certify that, to the best of my knowledge, the appointment or personnel transaction(s) shown above is/are in compliance with Board of Regents policies and all applicable statutes and regulations.

Approving Officer Signature/Date
Approving Officer Signature/Date
Fiscal Authority Signature/Date
Appointing Officer Signature / Date
2nd PNF
1. Click on JOB DATA
2. Search for the employee
3. Go to WORK LOCATION
4. Add a row
5. Enter the UH Eff date: 04/12/2011
7. SAVE

8. Click Generate PNF
9. Enter SUS actions Date from: 04/12/2011
10. Save
11. Click PNF MAINT
12. Enter Partial Day Pay Code: 500

13. Go to UH PNF Data 3, enter remarks: “Ongoing. Partial Day Pay represents partial payment for entire duration of this action. Employee on .50 LWOP for personal reasons from 04-12-11 through 05-12-11.”
14. Save, print and send to Payroll.
15. Send Special Handling email to the Payroll office.

**Partial LWOP remarks continue to be entered on all subsequent PNFs until employee returns.**
### Payroll Notification Form

**University Of Hawaii**

**From: Position Title**

<table>
<thead>
<tr>
<th>From Position Title</th>
<th>Pos No</th>
<th>Grade Stp</th>
<th>F/T Mon Percent</th>
<th>To Position Title</th>
<th>Pos No</th>
<th>Grade Stp</th>
<th>F/T Mon Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>INSTITUTIONAL SUPPORT</td>
<td>PBA 18</td>
<td>1.00000</td>
<td>78</td>
<td>INSTITUTIONAL SUPPORT</td>
<td>PBA 18</td>
<td>1.00000</td>
<td>78</td>
</tr>
</tbody>
</table>

**Annual:**

- Semi-mo: 
- Pay Type: BASER
- Account Code: MA
- Percent: 10000
- Semi month amt: 
- NTE Date: 
- Position Number:

**Remarks:**
- Ongoing. Partial Day Pay represents partial payment for entire duration of this action. Employee on .50
- LWOP for personal reasons from 04-12-11 through 05-12-11.
- The above appointment is contingent on the availability of funds, and visa provisions when applicable. It is certified that the appointment is in compliance with Board of Regents policies and applicable statutes and regulations. In the event that service does not continue throughout the term, if any be specified, the salary due will be based upon the period of actual service.
- I certify that, to the best of my knowledge, the appointment or personnel transaction(s) shown above is/are in compliance with Board of Regents policies and all applicable statutes and regulations.

**Approving Officer Signature/Date**

**Approving Officer Signature/Date**

**Fiscal Authority Signature/Date**

**Appointing Officer Signature / Date**

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**Page 37**
Return to Duty for ALL Leave Actions

ACTION

All LWOP actions require a PNF to return the employee to the payroll. Payroll will not reactivate the employee’s pay without a PNF.

1) Click on JOB DATA
2) Search for the employee
3) Click WORK LOCATION tab
4) Add a row
5) Enter UH Eff Dt – 12/13/2014
6) Action/Reason: “Return from Leave.” Code will be dependent on type of leave (i.e., personal reasons, sabbatical, family leave, etc.)
7) SAVE

After action is executed and approved, employee status will change to ACTIVE

NOA Code and Description will be dependent upon type of LWOP action used to put employee on LWOP
8) Generate PNF through normal process

Return from LWOP of 5 hours on 12/12/14.

Remarks should reflect LWOP action that resulted in employee placed on LWOP (i.e., Return from military leave on 09/16/14; Return from sabbatical on 01/01/14; etc.)

Remarks:

Return from LWOP of 5 hours on 12/12/14.
Partial Leave Without Pay Examples  
Date: 04/18/11; Updated 04/09/12 with note 4; updated 10/30/14 with corrections to Example 1a and 1b.

NOTES:

1. Enter unreduced FTE into PeopleSoft  
2. Due to special handling by the Payroll Office, highlight comments in yellow and handcarry to the Payroll Office.  
3. Partial LWOP remarks continue to be entered on all subsequent PNFs until employee returns  
4. Semi-monthly salary on PNF remains unreduced

**REMARKER:** If partial LWOP situation results in an overpayment, call the Payroll Office as soon as possible.

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<tbody>
<tr>
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<td>Effective Date</td>
<td>Action</td>
</tr>
</tbody>
</table>
| **EXAMPLE 1a: Partial LWOP for Personal reasons for single day taken at end of the day (requires 2 separate PNFs)** | 4/11/2011 | 6 hour LWOP | 1.00 | $6,000 | 610 - Personal Reasons | 4/11/2011 | 250 | "First day. Partial Day Pay represents partial payment for one day only. LWOP 6 hours. Pay for 2 hours on 04-11-11."
| 1st PNF to place on partial LWOP | | | | | | | | |
| 2nd PNF to Return from partial LWOP | 4/12/2011 | Return | 1.00 | $6,000 | 710 - Return from LWOP - Personal Reasons | 4/12/2011 | | "Return from LWOP of 6 hours on 04-11-2011."

**EXAMPLE 1b: Partial LWOP for Personal reasons for single day taken at the beginning of the day (requires 1 PNF with two actions for the leave and return on the same effective date.)**

| One PNF with two actions | 4/11/2011 | 6 hour LWOP | 1.00 | $6,000 | 610 - Personal Reasons | 4/11/2011 | 250 | "First day. Partial Day Pay represents partial payment for one day only. LWOP 6 hours. Pay for 2 hours on 04-11-11."
| | 4/11/2011 | Return | 1.00 | $6,000 | 710 - Return from LWOP - Personal Reasons | 4/11/2011 | | |

**EXAMPLE 2: Ongoing Partial LWOP with starting day FTE different from ongoing FTE (requires 3 separate PNFs)**

| 1st PNF: first day | 4/11/2011 | 6 hour LWOP | 1.00 | $6,000 | 523 - Partial Leave Without Pay | 4/11/2011 | 250 | "Ongoing. Partial Day Pay represents partial payment for entire duration of this action. Employee on .50 LWOP for personal reasons from 04-12-2011 to 05-12-11"
| 2nd PNF: every day thereafter (ongoing at different FTE) | 4/12/2011 | 4 hour LWOP | 1.00 | $6,000 | 523 - Partial Leave Without Pay | 4/12/2011 | 500 | "Ongoing. Partial Day Pay represents partial payment for entire duration of this action. Employee on .50 LWOP for personal reasons from 04-12-2011 to 05-12-11"
| 3rd PNF: return from partial LWOP | 5/13/2011 | Return | 1.00 | $6,000 | 525 - Return from Partial Leave Without Pay | 5/13/2011 | | "Return from Partial LWOP 04-11-2011 through 05-12-2011."

**EXAMPLE 3: Partial LWOP for a single day followed by a period of 100% LWOP**

| First day partial pay followed by full LWOP | 04/11/2011 until 05/12/11 | 6 hour LWOP | 1.00 | $6,000 | 610 - LWOP Personal Reasons | 4/11/2011 | 250 | "First day. Partial Day Pay represents partial payment for one day only. Pay for 2 hours on 04-11-11. Full LWOP from 04-12-11 through 05-12-11."

**EXAMPLE 4: Ongoing Partial LWOP with starting day FTE same as ongoing FTE**

| Ongoing partial LWOP | 04/11/2011 until 05/12/11 | 6 hour LWOP | 1.00 | $6,000 | 523 - Partial Leave Without Pay | 4/11/2011 | 250 | "Ongoing. Partial Day Pay represents partial payment for entire duration of this action. Employee on .80 LWOP for personal reasons from 04-11-11 to 05-12-11"

**EXAMPLE 5: Part-Time Sabbaticals**

| Sabbaticals (Year Long) | 1/1/2012 until 12/31/2012 | 50 Sabb | 1.00 | $6,000 | 490 - Sabb/Prof Improvement Leave | 1/1/2012 | 500 | "Ongoing. Partial Day Pay represents partial payment for entire duration of this action. Employee on .50 Sabbatical from 01-01-12 to 12-31-12"
Generic Position Numbers

ACTION

Hiring employees into Generic Positions Casual Hires, Grad Assistants, Lecturers

1. Enter Effective Date; use “Hire” as Action Code and “009” Exempt Appointment as Reason Code (if Transferring into generic position, select appropriate Action/Reason Code)
2. Enter Appointment Period From and To Dates
3. Enter Appropriate Generic Position Number:
   - CASUAL for Casual Appointments
   - 0000GA09 for 9-mo Graduate Assistants
   - 0000GA11 for 11-mo Graduate Assistants
   - 0002LECA, 0002LECB, 0002LECC for Lecturers at 2 Year Campuses
   - 0004LECA, 0004LECB, 0004LECC for Lecturers at 4 Year Campuses
   - 000NCOMP for Non-compensated Appointments
   - OVERLOAD for Overload Appointments
4. Click on “Override Position Data” Button (sometimes the textboxes to override the position data do not appear on the screen after clicking the button once, you may need to click the button twice for the textboxes to appear)
5. Enter appropriate EAC code in “#Department” Field
   ***If EAC code is not entered, you will not be able to access the employee’s record later***
   If you do not have access to the record, DO NOT CREATE A NEW RECORD, Call System OHR and provide them the appropriate EAC Code; the record will be transferred to you
6. Enter appropriate Location code in “Location”
7. Enter Supervisor information
8. Enter the Island code

**DO NOT FORGET TO UPDATE EAC CODE!**
9. Click on the “Job Information” Tab, double check FTE and BU. Grad Assistants should not be more than .50 FTE. Overloads will not have an FTE. If hiring a casual or overload, remarks should be entered in the Job Comment textbox (textbox does not have a character limit).

10. Click on the “Payroll” Tab; enter appropriate exemptions, Warrant Distribution, Payroll Number, Retirement Code, and FICA Code

11. For GAs and Lecturers, Click on the “Salary Plan” Tab, clear “Step” field, tab out to Refresh, and for GAs, insert appropriate step; for Lecturers, insert # of credits taught in “Step” field

12. Click on the “Compensation” Tab. For GAs and Lecturers double check “Compensation Rate and “Frequency” fields; for Casual appointments, enter appropriate data in “Compensation Rate” and “Frequency” fields. Be careful when changing the compensation frequency. If the compensation frequency is changed, sometimes the compensation rate changes to zero after clicking on other tabs or saving, so be sure to double check your rates.

13. Click on “Employment Data” Link at bottom of screen. Employment Data needs to be completed for all appointments except Casual and Overload. Service Comp Date for GA and NonComp should be 01/01/9999. Tenure information should also be completed for GA, NonComp and Lecturers (enter effective date of hire and N/A for tenure code).
Different Job Titles

Reference: Board of Regents Policies

- RP 9.202 – Classification Plans and Compensation Schedules (non-comp employees)
  - Section III.E.4.b.1
  - Section III.E.5.a.3

1. Job Title

Automatically assigned to all employees based on Job Code on the Add/Update Position Description Panel. Job Title on Job Data/Work Location panel is pulled from the Position panel when position number is entered on Job Data. This should be the title displayed on WorkatUH and the Star Advertiser.

For APT employees, the Job Title is also called Career Group

If the job title does not match the job code, refresh the position number (i.e., erase position number on job data, tab out, go back and re-enter the position number.) This will cause the position data to update the job data panel.

2. BOR Title – Only use official Board of Regents approved title for BOR employees. No other titles can be used.

Examples:
  - Professor and Chair
  - Interim Assistant Dean & Prof

- Non-compensated employees - must have BOR titles consistent with Board of Regents Policy Chapter 9.202 Section III.E.3 through 5
- Incentive Early Retirement (IER) employees – IER titles are no longer valid titles pursuant to Act 179. (e.g. IER Professor). Historically, “IER” should be the first 3 letters of the BOR title
- “Interim” is used when an employee is temporarily filling a vacant position. “Acting” is used when an employee is temporarily filling a position for which another employee will return to.

3. Functional Title - Reserved for APT employees only. This title assigned by Functional Code on Add/Update Position Description Panel.

Ref: OHR web site/HR Info Systems/Table Code Listings/Functional Codes

4. Working Title – For Faculty and Executive/Managerial employees. Only stored on the position panel. Does not output to the HR datamart or print on PNF.
5. Casual/Overload - Job Data / Work Location panel displays “Working Title” rather than “BOR Title”.

Note:
- HR datamart – the Job title is the default value in the PSEMPL table. The BOR title supercede the Job Title if the BOR title field is filled.
- BOR titles print on the PNF. If no BOR title exists, then the Job title associated with the Job Code is used.
Different FTE values

1. Position FTE (on the Add/Update Position Info/Specific Information panel)

FTE of the position. FTE is obtained from the appropriate HRD-1 or SF-1.

For Civil Service and Executive/Managerial positions a HRD-1 or SF-1 respectively must be submitted in order to effectuate a change. Faculty & APT changes are delegated to the field units; appropriate documentation may be required to make a change.

This field should NOT be changed if an employee decreases their FTE. That change is made only on the Job Data/Job Information Panel.

Position FTE should not be changed for all generic position numbers (ie., Overload, casual, non-comps, lecturers, grad assts). As generic position numbers are shared by all users, changing this data will create errors for all generic positions.

2. Appointment FTE (on the Job Data/Job Information Panel)

FTE of the appointment. Overload and Non-compensated employees have a FTE = 0. Default FTE for non-generic position numbers is pulled from the Position FTE but can be overridden in Job Data. Job Data FTE can be less than the Position FTE.

Job Data FTE may possibly be greater than 1.0 if employee has a lecturer appointment. PNF is capped at 1.0

3. FTE person (in HR Datamart)

FTE of the appointment (ie., FTE on the Job Data/Job Information Panel)

4. FTE total (in HR Datamart)

Sum of all FTE for all appointments. This value is stored only in the home base appointment in the HR Datamart. All subsequent appointments will have a value of zero.

Example:

<table>
<thead>
<tr>
<th>HR DataMart Record No</th>
<th>FTE Person</th>
<th>FTE Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>.75</td>
<td>1.00</td>
</tr>
<tr>
<td>2</td>
<td>.10</td>
<td>0.00</td>
</tr>
<tr>
<td>3</td>
<td>.15</td>
<td>0.00</td>
</tr>
</tbody>
</table>
History of Lecturer FTE

• HR System: Faculty Staff Information System (FSIS)

Prior to September 1994: SF-5Bs and the Faculty Staff Information System (FSIS): reflected 1.00 as the FTE for all lecturers, regardless of number of credits taught. Field units sent to ERS only those SF-5Bs which reached the threshold (7 credits for 4-year campuses; 8 credits for 2-year campuses)

• HR System: American Management System Human Resources Information System (Spring 1994)

Note: HR Datamart historical data as of March, 1995

September 1994: Lecturers were added into the Human Resources Information System (HRIS) with FTE based on number of credits taught, using 12 credits (full-time) as the base for the four-year campuses and 15 credits (full-time) for two-year campuses. For example, 6 credits taught at 4-year campuses translates into a .50 FTE. However, 6 credits is not ERS-eligible. Field units send to ERS only those eligible employees. (background: HRIS required an FTE)

• HR System: PeopleSoft Human Resources System (March 1998)

January 16, 1999: All Lecturer appointments were coded as 0.00 FTE to resolve the discrepancy between the policy that 7/8 credits equated to half-time for lecturers teaching at 4-year and 2-year campuses respectively, while on HRIS, 6/7.5 equated to half-time.

• January 16, 2004 Lecturer FTE based on Matrix.

Ref: OHR web site / HR info systems / Systemwide Processing Instructions Lecturer Hour Conversion Matrix

• December 15, 2011 – Lecturer FTE based on Matrix revised

Ref: OHR web site / HR info systems / Systemwide Processing Instructions Lecturer Appointments Effective Spring 2012

Graduate Assistants

Ref: OHR web site / HR info systems / Systemwide Processing Instructions Graduate Assistants with Multiple Appointments

Casual/Overload

Casual appointments must have a FTE; Overload appointments do not have an FTE.
Maximum Lecturer Salary allowed on Payroll Notification Form (PNF)

Background
PNFs for lecturers must accurately reflect salaries for the Employees' Retirement System (ERS). For lecturers with multiple appointments, the maximum monthly salary that can be paid on the PNF and reported to the ERS, is an amount equivalent to the highest full-time salary. The full-time equivalent salary for 4-year campuses is based on 12 credit hours, while the full-time equivalent for 2-year campuses is based on 15 credits. All excess earnings must be paid via overload, which are not reported to ERS for pension consideration.

The following rates are the full-time monthly salary for lecturers, by step, allowable on the PNF and reportable to ERS, based on the September 1, 2014 rates in the UHPA Agreement. Rates change with each salary update in the UHPA Agreement Article XXI.E.

4-year campus (based on a full-time rate of 12 credits):

Step A: $3,664.00
Step B: $4,402.68
Step C: $5,144.00

2-year campus (based on a full-time rate of 15 credits):

Step A: $4,580.00
Step B: $5,503.34
Step C: $6,430.00

In the event that the lecturer teaches at a combination of 2- and 4-year campuses, the maximum amount payable on the PNF is the full-time equivalent of the higher monthly rate.

Note: The above section does not apply to APT and civil service employees who have lecturer appointments. In these situations, the lectureship must be paid via overload, regardless of the FTE of the APT or civil service appointment.

Process
The following steps will compute the overload amount. The unit adding the second or third, etc., appointment record in PeopleSoft is responsible for determining whether the subsequent appointment can be entirely on the PNF or if part of the earnings must be paid via overload. The subsequent hiring unit must:

A. determine the highest full-time monthly salary of all appointments (this is the maximum that can be reflected on the PNF).
B. determine the employee’s actual salary based on number of credits or FTE.
C. if B is greater than A, then the balance must be paid via overload.
Examples

**Example 1:** An Assistant Researcher is .80 FTE with a full-time equivalent monthly salary of $4,584.00, to which a 3-credit UHM lectureship (LA) is added.

A. Determine highest full-time monthly salary:
   - Maximum for Asst Researcher = $4,584.00
   - Maximum for an LA lecturer = $3,664.00
   - $4,584.00 is the maximum salary to be reflected on the PNF.

B. Determine the actual monthly salary:
   - Faculty: $4,584.00 x .80 = $3,667.20
   - Lecturer: LA 3 credits = $916.00
   - Total: $4,583.20

C. Determine the amount, if any, to be paid via overload:
   - Total actual pay = $4,583.20 per month is less than the $4,584.00 maximum; therefore $4,583.20 can be reflected on the PNF.

**Example 2:** An Assistant Researcher is .80 FTE with a full-time monthly salary of $4,584.00, to which a 6-credit UHM lectureship (LA) is added.

A. Determine highest full-time monthly salary
   - Same as example 1: $4,584.00

B. Determine the actual monthly salary:
   - Faculty = $3,667.20
   - Lecturer, Step A, 6 credits = $1,832.00
   - Total = $5,499.20

C. Determine the amount, if any, to be paid on the PNF and via overload:
   - $5,499.20 - $4,584.00 = $915.20 excess
   - The lecturer salary must be reduced by $915.20, and the remaining earning must be paid via overload:
   - A total of $4,584.00 can be reflected on the PNF, so the lecturer salary must be reduced by $915.20 ($1,832 – $915.20 = $916.80)
   - The PNF will reflect the lecturer monthly salary as $916.80, and $915.20 must be paid via overload.

**Example 3:** Lecturer teaches 8 credits at UH Mānoa (LB). Honolulu CC adds 7 credits as a second appointment (LA).

A. Determine highest full-time monthly salary:
   - UHM: $4,402.68
   - CC: $4,580.00
   - Maximum = $4,580.00
B. Determine the actual monthly salary:

- UHM: $2,935.12
- CC: $2,137.34
- Total = $5,072.46

C. Determine the amount, if any, to be paid on the PNF and via overload.

$5,072.46 - $4,580.00 = $492.46 excess.

Honolulu CC’s salary must be reduced by to $492.46, and the remaining earning must be paid via overload:

A total of $4,580.00 can be reflected on PNF, so Honolulu CC’s lecturer’s salary must be reduced by $492.46. ($2,137.34 – $492.46 = $1,644.88.)

The PNF will reflect Honolulu CC’s lecturer salary as $1,644.88, and $492.46 must be paid via overload.
PeopleSoft Instructions:

1. Compute maximum allowed, and each time another appointment is added, that unit is responsible to check if the maximum has been reached.

2. If maximum is exceeded, the unit must adjust the salary for that appointment so that the total salary paid via the PNF does not exceed the maximum. Step (number of credits) is reflected.

3. Include in remarks the amount paid via overload; e.g., “Lecturer teaching 8 credits (LB) at LLL, 7 credits (LA) at HCC - total salary of $5,072.46 exceeds maximum allowable amount of $4,580.00 payable on the PNF. Excess of $492.46 paid via overload.”
Remarks on PNF

The following are examples of remarks to be included in the Remarks section of the PNF. Most are suggested; however, there are a few which are mandatory to satisfy union or Payroll requirements. Mandatory remarks are noted.

Note: Character limit on Remarks field on PNF is 216 characters.

General Rules

All corrections: Identify the doc number of the original PNF that is being corrected and indicate what is being corrected. E.g., “Corrects doc no xxxxx to correct account code.” (MANDATORY)

If an overpayment occurred more than two years ago, and employee was not officially notified of the overpayment by Payroll, then include: “Due to 2-year statute of limitations in notifying employee of overpayment, this salary overpayment will not be collected” (MANDATORY) Refer to HRS 78-12 which says, in part:

“(e) If the indebtedness has occurred as a result of salary or wage overpayment, the disbursing officer shall determine the amount of indebtedness and notify the employee in writing of the indebtedness; provided that, to be an actionable cause of action, the determination and notice to the employee shall be made within two years from the date of the salary or wage overpayment, and not after….”

Specific Actions – Sample Comments

Hire Actions

Reminder: If multiple appts are effective the same day, both appts should be coded as Hire 009. Do not reflect the second appointment as Hire 200(additional position)

- If applicable, “Retirement/FICA verified with ERS on xx-xx-xx.” (MANDATORY)
- “Dean, Arts & Humanities, effective 09/22/2014 - 09/15/2017, unless sooner relieved, approved President on 08/22/2014.”
- “Appointed as Interim Assistant to Senior Executive, approved by BOR August 21, 2014. Ret / FICA code verified by ERS 08/01/2014”
- “Hiring ERS retiree into part-time pos excluded from ERS membership.”
- Lecturers: Effective January 16, 1999, all Spring lecturers must reflect the following remarks on the 01/16/xxxx (or later) PNF; this serves as a notice of termination at the end of the Spring semester. No PNF is generated to terminate the lecturer on 05/31/xxxx. The system should automatically add these remarks.
“This appointment ends on May 31, xxxx, unless employment is terminated prior to the end of the Spring semester.” (MANDATORY)

Remarks to include courses to be taught by the lecturer are optional. Example of a lecturer with multiple appointments: “UHM: ART 113, 3 cr @ LA, $1374/cr. HCC: ART 101, 3 cr @ LB, $1651/cr. Contingent on sufficient enrollment & funds.”

Job Earnings Distribution – move to S397 acct (Earnings Distribution 397)

For BU 08 only: "Pursuant to Article 14.I. & MOU dated 12/31/13, a temp change in funding has occurred for your position. No change in benefits or rights to your position and original funding shall be restored effective 07/01/xx." (MANDATORY)

Pay rate change

- Lump sum special payment
  
  Include in remarks reason for lump sum.

- Pay Advanced Prorata Summer Pay (Pay Rate Change 419) pay advanced prorata summer pay (this is used in conjunction with Hire 009)

  Note: this is used when the 9-month faculty member completes the I9 after August 1 but before the on duty date; the employee is entitled to be paid the entire advance prorata summer pay (August 1 to the on-duty date).

  Example: Employee completes I9 on August 10; PNF effective date for both hire and code 419 is August 10, PNF must be special handled to Payroll.

  Remarks: “Pay from August 1, xxxx to included advance prorata summer pay.” (MANDATORY)

- Pay Adjustment – Other (440)

  This code is a generic code. This code is used when the lecturer changed credit hours; also used for mass E/M salary adjustments. These two situations are exceptions, but for anything else, include in remarks what the adjustment was for.

- Promotion

  If applicable, “Promotion approved by the Board on xxxxxx.”
Pay Adjustment = IRC Section 457(f)

Monthly salary temporarily increased to maintain compliance with Section 457(f) of the Internal Revenue Code, not-to-exceed 12/31/xxxx.

Eff 01/01/xxxx: “Monthly salary temporarily decreased to maintain compliance with Section 457(f) of the Internal Revenue Code.”

Additional stipend

Indicate what the stipend is for and the duration of the stipend:
“Appointed Chair, English Department from 07-01-2014 to 6-30-2015.”
“Deletes stipend; ends Chair English Dept”

470 Employment & Pay Rate Continued vs 471 Extension of Appt Period

There was a need for the appointment period to be extended in addition to having a salary adjustment.

470: Employment and Pay Rate Continued = indicates that the pay rate is continuing

471: Extension of Appointment Period = allows a way for a salary adjustment to occur. The 471 code can be used with a pay rate change row.

Special Salary Adjustment

“Special adj based on market & retention, approved by the President on xx/xx/xxxx.”

“Special salary adjustment based on equity.”

“Position redescribed. Permanent in-grade adjustment of 2 steps.”

Leaves

Changes while on paid leave or LWOP

Indicate change that occurred.

Partial LWOP

“On-going. Partial Day Pay represents partial payment for entire duration of this action. Employee on .50 Sabbatical Leave from 01/01/2015 to 12/31/2015.” (MANDATORY)

Link: OHR web site / HR Info Systems / Systemwide Processing Instructions / Partial LWOP or Part-time Sabbaticals
Separations

- **All Separations:**

  If a lump sum is paid on the remarks, and it should be charged to an account different from that on the PNF: “Pay (e.g., lump sum prorata summer pay) from xx/xx/xx to xx/xx/xx of $x,xxx.xx) charged to account XXXXXXXXXXX.” This should be special handled to Payroll.

- **Termination – Examples:** not passing probation period, not meeting performance requirements, end of contract

  “Termination due to lack of funds.”
  “End of temporary appointment.”

- **Retirement**


  “Retire with ERS on xx/xx/xx. COB xx/xx/xx. Includes all prorata summer pay.”

  “Retire with ERS on 06-01-2014. COB xx/xx/xx. Pay lump sum prorata summer pay through 07/31/2014 on 06/05/14 (or whenever) payroll in the amount of $x,xxx.xx. Charge lump sum payment to account xxxxxxxxxx.


- **Discharge – Employees who are discharged due to misconduct are not entitled to additional service credit in the retirement system based on unused sick leave.**

  “Discharge due to misconduct. Per HRS 88-63, employee not eligible for additional ERS service credit for unused sick leave.” **(MANDATORY)**

Other

- **Payroll Number Change:** Special note: if the payroll number is changing from Lag to After the Fact or vice versa, be sure to special handle these to Payroll as soon as possible.

- **Name Change 900**

  Note: Social security card is required. Attach a copy of PNF and submit to Payroll Office. If SS card is faxed along with the name change PNF, include payroll number and warrant distribution code.
“Name change from xxxxxxxx to yyyyyyy. Change in payroll number from F53 to F57.”

- Change in record tax exemption 907

  Note: for those employees who want to withhold more that $495 for Federal and/or $198 for State taxes, enter “-99” in exemptions field, and in remarks, enter additional amount the employee is requesting to withhold and for State and/or Federal. This should be special handled to Payroll with a copy of the tax form (W-4 or HW-4) to Payroll with a copy of the PNF.

  “Employee requests $1,000 withheld for Federal and $500 for State Taxes per pay period.”

  “Change federal & state tax exemptions from "x" to "y." ”

  “Change in fed tax from 2 to -20 and state tax from 2 to 0.”

- Change in record warrant distribution 909

  “Change warrant from 935 to 901.”

- Change in record – retire/fica 911

  “Change ret code from 25.”

- Change in record tenure status 940

  “Change in probationary period from 2015 to 2016.”
Closing

1. Data Police / Corrections
   - Run pre-defined Discoverer query to determine errors
   - Policing happens around the 22\textsuperscript{nd} of each month
   - Data is frozen into the HR datamart as of the last month. Corrections completed before end of the month
   - March (Spring semester), June (Budget purposes), October (Fall Semester) & December (Separations) are especially important months

2. Invalidating / Voiding PNFs that affect Leave Transactions
   Contact Stacy Shigemura <sshigemu@hawaii.edu> if Invalidating or requesting Payroll to Void PNFs that affect leave accruals such as:
   - Bargaining Unit
   - FTE
   - Employee status (going on LWOP)
   - Changes between vacation accruing and non-vacation accruing
   - Hires & terminations
   - Changes in position numbers/transfers

   Additionally if going on LWOP, ensure that an LWOP action is separately entered in the Online Leave system for the employee.

3. Upcoming actions/reminders

9-month faculty who retire on 12/31/2014 (COB on the PNF = 12/30/2014) must be paid in lump sum for the one day on 12/31/2014, in addition to any other prorata summer pay due to the employee. Payment is made in remarks with the suggested verbiage as follows: "Retire with ERS 12/31/14, COB 12/30/14. Pay PSP from 12/31/14 to 01/31/15 (or appropriate date) of $xxxx.xx on 01/05/15."