New PAF: Helpful Hints on the PAF for Faculty Appointments (Updated 12/06)

- **Additional pay** is to be used to pay current employees within their regular appointed department for temporary duties or for summer money. This pay is not counted for salary increases, but is combined with the annual salary for calculation of the 25% overload supplemental payments and defined contributions. (i.e. Additional duties to cover during another employee’s sick leave; additional work on a special one-time project during normal work hours; temporary fellowship; summer 9-month faculty appointments.)

- **Account codes** - Budgeted positions have the following object/account codes are 600005, 620005, 630005, 650005, and 700005. Except some summer pools 601105 and 631105 and Graduate Assistant pools 602505 and 632505 may also be budgeted. Non-Budgeted positions have object/account codes that are formatted xx7x05.
  - Example:  637005 faculty, research, temporary
  - 607005 faculty, teaching, temporary
  - 657005 temporary monthly staff
  - 707005 temporary hourly staff

- **Affiliate Appointments**: Affiliate title is used to appoint faculty who do not hold a paid position at OU and will be serving on committees or assigned as instructor without pay. Use the paper PAF for submission. A position number is not required on the PAF. Departments will appoint a person to the job code 8888 Affiliate, indicate the academic rank on the PAF, and enter zero in the salary portion of the PAF. The PAF is forwarded to the Office of the Provost. Also have the faculty provide a Personnel Data Form (PDF). These appointments are forwarded to Payroll to be set-up in PeopleSoft which generates an e-mail address and Sooner Id number for the appointee. Remarks should explain the reason for the appointment, i.e. serving on dissertation committee.

- **Effective date** is the first day of the new status; i.e. common termination dates are 7/1/xx, 8/16/xx, 5/16/xx. This reflects the first day in the retired or resigned status.

- **GTA and GRAs** will be appointed as 12 months. Preferred dates are August 1 through May 31 for 10-month GTA appointments and June 1 through July 31 for summer teaching appointments. August 16 through May 15 for 9-month GTA appointment dates are acceptable; however, using the 10 month period is easier to use in the payroll system by avoiding the half months. GTAs and GRAs will require a PAF to stop payments at the end of their appointments.

- **New or rehired employees** are required by federal law to complete the I-9 on the first working day and provide specific documentation of identity within the first 3 working days. If the new employee is out of town the Loyalty Oath and copies of I-9 identification may be notarized and mailed to the department or Payroll Office. To help get our new employees paid in August, it is very important that we are vigilant in helping them get this information to Payroll earlier than the start date. Documents may be downloaded on the HR website.

- **Non-budgeted, temporary faculty employees** do require a PAF to extend their 4.5 or 9 month contract. A PAF is not necessary to stop payment at the end of the academic appointment. If you process an additional pay for summer session, this action will not require a PAF to stop payment either. A PAF is required to terminate all employees from the University. So when they no longer will be extended, a termination PAF should be prepared.
- **Postdocs/Scholars** are ineligible for retirement benefits. Visiting titles have an option to join OTRS, and Adjuncts are ineligible for all benefits. If an employee is currently in OTRS they may not opt out by a change of their title.

- **Renewable Term** appointments are on Budgeted position numbers. These faculty appointments go through Equal Opportunity Office faculty hiring procedures and may have rank professor titles (i.e. Asst. Prof., Assoc. Prof., Professor).

- **Summer Appointments**: The 9-month faculty summer teaching and research appointment period falls between May 16 through Aug 15. Teaching is normally during June and July. The summer pay for 9-month faculty is process on the paper PAF form using the Additional Pay section. Additional pay will pay from position 99999. Earning distributions are process by payroll on the PAF form for additional pays. The summer object/account codes determine the correct funding source. It is important to reflect the correct funding source on the PAF, because reports are ran using the object/account code for distribution for the central funds.
  
  601005 = Summer Session  
  601105 = Department funds  
  601205 = GenEd funds  
  631105 = Research department funds.

- **Twelve months to nine months (or vice versa)** - When a faculty is transferring from a 12-month administrative job to a 9-month faculty position use the Action Code XFR with the Reason Code ACA - Faculty Position Change. If effective July 1, the remarks should read "off payroll from July 1 through August 15". This does not exclude the payments of summer additional pay (which is paid from position 99999), but only applies to the position number used for the 9-month contract. Also, faculty’s accrue time will be loss if not taken before the effective date (this only applies when they are moving from 12 to 9). Remarks should clearly state that employee is “moving from a 12 months to 9 months appointment” (or other vice versa). Also select the appropriate contract months 12 or 9 on the paper form, or make sure the on-line for action/reason opens up the pay group to reflect the correct salary calculation. A few changes can not be done on the on-line version and must be completed on the paper form.
Paying Academic Appointment on Supplement Pay:

**APPROVALS:** Before entering supplemental pays for full-time monthly staff and faculty to any of the Monthly Time and Earnings pages in People Soft, departments should fill out a (1) Personnel Action Form, (2) “Permission for Supplemental Pay for OU Full-Time Employee” form (if applicable), and (3) “Supplemental Pay and Payroll Correction Request” form.

**Personnel Action Form:** Departments will use a PAF to appoint the employee to an academic title (Adjunct, job code 1721, should be used in most cases). For current employees, leave the position number blank. For new employees who do not have a current appointment in payroll, use a specific department pool position number. Set up with zero pay and .10 FTE. Title information for the Academic Appointment section should indicate the appropriate faculty rank. Continue to the *Remarks section of the PAF and enter "Paid on supplemental for teaching (course information)".* The PAF will be used to update Class Schedule Instructor Data by the Provost Office, notify faculty of their appointment, and updated in payroll if appointing a new employee. Send a PDF to the Provost Office with the PAF. The new employee paperwork will be required in payroll.

The permission and supplemental pay approved forms will be returned to the department and the payment can then be entered into People Soft. The departments are required to keep the original form as backup for the entry. For employees with part-time monthly staff and faculty OU appointments the supplemental pay form may be completed and signed by an internal approval process set up by your Unit/Dean’s Office. *Routing of payments processed through CCE will follow CCE guidelines.*

When departments are ready to pay these employees, go to **Add Monthly Time and Earnings**, enter SUP (the ADDL REMARKS choice will appear), enter the exact dates the employee worked (ex: 8/15 – 12/15 or 11/1 – 11/12), enter information about the job the person performed, click OK, enter a flat rate of pay in the earning box and the account code information, SAVE.