



Banner Human Resources

Preparing an Electronic F3.2
Personnel Action Form

[F3.2-Personnel Action Form]

- The electronic form is located at myLamar under the Working at Lamar tab
 - Must have the most recent version of ADOBE READER-To download go to www.adobe.com
- Complete, print, and sign the form in blue ink
- Form may be saved; however, the social security number will not save in accordance with the University's security policy
- Always keep a copy for your file

[Section A]

■ Type of Action

- Indicates the type of action to be accomplished
- Use the drop down box to select an action
 - One action per form
- Where an asterisk (*) appears by an item, an explanation and/or documentation should be provided in section F of the F3.2

[Section A (continued)]

■ Action Type Definitions

- New Hire-never previously employed by Lamar University
- Re-Hire-previously employed with a break in service
- Reappointment-continuation of employment, assignment ends and another begins with no break in service
- Reclassification-change made to a job through consultation with the compensation staff
- Overload-any work assignment beyond 100%
- Stipend-additional salary paid for a continuing period for assumption of other duties, such as a stipend for assumption of interim duties, only exempt personnel qualify for stipends

[Section A (continued)]

■ Action Type Definitions (continued)

- Promotion-movement to a position in a higher pay grade
- Demotion-movement to a position in a lower pay grade
- Other-for all other actions not described, i.e., deducts
- Transfer-In-moving to a new source of funds and/or new department/organization
- Transfer-Out-ending the payment source and/or department/organization due to a change
- Separation-termination of the employment relationship
- One Time Pay-payment made for temporary job that has been completed. A lump sum amount to be paid to an employee. This does not become part of base pay.
- Leave-the beginning or end of a period of non-work; may be with or without pay

[Section A (continued)]

- **Employee ID**

- Employee ID=Banner ID
 - L00000000
 - Do not use student campus wide ID

- **Social Security Number**

- Include SSN only for new hires

- **Prefix**

- Use the drop down box to select a prefix

- **Name**

[Section B]

- **Org Name**

- The department/organization name initiating this action

- **Org Number**

- The organization number

- **PO Box**

- Where campus mail is received

- **Dept. Phone #**

- Number to call for questions concerning the F3.2

[Section B (continued)]

- **Job Title**

- Title of position assigned by budget or on the F3.1

- **Position #**

- Position number assigned by budget or on the F3.1; may be pooled or single

[Section B (continued)]

■ Funding Distribution

- Index-5 or 6 characters assigned that reflect the FOAPAL (alpha and numeric characters, i.e., HUHUR, ED5001)
- Fund-where the funds are coming from
- Organization-who is responsible for the fund
- Account-what the funds are used for
- Program-why the funds are used
- Activity-used to describe a classification of personnel costs
- % of Funding-always totals 100%; may be paid from multiple funds
- Amount of Position-based on the %
- Begin and End Date-date funding begins and ends

[Section C]

- **Job Start and End Date**
 - Date funding is available for the position (never crosses two fiscal years)
- **Hourly Rate**
 - Rate of pay for an employee paid on an hourly rather than salary basis
- **Annual Salary or Total Contract**
 - Total amount paid for the job or total amount paid for contract period
- **One Time Pay**
 - Lump sum payment for temporary job; never becomes part of base salary
- **Monthly Salary**
 - The amount shown for annual salary divided by the contract period

[Section C (continued)]

- **Contract Period**
 - Use the drop down box to select a contract period
 - 12 months-for staff and library faculty
 - 9 months-for faculty
 - 4.5 months-for adjuncts, overloads, and grad students (9/1-1/15) and (1/16-5/31)
 - 3 months-summer III (6/1-8/31)
 - 1.5 months-summer I (6/1-7/15) or summer II (7/16-8/31)
 - 2 months-summer IV (6/1-7/31)
 - Other-if other specify
 - Partial month payments will be based on the number of regular work days in the month.

[Section C (continued)]

■ FTE

- The amount of time assigned to the position compared to the standard full time position
 - Standard for:
 - Staff-40 hours per week=100% FTE
 - Regular Full Time Faculty-12 semester credit hours per semester=100% FTE
 - Adjunct Faculty-3 semester credit hours=20% FTE

[Section D]

■ Leave

- Prepared when the employee is not at work, but has not been terminated
- F3.2 is completed at the beginning and end of leave
- Use the drop down box to select leave with or without pay or to return an employee from leave
- Leave may be with or without pay based on available leave balances
- Enter type of leave; for example, FMLA, extended sick leave, military, or developmental

[Section E]

■ Separation Codes

- Use the drop down box to select a separation code
 - Resignation-employee voluntarily ends employment (attach letter of resignation)
 - Involuntary Separation-employee is terminated due to layoff, end of position, or for disciplinary reasons
 - Temporary Assignment-end of a temporary or interim position
 - Retirement-employee voluntarily ends employment due to retirement (attach letter of retirement)
 - Death-employment ended due to death of employee
 - End of Assignment-employment ended due to completion of assignment

[Section E (continued)]

- **Last Date Worked**

- The last day the employee was physically present and performed the duties of the job

- **Termination Date**

- The date the job ended (may be the same or different from the last date worked)

- **Reason for Separation**

- Specific reason for separation if known, i.e., accepted other employment, transfer to another state agency, moving out of area

[Section F]

- **Comments/Notes/Special Instructions**
 - Explain actions in more detail; for example, actual dates of one time pay, courses taught and FTE assigned to each, special calculations, deductions from pay, etc.
- **Financial Aid**
 - Used by the Financial Aid Department
- **Payroll**
 - Used by the Payroll Department

[Section G]

- **Complete on New Faculty and Faculty Status Changes**
 - Used by academic divisions to provide documentation for initial status of faculty as well as changes
 - Use drop down boxes to select highest degree, tenure status, and rank

[Section H]

■ Signatures

- F3.2 should be routed as appropriate for approval
- Departments are reminded to make a copy before forwarding the F3.2 to the next area for signature (no carbon copies)

■ Human Resources

- Used by the Human Resources Department

■ Primary Supervisor's Initials

- Must be completed when employee has more than one job assignment. It is the employing department's responsibility to forward the F3.2 to the primary supervisor for approval.

■ Deadlines

- Final date the F3.2 is due to Budget
 - Student, hourly, and student one time pay payroll-due on or before the 20th for payment on the 15th (or 1st working day following the 15th)
 - Faculty, staff, and one time pay payroll-due on or before the 15th for payment on the 1st working day of the following month

[Questions/Assistance]

- For questions or assistance with completing an electronic F3.2 form contact departments as indicated below:
 - Budget Office for funding or finance questions
 - HR Office for general form completion questions