Preparing a F3.2 Personnel Action Form

Please complete and sign the F3.2 form in blue ink

Section A

- **Student Worker Information Box**
  - Identify if an employee is an undergraduate or graduate student
  - Indicate if Federal or State Financial Aid is being received
  - Indicate if the Student Worker is a domestic or international student
    - Provide the Financial Aid award amount
    - Provide the Financial Aid employee’s initials

- **Preparer’s Name and Preparer’s Extension**
  - Provide the preparer’s name and phone extension so signers and processors can contact the person if questions arise.

- **Type of Action**
  - From the drop-down menu, select the phrase that best describes the type of personnel action needed
    - i.e. New Hire, Promotion, Transfer, Leave . . .
    - Only one action can be listed per form
    - If an asterisk (*) appears by a selected action, provide an explanation in section F and attach documentation.

- **Action Type Definitions**
  - New Hire - Never previously employed by Lamar University
  - Re-Hire - Previously employed with a break in service
    - Student or hourly: previously or currently employed with another department
  - 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 faculty 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
    - Does not become part of base pay
    - Only exempt personnel qualify for stipends
  - 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, such as 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
  - Agency Transfer* - Employee is moving to or come in from another state agency or university
  - Separation* - Termination of the employment relationship
Preparing a F3.2 Personnel Action Form

- One Time Pay – A single payment that does not repeat
  - A lump sum amount to be paid to an employee
  - Does not become part of base pay
  - **Only exempt employees qualify for OTP**
- Leave* - The beginning or end of a period of non-work; may be with or without pay
- Salary Increase* – A salary increase not associated with a promotion
- Data Correction* – A correction of information previously recorded

- **Employee ID and Name** - Provide Lamar Employee’s ID number if one has been assigned
  - Employee ID: = Banner ID (ex: L12345678)
- **Prefix** - Use the drop-down box to select a prefix for the employee
- **Name** - Provide the employee’s 1st name, 2nd name, and last name
- **Employee Job Title** - Provide the title of the employee’s job, such as Student Assistant, Graduate Assistant, Administrative Associate Sr., Adjunct
  - Use the position title assigned by the Budget office or on the F3.1
- **Employee Timesheet Org#** - This identifies the organization where the employee’s timesheet will be housed
- **Employee PO Box** - Specify the interoffice mail number to be used to send mail to the employee
- **Employee Department Extension** - Specify the phone number to be used to call the employee at work
- **Home Org Name** - Identify the department/organization initiating this action
  - Where the funding is housed?
- **Home Org Number** - Insert the number assigned to the Home Org by the Budget Office
- **Supervisor Name** - Identify who will perform the employee’s evaluations, approve timesheets, or otherwise oversee this employee’s work?
- **Supervisor Position Number** - This number is needed for set-up in Banner

**Section B**

- **Budget Data**
  - **Position Number** – This is the employee’s position number
  - **Index**-5 or 6 characters assigned that reflects the FOAP (alpha and numeric characters, i.e., HUHUR, ED5001)
  - **Fund**-identifies where the funds are coming from
  - **Fund Organization**-Identifies who is responsible for the funds
  - **Account**- Identifies what the funds are used for
  - **Program**-Identifies why the funds are being used
  - **Activity**- (for HR use only) used to describe a classification of personnel costs
  - **% of Funding**- may be paid from multiple funds; the total should always equal 100
  - **Salary Amount** – Insert the total annual salary

**Section C**

- **Job Start Date**: This is the date that the employee is expected to start work at their work location
  - Or for faculty, the first date funding is available for the position
- **Job End Date**: This is the date that the employee is expected to end work. It is their targeted “last day worked” in the position
Preparing a F3.2 Personnel Action Form

- Or for faculty, the last date funding is available for the position
- **The Job Start Date and Job End Date should never cross 2 fiscal years**
  
  **NOTE:** These dates impact the employee’s retirement accounts
- **Pay Type**
- **Hourly Rate** – Insert the rate of pay for an employee paid on an hourly basis rather than a salary basis
- **Annual Salary** - Insert the total amount paid for the job in a year
- **Total Contract** – Insert one of the following
  - Total amount for the job, or
  - The total for contract period, or
  - The total stipend amount
- **One Time Pay** - Lump sum payment for temporary job; this never becomes part of the employee’s base salary
- **Monthly Salary** - Specify the amount shown for the annual salary or the total contract divided by the Contract Period.
- **Contract Period** – Use the drop-down box to select a contract period
  - 12 months-for staff and library faculty
  - 9 months-for faculty
  - 5 months – spring semester
  - 4 months – fall semester
  - 3 months – Summer 1
  - 2 months – Summer 2 and Summer 3
- **Total FTE** - The amount of time assigned to the position compared to the standard full-time position
  - 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** – This section is used when the employee is not at work, but has not been terminated
  - Complete an F3.2 at the beginning of leave
  - Complete another F3.2 at the end of leave
    - Use the drop-down menu to select leave with or without pay or to return an employee from leave
  - Enter type of leave; for example, FMLA, extended sick leave, military, or developmental

**Section E**

- **Separation Codes** - Use the drop-down menu 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
    - Send F3.2 IMMEDIATELY IF TERMINATED FOR DISCIPLINARY REASONS as employee must receive final paycheck within 10 business days of termination
  - Temporary Assignment-end of a temporary or interim position
  - Retirement - employee voluntarily ends employment due to retirement
    - Attach letter of retirement
Preparing a F3.2 Personnel Action Form

- Death-employment ended due to death of employee
- End of Assignment - employment ended due to completion of assignment
- **Last Date Worked** - The last day the employee was physically present and performed the duties of the job
- **Direct Agency Transfer Date** - Must be Sunday if employee worked through end of week or, if not, the next physical work day following last physical work date
- **Separation Date** - The date the job ended (may be the same as last date worked)

**Section F**

- **Comments/Notes/Special Instructions**
  - Explain actions in more detail. For example:
  - Specify what the employee did to earn OTP or a stipend
  - Provide any special calculations used to determine compensation
  - List the reasons for any deductions from pay
  - Provide the specific reason for separation if known (accepted other employment, transfer to another state agency, moving out of state, etc.)

**Section G**

- **Faculty / Adjunct Course Information**
  - To determine the correct Part of Term information refer to the “Semester Chart with Parts of Term FYxx Academic Calendar”
  - Complete on New Faculty, Faculty Adjuncts, Overloads, and Large Class Stipends
  - Use the drop-down menus to select **Highest Degree**, **Tenure Status**, and **Rank**

**Section H**

- **Signatures**
  - Be sure to allow time for routing to occur prior to the effective date of the desired employee action
  - The College Business Administrators are responsible for reviewing the F3.2 form for accuracy
    - Approve and forward if correct
    - Return to preparer if errors are noted
  - F3.2 should be routed as appropriate for approval.
    - See the “Action Type Routing Sheet” provided on-line for the proper routing through departments.

**Questions/Assistance**

- For questions or assistance with completing a F3.2 form contact departments as indicated below:
  - Your College Business Administrator for administrative questions
  - The Budget Office for funding questions
  - The Payroll Office for payroll questions
  - The HR Office for general questions
# Routing for F3.2 Action Types

<table>
<thead>
<tr>
<th>Action Type</th>
<th>Order of Signatures</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Hire:</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Faculty or Staff                 | College Business Administrator  
Org Mgr/Director  
Dean/Vice President  
Budget/Sponsored Programs  
Human Resources | Never previously employed by Lamar University.  
Process after a F3.1 has been approved.  
F3.2 information must be consistent with the F3.1.  
Documentation must accompany any variance from F3.1. |
| **New Hire:**                   |                     |                                                                          |
| Work Study Students              | College Business Administrator  
Org Mgr/Director  
Dean/Vice President  
Financial Aid (initial student worker box)  
Budget/Sponsored Programs  
Human Resources | Never previously employed by Lamar University.  
Financial Aid will determine eligibility and amount available.  
Position lists available on Budget Office webpage. |
| Student Assistants               | College Business Administrator  
Org Mgr/Director  
Dean/Vice President  
Financial Aid (initial student worker box)  
Graduate Studies  
Budget/Sponsored Programs  
Human Resources | Never previously employed by Lamar University.  
Graduate Studies requested opportunity to review. |
| **Re-hire (Students Only)**     |                     | Previously employed with a break in service.                            |
| **Reappointment**               | College Business Administrator  
Org Mgr/Director  
Dean/Vice President  
Budget/Sponsored Programs  
Human Resources | Continuation of employment, assignment ends, and another begins with no break in service. |
| **Reclassification**            | College Business Administrator  
Org Mgr/Director  
Dean/Vice President  
Budget/Sponsored Programs  
Human Resources | Change made to a job through consultation with the compensation staff. |
| **Overload**                    | College Business Administrator  
Org Mgr/Director  
Dean/Vice President  
Budget/Sponsored Programs  
Human Resources | Any work assignment beyond 100%.  
Budget must review to determine availability of funds.  
HR will forward to Payroll. |
| Faculty Overload: (Not > 1.25%)  |                      |                                                                          |
| Non-Classified/Exempt Stipends  | College Business Administrator  
Org Mgr/Director  
Dean/Vice President  
Budget/Sponsored Programs  
Human Resources  
Payroll | Only exempt personnel qualify for stipends.  
Additional salary paid for a continuing period for assumption of other duties, such as the assumption of interim duties. |
| **Stipend**                     | College Business Administrator  
Org Mgr/Director  
Dean/Vice President  
Budget/Sponsored Programs  
Human Resources | Movement to a position in a higher pay grade. |
| **Promotion**                   | College Business Administrator  
Org Mgr/Director  
Dean/Vice President  
Budget/Sponsored Programs  
Human Resources |                                                                          |
# Routing for F3.2 Action Types

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<th>Org Mgr/Director</th>
<th>Dean/Vice President</th>
<th>Budget/Sponsored Programs</th>
<th>Human Resources</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demotion</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Movement to a position in a lower pay grade.</td>
</tr>
<tr>
<td>Transfer-In</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Moving to a new source of funds and/or new department/organization. No change in personnel or salary change only in budget account.</td>
</tr>
<tr>
<td>Transfer-Out</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Ending the payment source and/or department/organization due to a change. No change in personnel or salary change only in budget account.</td>
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<td>Agency Transfer*</td>
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<td>Separations, Retirement, and Terminations</td>
<td>College Business Administrator</td>
<td>Org Mgr/Director</td>
<td>Dean/Vice President</td>
<td>Human Resources</td>
<td>Payroll</td>
<td>Termination of the employment relationship. Letters of resignation, termination documentation, and agreements for faculty retirement options should be included. HR will forward to Payroll.</td>
</tr>
<tr>
<td>One-Time Pays</td>
<td>College Business Administrator</td>
<td>Org Mgr/Director</td>
<td>Dean/Vice President</td>
<td>Budget/Sponsored Programs</td>
<td>Human Resources</td>
<td>Payroll</td>
</tr>
<tr>
<td>Leave (Paid/Unpaid) and Return from Leave</td>
<td>College Business Administrator</td>
<td>Org Mgr/Director</td>
<td>Dean/Vice President</td>
<td>Human Resources</td>
<td></td>
<td>A lump sum amount to be paid to an employee. Designate with or without pay for FMLA as applicable.</td>
</tr>
<tr>
<td>Salary Increase</td>
<td>College Business Administrator</td>
<td>Org Mgr/Director</td>
<td>Dean/Vice President</td>
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<td>Data Correction</td>
<td>College Business Administrator</td>
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