

## Preparing a F3.2 Personnel Action Form

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

### Section A

- **Type of Action**
  - Identify if an employee is an undergraduate or graduate student
  - Identify the Type of Action to be accomplished
    - Use the drop-down box to select a type of action
      - 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
  - 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
  - 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
  - Salary Increase – A salary increase not associated with a promotion
  - Data Correction – A correction of information previously recorded
- **Employee ID** - Employee ID = Banner ID. (i.e. L00000000)
- **Prefix** - Use the drop-down box to select a prefix
- **Name** - Provide the 1<sup>st</sup> name, 2<sup>nd</sup> name and last name of the employee

### Section B

- **Org Name** - Identify the department/organization initiating this action
- **Job Title** – Use the position assigned by budget or on the F3.1
- **Position #** - Use the number assigned by budget or on the F3.1; may be pooled or single
- **Dept. Extension #** - Provide a number to call for questions concerning the F3.2

## Preparing a F3.2 Personnel Action Form

- **Suprv Name** - Provide the supervisor's first and last name, their ID number, their Position number and their PO Box number
- **Funding Distribution**
  - Index-5 or 6 characters assigned that reflects the FOAPAL (alpha and numeric characters, i.e., HUHUR, ED5001)
  - Fund-where the funds are coming from
  - Organization-that 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
- **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)
- **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** - 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

## Preparing a F3.2 Personnel Action Form

- 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
- **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 as 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 percentage 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**
  - Use the drop-down boxes to select **Highest Degree**, **Tenure Status**, and **Rank**

### Section H

- **Signatures** - F3.2 should be routed as appropriate for approval.
- **Human Resources** - Used by the Human Resources Department
- **Primary Supervisor's Initials**
  - Must be completed if 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 a F3.2 form contact departments as indicated below:
- Budget Office for funding or finance questions
- HR Office for general form completion questions

## Routing for F3.2 Action Types

Action Type	Order of Signatures	Comments
<b>New Hire:</b> Faculty or Staff	Org Manager Dean/Director VP-Provost Budget / SPA 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.
<b>New Hire:</b> Work Study Students Student Assistants	Org Manager Dean/Director Financial Aid Budget / SPA Human Resources	Never previously employed by Lamar University. Financial Aid will determine eligibility and amount available. Position lists available on Budget Office webpage.
<b>New Hire:</b> Graduate Student Teaching Assistant Research Assistant	Org Manager Dean/Director VP-Provost  Financial Aid Graduate Studies Budget / SPA Human Resources	Never previously employed by Lamar University. Graduate Studies requested opportunity to review.
<b>Re-hire (Students Only)</b> (EPAF – being developed)	Org Manager Dean/Director Budget / SPA Human Resources	Previously employed with a break in service.
<b>Reappointment</b>	Org Manager Dean/Director VP-Provost Budget / SPA Human Resources	Continuation of employment, assignment ends, and another begins with no break in service.
<b>Reclassification</b>	Org Manager Dean/Director VP-Provost Budget / SPA Human Resources	Change made to a job through consultation with the compensation staff.
<b>Overload</b> Faculty Overload: (Not> 1.25%) Non-Classified/Exempt Stipends	Org Manager Dean/Director VP-Provost Budget / SPA Human Resources Payroll	Any work assignment beyond 100%. Budget must review to determine availability of funds. HR will forward to Payroll.
<b>Stipend</b> (EPAF – being developed)	Org Manager Dean/Director VP-Provost Budget / SPA Human Resources	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.
<b>Promotion</b>	Org Manager Dean/Director VP-Provost Budget / SPA Human Resources	Movement to a position in a higher pay grade.

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<b>Demotion</b>	Org Manager Dean/Director VP-Provost Budget / SPA Human Resources	Movement to a position in a lower pay grade.
<b>Transfer-In</b>	Org Manager Dean/Director VP-Provost Budget / SPA Human Resources	Moving to a new source of funds and/or new department/organization.  No change in personnel or salary change only in budget account.
<b>Transfer-Out</b>	Org Manager Dean/Director VP-Provost Budget / SPA Human Resources	Ending the payment source and/or department/organization due to a change.  No change in personnel or salary change only in budget account.
<b>Separations, Retirement, and Terminations</b>	Org Manager Dean/Director VP-Provost Human Resources Payroll	Termination of the employment relationship.  Letters of resignation, termination documentation, and agreements for faculty retirement options should be included.  H.R. will forward to Payroll.
<b>One-Time Pays</b> (EPAF – being developed)	Org Manager Dean/Director VP-Provost Budget / SPA Human Resources Payroll	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.  Questionable payments: H.R. will refer to Vice-President. H.R. will forward to Payroll.
<b>Leave (Paid/Unpaid) and Return from Leave</b>	Org Manager Dean/Director VP-Provost Human Resources	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.  Designate with or without pay for FLMA as applicable.
<b>Salary Increase</b>	Org Manager Dean/Director VP-Provost Budget / SPA Human Resources	A salary increase that is not associated with a promotion.
<b>Data Correction</b>	Org Manager Dean/Director Budget / SPA Human Resources	A correction of information previously recorded.