



DISTRIBUTION PROCEDURES FOR FACULTY AND ACADEMIC STAFF PERSONNEL ACTION FORMS

1. **RESPONSIBILITY FOR COMPLETING THE FORMS?**

It is recommended that each Division Head assign one individual who has primary responsibility for preparing Personnel Action (PA) Forms for all Division employees. This responsibility includes all PA Forms regardless of type or source of funding. If an employee is assigned to more than one Division, then the Division that employs her/him for the largest percentage of time (i.e., major division) is responsible for completing all necessary PA Forms.

2. **SIGNATURE(S) NEEDED**

Completed PA Forms need only be signed by the Division Head(s) (or designee(s)) who has/have authority over the budgets from which the requested salary is being paid.

If any modifications are made to the PA Form after it is signed by the Division Head(s) it should be clearly noted on the original PA along with the initials of the person making the change.

3. **OVERLOAD AND SUMMER SERVICE/SESSION PAYMENTS**

Request for Overload Payment or *Request for Summer Session/Service Payment* Forms must be completed and all necessary approvals obtained prior to the starting date of the overload, summer session or summer service activity for which the individual is to be paid. It is the responsibility of the Division Head (or designee) who will be providing the payment to initiate the processing of the appropriate request form.

PA Forms authorizing Overload or Summer Service/Session payments can only be processed after all necessary approvals are obtained. The original, completed request form must be attached to the PA Form when it is sent to Human Resources for processing.

Each Division must maintain a database of all Overload, Summer Service and Summer Session payments made to employees within the Division, regardless of source of funds. If an employee is assigned to more than one Division, then the Division that employs her/him for the largest percentage of time (i.e., the major division) is responsible for maintaining a record of payments to the individual. Division Heads within the Provost Area should send a calendar year, summary report of all payments to the Associate Provost for Academic Affairs by February 1 for the previous year. Other Division Heads should consult with their Area Leader regarding reporting requirements.

4. **PROCESSING DEADLINES**

Divisions will be notified on a monthly basis regarding the PA deadline submission date for the following month.



5. CIRCULATION PROCESS

Completed PA Forms with the necessary documentation will be circulated as follows:

Step 1: PA Form is completed and all necessary signatures are obtained.

Step 2: Signed PA Forms, with necessary supporting documentation, are routed to Human Resources for review and processing. For new hires, the initial PA Form should be sent to the Area Leader's Office along with other new employee documentation as described in the *Post-Offer Hiring and Orientation Process* for the relevant employee type.

Step 3: Human Resources enters the necessary information into HRS.

Step 4: All original PA Forms and attached documents will be filed in the payroll file and managed following established UW-Green Bay records policies and procedures.