

**CTC
PERSONNEL
ACTION FORM
INSTRUCTIONAL
MANUAL**

TABLE OF CONTENTS

CTC Instructions.....	3
Human Resources Instructions.....	5
Administration and Finance Instructions.....	7
Appendix.....	9
Flow Chart.....	10
Signature Page.....	11
Recommendation for Part-Time Faculty Appointment Form.....	12

CTC PERSONNEL ACTION FORM INSTRUCTIONAL MANUAL

The following is a checklist for completing the CTC Personnel Action Form (PAF). Below the checklist are detailed instructions from both the Office of Human Resources www.shepherd.edu/hrweb and the Administration and Finance Office www.shepherd.edu/afweb. If you have any questions concerning the process and completion please be sure to ask the Budget Analyst.

Please note that for new employees the PAF information **MUST** be in Charleston at least three weeks prior to their start date. For current employees receiving a stipend the paperwork for the stipend **MUST** be approved prior to beginning work.

- Obtain all necessary information from new employee and give to Program Liaison
 1. I9 and supporting documentation (on back of form one from column A or one from column B and one from column C) - Program Liaison will verify and sign off; Program Liaison will forward to Human Resources
 2. Drug form – Program Liaison will forward to Human Resources
 3. Affirmative Action Data Form – Program Liaison will forward to Human Resources
 4. W4 – Withholding form – federal and state – Program Liaison should mark in red CTC for all W-4s except for Part-Time Faculty W-4s. The Part-Time Faculty W-4s should be marked CTC-PTF; Program Liaison will forward to Payroll
- Complete PAF
- Forward completed PAF to the Budget Analyst for funding verification
- Budget Analyst will return PAF to Organizational Administrator/Division Director for signature or correction
- W4 and state withholding forms may be forwarded to University Accountant prior to obtaining all signatures on the PAF
- Approved PAF sent to Program Liaison who will forward to Human Resource
- Obtain Human Resources signature on the PAF
- Obtain VP for Administration and Finance signature on PAF
- Obtain President signature on PAF (not needed for adjunct faculty)
- Program Liaison distributes copies to appropriate offices (goldenrod copy will initially go to the Budget Analyst until approval has been received)
- Budget Analyst sends goldenrod copy to supervisor.

Stipends: For those individuals receiving a stipend line 2 of the PAF should have Hourly/Monthly crossed out and the total amount of the stipend should be entered in the space. If the stipend is to be paid in installments please indicate the payment dates and amounts. If installments are not indicated, payment will be lump sum. Stipends **MUST** be paid in arrears after work is completed.

CTC Recommendation for Part-Time Faculty Appointment form: Use computer generated form with CTC on the top (see appendix for copy). Copy sent to Payroll must be on yellow paper.

- Complete after add/drop
- If the amount to be paid is different than the PAF that had previously been submitted a new PAF must be completed. The new PAF **must** have "AMENDED" marked on the top.
- Forward to Budget Analyst for funding verification
- Return to organization for signature
- Forward to Program Liaison so the adjunct faculty may be added to the list
- Program Liaison will forward Recommendation for Part-Time Faculty Appointment form to Payroll along with list

Part-Time Faculty will be paid in two installments, unless otherwise indicated.

Additional important information: Checks are normally available at the cashier's window at the University unless other arrangements have been made. Checks not picked up after approximately a week will be mailed. The following are options to picking up paychecks:

1. direct deposit of paycheck - please complete the appropriate form found under the Administration and Finance section. Allow one pay period for direct deposit to take effect.
2. mail paycheck – please complete the Payroll Distribution Form, be sure to mark form CTC
3. allow another individual to pick up paycheck – please complete the Payroll Distribution form, be sure to mark form CTC

Any time a change of address occurs a new W-4 **MUST** be completed and given to the Program Liaison who will mark in red CTC and forward to Payroll.

E-mail accounts: new CTC Shepherd employees - the Human Resource Assistant will forward a copy of the PAF to the Administrative Secretary in the Office of Information Technology Services.

Student employees - use their student account to send e-mail while working at the CTC Shepherd.

Temporary employees - ie. Manpower, not directly paid by CTC Shepherd, in order to establish an e-mail account a Shepherd University Computer Account Request Form must be completed.

INSTRUCTIONS FOR COMPLETING PERSONNEL ACTION FORMS

From the Human Resources Website

It is very important that Personnel Action Forms be completed fully and accurately by supervisors for any new employee or change in status or pay for an employee. The form MUST be typed to ensure legibility. If corrections need to be made remember that the copies may not be clear. Make sure that the copies are legible.

The applicable information on this form, for new employees, will be used for the Campus Directory and for setting up campus email and network accounts.

Line 1: Provide legal first name, middle name or initial, and last name. If nickname or middle name preference is known, please so indicate on the line marked "1st Name Preference. If a nickname is indicated on this line, that nickname will be displayed in the Campus Directory and Email system.

Line 2: Please provide department name and 6-digit BANNER Org. #. Provide 6-digit BANNER Fund number. If employee is hourly, provide hourly rate. If salaried, provide monthly salary rate.

Line 3: Provide date the form is typed. Provide the intended effective date of new employment, change in status, or termination as applicable. Be sure to circle the appropriate term.

Line 4: Provide Social Security Number on all forms, to ensure correct identification. Provide Job Title and Department Name that will be published in Campus Directory.

Line 5: Please provide the building name and room number where the employee will work, as well as the employee's campus phone extension, if any. Please provide the name of the immediate supervisor of the employee.

Line 6: Please provide birth-date in the format of month, then date, then year (xx/xx/xxxx). Please designate gender as "M" or "F". If race is known, please designate "W" (White), "B" (Black or African-American), "A" (Asian), "H" (Hispanic), or "Nat Am" (Native American). For "Pay Grade", if classified staff show Mercer pay grade; if Faculty show "F"; if non-classified staff, show "NC".

Line 7: Designate number of months in the fiscal year the employee will be budgeted for. Please designate the typical number of hours per week that will be worked. If less than a 12-month appointment, designate the specific dates of the appointment.

Line 8: Please enter the home address for any new employee, or any change of home address on an employee. This will become the University's official record of home address. For new employees, if a local home address has not yet been established, please mark "None" and the campus address will be temporarily used. Once local home address has been established please complete new W-4 for payroll.

Line 9: Please provide home telephone number. Please designate the new employee's Citizenship status: "C" (citizen of the US); "PR" (Permanent Resident); or "WP" (non-immigrant work permit).

**PLEASE NOTE, THE UNIVERSITY DOES NOT
Make Home Address or Home Telephone Information
Available to Others, Except for Management Employees
Who Need the Information for Business Purposes**

PROPOSED ACTION:

For new employees, please mark the appropriate status.

FOR ADJUNCT FACULTY, 1 PAF for the adjunct must be completed for **each** academic semester that the person will teach as an adjunct, even if that person teaches in consecutive semesters. After an Adjunct Faculty PAF reaches the Human Resources Office, it is distributed without further signatures from that office. (The adjunct PAF DOES NOT replace the adjunct faculty contract paperwork).

Every employee of the University and the CTC does have, or will have, a Shepherd ID number. If the employee has a Rambler Card, the ID number will be the last nine digits of the Rambler Card number, printed on the face of the card. For new employees, this number will not yet be assigned when the PAF is completed, and therefore this line should be left blank. For continuing employees, please provide the campus ID #

For separating employees, data on Annual Leave to be cashed is completed by the HR Office.

PAY SCHEDULE FOR EMPLOYEES

All employees must be approved in Charleston before they can start work and be put on the payroll.

Adjunct Faculty

Adjunct Faculty at Shepherd University are paid twice in each semester. Checks are mailed unless other arrangements have been made. Some adjunct request to be paid in seven (7) equal installments and this must be noted on the Part-Time Faculty form.

Fall: October 31 and December 31

Spring: March 31 and May 31

Salaried Shepherd University Employees

Salaried employees are paid in arrears on a semi-monthly basis at Shepherd University. If employed less than 12 months, salary can be spread over 24 pay periods, but Payroll must be notified before the fiscal year begins.

Designated pay days are:

15 and 30 if there are 30 days in a month.

16 and 31 if there are 31 days in a month.

If the pay day falls on the weekend, the pay day is usually the preceding Friday.

Part-time Hourly Employees

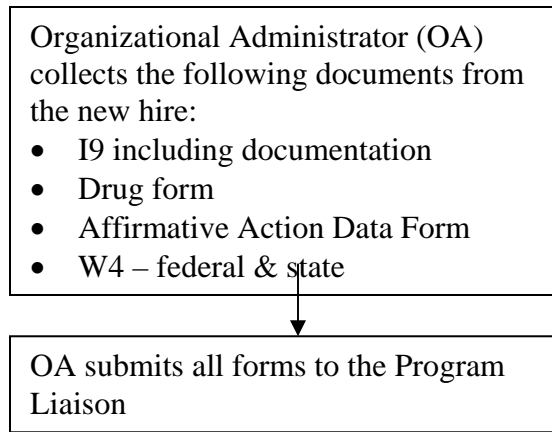
Part-time hourly employees at Shepherd University are paid in arrears on a semi-monthly basis.

Timesheets are due on the 12 and 27 of each month. If these dates fall on the weekend, then timesheets are due the preceding Friday. If these dates need to be changed (i.e., Thanksgiving and Christmas) the campus will be notified of the new deadlines.

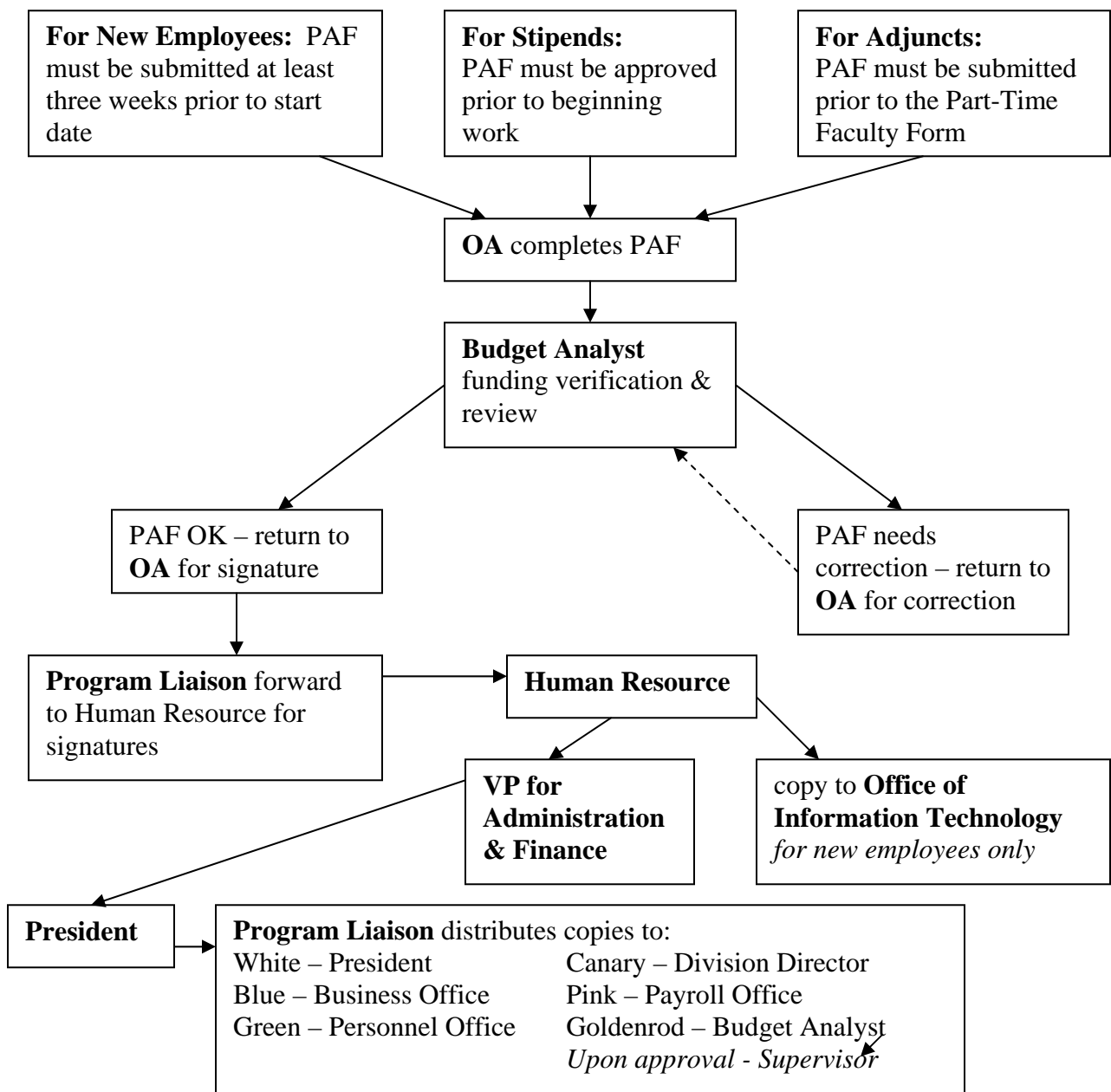
Employees may elect [Direct Deposit](#). Your salary may now be distributed into more than one account (i.e. savings, checking, money market, etc.).

APPENDIX

Brand New Hires



PAF Flow Chart



SIGNATURES

President

Date

Vice President Administration & Finance

Date

Director of Human Resources and Affirmative Action

Date

Director Information Technology

Date