Payroll/Personnel Action Requests (PARs) Training

https://portal.weber.edu/hr/PAR/
Overview of the
Payroll/Personnel Action Requests (PARs) Policy

(For step-by-step instructions for the PAR process, go to page 5)

☐ Payroll/Personnel Action Requests (PARs) are used to initiate payroll activity and human resource information for University employees and to report all changes which occur after hiring.

☐ PARs must be completed and appropriately approved/signed 1) prior to payment for services rendered by University employees; 2) prior to employment status changes (including supervisory/reporting changes); and 3) prior to organizational changes.

PROCEDURES

a. Preparer completes PAR web-based form to initiate action.
b. Preparer prints form.
c. Preparer secures appropriate signatures on first line of PAR form to satisfy legal and audit considerations.
d. Preparer routes form to either the Payroll Department or the Human Resources Department for action.
   i. The Human Resources Department receives all PARs related to base pay status or employment status of salaried employees.
   ii. The Payroll Department receives all other PARs.
e. Human Resources secures signature(s) from appropriate executive(s) on PAR form, as required.
Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Definitions</td>
<td>4</td>
</tr>
<tr>
<td>2</td>
<td>Logging In/Overview</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Manage FOAPALs</td>
<td>7</td>
</tr>
<tr>
<td>4</td>
<td>Hiring a New Employee</td>
<td>9</td>
</tr>
<tr>
<td>5</td>
<td>Separation</td>
<td>13</td>
</tr>
<tr>
<td>6</td>
<td>All Other Actions</td>
<td>19</td>
</tr>
<tr>
<td>7</td>
<td>Supervisory/Reporting Changes</td>
<td>23</td>
</tr>
<tr>
<td>8</td>
<td>Organizational Change</td>
<td>27</td>
</tr>
<tr>
<td>9</td>
<td>History</td>
<td>29</td>
</tr>
<tr>
<td>10</td>
<td>Examples</td>
<td>30</td>
</tr>
<tr>
<td>11</td>
<td>Special Notes</td>
<td>32</td>
</tr>
</tbody>
</table>
1. Definitions

- **Any Type of Leave** - Leave types include Leave Without Pay (LWOP), Family Medical Leave Act (FMLA), sabbatical, etc.

- **Continuation of Employment** - Used when a temporary employee’s term of employment is extended.

- **FOAPAL Change** - A change made to an employee’s funding source.

- **FTE Change** - A change in full-time equivalency. For example, if an employee is changing from full-time to ¾-time, that is an FTE change.

- **Instructional Credit Pay** - Additional pay provided for instruction that generates student credit hours, including overload.

- **Instructional Non-Credit Pay** - Additional pay provided for instruction that does NOT generate student credit hours - commonly used for continuing education.

- **Moving Expenses** - see Supplemental Pay.

- **New Hire** - An individual who is (1) new to WSU or is a rehire, or (2) moving from adjunct to salaried, or (3) moving from hourly/workstudy to salaried.

- **Organizational Change** - A change in the organization that affects more than one group. Typically, the concept of organizational change is in regard to organization-wide change, as opposed to smaller changes such as adding a new person. Examples of organization-wide change might include restructuring a department or even a division.

- **Salary Change** - A change made to an employee’s salary or wage.

- **Student** - A student attending WSU.

- **Supervisory/Reporting Change** - A change made regarding to whom the employee reports; the employee’s supervisor is being changed.

- **Supplemental Pay** - Additional pay for (1) services rendered by an employee in addition to the responsibilities required by the regular position (i.e., special project, test administration, etc.); (2) faculty or staff awards; or (3) moving expenses (copies of receipts need to be submitted with the PAR). Supplemental pay may be determined by an hourly rate or for a given period of time.

- **Title Change/Promotion** - A change made to an employee’s title and/or a promotion for the employee. This change has to be approved by Human Resources before a PAR can be generated.

- **TKL** - Timekeeping location designated by three digits (can be found on the maintenance or verify screens of the Time and Attendance System).

- **Transfer** - Used when an individual’s employment is ending in one area or department and beginning in a different area or department.

> Salary increases and instructional credit pay are NOT supplemental pay.
2. Logging In/Overview

To view this new PAR web application, using Internet Explorer, log into the Faculty/Staff portal with your GroupWise ID and Password. From there, either:

☐ Click on “PAR” located in the “A to Z” index
OR
☐ Type in this URL: https://portal.weber.edu/PAR/.

If you want to include the PAR web application on the purple bar in the Faculty/Staff portal,

Click on PREFERENCES from the purple links bar on the left.

Choose QUICK LINKS from the buttons across the top of the page (these are lined up under the word PREFERENCES)

Check the box (by clicking on it once with your cursor) beside the words Payroll/Personnel Action Request

☑ PAR Payroll/Personnel Action Request

Click the SUBMIT button at the bottom of the page

After you have selected the PAR web application, the screen on the next page will appear (see Figure 1).
Notice that there are four (4) choices across the top: “Create New PAR,” “Manage FOAPALs,” “History,” and “Help.”

- “Create New PAR” - You will spend most of your time here creating new Payroll/Personnel Action Requests (PARs).
- “Manage FOAPALs” - You will identify how the position will be funded in this area. FOAPAL replaces the FRS cost code. The FRS cost code has become known as “Index” in Lynx.
- “History” - You can save your PARs here.
- “Help” - You can get specific definitions related to the PAR process and a copy of the training manual in this area.

As you select one of these four options, the background will change to white (see “Create New PAR” in Figure 1).
3. Manage FOAPALs

If this is the first time that you are using the new PAR web application, you need to begin with “Manage FOAPALs.” Follow these instructions:

☐ Click on “Manage FOAPALs.” Figure 2 will appear.

☐ Click on “Add New FOAPAL.” Figure 3 will appear.

☐ Type in your “Index” (old FRS cost code) into the blue box under the column marked “Index” (see circled item above in Figure 3).

☐ Click on “FOAPAL Lookup” (see arrow). This will populate the “FUND,” “ORGN,” “PROG,” and “Department,” as shown in Figure 4.
☐ Save this FOAPAL by clicking on “Save” at the right side of the screen as shown in Figure 4 above (see arrow).

☐ Continue to add FOAPALs using “Add New FOAPAL” until all of the FOAPALs you regularly use have been added and saved (see Figure 5).
4. Hiring a New Employee

☐ To hire a new employee, click on “Create New PAR” as shown in Figure 6 below.

☐ Under the “Action” drop-down menu, select the appropriate action: “New Hire,” “Separation,” or “All Other Changes.”

☐ A “Class” drop-down menu will appear. Select the appropriate classification: “Salaried,” “Adjunct,” or “Hourly/Workstudy.”

☐ A “Category” drop-down menu and various check boxes will appear.
  - Select the appropriate category: “Executive,” “Professional,” “Faculty,” or “Classified.”
  - Check the appropriate box, either “New to WSU or Rehire,” “Adjunct to Salaried,” or “Hourly/Workstudy to Salaried.”

☐ Finally, click on “Next,” as circled in Figure 6 above. After clicking “Next,” you will be required to enter new hire and funding information (see Figure 7 on next page).
Enter the “ID# (SSN or “W”#) of the New hire, if available.

- If the number is unavailable, leave blank. Enter the “Name” of the New Hire. A period (.) is not necessary after the “Middle Initial.” Enter the “Job Title” of the New Hire.

- If the number is available, click on Fill in Fields (Fill in ID#). This will populate at least the name field with the appropriate information. Enter the “Job Title” of the New Hire.

Under the “FOAPAL” drop-down menu, select the appropriate FOAPAL for funding this position. If you are using more than one “FOAPAL,” select all that apply.

Fill in the “Start Date.” Leave “End Date” blank, unless the duration of the employment has been determined.

Enter the amount for the FOAPAL. If more than one FOAPAL is being used, enter all amounts that apply.

Enter any “Remarks,” as needed.
Fill in the “Supervisor Name,” “Supervisor Mail Code,” and “Supervisor Work Extension.”

The “Employee Mail Code” and “Employee Work Extension” may have been automatically populated when you clicked Fill in Fields (Fill in ID#). If this information is incorrect, or not filled in, type in the correct information.

Finally, if this New Hire is replacing another employee who terminated, select “Replacement” under the drop-down menu under “Position Status.” Then, fill in the name of the replacement in the next field. However, if this is a new position, select “New Position” under “Position Status.”

Click on “Get Report” and a completed form will be generated for you. At that point, you will have three options: “Save to History,” “Print Report,” or “Create New PAR” (see Figure 9 below).

“Save to History” allows you to save this PAR.

“Print Report” allows you to print this report and then get the appropriate signatures. (See sample of report on next page.)

Note: If you’ve noticed an error after printing, just use your browser’s back button to go back to the PAR web application and make the appropriate changes. Click on “Get Report” again and a revised form will be generated for you.

“Create New PAR” allows you to go back to the main menu and create another PAR.
Wildcat, Waldo T.

Weber State University
Personnel/Payroll Action Request

INSTRUCTIONS
Send Salaried PARs to Human Resources (MC 1016) after obtaining department chair/supervisor and dean or director signatures. Human Resources Help: (801) 626-6032, Payroll Help: (801) 626-6031

<table>
<thead>
<tr>
<th>ACTION</th>
<th>CATEGORY</th>
<th>TYPE OF PAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Hire</td>
<td>Classified</td>
<td>newEmp</td>
</tr>
<tr>
<td>CLASS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaried</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>Supervisor</td>
<td></td>
</tr>
<tr>
<td>Wildcat</td>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>Mail Code,</td>
<td>Phone</td>
</tr>
<tr>
<td>Waldo T.</td>
<td>1006, 7496</td>
<td>1006, 0000</td>
</tr>
<tr>
<td>ID#</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Job Title: Mascot

<table>
<thead>
<tr>
<th>FUND</th>
<th>ORGN</th>
<th>PROG</th>
<th>Index</th>
<th>Department</th>
<th>Start Date</th>
<th>End Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>120100</td>
<td>35001</td>
<td>610</td>
<td>215022</td>
<td>Adm Srv Quality Supp</td>
<td>01-Jul-2003</td>
<td>30-Jun-2004</td>
<td>$5,000.00</td>
</tr>
<tr>
<td>180370</td>
<td>35001</td>
<td>610</td>
<td>235196</td>
<td>Quality Support</td>
<td>01-Jul-2003</td>
<td>30-Jun-2004</td>
<td>$5,000.00</td>
</tr>
</tbody>
</table>

Total: $10,000.00

REMARKS
This is a one-year position based on performance.

Position Status: Replacement: Position replacing "The Cat"

For Human Resources Use

<table>
<thead>
<tr>
<th>Emp Class</th>
<th>Position Class</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Position Number

Grade/Salary Schedule

EEO Department Status

Veteran

Handicapped

Location

Professional Non-Exempt [ ]

For Payroll Department Use

<table>
<thead>
<tr>
<th>Earnings Code</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Months</th>
<th>Percent of Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DOB</th>
<th>Phone</th>
</tr>
</thead>
</table>

Phone: 7496
Preparer: CHERRIE NELSON
Date: 04-Dec-2003

Dept. Chair/Supervisor

Date

Dean or Director

Date

Human Resources

Date

President or Vice President

Date

https://portal.weber.edu/PAR/default.aspx

12/4/2003
5. Separation

To separate (end or part with) an existing WSU employee, click on “Create New PAR,” as shown in Figure 10 below. Note: Do NOT use “separation” for an employee transferring to another area or department - use “All Other Changes” and click on “Transfer.”

- Under the “Action” drop-down menu, select “Separation.”
- A “Class” drop-down menu will appear. Select the appropriate classification: “Salaried,” “Adjunct,” or “Hourly/Workstudy.”
- A “Category” drop-down menu and various check boxes will appear.
  - Select the appropriate category: “Executive,” “Professional,” “Faculty,” or “Classified.”
  - Check the appropriate box, either “Leaving WSU,” “Retirement,” or “Early Retirement.”
- Finally, click on “Next,” as circled in Figure 10 above. After clicking “Next,” you will be required to enter information about the separating employee (see Figure 11 on the next page).
Figure 11

☐ Enter the “ID# (SSN or “W”#) of the separating employee.

☐ Click on [Fill in Fields (Fill in ID#)]. This will populate the name and job title fields with the appropriate information.

☐ Under the “FOAPAL” drop-down menu, select the appropriate FOAPAL that has been funding this position. If you are using more than one “FOAPAL,” select all that apply.

☐ Enter any “Remarks,” as needed.
Fill in the “Supervisor Name” and “Supervisor Work Extension.”
Enter the “Last Working Day” and “Reason for Cancellation/Separation.”
Finally, record the “Vacation Hours During Month of Separation.”
Click on “Get Report” and a completed form will be generated for you.
At that point, you will have three options: “Save to History,” “Print Report,” or “Create New PAR” (see Figure 13 below).

- “Save to History” allows you to save this PAR.
- “Print Report” allows you to print this report, as well as Employee Release and Exit Interview forms. After printing, you can then get the appropriate signatures. (See sample of report and forms on next pages.)
  - Note: If you’ve noticed an error after printing, just use your browser’s back button to go back to the PAR web application and make the appropriate changes. Click on “Get Report” again and a revised form will be generated for you.
- “Create New PAR” allows you to go back to the main menu and create another PAR.
WEBER STATE UNIVERSITY
Personnel/Payroll Action Request

INSTRUCTIONS
Send Salaried PARs to Human Resources (MC 1016) after obtaining department chair/supervisor and dean or director signatures.
Human Resources Help: (801) 626-6032, Payroll Help: (801) 626-6031

ACTION: Separation
CLASS: Salaried
Last Name: NELSON
First Name: CHERRIE G.
ID#: W00000886

CATEGORY: Professional
TYPE OF PAY: Leaving
Supervisor Name: Stan Greenhalgh
Supervisor Mail Code, Phone: 6033
Employee Mail Code, Phone: 1006, 7496

Job Title: DIRECTOR/QUALITY SUPPORT AND TRAINING

<table>
<thead>
<tr>
<th>FUND</th>
<th>ORGN</th>
<th>PROG</th>
<th>Index</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>120100</td>
<td>35001</td>
<td>610</td>
<td>215022</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Total: $0.00</td>
</tr>
</tbody>
</table>

REMARKS
Cherrie Nelson has decided to take employment in Hawaii.

Last working day: 12/31/2003
Vacation hours used during month of separation: 16
Reason for separation: Other employment

Phone: 7496 Preparer: CHERRIE NELSON Date: 02-Dec-2003

Dept. Chair/Supervisor Date
Dean or Director Date
Human Resources Date
President or Vice President Date
**Weber State University Employee Release**

<table>
<thead>
<tr>
<th>Name:</th>
<th>Social Security:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td></td>
</tr>
</tbody>
</table>

- Supply inventory.................................................. [ ]
- Equipment inventory............................................... [ ]
- Manual returned.................................................... [ ]
- Hazardous material properly disposed of (if applicable).... [ ]

**Department Chair or Office Head**

<table>
<thead>
<tr>
<th>Account Cleared:</th>
<th>Bookstore - UB</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parking Tickets Paid:</td>
<td>Police and Parking - A5</td>
</tr>
<tr>
<td>Books Returned:</td>
<td>Library - Stewart Library</td>
</tr>
<tr>
<td>Keys Returned:</td>
<td>Physical Plant - MB201</td>
</tr>
<tr>
<td>Account Cleared:</td>
<td>Cashier - SC209</td>
</tr>
<tr>
<td>Purchasing Clearance:</td>
<td>Payroll - MA111A</td>
</tr>
<tr>
<td>Payroll Clearance:</td>
<td>Payroll - MA111A</td>
</tr>
<tr>
<td>COBRA, ID, Insurance and Credit Cards returned:</td>
<td>Human Resources - MA111</td>
</tr>
</tbody>
</table>

**Effective date of Separation:**

**Comments:**

---

*NOTE: Weber State University employees will not be officially released, or final pay checks issued, until this form is fully completed and returned to Human Resources MA111*
EXIT Interview

Your observations as a separating employee are very valuable in helping us to recognize areas where we can improve at Weber State University. The completion of this questionnaire is optional, but we would appreciate your input and suggestions.

You may also omit your name, if you choose, but it would be helpful for statistical purposes to have your name, job title, and department.

Name: ___________________________ Department: ___________________________

Job Title: ___________________________ Separation Date: ___________________________

1. What is your present status?
   - [ ] I have already found another job.
   - [ ] I have not, as of yet, found another job.
   - [ ] I do not plan to continue working.

2. What does your new job offer you that your job at WSU did not?
   ________________________________________________________________
   ________________________________________________________________

3. Does your new job offer a higher salary? [ ] Yes [ ] No
   How much higher than your present position? $
   ________________________________________________________________

4. How were the physical working conditions in your department?
   - [ ] Very Good
   - [ ] Good
   - [ ] Fair
   - [ ] Poor

5. How were the communications in your department?
   - [ ] Very Good
   - [ ] Good
   - [ ] Fair
   - [ ] Poor

6. Was the workload usually:
   - [ ] Too Great
   - [ ] About Right
   - [ ] Varied, but OK
   - [ ] Too Light

7. How would you describe the supervision in your department?
   - [ ] Very Good
   - [ ] Good
   - [ ] Fair
   - [ ] Poor

8. What did you like most about your WSU job and department?
   ________________________________________________________________
   ________________________________________________________________

9. What did you like least about your WSU job and department?
   ________________________________________________________________
   ________________________________________________________________

10. Would you recommend employment at WSU to a friend? [ ] Yes [ ] No

11. Please state your reason for separating:
   ________________________________________________________________
   ________________________________________________________________

6. All Other Changes

For all other changes (not New Hires or Separations), click on “Create New PAR” (see Figure 14 below).

Figure 14

- Under the “Action” drop-down menu, select “All Other Changes.”
- A “Class” drop-down menu will appear. Select the appropriate classification: “Salaried,” “Adjunct,” or “Hourly/Workstudy.”
- A “Category” drop-down menu and several check boxes will appear.
  - Select the appropriate category: “Executive,” “Professional,” “Faculty,” or “Classified.”
  - Check all boxes that are applicable. **Note:** See page 4 for definitions of these options.
- Finally, click on “Next.” After clicking “Next,” you will be required to enter information about the changes (see Figure 15 on the next page).
Enter the “ID# (SSN or “W”#) of the employee.

- Click Fill in Fields (Fill in ID#)). This will populate the name and job title fields with the appropriate information.
- Under the “FOAPAL” drop-down menu, select the appropriate FOAPAL for funding this action, if applicable. If you are using more than one “FOAPAL,” select all that apply.
- Enter the amount for the FOAPAL, if applicable. If more than one FOAPAL is being used, enter all amounts that apply.
- Since the example we are using involves instructional credit pay, complete the fields noted below.

<table>
<thead>
<tr>
<th>Semester/Year (###/###)</th>
<th>Course ID#</th>
<th>Course Dept.</th>
<th>Course#</th>
<th>Section</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/04</td>
<td>2101501</td>
<td>SP OFF/BASE/BAS/ART</td>
<td>PE 2020</td>
<td>12</td>
<td></td>
</tr>
</tbody>
</table>

- Use the drop-down menu to select the appropriate semester. Semesters are numbered as follows: 2 = Fall; 3 = Spring; and 4 = Summer.
Enter any “Remarks,” as needed.
Fill in the “Supervisor Name.”
Enter the “Supervisor Mail Code” and “Supervisor Work Extension.”
The “Employee Mail Code” and “Employee Work Extension” were automatically populated when you clicked [Fill in Fields (Fill in ID#)].
Click on “Get Report” and a completed form will be generated for you. At that point, you will have three options: “Save to History,” “Print Report,” or “Create New PAR” (see Figure 17 below).

- “Save to History” allows you to save this PAR.
- “Print Report” allows you to print this report and then get the appropriate signatures. (See sample of report on next page.)
  - Note: If you’ve noticed an error after printing, just use your browser’s back button to go back to the PAR web application and make the appropriate changes. Click on “Get Report” again and a revised form will be generated for you.
- “Create New PAR” allows you to go back to the main menu and create another PAR.
NELSON, CHERIE G.  

Weber State University  
Personnel/Payroll Action Request  

INSTRUCTIONS  
Send Salaried PARs to Human Resources (MC 1016) after obtaining department chair/supervisor and dean or director signatures. 
Human Resources Help: (801) 626-6032, Payroll Help: (801) 626-6031  

<table>
<thead>
<tr>
<th>ACTION</th>
<th>CATEGORY</th>
<th>CLASS</th>
<th>TYPE OF PAY</th>
<th>Last Name</th>
<th>Supervisor Name</th>
<th>Supervisor Mail Code, Phone</th>
<th>Employee Mail Code, Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>Professional</td>
<td>Salaried</td>
<td>credit</td>
<td>NELSON</td>
<td>Dot Richardson</td>
<td>1006, 9999</td>
<td>1006, 7496</td>
</tr>
</tbody>
</table>

Job Title: DIRECTOR/QUALITY SUPPORT AND TRAINING  

<table>
<thead>
<tr>
<th>FUND</th>
<th>ORGN</th>
<th>PROG</th>
<th>Index</th>
<th>Department</th>
<th>Start Date</th>
<th>End Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>165415</td>
<td>54105</td>
<td>510</td>
<td>992242</td>
<td>Softball-Women's</td>
<td>08-Mar-2004</td>
<td>30-Apr-2004</td>
<td>$1,800.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Total: $1,800.00  

Semester | Course ID | Course Dept. | Course Number | Course Section | Credit Hours  
---|-----------|--------------|---------------|----------------|--------------
03 / 04 | 2101501 | Physical Education | PE 2020 | 01 | 2  

REMARKS  
Instructional credit pay for SP OFF/BASEBALL/ SOFTBALL, taught T-TH, $900/credit hour.  

Position Status:  

For Payroll Dept Use  

<table>
<thead>
<tr>
<th>Veteran</th>
<th>Handicapped</th>
<th>EEO Status</th>
<th>Emp Class</th>
<th>Position Number</th>
<th>Earnings Code</th>
<th>T.K</th>
<th>Calendar</th>
<th>Tax Status</th>
<th>Exempt</th>
<th>FICA</th>
<th>Y</th>
<th>N</th>
</tr>
</thead>
</table>

Phone: 7496  Preparer: CHERIE NELSON  Date: 04-Dec-2003  

Dept. Chair/Supervisor  Date  Dean or Director  Date  

Human Resources  Date  President or Vice President  Date  

7. Supervisory/Reporting Change (new section)

The new Payroll/Personnel Action Requests PPM No. 3-53 requires that a PAR be submitted when a supervisory or reporting change occurs. Here are some examples that indicate that a PAR needs to be generated:

**Example 1:** A change in work load necessitates that Jane Doe reports to Mary Smith rather than Lisa Jones. There is no Title Change or Promotion involved in this scenario. Select the “Supervisory/Reporting Change” option on the PAR.

**Example 2:** An assistant to the manager is named and now several employees report to the assistant rather than to the manager. Since this is a promotion, “Title Change/Promotion” should also be selected on the PAR in addition to the “Supervisory/Reporting Change” option.

To create a PAR that addresses **Example 1**, follow the instructions below.

![Payroll/Personnel Action Request (PAR)](image)

- Select “Create New PAR” (see Figure 18 above).
- Under the “Action” drop-down menu, select “All Other Changes.”
- A “Class” drop-down menu will appear. Select the appropriate classification, which will generally be “Salaried.” We are not tracking supervision for “Adjunct” or “Hourly/Workstudy” employees.
- A “Category” drop-down menu and several check boxes will appear.
  - Select the appropriate category: “Executive,” “Professional,” “Faculty,” or “Classified.”
  - Check the “Supervisory/Reporting Change” box.
- Click “Next.”
- Enter the “ID #” (see Figure 19 on the next page).
- Click on “Fill in Fields” (this should populate “Name” and “Job Title”).
☐ Fill in the “Start Date” (the date the change should take effect.)
☐ Explain the reason for the supervisory/reporting change in the “Remarks” box.
☐ List the employees who will report to this person and/or who this person will report to in the next box.
☐ Since this change does not include a new job title or promotion, put “N/A” in the “New Job Title” box and click on “No” next to the question, “Is this for a promotion?”
☐ If the former supervisor’s name appears in the “Supervisor Name” box, type in the new supervisor’s name (Mary Smith).
☐ If the “Supervisor Mail Code” is incorrect, type in the correct Mail Code.
☐ If the employee’s mail code and work extension are going to change, type in the new information.

Figure 19
Click on “Get Report” and a completed form will be generated for you. At that point, you will have three options: “Save to History,” “Print Report,” or “Create New PAR.”

Note:
Remember to send a copy of the PAR to Accounting Services, M/C 1014.

To create a PAR that addresses Example 2, follow the instructions below.

Figure 20

Select “Create New PAR” (see Figure 20 above).
Under the “Action” drop-down menu, select “All Other Changes.”
A “Class” drop-down menu will appear. Select the appropriate classification, which will generally be “Salaried.” We are not tracking supervision for “Adjunct” or “Hourly/Workstudy” employees.
A “Category” drop-down menu and several check boxes will appear.
- Select the appropriate category: “Executive,” “Professional,” “Faculty,” or “Classified.”
- Check the “Title Change/Promotion” box and the “Supervisory/Reporting Change” box.
Click “Next.”
Enter the “ID #” (see Figure 21 on the next page).
Click on “Fill in Fields” (this should populate “Name” and “Job Title”).
Select the FOAPAL that will pay the salary for this person from the drop-down menu.
Fill in the “Start Date” (the date the change should take effect).
Fill in the “Annual Salary.”
Explain the reason(s) for the change(s) in the “Remarks” box.
List the employees who will report to this person and/or who this person will report to in the next box. Provide as much information as possible.
Type in the job title in the “New Job Title” box.
☐ Click on “Yes” next to the question, “Is this for a promotion?”
☐ Identify that this employee will not be on probation in this new position by clicking on the “No” button.
☐ Make certain that the correct supervisor’s name appears in the “Supervisor Name” box.
☐ Make certain the “Supervisor Mail Code” is correct.
☐ If the employee’s mail code and work extension are going to change, type in the new information.

![Figure 21](image)

☐ Click on “Get Report” and a completed form will be generated for you. At that point, you will have three options: “Save to History,” “Print Report,” or “Create New PAR.”

**Note:**
Remember to send a copy of the PAR to Accounting Services, M/C 1014.
8. Organizational Change (new section)

The new Payroll/Personnel Action Requests PPM No. 3-53 requires that a PAR be submitted when an organization change takes place. Examples of recent WSU organization changes include:

☐ The Bookstore moved from the Student Services Division to the Administrative Services Division.
☐ The Office of Public Safety was reorganized and several of the groups moved to Facilities Management and one group moved to Accounting Services.

To create a PAR that addresses an organizational change, follow the instructions below.

![Figure 22](image)

- Select “Create New PAR” (see Figure 22 above).
- Under the “Action” drop-down menu, select “All Other Changes.”
- A “Class” drop-down menu will appear. Select “Organizational Change.”
- A “New Division” drop-down menu will appear. Select the Division (i.e., Academic Affairs, IT, University Relations, etc.) that is receiving the new department or area.
  - In our example where the Bookstore is moving from the Student Services Division to the Administrative Services Division, the Administrative Services Division will be selected as shown in the example above.
- Click on “Next.”
- After clicking “Next,” you will be required to enter information about the organizational change (see Figure 23 on the next page). Type in that information. In addition, submit an organizational chart with the PAR to further define the change.
- Next, you will be asked if a Lynx (Banner) organizational code change will accompany this change? Click on the radio button next to “Yes” or “No” to indicate your answer. If you are not certain if there will be an organizational code change, contact Accounting Services at ext. 7443.
Finally, indicate the effective date of the change.

Click on “Get Report” and a completed form will be generated for you. At that point, you will have three options: “Save to History,” “Print Report,” or “Create New PAR.”

**Note:**
1. Remember to attach a copy of the organization chart (see example below).
2. Remember to send a copy of the PAR and organization chart to Accounting Services, M/C 1014.

**Chart which details an organization change (may not contain correct data)**
9. History

As noted earlier, when “Get Report” is clicked, three options will be presented: “Save to History,” “Print Report,” or “Create New PAR.”

![Figure 24: Save to History, Print Report, Create New PAR](https://example.com/figure.png)

**Figure 24**

- “Save to History” allows you to save this PAR. After clicking this option, notice that the program lets you know that the PAR has been saved.
- “Print Report” allows you to print this report.
- “Create New PAR” allows you to go back to the main menu and create a new PAR.

- Click on “Save to History.” You will see a list of PARs that have been saved (see Figure 19 below).

![Figure 25: View Button](https://example.com/figure.png)

**Figure 25**

- Click on the “View” button to look at a particular PAR. At this point, you have several options:
  - You can click the “Get Report” button on the bottom of the page to print the PAR again.
  - You can use this PAR as a template to create a new PAR.
- Click on the “Delete” button to remove any PARs.
10. Examples

Example 1:
- Non-credit pay.

**Weber State University**
**Personnel/Payroll Action Request**

**INSTRUCTIONS**
Send Salaried PARs to Human Resources (MC 1016) after obtaining department chair/supervisor and dean or director signatures.

**Human Resources Help:** (801) 626-6032, Payroll Help: (801) 626-6031

<table>
<thead>
<tr>
<th>ACTION: Other</th>
<th>CATEGORY: Professional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name: NELSON</td>
<td>Supervisor Name: Nancy Critchlow</td>
</tr>
<tr>
<td>First Name: CHERRIE G.</td>
<td>Supervisor Mail Code, Phone: 4019, 6773</td>
</tr>
<tr>
<td>ID#: W00000086</td>
<td>Employee Mail Code, Phone: 1006, 7496</td>
</tr>
</tbody>
</table>

**Job Title:** DIRECTOR/QUALITY SUPPORT AND TRAINING

<table>
<thead>
<tr>
<th>FUND</th>
<th>ORGN</th>
<th>PROG</th>
<th>Index</th>
<th>Department</th>
<th>Start Date</th>
<th>End Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>120100</td>
<td>36000</td>
<td>610</td>
<td>215020</td>
<td>VP For Admin Service</td>
<td>12-Jan-2004</td>
<td>12-May-2004</td>
<td>$2,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Total:** $2,000.00

**REMARKS**
This non-instructional credit pay is being provided to Cherrie Nelson who is teaching a Java script class at Hill Air Force Base for Continuing Education.

**Position Status:**

**For Payroll Dept Use**

<table>
<thead>
<tr>
<th>Veteran</th>
<th>Handicapped</th>
<th>EEO Status</th>
<th>Emp Class</th>
<th>Position Number</th>
<th>Salary Schedule</th>
<th>Job Class</th>
<th>Earnings Code</th>
<th>T.K. Calendar</th>
<th>Tax Status</th>
<th>Exempt</th>
<th>FICA</th>
<th>Y</th>
<th>N</th>
</tr>
</thead>
</table>

**Phone:** 7496  **Preparer:** CHERRIE NELSON  **Date:** 31-Dec-2003

**Dept. Chair/Supervisor**
**Date**

**Dean or Director**
**Date**

**Human Resources**
**Date**

**President or Vice President**
**Date**
Example 2:
- Hourly, non-student salary increase.

---

**Weber State University**

**Personnel/Payroll Action Request**

**INSTRUCTIONS**
Attach a completed 1-9 if New Hire. Attach Career Services form.
For Payroll help, call (801) 626-6031. Send directly to payroll (MC 1021) after obtaining signatures.

| ACTION: | Other |
| CATEGORY: | Non-Student |
| CLASS: | Hourly |
| TYPE OF PAY: | salary |
| Last Name: | Doe |
| Supervisor Name: | Cherrie G. Nelson |
| First Name: | Mary M. |
| Supervisor Mail Code, Phone: | 1006, 7496 |
| ID#: | 888888888 |
| Employee Mail Code, Phone: | 1006, 8888 |

**Job Title:** Custodian

<table>
<thead>
<tr>
<th>FUND</th>
<th>ORGN</th>
<th>PROG</th>
<th>Index</th>
<th>Department</th>
<th>Start Date</th>
<th>End Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>120100</td>
<td>32100</td>
<td>610</td>
<td>215110</td>
<td>Accounting Services</td>
<td>01-Jan-2004</td>
<td></td>
<td>$6.25</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**REMARKS**
Increase hourly rate from $6.00 to $6.25 per hour based on excellent performance.

---

**For Payroll Dept Use**

| Veteran | Handicapped | EEO Status | Emp Class | Position Number | Salary Schedule | Job Class | Earnings Code | T.K. Calendar | Tax Status | Exempt | FICA | y | N |
|---------|-------------|------------|-----------|-----------------|----------------|-----------|---------------|---------------|------------|--------|-------|-----|---|---|
|         |             |            |           |                 |                |           |               |               |            |        |       |    |   |   |

**Phone:** 7496  
**Preparer:** CHERRIE NELSON  
**Date:** 31-Dec-2003

Immediate Supervisor  
Date  
Next Approval Level  
Date

---

https://portal.weber.edu/PAR/default.aspx?ID=175

12/31/2003
11. Special Notes

You cannot save a PAR or leave it “In Process” in the middle of data entry. Once the PAR is started, it must be completed and saved or all information will be lost. Time out is set for 60 minutes in the Faculty/Staff portal.

Help with the PAR web application can be obtained from:

- Several members of the Lynx HR Team
  - Cherrie Nelson, ext. 7496
  - Nancy Hadley, ext. 6031
  - Holly Hirst, ext. 6036
  - Travis Hampshire, ext. 6648
  - Nancy Critchlow, ext. 6773

- For technical questions, contact Sara Petty at ext. 6917.
Training documentation developed by the WSU Office of Workplace Learning (OWL). Web Application developed by Sara Petty of the WSU IT Web Group in cooperation with the Lynx HR Team.