

INSTRUCTIONS FOR COMPLETING EMPLOYEE PERSONNEL REPORT

Follow the number key on the sample form and complete as follows:

I. Document and Personnel Identification Information

1. Document Number: This number uniquely identifies each document. If a budget amendment accompanies a personnel report, both should have the same document number. Document numbers may not be reused during a fiscal year.
 - A. The first three digits are the home department number of the budgetary unit responsible for the personnel report.
 - B. The next two digits are the source code assigned to each originating individual (or office) within the home department.
 - C. The last four digits are sequence numbers that will be used to uniquely identify (and sequence) amendment or personnel documents as they are created. Example: Use 0001 on first document, 0002 on second document, etc. WebDFS System has the ability to assign sequence numbers.
2. Document Page Number: The page number of a multi-page document. Page number may be omitted when an entire transaction is contained on a single page. WebDFS System completes document page number.
3. Document Date: The month, day, and year the personnel report was prepared in the format MMDDYY.
4. Fiscal Year: The applicable fiscal year for which personnel report is intended: For 2011-2012, WebDFS System users will need to enter 2012.
5. Department Phone: The telephone number of the person to be contacted if there are questions about the document. Be sure to enter the area code.
6. College/Division: The name of employee's college or division. Information not in a DB2 table at this time and WebDFS System will leave blank.
7. UGA Employment History: Select one box to indicate if the individual is a current or previous employee of the University. If the individual has no history of employment at the University, Select blank box.
8. If the individual is a previous employee of the University, enter the most recent UGA employment termination date in the format MMDDYY.
9. Payroll Type: One of the following codes to designate which payroll is appropriate:

A - Academic

H - Hourly Bi-Weekly
M - Monthly
S - Salaried Bi-Weekly

When an employee's payroll type is being changed, the Personnel Report should always be completed using the employee's new payroll type. WebDFS System assigns in validation process.

10. Department/Project: The name of the home department or the name of the project if applicable.
11. Primary Department Number: The primary department number for the employee (usually the home department number).
12. Highest Degree Earned: The highest degree earned by the employee. Do not include punctuation in the degree. (Example: BS, AB, MS, PHD, etc.) Drop down menu available in WebDFS System.
13. Institution: Enter the name of the institution from which highest degree was earned. Information not in a DB2 table at this time and WebDFS System will leave blank.
14. Year: Enter the year the highest degree was earned. Information not in a DB2 table at this time and WebDFS System will leave blank.
15. Social Security Number: This number is the key for all budget and payroll entries, so be certain that the number is correct. When an employee's social security number is being changed, the Personnel Report form should always be started with the old SSN and the reason code "M" used to establish the new SSN. Do not use spaces, dashes, or slashes. Do not assign a new position number for a social security number change.
16. Employee Last Name: The last name of the employee. When an employee's name is being changed, the Personnel Report form should always be completed using the employee's new name. Do not assign a new position number for a name change.
17. Employee First Name or Initial: The first name or first initial of the employee. Forms completed for individuals who prefer to use their middle names should only contain the first initial in this area.
18. Employee Middle Initial or Name: The middle initial or middle name of the employee. Forms completed for individuals who prefer to use their middle names should contain the entire middle name in this area.
19. Employee Name Suffix: The employee's name suffix: Jr, Sr, III, etc.
20. Employee Street Address (Line 1): The first line of "street" of the employee's mailing address.

21. Employee Street Address (Line 2): The second line of "street" of the employee's mailing address.
22. Employee City, State, and Zip + 4 Codes: The city, state, zip code, and 4 character zip code suffix of the employee's mailing address. Do not use dash or space between zip code and zip code suffix.
23. Non-Work Telephone Number: The telephone number (including area code) at which the employee may be reached when not at work. Do not use parentheses, dashes, or spaces.
24. University Telephone Number: The work telephone number to be published in the University directory. This phone number is not only used for the directory, but it is also used by the University Information Operators. The area code should be included in the telephone number. Do not use parentheses, dashes, or spaces.
25. University Building Name: The name of the building in which the employee is primarily located. The WebDFS system will populate based on the building number user enters.
26. Employee Work Address: The address at which the employee is primarily located. Work address consists of the following:
 - A. A four character, University building number.
 - B. A four character, University room number determined by list available on WebDFS System bulletin board.
27. Date of Birth: The employee's date of birth. Enter in the format MMDDYY.
28. Employee's Spouse's Name: The name of the employee's spouse. Not required in WebDFS System.
29. Special Chair: This code will be provided by the Faculty Affairs Office. You may call the Faculty Affairs Office at 706 542-0547 to obtain the assigned code.
30. Country of Citizenship: The country of which the employee is a citizen. Enter the name or an abbreviation of the country. Drop down menu available in WebDFS System.
31. I-9 Code: Select box with a "Y" if a properly executed I-9 form is on file in the department verifying the employee's identification and eligibility for employment. Select box with an "N" if the employee has not provided this information at the time the personnel report is prepared. Federal law requires that each new employee have a properly executed I-9 form on file within three working days of starting to work.

32. Visa Type: The code indicating the type of visa held by an alien employee. This element should be left blank for employees who are citizens of the United States. The type code should be selected from the drop down menu available in the WebDFS system. It should be the same type code as on Arrival and Departure Form, which all non-resident aliens receive from the immigration authorities. Enter "RA" for resident aliens. Resident aliens are issued an alien registration card.
33. Work County Code: A code indicating the Georgia county in which the individual is employed in. Out-of-state employees should leave the county code blank. County code is essential only for Cooperative Extension Service employees.
34. Payroll Status: Select the appropriate box from the drop down menu to indicate the employee's category. Contact Human Resources (706)542-2222 with any questions concerning the proper category in which to place an employee.
35. UGA % Time: The employee's current percent time for all University budget positions combined. The percent time should be entered as follows:

100.000 for full time (100%)
50.000 for half time (50%)
33.333 for one-third time (33%), etc.
36. Action Date: The date on which the requested action is to become effective. Enter in the format MMDDYY.
37. Wage Type: Select the appropriate box from the drop down menu to indicate the Fair Labor Standards Act classification of the employee. Employees receiving tips as part of their compensation should be classified as "tipped". All monthly employees are "exempt". Salaried and hourly bi-weekly employees not classified as "tipped" are generally "non-exempt".
38. Gender: Select the appropriate box from the drop down menu to indicate the gender of the employee.
39. Marital Status: Select the appropriate box from the drop down menu to indicate the marital status of the employee.
40. Faculty Status: Check the appropriate box to indicate the faculty status of the employee. Faculty should be checked for employees having academic rank or other faculty status, graduate teaching assistants, and Administrative "A" employees. Non-Faculty should be checked for administrative classified personnel and all other personnel not included as faculty above.
41. Faculty Rank: The five digit code that identifies a faculty member's position. The faculty rank code designates the official University faculty rank of the incumbent (not job classification). A list of Faculty Rank codes is available at

the following website:

https://busfin1.busfin.uga.edu/budgets/faculty_rank_codes.cfm Questions regarding faculty rank should be directed to the Faculty Affairs Office (706 542-0547). Faculty rank code is not required for graduate teaching assistants.

42. Ethnic Origin: Select the appropriate box from the drop down menu to indicate the origin of the employee. Type in Other Ethnic Origin if necessary.
43. Cooperative Extension Service Employee's UGA Salary: To be coded for Cooperative Extension Service employees only. This area should contain that portion of the employee's full time annual salary that is funded through The University of Georgia.
44. Cooperative Extension Service Employee's County Money: To be coded for Cooperative Extension Service employees only. This area should contain that portion of the employee's full time annual salary that is funded by the county. (County money paid to Cooperative Extension Service employees by their associated counties is used in determining certain employee withholdings.)
 - A. Portion of employee's salary funded by the county.
 - B. Portion of employee's salary funded by the county to be received per pay period.
 - C. Portion of employee's salary funded by the Board of Commissioner.
 - D. Portion of employee's salary funded by the Board of Education.
 - E. Primary Job Responsibility should be one of the following:
 1. 4-H
 2. Family and Consumer Science - FCS
 3. Agriculture and Natural Resources - ANR
 4. Other - OTH
 - F. Federal Appointment select Yes or No.
45. Cooperative Extension Service Employee's Total Salary: To be coded for Cooperative Extension Service employees only. This area should contain the employee's total full time annual salary, the sum of the UGA and county portions.
46. Payroll Distribution Code: Select the appropriate code from the menu to indicate how the employee's pay check or advisement is to be distributed. List available on WebDFS System bulletin board.

II. Budget Position Information

47. Position Transaction Code: Leave blank.
48. Budget Position: The position identifier composed of the following:

- A. Home Department: The three digit department number of the home department. These numbers are listed on the following website:
https://busfin1.busfin.uga.edu/budgets/dept_listing.cfm
- B. Position Short Title: The five character abbreviation assigned to classify the position in the budget. These abbreviations are listed on the following website:
http://www.busfin.uga.edu/budget_div/BAInstrShorttitles.pdf . Be sure to insert spaces correctly in position short titles (Example: GA M not GAM).
- C. Position Number: The first two characters (normally numeric) are assigned in chronological sequence to identify the position within a position short title. Be sure to enter both characters; for example, 01, 02, etc. The third character (alphabetic) is assigned to identify each incumbent assigned to a given position. An incumbent must be assigned a separate position occurrence (i.e., the "A", "B" or "C" part of the position number) for all job classification and/or job title changes, and percent time changes. The new position number should be effective on the date of the change. Payroll vouchers and time cards must be changed to reflect the new position number. For a lump sum position, enter a capital "L" in the first character, a blank in the second character, and an "A" in the third character (L A).
49. Appointment Beginning Date/Hour: The date and hour of employment entered in the format MMDDYYHH. HH is number of hours expired in the day to the nearest 10th. "00" means 0.0 hours expired in the work day. "7" means 7.0 hours expired in the work day.
50. Appointment Ending Date/Hour: The last date and hour the employee is paid from the position entered in the format MMDDYYHH. HH is number of hours expired in the day to the nearest 10th. "8" means 8.0 hours expired in the work day (a full day).
51. Job Class Code: An alphabetical listing of the five digit job classification codes is provided in
http://www.hr.uga.edu/recruitment/compensation/payplan_2009_title.pdf . The job classification code is to classify the position and not the incumbent. Questions regarding job classifications should be directed to Human Resources (706)542-2222.
52. Position Title: The descriptive job title of the employee's position. This title will usually be the same as the one associated with the job class code.
53. Position Percent Time: The percent time for the position should be rounded to five decimal places and entered as follows:
- 1.00000 for full time (100%)
.50000 for half time (50%)

.33333 for one-third time (33%)

54. Contract Code: The type of contract associated with the position and the employee. Located at the following link:
http://www.busfin.uga.edu/budget_div/BAInstrcontract.pdf

55. Full Time Annual Salary: Enter full time annual salary rate.

56. Salary Supplement Code: Identifies the type of salary supplement associated with the employee.

A - Administrative

C - County

S - Special Chair

D - District

57. Salary Supplement Amount: The annualized amount of supplemental salary associated with the employee. The amount of supplemental salary is included in the full time annual salary.

III. Payroll Authorization Information

This section of the form can be used to authorize different rates or amounts of pay for up to five date ranges and six position/account combinations. Multiple rates (or amounts) for the same position, account, and period of time should be coded vertically under the "from" and "through" dates to which they apply. If more coding areas are required, the TOTAL area should be used to indicate a continuation and additional forms should be attached. Authorization totals should only be entered on the last page.

58. Payroll Authorization Transaction Code: Leave blank.

59. Budget Position: Enter the budget position number as explained in #48.

60. Account Number: Enter the 12 digit account number from which the employee is to be paid with no spaces or dashes.

61. Fiscal Year EFT: The EFT for the account for the entire fiscal year, rounded to three decimal places followed by two zeros. Example 0.37500

62. Fiscal Year Budget: The budget amount in whole dollars for the account for the entire fiscal year.

63. Authorization Beginning Date/Hour: The date and hour on which a particular pay rate (or amount) is authorized to begin. Enter the date/hour in the format MMDDYYHH.

64. Authorization Ending Date: The date and hour on which a particular pay rate (or amount) authorization ends. Enter the date/hour in the format MMDDYYHH.
65. Authorization Pay Rate or Amount Per Pay Period: Employees paid on the hourly and salaried bi-weekly payrolls are authorized by specifying an hourly pay rate (to three decimal places). Employees paid on other payrolls are authorized by specifying an amount per pay period (to two decimal places).
66. Total EFT for the Fiscal Year: The sum of the EFT's for the entire fiscal year.
67. Total Budget for the Fiscal Year: The sum of the budget amounts for the entire fiscal year.
68. Total of Authorized Pay Amounts Per Pay Period: The sum of the authorized amounts for each period for employees paid monthly. Leave blank for hourly and salaried bi-weekly employees.

IV. Reason Codes

69. Action Requested by Document: The following are explanations of the statements indicating the action to be taken or purpose of this Personnel Report. Please select every statement that applies.
 - A. The individual is not currently working for the University.
 - B. The individual is being moved to another position with the same title or equal pay range or is being reclassified to an equal classification.
 - C. The individual is being moved to another position with a higher title and pay range or is being reclassified to a higher classification. In the case of a reclassification, attach two copies of the supporting Notice of Classification Action for justification.
 - D. The individual is being placed in an existing position replacing another individual whose name should be typed in the space provided.
 - E. The individual is being placed in a newly created position. If this box is checked, two copies of the corresponding Notice of Classification Action should be attached to the Personnel Report as proof of the existence of the position.
 - F. The individual's percent time employed is either being increased or decreased. This box applies to current employees only.
 - G. The individual's employment is being continued beyond the date originally reported on a previous Personnel Report.

- H. The individual's distribution of salary is being changed. Check this box if the account number from which the individual is paid or the amount paid per account number is changing.
- I. The individual is being transferred from one department to another.
- J. The individual's payroll type is being changed. This box applies to current employees only. The top portion of the Personnel Report should always be completed using the employee's new payroll type.
- K. The individual's title is being changed. This box applies to current employees only.
- L. The individual's name is being changed. The change could be necessitated by a change in marital status, a legal name change, or an error in the original paperwork. It is necessary to fill in the blanks provided with the name as it currently appears and the name as it should be corrected in order to cross reference the old (current) name to the new one. The top portion of the Personnel Report should always be completed using the employee's new official name.
- M. The individual's social security number is being changed. It is necessary to fill in the blanks provided with the social security number as it currently appears and the corrected number in order to cross reference the old (current) number to the correct one. A copy of the social security card should be attached. The top portion of the Personnel Report should always be completed using the employee's correct social security number.
- N. The individual is being placed on approved Leave Without Pay status. Attach a copy of the approved Leave Without Pay Form as supporting documentation.
- O. The individual's county money is being changed.
- P. The individual is leaving the University of Georgia's employment. It is necessary to fill in the blanks provided with the reason for the separation.
- Q. When reasons for the Personnel Report cannot be indicated by the check boxes provided, complete this line.

70. Personnel Remarks: Enter any additional information necessary for the processing of the document.

V. Approval

This section of the form is provided for signatures (or initials) of persons authorized to approve the requested transactions.

71. Signatures: Indicate that requested funds are available and that requested changes are within University of Georgia policies and guidelines.