

# SASI

## Forms “101”

Student Development and Enrollment Services

December 14, 2015





# Personnel Action Form

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<http://bps.sdes.ucf.edu/paf/>





# What/Where/When?

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- Online form located at: <http://bps.sdes.ucf.edu/paf/>
- Should be printed and attached for:
  - Position Establishments
  - Hires
  - Position Reclassifications
  - Special Pay Increases
  - Temporary Pay Increases
  - Position Updates
- To post a position, use a PVA, **NOT** a PAF
  - <https://portal.sdes.ucf.edu/>



# “Action Types”

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- Located near bottom of form
- Hire-Contingent: employee hired before background check complete
  - “Ban the Box” initiative means all hires must now be standard, effective immediately
- Hire-Standard: employee hired after background check complete
- SPI’s: Market, Merit, Equity
- Position Update: SPI within class or any significant change to PD (this would include reports to changes)
- Position Establishment: Creating a new position
- Position Reclassification: Reclassifying current position
- Comp Pre-Analysis: May be used to determine funding needed for person/position



# PAF Problem Fields

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- “Applicant Name”
  - Applicant name for new hires, TBD for position establishment, and employee name for all other actions
- “Position Number”
  - TBD for establishment, it will be assigned once we have received the packet
- “Estimated Start Date”
  - Requested start date for hire, we will reconfirm/modify after compensation pre-analysis
  - Requested effective date for all other actions



# PAF Problem Fields (Cont.)

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- “Employee Class”
  - Interim, Regular, Time Limited, Visiting
  - Time Limited and Visiting should be used for emergency hires
- “Criminal History”
  - Previously available on application, only relevant of new hires
  - Will need to be removed due to “Ban the Box”, indicate no in the box
- “Home Department”
  - Where their payroll is processed



Basic Information

**Applicant Name (as it appears on UCF application)**

Some Guy

**Position Title**

Chancellor of the Galactic Senate

**Position Type**

A&P

**Position Number**

14309

Pay Rate Information

**Additional Funding Department(s)**

This field is optional. If you plan to split fund this position, please fill in the additional department number(s) and appropriate percentages.

**Salary Budgeted for Current FY \$**

100000

**Requested Salary \$**

160000

**Funding Department (Primary)**

03190302 Career Services AUX

**Additional Funding Department(s) (Optional)**

01433343 Republic Funds

**Estimated Start Date (Fridays of the Current FY)**

07/17/2015





# Position Vacancy Announcement (PVA)

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[https://portal.sdes.ucf.edu/personnel/formtracker/staff\\_pva\\_submit.aspx](https://portal.sdes.ucf.edu/personnel/formtracker/staff_pva_submit.aspx)





# Position Vacancy Announcement (PVA)

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- Login with the credentials you use to logon to your computer (NOT the credentials that you use for my.ucf.edu, Outlook, etc.)
- When to use a PVA:
  - You want a new, vacant, or soon to be vacant position posted in order to conduct a search
  - You want to perform an emergency hire
- When not to use a PVA:
  - To extend a posting that is still active or to reopen a recently closed posting for additional weeks (to do this, just send us an email)
  - For any other reason unless specifically requested



# PVA Tips

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- Fields are out of date, but it is more important to be sure you have included everything necessary for posting on PeopleAdmin somewhere on the form
- PVAs must be completed in full and have been approved through their entire routing process to reach B&PS **by no later than Tuesday at 12 PM** in order to post that Friday
- Please submit PVA ASAP and do not wait until the last minute to discover there is an issue!



# PVA Trouble Fields

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- Preferences: Because the form does not include a box for position description, you will need to provide a position description here. Make sure to start the description with “Description” and the preferences with “Preference”
- Start Date: Emergency hires should be marked to begin that date or the day after. PVAs that are to be posted must start on a Friday
- End Date: Postings must stay up for at least a week (unless an emergency hire, where HR will determine close date) and must close on a Thursday



# Dual Compensation

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[https://hr.ucf.edu/files/dual\\_comp.pdf](https://hr.ucf.edu/files/dual_comp.pdf)





# Dual Compensation

- One form filled by your home department, secondary department, and then sent to the VP Office for signature
- Department in which you have secondary employment will perform the ePAF. Once the form has received the appropriate signatures from the VP Office, we will return the document to you to forward to the secondary department for further processing
- Guidelines can be found here: <https://hr.ucf.edu/files/DUAL-COMPENSATION-GUIDELINES.pdf>
- Work must be different in nature from normal work assignments and must not interfere with employee's 1.00 FTE
- Total yearly pay from dual comp CANNOT exceed 25% of yearly salary or \$10,000, whichever is greater
- USPS non-exempt is not eligible for dual compensation. USPS would report as overtime and then departments would perform a journal transfer





# Dual Compensation Problem Fields

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- Funding Department Number: Make sure to include the name and number for both your primary and secondary employers. If you do not know it, ask a supervisor
- FTE: Most employees will be 1.0 FTE (work schedule 40 hours a week, you are at 1.0 FTE). To calculate FTE for your secondary employment, divide the number of hours worked weekly by 40
- Total Payment: If not provided by secondary department, can be calculated using the ePAF calculator:  
<https://hr.ucf.edu/files/epaf-hourly-rate-calculator.xls>



# Questions?

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# **SDES Travel Authorization Form**





# SDES Travel Authorization Form (TAR)

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- “Funding source” should equal 100% (can be split between categories)
- SDES only allows \$2,000 per employee per year for professional development, with some exceptions. See your director for further clarification. Director must approve and sign prior to submitting a copy to Elvis Wanamaker
- Meetings do NOT count as professional development
- When an employee attends a conference and there is no cost to the university a “Complimentary Travel Form” should be submitted to your director
- It is preferred that departments complete a Blanket P.O. for all employees that travel in-state within the fiscal year. F&A will return the remaining balance to your account once the P.O.’s are closed





# **SDES Contract and Agreement Review Sheet**





# SDES Contract and Agreement Review Sheet

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- When submitting a contract, agreement, or a Memorandum of Understanding (MOU), make sure to complete the SDES Contract and Agreement review sheet
- Elvis should only receive MOUs that are from outside vendors
- Scan all documents, including the Contract Review Sheet, to Elvis at [elvis.wanamaker@ucf.edu](mailto:elvis.wanamaker@ucf.edu)
- Once the paperwork has been received, it is then forwarded to General Counsel the same day for approval
- General Counsel will return the paperwork within two to three business days with any necessary revisions or their stamp of approval
- Documents will be given to Sharon Ekern for final approval, which will take approximately one day
- The scanned approved documents will be sent back to the department



# **SDES Foundation Payment**





# Foundation Payment Authorization Form

## Parent and Family Fund

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- Signature Process: ALL ORIGINAL FORMS AND DOCUMENTATION MUST BE SUBMITTED
- Parent Fund: All Foundation forms and supporting documentation must be sent to Erin Butler, Director, FYE.
- Erin will send to DeLaine Priest for approval
- DeLaine will initial and forward to Coordinator, Betty Lahens for appropriate signatures
- Once approval process is complete, Betty will forward documents to Foundation
- ANYTHING over \$10K requires provost approval (Betty will forward after VP/AVP approval)



# Foundation Payment Authorization Form

## FAIRWINDS

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- Signature Process: ALL ORIGINAL FORMS AND DOCUMENTATION MUST BE SUBMITTED
- FAIRWINDS: All Foundation forms and supporting documentation must be sent to Cynthia Kirk, Executive Administrative Assistant
- Cindy will forward to Chanda Torres for approval
- Chanda will approve and forward to DeLaine Priest for approval
- DeLaine will forward to Betty Lahens for appropriate signatures
- Once approval process is complete, Betty will forward documents to Foundation
- ANYTHING over \$10K requires provost approval (Betty will forward after VP/AVP approval)



# Foundation Payment Authorization Forms Continued

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- All other Foundation requests go directly to Betty Lahens. Betty will secure the appropriate signatures
- Once the approval process is complete, Betty will forward documents to Foundation
- ANYTHING over \$10K requires provost approval (Betty will forward after VP/AVP approval)



# Questions?

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# Concession



# Concession Reimbursement

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- For concession reimbursements, the following paperwork must be submitted together:
- Name of person or organization to be reimbursed
- Original receipt(s) with total amount and date
- Agenda with date of event
- List of attendees
- Send to Betty Lahens in MH 282 for reimbursement
- The process for payment of concessions funds is to create a requisition, obtain signatures and approvals, print P.O., and send to F&A. Reimbursement payments could take approximately 3-4 weeks. If not paid within one month, please contact Betty



# **Cell Phone Allowance Form**





# Cell Phone Allowances

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- Common issues with the form:
  - Amounts did not reflect discount provided to UCF employees
  - The most recent cell phone allowance form was not used
  - Form not signed by employee and supervisor
  - Employees with family plans did not calculate percentage properly
  - Entire phone bill not attached

Send completed and signed Cell Phone Allowance form  
and documentation to Dave Pavlonnis, MH 282



# Cell Phone Monthly Allowance Work Chart

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- Family plan: if three phones are on the plan, the percentage is 1/3 of total billing
- Monthly cell phone service: use the percentage of the one phone that is used for business. If you use your phone for business 25% of the time, it would be 25% of 33.3% if you have 3 lines (or 8.325% total)
- Texting: is also a percentage of service used for business
- Monthly data service: would be 100% of that phone only. With three phones on the plan, data would be 33%
- Monthly phone bill: tax is 100% of that phone only



# Questions?

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# **Purchasing Card (PCARD) Certification**





# Purchasing Card (PCard)

- These forms can be found on line at: <http://www.fa.ucf.edu>
- Click on “Forms” on the top of the page
- Then click:
  - “Procurement Card” under FORMS
  - Select Cardholder Agreement
  - Cardholder Profile/Pcard Application, Departmental Authorization Security Access Ethics Certification
- These forms are all in PDF and the Profile has an instruction page to help
- Once an employee has taken the on-line Finance and Accounting class Pcard Training for Cardholders (FPO125) the following forms need to be completed:
  - Purchasing Cardholder Profile/Pcard Application
  - Cardholder Agreement
  - Departmental Authorization Security Access Ethics Certification



# Purchasing Card (PCard)

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- All forms have to be completed and signed by the appropriate designated DDC (Dean/Director/ Chair) and the RFO (Responsible Fiscal Officer) for your department account funding the Pcard
- Depending on your unit this will be someone in SDES, i.e. associate vice president or assistant vice president
- After processing, which usually takes about 3-4 weeks, the cardholder will be contacted by Finance & Accounting on where to pick up their new Pcard
- Helpful Links:
  - Procurement Card Forms  
[http://www.fa.ucf.edu/Forms/Forms.cfm#Forms\\_PCard](http://www.fa.ucf.edu/Forms/Forms.cfm#Forms_PCard)
  - FAQ's  
[http://www.fa.ucf.edu/Procurement\\_Card/Publications/PCARD\\_FAQ.PDF](http://www.fa.ucf.edu/Procurement_Card/Publications/PCARD_FAQ.PDF)
  - PCard: Manuals-Guidelines  
[http://www.fa.ucf.edu/Procurement\\_Card/Publications/Publications.cfm](http://www.fa.ucf.edu/Procurement_Card/Publications/Publications.cfm)



# Questions?

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