

PAYROLL PROCESSING FORM INSTRUCTIONS

What is a Payroll Processing Form?

The Payroll Processing Form (PPF) is the main form used for hiring and appointment or pay changes like promotion, additional employment, change of status, request for temporary reclassifications, change in pay rate and for requesting Payroll ledger funding transfers. Below you will find the instructions for each action on the PPF and the reasons for selecting each action.

Obtaining the Payroll Processing Form (PPF)

- Type: <http://www.housing.berkeley.edu/staff/>
- Underneath **Forms and Publications** click **Payroll Forms**

Action

You will need to check at least one box or all that apply in this section whenever submitting the Payroll Processing Form (PPF).

New hire / Rehire

- For anyone new to the University
- For Employees new to RSSP
- If the employee has not worked for 4 months
- If a separation form was submitted

Promotion

- A current employee is hired in a higher classification and the job has been listed in the job bulletin
- A job vacancy listing number is required.

Additional Employment

- When an employee has another appointment in RSSP
- When an employee has an additional employment in RSSP
- If an limited appointment needs to be extended

Permanent Reclassification

- If a current employees job duties have changed significantly
- Job description must be submitted.
- Prior approval is needed by Human Resources

Change in Pay Rate

- Employee has an increase in pay rate for any reason
- Must be approved by Human Resources

Temporary Reclassification

- Employee takes on additional duties temporary
- Employee is doing the job of another employee in a higher classification
- Request is done via this form (**also complete section 4 on back**)

Change in Fund Source

- For future changes in any part of the funding
- Changes to the percent of time to be worked in a position
- Changes in the distribution percentage
- For retroactive changes complete section 5 on back of form
- Ledger Expense Transfer

Workstudy

- If a student employee is hired with a work-study referral
- If a student employee is awarded additional work-study money
- If a student employee receives work-study referral after the initial hiring process
- Work-study referral form must be attached

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Benefits Eligible

- If employee is going from limited to career
- If employee benefits will increase

Leave of Absence

- To report any type of leaves
- Suspension, furlough, layoff, medical leaves, personal leave, and administrative leave
- More than 2-week period
- Contact Letrice Waite

Create New Department Code

- If there is a position without the funding you want
- If there is a position without the title code you want

Add Shift Differential

- If an employee will work 4 hours after 5p.m. (enter the **new** effective date of the change and the new schedule in payroll scheduling screen)

Worker's Compensation

- Any one on approved worker's compensation
- Contact Letrice Waite at (510) 642-1179 or email: letrice@berkeley.edu

Disability

- Any one on approved disability
- Contact Letrice Waite

Change in Check Pick-up Location

- If the employee has changed check pick up or work location
- Takes approximately one month to process

Section 1

This section is to be completed each time you fill out the PPF. (Exception: if you are filling out section 5 and there are no future changes for the employee funding.)

Status

- Career
 - If an employee is in a fixed or variable percentage appointment at 50% or more of full-time and is expected to continue for one year or longer.
- Partial year Career # of months
 - Career appointments, which contain regularly, scheduled periods the incumbent remains an employee but is not at work.
 - Must tell us how many months the employee will be working annually (no less than 9 months)
- Limited
 - A limited appointment is an appointment established at any percentage of time, fixed or variable, which is not expected to continue for more than 1000 hours in a 12-month period.
- UCB Student
 - Any one who is a University of California Berkeley Student
 - UCB Campus name - Casual Restricted

Name

- Employee's last, first and middle initial if applicable as appeared on their legal documents (i.e. SSN card). This will appear on his or her University payroll check.

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SSN Last 5 digit

- Last 5 numbers of employee's Social Security Number

Unit

- The unit name and branch (etc. U1H-HOME, CKF-D/S, RES-OSD, AH - ECEP)

Working Title

- This is a title that is use in RSSP and represent the type of work the employee is actually doing
- This is usually associated with the department code and can be found on your unit department code list

Dept. Code

- This code is a 4-digit code used in RSSP only
- It's associated with the working title, a campus title code, and a funding source in which pay will be generated for the employee

Payroll Title

- This is the title that is used through Campus
- It is also associated with a title code
- This can be found in your JVL packet for new hire, on the payroll ledger, on the web at HR web site under compensation, management guide under employment, and the department code list

Title Code

- This is a 4-digit code that is used on through Campus for determining the Payroll Title
- This can be found in your JVL packet for new hire, on the payroll ledger, on the web at HR website under compensation, management guide under employment, and the unit department code list

Pay Rate

- This is usually the beginning salary of the title unless approved by Human Resources

Appointment%

- Percent of time the employee will work in this position
- If employee has a split appointment you will need to show the percentage of both appointments by putting a slash (i.e. 60/40)
- This is the full-time equivalent appointment not the budget FTE amount.

Begin date

- This is the start date of the action that you are requesting or taking in the Action section

End date

- This is the end date of the action that you are requesting or taking in the Action section is applicable

Fund%

- This is the percent of time the employee is to be paid from the Fund Source
- Total percentage of funding cannot add up to more than 100%

Fund Source

- This is the funding Chart of Account (COA) where the employees pay will be charged to.

Name Unit Manager

- First & Last name of the unit Manager and his/her UCB ID number or department Designee. *(This person will also receive HRMS notifications of changes made in the employee's job record)*

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Section 2

This section is to be completed for new hires only, but remember that you must have an action item check and **Section 1** must be completed.

UCB Student?

- If no
 - No other information is needed
- If yes
 - Anyone who is a University of California Berkeley Student
 - UCB Campus name – Casual Restricted
 - Need to know if they are undergraduate or graduate student

Date of Birth

- Employee month, date, and year of birth

Previous UCB employment?

- If no
 - No other information is needed
- If yes
 - Anyone who has worked for University of California Berkeley
 - Need to know what department they worked in and what period of time
 - This information applies to all employees - career, limited and UCB students

Section 3

Complete this section for all current employees in RSSP. You must also fill out **Section 1** for the transaction to be completed.

Will employee continue to work under current department code?

- If yes
 - No other information is needed
 - The employee may be a UCB student with multiple concurrent positions in the department of RSSP
 - The employee may have a limited appointment and will be working in both HOME and D/S
- If No
 - Last day working in old department code is needed
 - Employee will not perform any work under old department code
 - Employee received a permanent reclassification
 - Employee received a promotion
 - Employee is moving from one unit, position, department code permanently

If employee will return to current dept. code date of return

- If employee has a temporary reclassification
- If employee is moving from one unit, position, department code for a temporary period of time and returning to original position
- A date of return is needed

Universe ID#

- The Identification number assigned to the employee by RSSP's Universe Payroll System

Comments

Complete this section to help explain any action checked or when you check the other box.

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Authorized By

This area is signed by the manager of the unit receiving the employee of whose account and fund will be charged.

Completed by

This area is signed by anyone the manager of the unit has given authorization to complete the form. This person should have knowledge of the action and be able to assist the Payroll Specialist when she/he has questions.

Section 4

This section is to be completed when requesting a temporary reclassification. Be sure to also complete section 1 and 3 of this form to complete the procedure. You will send the form to your Payroll Specialist and they will coordinate the approval process of the temporary reclassification with Shannon Lee.

Permanent Title

- Payroll Title employee normally works in

Temporary Title

- The Payroll Title for temporary position

Replacing

- The name of the employee who is temporarily out of the permanent position
- If there is no name in this area a job description must be attached for reclassification

Reason

What has caused the position to be opened?

- Vacant – The current employee is no longer in the position
- On Leave – The employee is out on some type of Temporary leave of Absence
- Internship – The employee has taken a temporary internship in the UC system
- Other – Anything that is not one of the other items above (please explain)

Start Date

- The month, day, and year the temporary reclassification will begin

End Date

- The month, day and year the temporary reclassification will end

Are all the duties of the position being performed?

- If yes
 - No other information is needed
 - The job description for this position has not changed
- If no
 - Give an explanation in the comments area below

Who is performing this person's permanent job duties during this period?

- The name of the employee who will perform the job duties of the temporary reclassified employee
- The duties are distributed among co-workers

Comments

- Completed this area to explain information in this section

Supervisor's Approval

- This area is to be signed by the Assistant Director or Director of the unit.

HR Approval is required for processing.

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Section 5

This section is to be completed to request retroactive/current funding changes. Remember for future funding changes: also complete **Sections 1 and 5**. In the **Payroll Use Only** section you will be told when to expect the charge to show on your ledger in the area name "Month Ledger Transaction Should Appear".

\$ Amount or Percentage

- Enter in the amount or percentage of the gross amount to be transferred.

FROM

- This is the chart string that was charged incorrectly

TO

- This is the chart string where you want to transfer the expense

Process Month

- The fiscal payroll ledger month the incorrect expense appeared on (i.e. October)

ET Month

- The fiscal payroll ledger month in numeric form

ET PG

- Page number is generally found next to ET Month.

ET Line #

- Line number (usually 2 digit)

Gross Amount

- Payroll gross earnings in the line item

Benefit Gross Amt.

- Amount of gross benefit in the line item (found towards the last columns)

Payroll Use Only

The Payroll Office will complete this area. You will receive an email once the action you requested has been completed. Also any special instructions will be included in the email (i.e. you are able to change the dept. code for the reclassification). Expected response time will be 5 – 7 working days.