HR Forms Guide

Employee Payroll Change Form

September 2020

TABLE OF CONTENTS

EMPLOYEE PAYROLL CHANGE FORM

AN OVERVIEW

Employee Payroll Change form is filled out by a Supervisor or Administrative Support person. This document is used by UW Parkside, specifically the payroll and human resources department, to record the changes that an employee wants to update to his payroll information.

This form can be used for changes in the employees' pay rate, title change, funding changes, overload lump sum, sabbatical and supervisor TL/approver. Through BP Logix you can easily track the changes to the employee's pay and status. It is important when making these changes, the changes are effective the start of a new pay period.

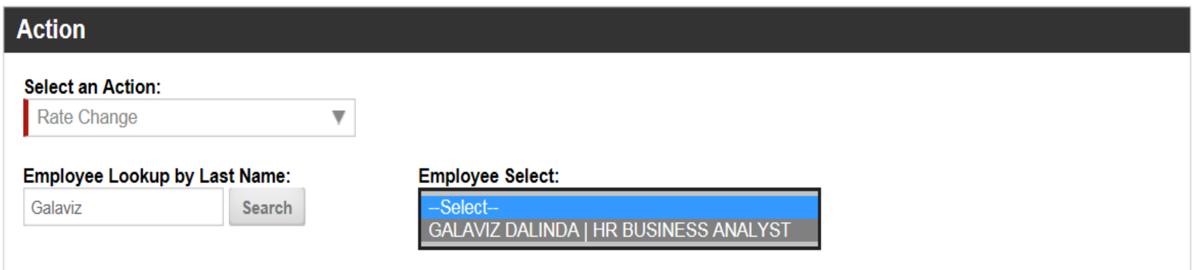
If you should you have any questions, please contact the Human Resources at Ext. 2204 or hr@uwp.edu.

SECTION I

RATE CHANGE

Step 1: ACTION

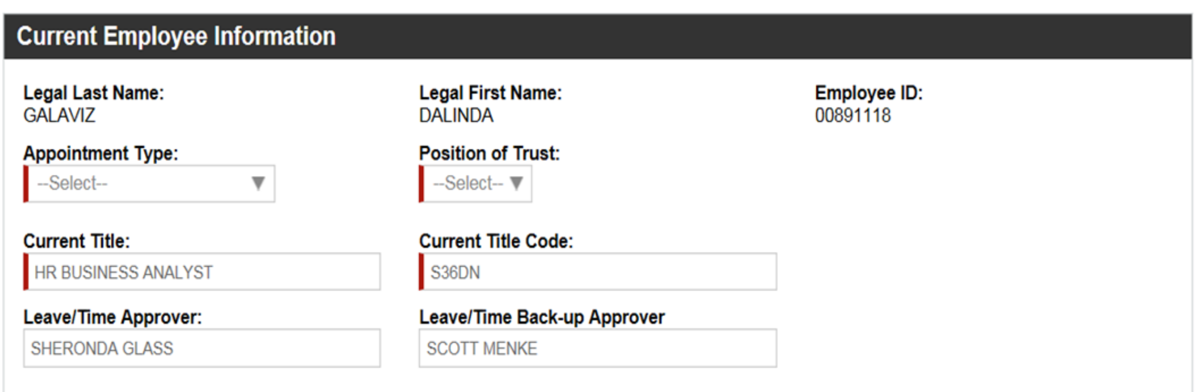
- Select Action
- Employee Lookup – enter Last Name
- Select Name



Note: Make sure you have all the employee information to complete the form. You cannot save and return to complete at a later time.

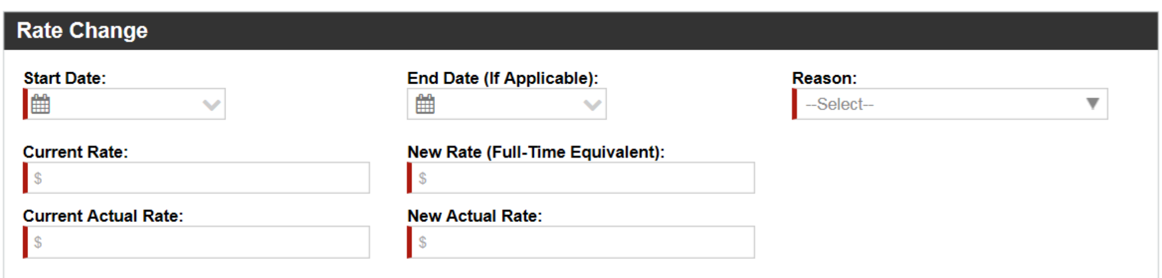
Step 2: CURRENT EMPLOYEE INFORMATION

- Some areas will automatically populate.
- Those with the red bar, it is required to be filled in.
- Drop down the arrow and it will give you a selection.



Step 3: RATE CHANGE

- Those with the **red bar**, it is required to be filled in.
- Start Date - drop down to select the date the rate is to occur.
- Enter an End Date if applicable.
- Reason: Needs to be selected
  - Change in Duties or Title
  - Promotion / Progression
  - Equity
  - Market Factor / Outside
  - Raise to Institution Minimum
  - Temporary Change in Duties
  - Temporary Employee Wage Increase
  - Student Help Increase
  - Performance
  - Merit\
- Enter the employee's current annual rate of pay.
- Enter the new annual rate of pay. This must be the Full Time Rate for the position regardless of the employee's FTE.
- Enter the current actual rate of pay. This will be hourly rate if the appointment is hourly. If the appointment is paid monthly this should be the annual rate of pay. If the employee is not full time this should be reflected in this annual rate.
- Enter the New Actual Rate of pay. This will be hourly if the appointment is hourly. If the appointment is paid monthly this would be the new annual rate of pay. If the employee is not full time this should be reflected in this annual rate. You should also make a note in the Comments Section of the form indicating the employee is not full time. If you know the current FTE please include this information as well.


Rate Change

Start Date:

End Date (If Applicable):

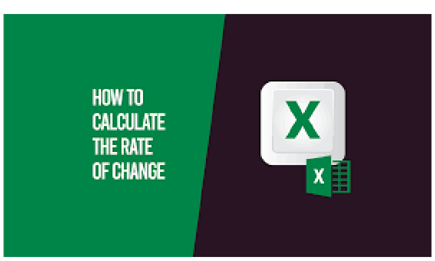
Reason:
--Select--

Current Rate:
$

New Rate (Full-Time Equivalent):
$

Current Actual Rate:
$

New Actual Rate:
$



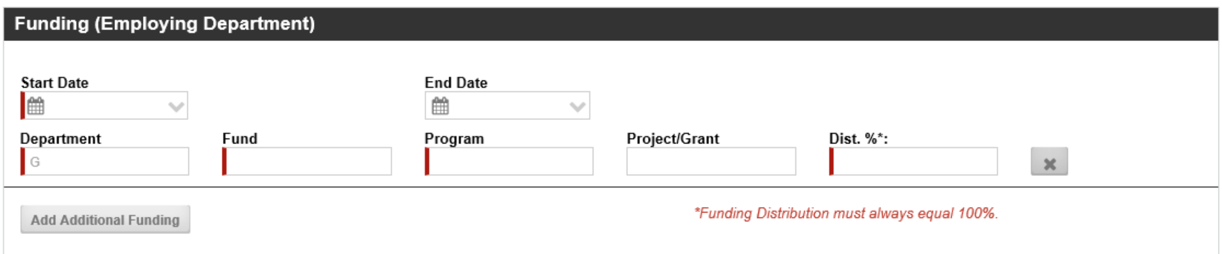
Step 4: FUNDING

- Those with the **red bar**, it is required to be filled in.
- Start Date - drop down to select the date the rate is to occur.
- If you need additional funding > click in the gray box
    - The Distribution of funding must always equal 100%. If you have multiple funding strings the total of all the funding strings should equal 100%.
- If you have questions regarding what funding strings you should use please contact Business Services.

Note the following for entering the digits:

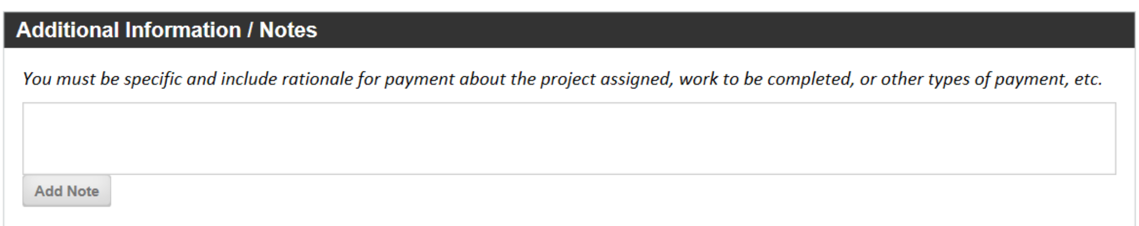
- **Department is 6 digits**
- **Fund is 3 digits**
- **Program is 1 digit**
- **Project is 7 digits**

****Changed your screen shot and removed one comment. We change these fields****



Step 5: ADDITIONAL NOTES

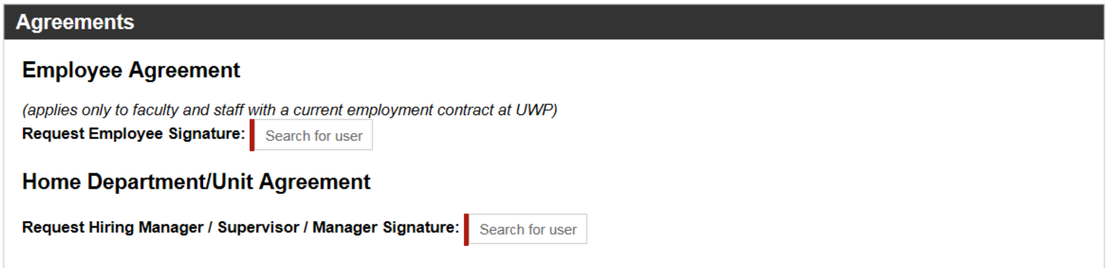
- Please always include additional information in the submission of this form as this helps tell the story of why this payment is to be processed.



Step 6: AGREEMENTS

- Please fill in the areas with the **red bar**, it is required.
- The Employee and Hiring Manager's Name will be required.
- If a name does not populate this means the employee or supervisor have not logged into the BPL system. Contact the employee or supervisor to ask them to log into BPL so you can complete the processing.

NOTE: Do not sign for another employee.


Agreements

Employee Agreement

(applies only to faculty and staff with a current employment contract at UWP)

Request Employee Signature: Search for user

Home Department/Unit Agreement

Request Hiring Manager / Supervisor / Manager Signature: Search for user

Step 7: SUBMIT

- Before you submit, please review all the entries entered.

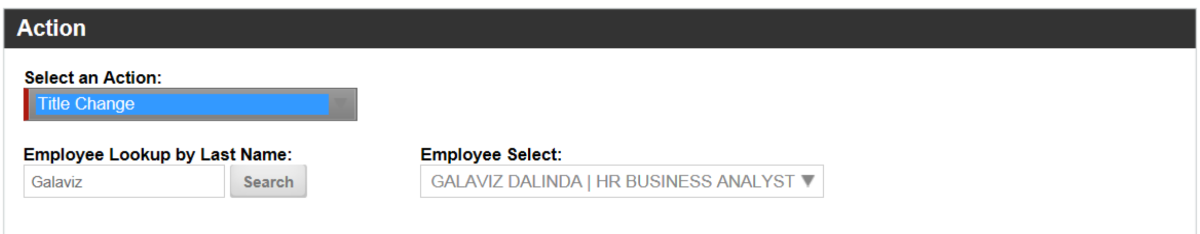
SECTION II

TITLE CHANGE

Title Changes should be discussed with your HR Business Partner prior to submitting to determine the correct new title and title code.

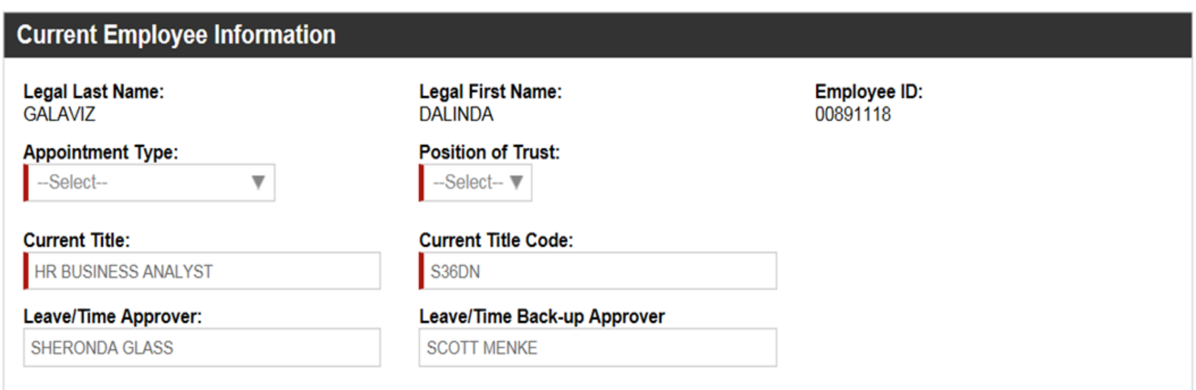
Step 1: ACTION

- Select Action
- Employee Lookup – enter Last Name
- Select Name



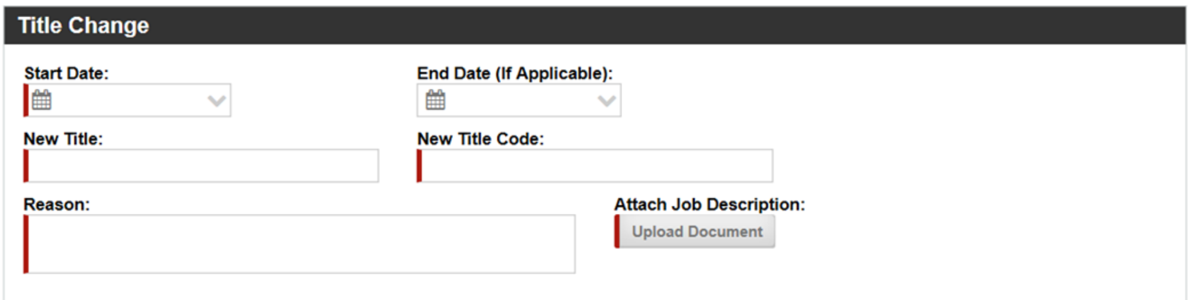
Step 2: CURRENT EMPLOYEE INFORMATION

- Some areas will automatically populate.
- Those with the red bar, it is required to be filled in.
- Drop down the arrow and it will give you a selection.



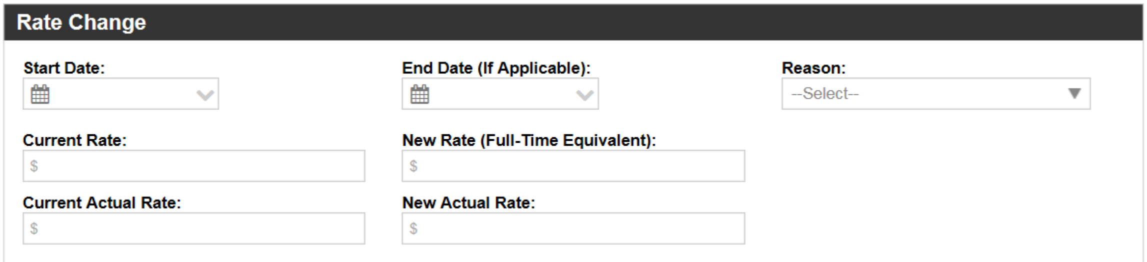
STEP 3: TITLE CHANGE

- Those with the **red bar**, it is required to be filled in.
- Start Date – drop down to select the date the rate is to occur.
- New Title (Discuss with your HR Business Partner)
- New Title Code (Discuss with your HR Business Partner)
- Must include the Reason for the Title Change.
- Must include Job Description. (This should be reviewed by your HR Business Partner prior to submitting.)



STEP 4: RATE CHANGE (If Applicable)

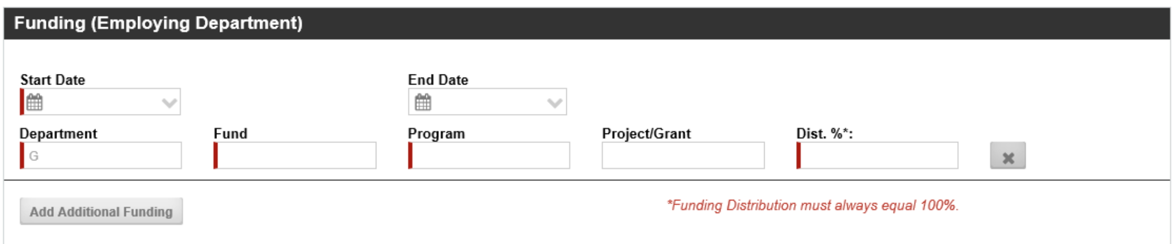
- Those with the **red bar**, it is required to be filled in.
- Start Date – drop down to select the date the rate is to occur.
- Enter the End Date if Applicable.
- Reason (All options will appear, but the most common for this situation are listed below.)
    - Change in Duties / Title
    - Promotion / Progression
    - Temporary Change in Duties
- Enter the employee's current annual rate of pay.
- Enter the new annual rate of pay. This must be the Full Time Rate for the position regardless of the employee's FTE.
- Enter the current actual rate of pay. This will be hourly rate if the appointment is hourly. If the appointment is paid monthly this should be the annual rate of pay. If the employee is not full time this should be reflected in this annual rate.
- Enter the New Actual Rate of pay. This will be hourly if the appointment is hourly. If the appointment is paid monthly this would be the new annual rate of pay. If the employee is not full time this should be reflected in this annual rate. You should also make a note in the Comments Section of the form indicating the employee is not full time. If you know the current FTE please include this information as well.



STEP 5: FUNDING

- This step is not required, but should be provided if the funding is changing in any way.

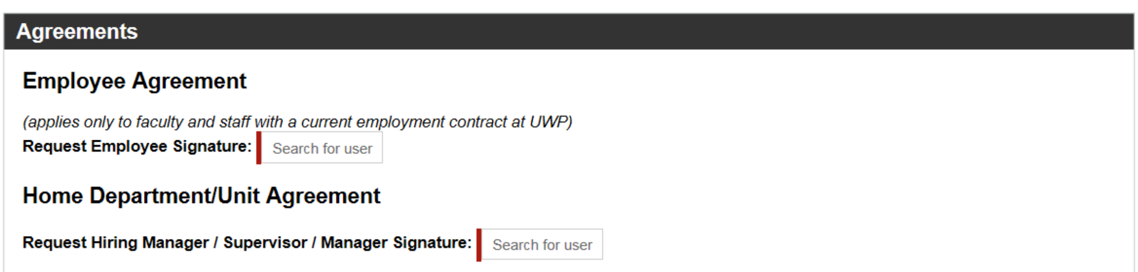
****Added new screen print to reflect changes made to BPL funding****



STEP 6: AGREEMENTS

- Please fill in the areas with the **red bar**, it is required.
- The Employee and Hiring Manager Name will be required.
- If a name does not populate this means the employee or supervisor have not logged into the BPL system. Contact the employee or supervisor to ask them to log into BPL so you can complete the processing.

Do not sign for another employee.



Step 7: SUBMIT

- Before you submit, please review all the entries entered.

SECTION III

APPOINTMENT PERCENT/FTE CHANGE

To complete the action, you should first calculate the FTE for the appointment. FTE can be calculated with the following methods.

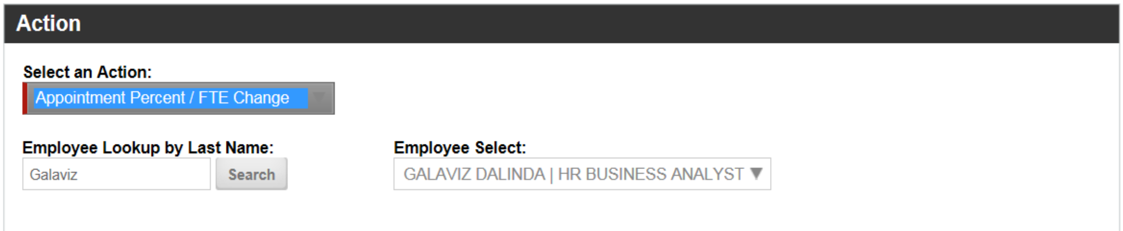
This action is used for adjuncts new semester appointments.

To complete this action, you should first calculate the following:

CATEGORY	POSITION	INSTRUCTIONS
Standard	Use for Hourly and Annual Positions	Number of hours to be worked per week divided by 40 Example: 32 hours per week divide by 40 = 80% FTE
9 Month Academic	Use for 9 Month Teaching Staff – based on credits	Use the FTE Calculator worksheet on the link below. Enter the amount to be paid per credit and the amount of credits. Be sure to use the correct tab for Faculty or Adjuncts as each has a different full-time credit load. FTE Calculations
Per Student Calculation	Contact your Dean to determine the FTE per student.	Multiple the FTE per student amount by the number of students to determine the FTE associated with the appointment.

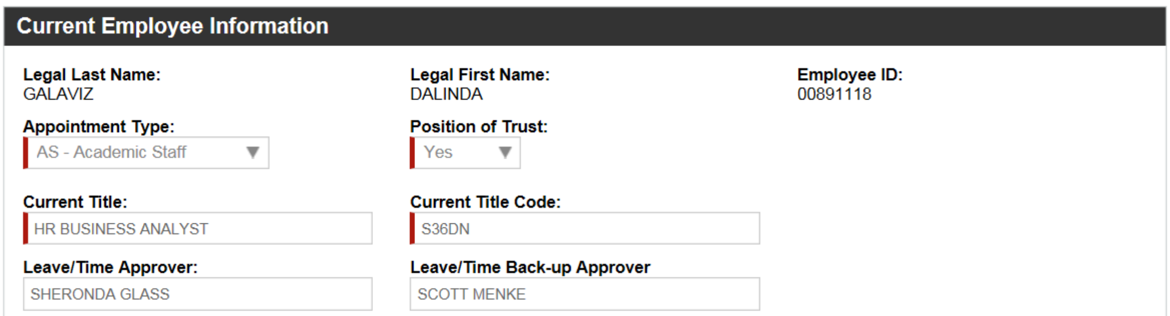
Step 1: ACTION

- Select Action
- Employee Lookup – enter Last Name
- Select Name



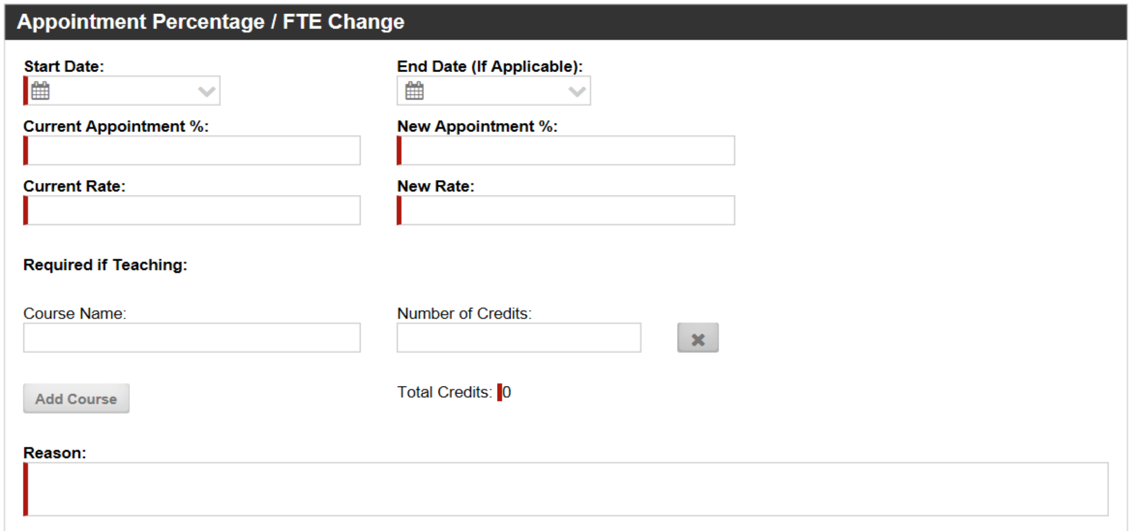
Step 2: CURRENT EMPLOYEE INFORMATION

- Some areas will automatically populate.
- Those with the **red bar**, it is required to be filled in.
- Drop down the arrow and it will give you a selection.



STEP 3: APPOINTMENT PERCENTAGE/FTE CHANGE

- Those with the **red bar**, it is required to be filled in
- Enter the Start Date of the FTE Change
- Enter the End Date of the FTE Change (if applicable)
- Enter Current Appointment % (% of FTE. Ex. 32 hours = 80% FTE)
- New Appointment %: (% of FTE after change)
- Enter the Employee's Current Rate. This could be annual or hourly depending on appointment type.
- Enter the Employee's New Rate based on the employee's new FTE.
- If the position is a teaching position add course information if applicable.
- Reason.
  - This explanation will vary.


Appointment Percentage / FTE Change

Start Date:

End Date (If Applicable):

Current Appointment %:

New Appointment %:

Current Rate:

New Rate:

Required if Teaching:

Course Name:

Number of Credits:

Add Course

Total Credits: 0

Reason:

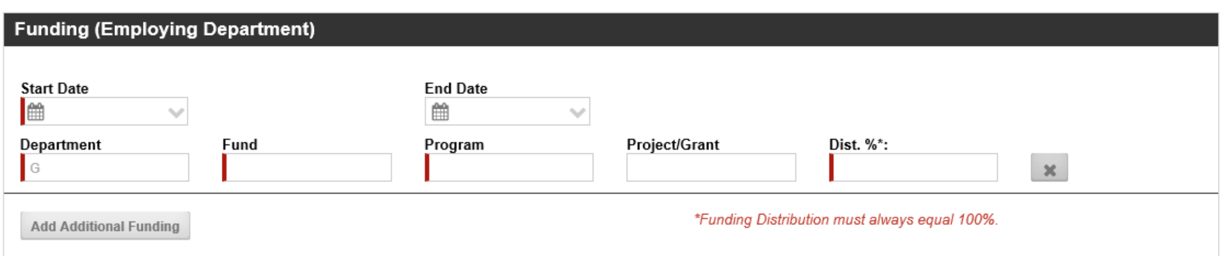
STEP 4: FUNDING

- Those with the **red bar**, it is required to be filled in.
- If you need to add additional funding > click in the gray box.
    - The Distribution of funding must always equal 100%. If you have multiple funding strings the total of all the funding strings should equal 100%.
- If you have questions regarding what funding strings you should use please contact Business Services.

Note the following for entering the digits:

- **Department is 6 digits**
- **Fund is 3 digits**
- **Program is 1 digit**
- **Project is 7 digits**

****Added new screen shot to reflect changes made to BPL****


Funding (Employing Department)

Start Date

End Date

Department

G

Fund

Program

Project/Grant

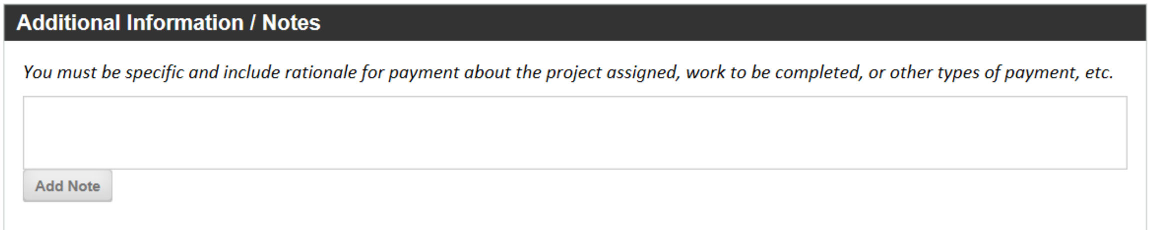
Dist. %*:

Add Additional Funding

*Funding Distribution must always equal 100%.

Step 5: ADDITIONAL NOTES

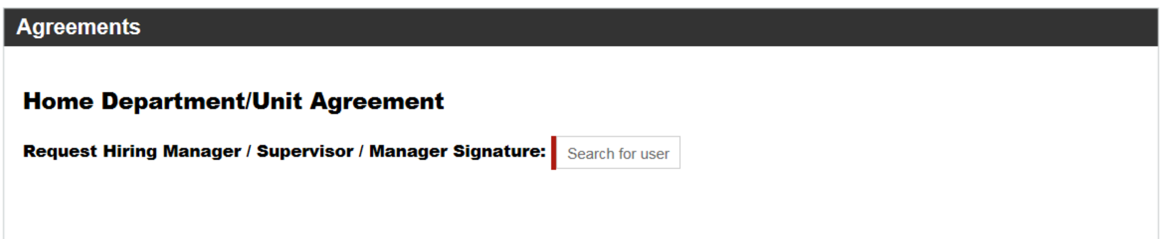
- Please always include additional information in the submission of this form as this helps tell the story of why this payment is to be processed.



STEP 6: AGREEMENTS

- Please fill in the areas with the **red bar**, it is required.
- The Employee and Hiring Manager Name will be required.
- If a name does not populate this means the employee or supervisor have not logged into the BPL system. Contact the employee or supervisor to ask them to log into BPL so you can complete the processing.

  Do not sign for another employee.



Step 7: SUBMIT

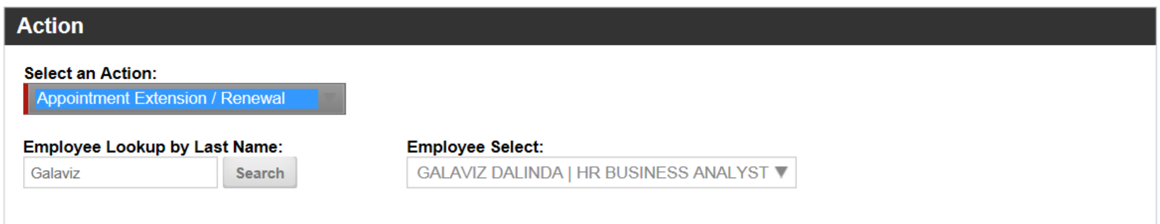
- Before you submit, please review all the entries entered.

SECTION IV

APPOINTMENT EXTENSION RENEWAL

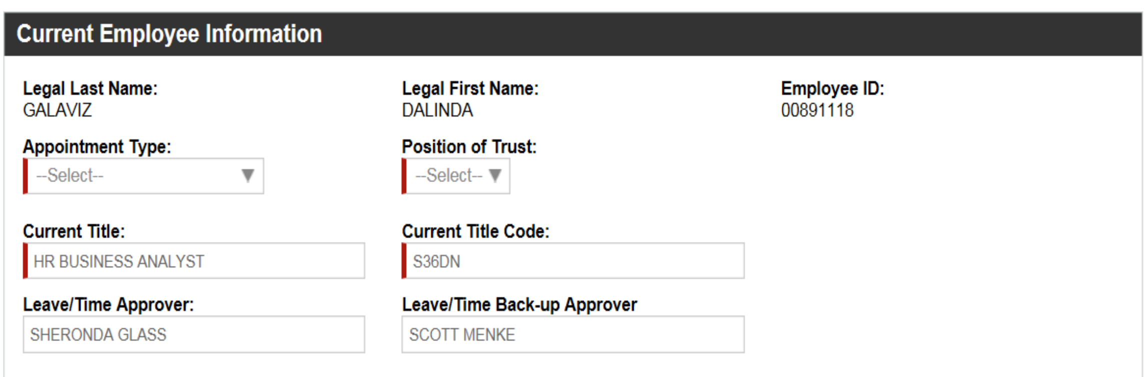
Step 1: ACTION

- Select Action
- Employee Lookup – enter Last Name
- Select Name


Action
Select an Action:
Appointment Extension / Renewal
Employee Lookup by Last Name:
Galaviz
Search
Employee Select:
GALAVIZ DALINDA | HR BUSINESS ANALYST

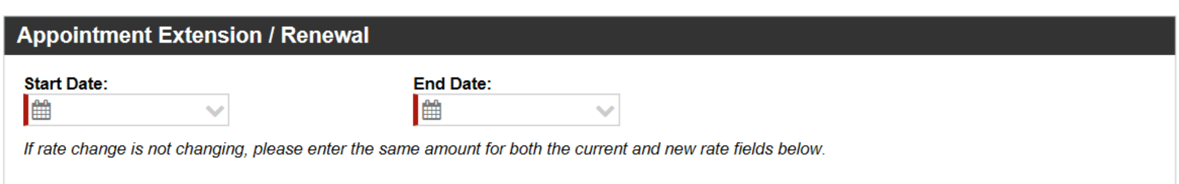
STEP 2: CURRENT EMPLOYEE INFORMATION

- Some areas will automatically populate
- Those with the **red bar**, it is required to be filled in
- Drop down the arrow and it will give you a selection


Current Employee Information
Legal Last Name:
GALAVIZ
Legal First Name:
DALINDA
Employee ID:
00891118
Appointment Type:
--Select--
Position of Trust:
--Select--
Current Title:
HR BUSINESS ANALYST
Current Title Code:
S36DN
Leave/Time Approver:
SHERONDA GLASS
Leave/Time Back-up Approver
SCOTT MENKE

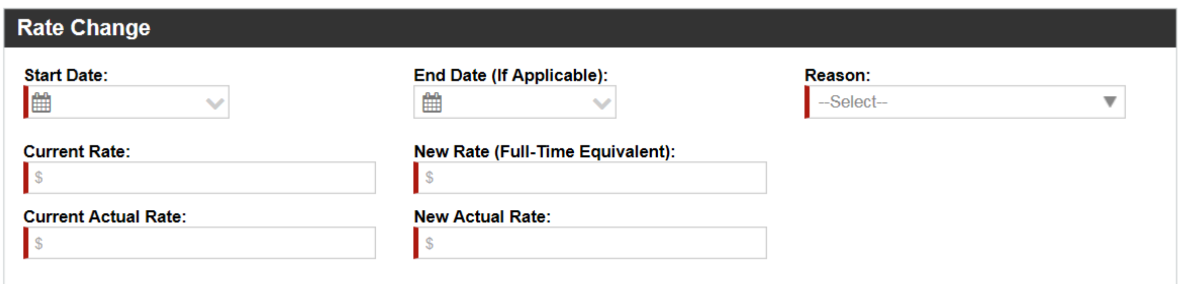
STEP 3: APPOINTMENT EXTENSION/RENEWAL

- Those with the **red bar**, it is required to be filled in.


Appointment Extension / Renewal
Start Date:
End Date:
If rate change is not changing, please enter the same amount for both the current and new rate fields below.

STEP 4: RATE CHANGE

- Those with the **red bar**, it is required to be filled in. Even if the rate is not changing this information is required.
- Start Date – drop down to select the date the rate is to occur.
- Reason: Needs to selected.
- Enter the current actual rate of pay. This will be hourly rate if the appointment is hourly. If the appointment is paid monthly this should be the annual rate of pay. If the employee is not full time this should be reflected in this annual rate.
- Enter the New Actual Rate of pay. This will be hourly if the appointment is hourly. If the appointment is paid monthly this would be the new annual rate of pay. If the employee is not full time this should be reflected in this annual rate. You should also make a note in the Comments Section of the form indicating the employee is not full time. If you know the current FTE please include this information as well.
- Enter the Employee's Current Rate. This could be annual or hourly depending on appointment type.
- Enter the Employee's New Rate based on the employee's new FTE.
- If the position is a teaching position add course information if applicable.

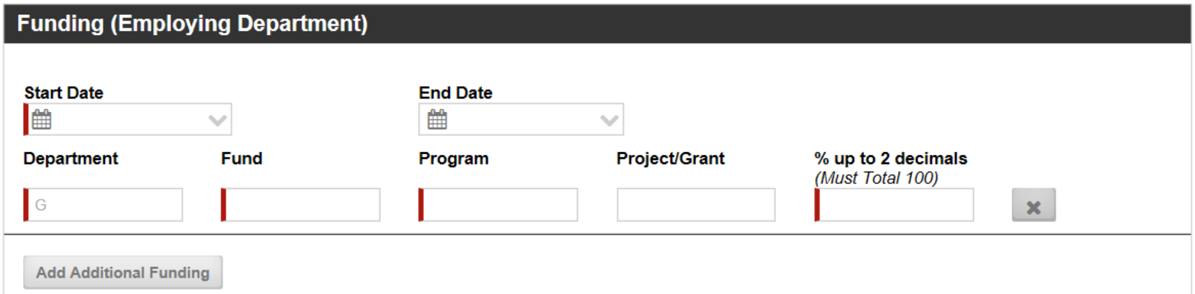


STEP 5: FUNDING

- Those with the **red bar**, it is required to be filled in.
- If you need to add additional funding > click in the gray box.
- If you need additional funding > click in the gray box
  - The Distribution of funding must always equal 100%. If you have multiple funding strings the total of all the funding strings should equal 100%.
- If you have questions regarding what funding strings you should use please contact Business Services.

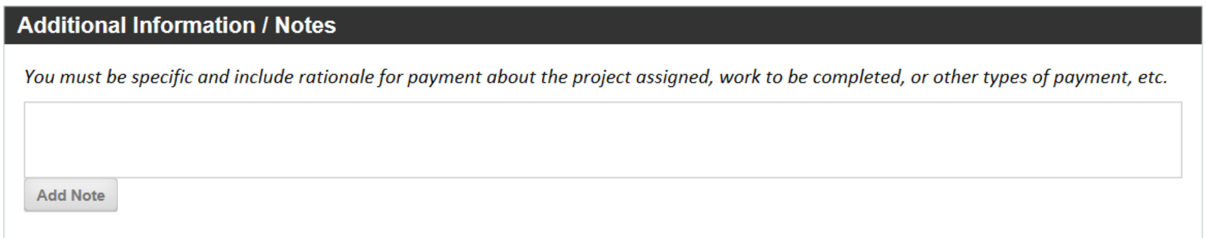
Note the following for entering the digits:

- **Department is 6 digits**
- **Program is 1 digit**
- **Fund is 3 digits**
- **Project is 7 digits**



STEP 6: ADDITIONAL NOTES

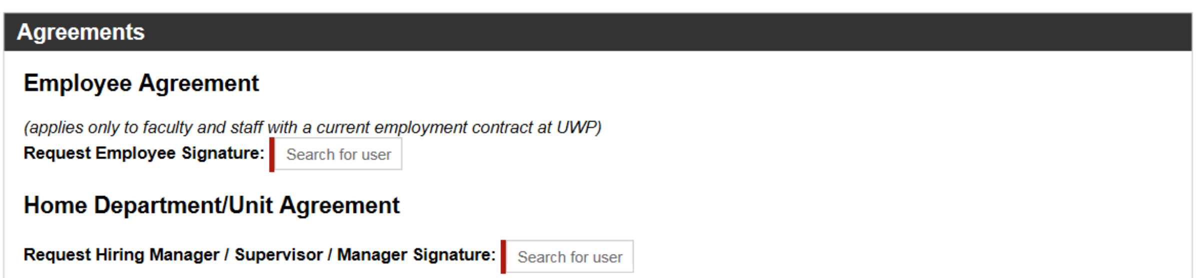
- Please always include additional information in the submission of this form as this helps tell the story of why this payment is to be processed.



STEP 7: AGREEMENTS

- Please fill in the areas with the **red bar**, it is required.
- The Employee and Hiring Manager Name will be required.
- If a name does not populate this means the employee or supervisor have not logged into the BPL system. Contact the employee or supervisor to ask them to log into BPL so you can complete the processing.

  Do not sign for another employee.



Step 8: SUBMIT

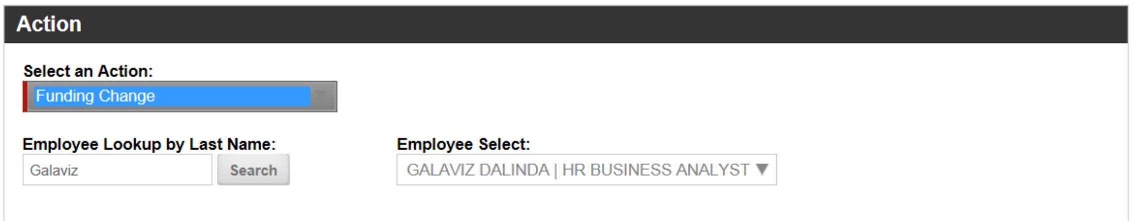
- Before you submit, please review all the entries entered.

SECTION V

FUNDING CHANGE

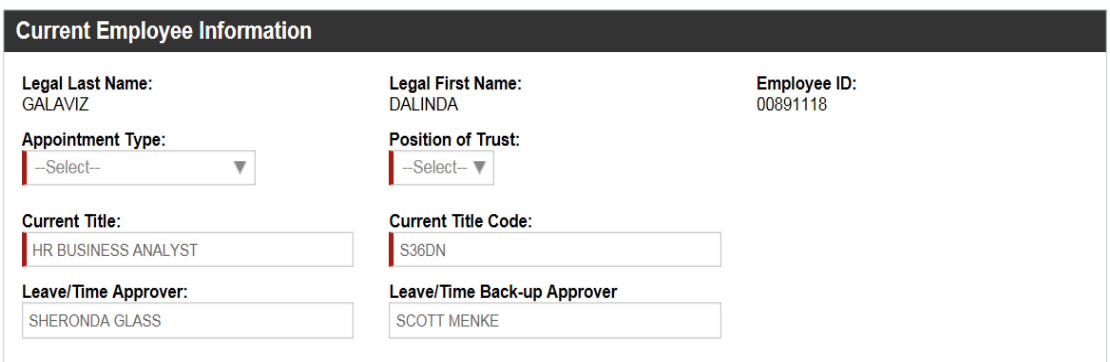
STEP 1: ACTION

- Select an Action: Funding Change
- Employee Lookup – enter Last Name
- Select Name



STEP 2: CURRENT EMPLOYEE INFORMATION

- Some areas will automatically populate
- Those with the **red bar**, it is required to be filled in
- Drop down the arrow and it will give you a selection

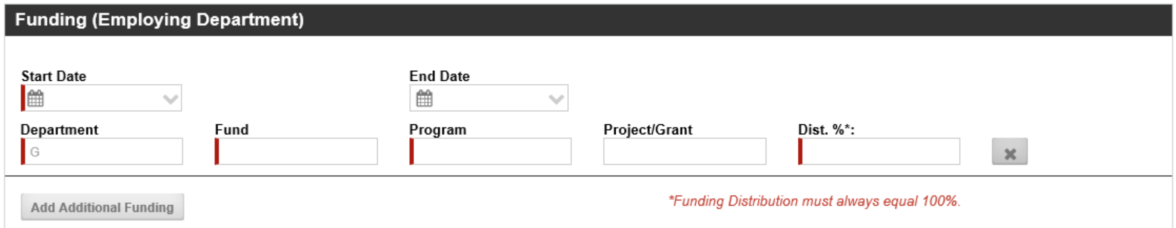


STEP 3: FUNDING

- Those with the **red bar**, it is required to be filled in.
- If you need to add additional funding > click in the gray box.
  - The Distribution of funding must always equal 100%. If you have multiple funding strings the total of all the funding strings should equal 100%.
- If you have questions regarding what funding strings you should use please contact Business Services.

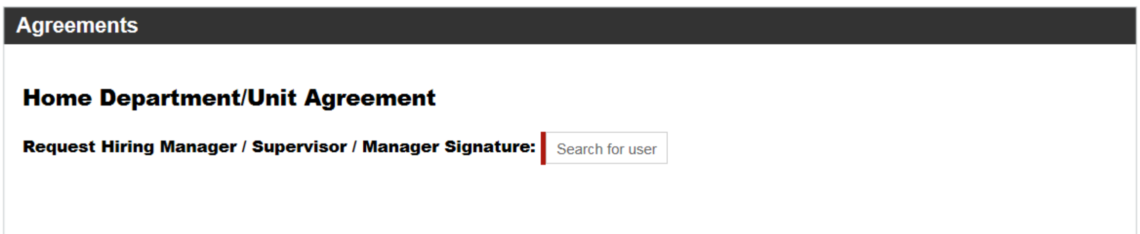
Note the following for entering the digits:

- **Department is 6 digits**
- **Fund is 3 digits**
- **Program is 1 digit**
- **Project is 7 digits**



STEP 4: AGREEMENTS

- Please fill in the areas with the **red bar**, it is required.
- The Employee and Hiring Manager Name will be required.
- If a name does not populate this means the employee or supervisor have not logged into the BPL system. Contact the employee or supervisor to ask them to log into BPL so you can complete the processing.



STEP 5: SUBMIT

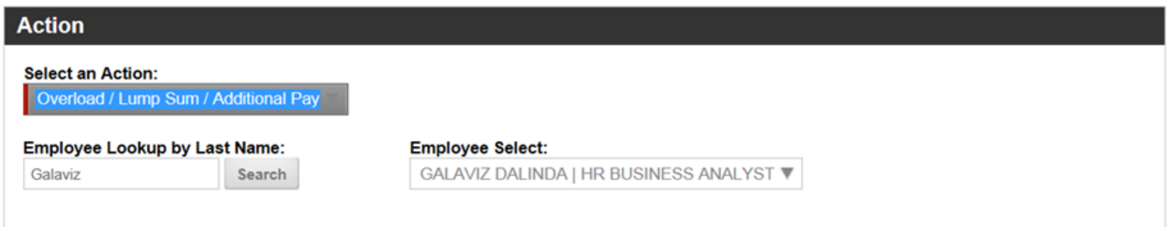
- Before you submit, please review all the entries entered.

SECTION VI

OVERLOAD LUMP SUM ADDITIONAL PAY

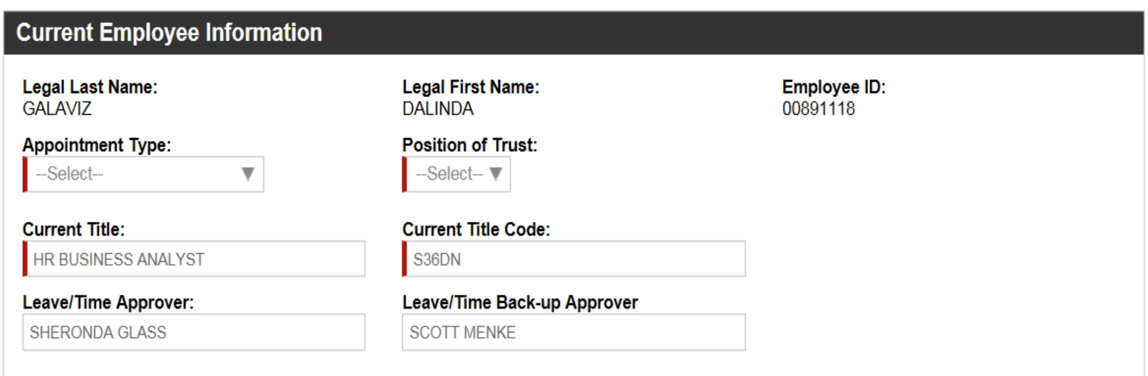
STEP 1: ACTION

- Select an Action: Overload/Lump Sum/Additional Pay
- Employee Lookup – enter Last Name
- Select Name



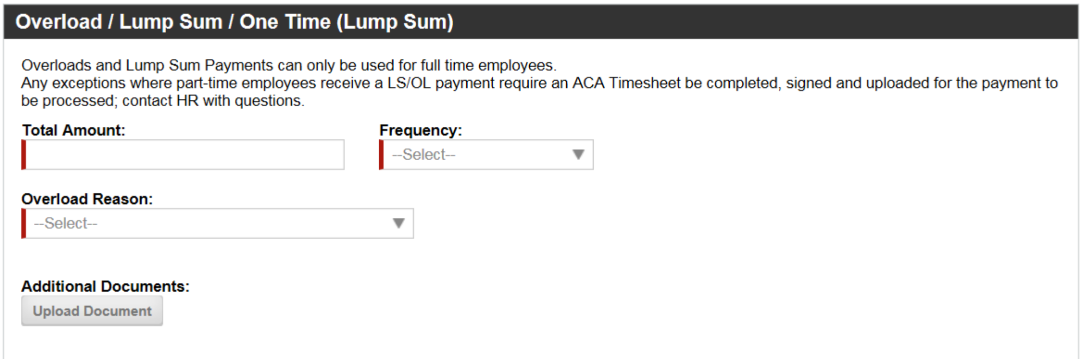
STEP 2: CURRENT EMPLOYEE INFORMATION

- Some areas will automatically populate
- Those with the **red bar**, it is required to be filled in
- Drop down the arrow and it will give you a selection



STEP 3: OVERLOAD / LUMP SUM / ONE TIME (LUMP SUM)
STEP 3A: OVERLOAD / LUMP SUM / ONE TIME (LUMP SUM)

- Those with the **red bar**, it is required to be filled in.
- Enter the total amount of the payment to be made.



Overload / Lump Sum / One Time (Lump Sum)

Overloads and Lump Sum Payments can only be used for full time employees.
Any exceptions where part-time employees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to be processed; contact HR with questions.

Total Amount:

Frequency: --Select--

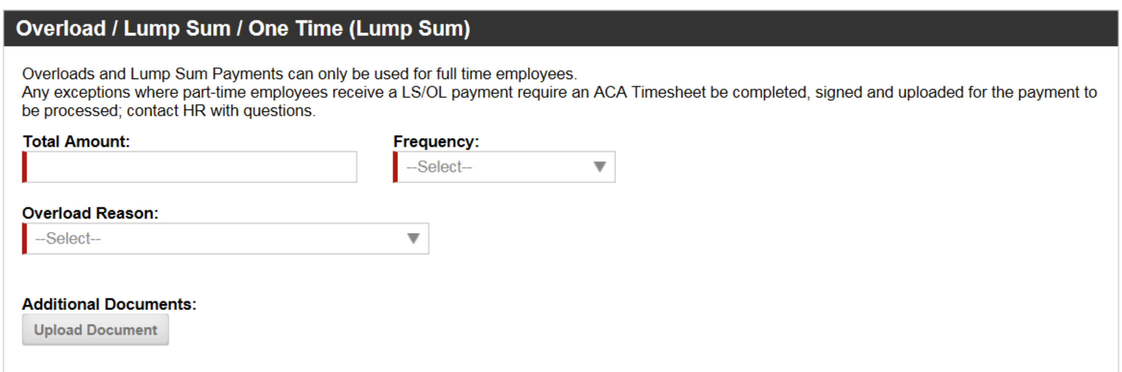
Overload Reason: --Select--

Additional Documents:

Upload Document

STEP 3B: FREQUENCY

- Enter the Frequency of the payment.
- One-time End of Period
  - Will pay on the pay date on or following the end date indicated in the Funding Portion provided.
- Pay Across Entire Period
  - Total amount of payment will be divided by the total number of payrolls to be processed in the date range of the appointment provided in the Funding Portion provided.
- Other Explain in Notes
  - Payments will be processed based on the information provided in your notes.



Overload / Lump Sum / One Time (Lump Sum)

Overloads and Lump Sum Payments can only be used for full time employees.
Any exceptions where part-time employees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to be processed; contact HR with questions.

Total Amount:

Frequency: --Select--

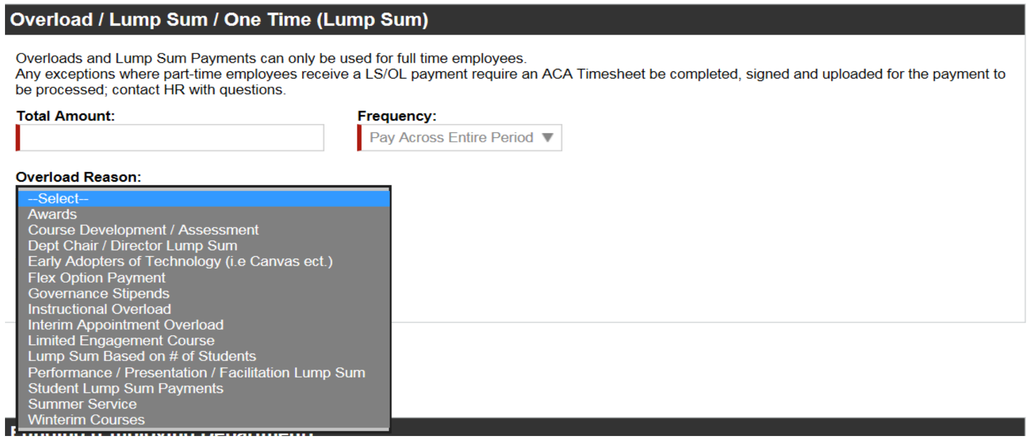
Overload Reason: --Select--

Additional Documents:

Upload Document

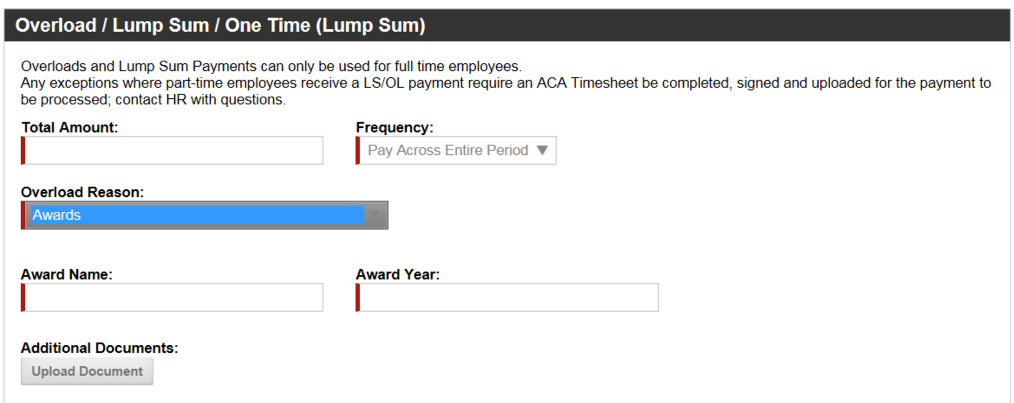
STEP 4C: OVERLOAD REASON – DROP DOWN SELECTIONS

- Select reason.



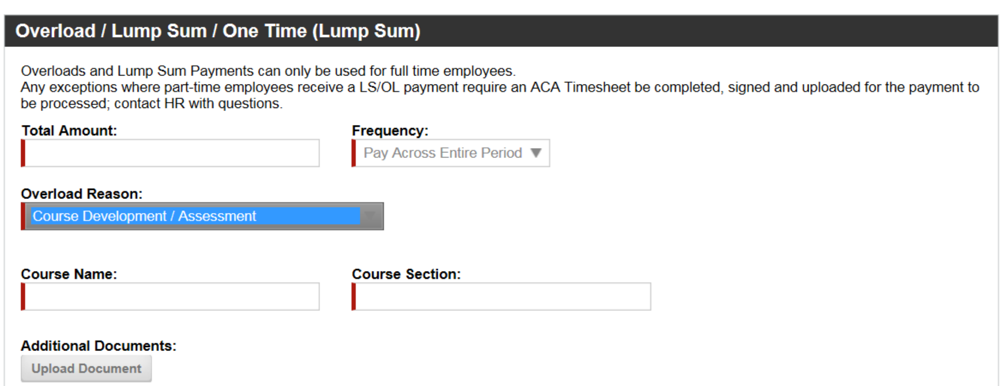
STEP 4C - 1: OVERLOAD REASON – AWARDS

- Drop down to select.
- Enter the employees name and award year.
- Any additional documents can be uploaded.



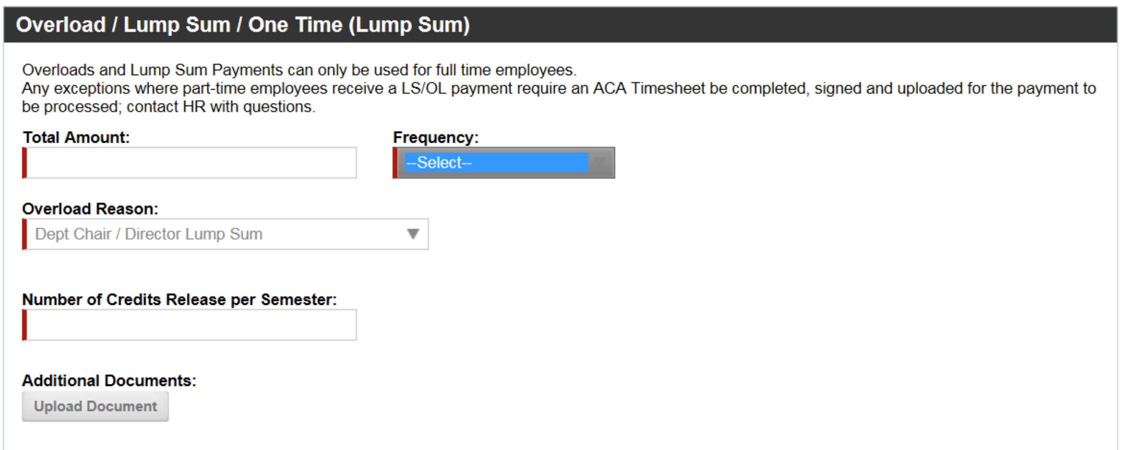
STEP 4C - 2: OVERLOAD REASON – COURSE DEVELOPMENT/ASSESSMENT

- Select Coarse Development / Assessment
- Add Course Name and Section.



STEP 4C - 3: OVERLOAD REASON – DEPT CHAIR/DIRECTOR LUMP SUM

- Select Dept. Chair/Director Lump Sum
- Enter # of Credits Release per Semester
- Enter the Prior Chair / Director Information.
  - This will ensure that all Reports to Information is Changed in the HRS system. It will also provide information to HR to make needed Time and Labor Approver Changes if applicable.



Overload / Lump Sum / One Time (Lump Sum)

Overloads and Lump Sum Payments can only be used for full time employees.
Any exceptions where part-time employees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to be processed; contact HR with questions.

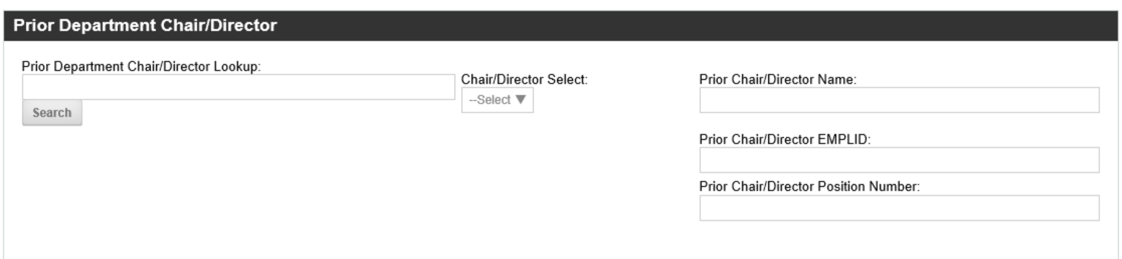
Total Amount:

Frequency: --Select--

Overload Reason: Dept Chair / Director Lump Sum

Number of Credits Release per Semester:

Additional Documents: Upload Document



Prior Department Chair/Director

Prior Department Chair/Director Lookup:

Search

Chair/Director Select: --Select

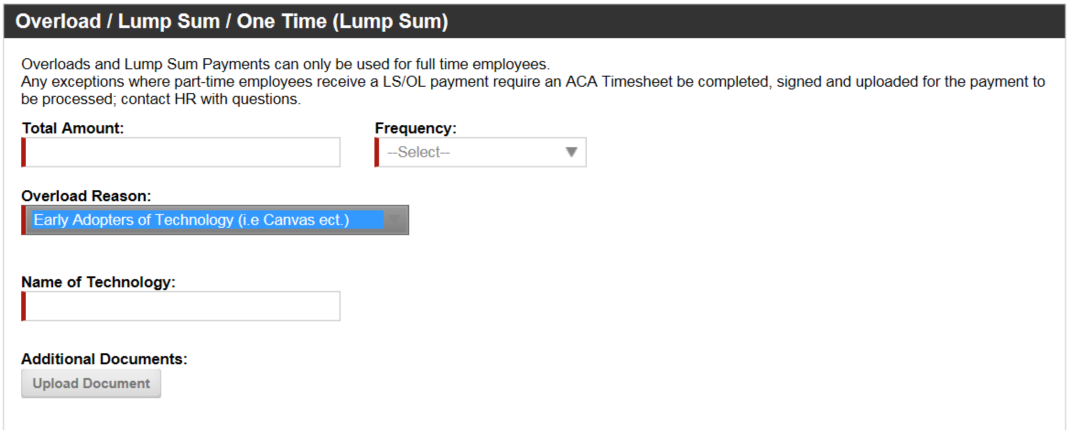
Prior Chair/Director Name:

Prior Chair/Director EMPLID:

Prior Chair/Director Position Number:

STEP 4C - 4: OVERLOAD REASON – EARLY ADOPTERS OF TECHNOLOGY

- Select Early Adopters of Technology.
- Enter Frequency (See above instructions and explanations).
- Enter Name of Technology.



Overload / Lump Sum / One Time (Lump Sum)

Overloads and Lump Sum Payments can only be used for full time employees.
Any exceptions where part-time employees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to be processed; contact HR with questions.

Total Amount:

Frequency: --Select--

Overload Reason: Early Adopters of Technology (i.e Canvas ect.)

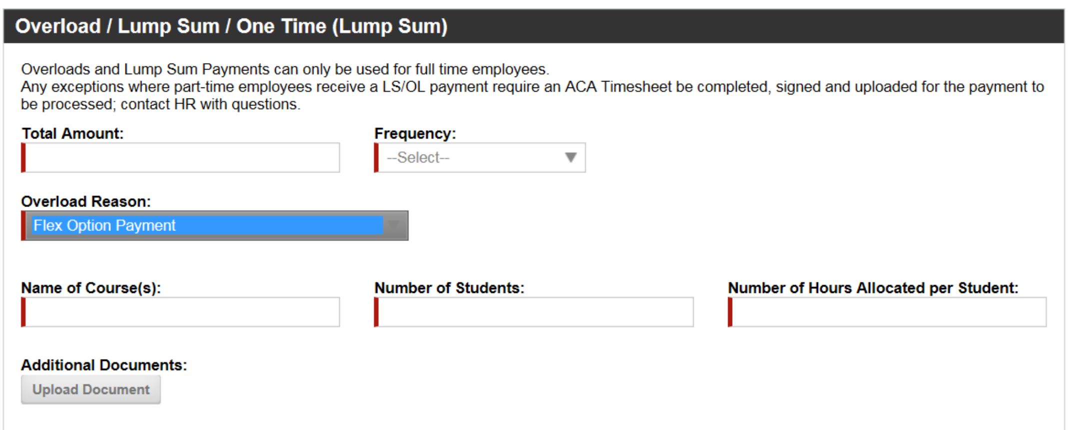
Name of Technology:

Additional Documents:

Upload Document

STEP 4C - 5: OVERLOAD REASON – FLEX OPTION PAYMENT

- Select Flex Option Payment
- Enter Course(s), # of Students and # of Hours Allocated per student
- Upload additional documents if needed.



Overload / Lump Sum / One Time (Lump Sum)

Overloads and Lump Sum Payments can only be used for full time employees.
Any exceptions where part-time employees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to be processed; contact HR with questions.

Total Amount:

Frequency: --Select--

Overload Reason: Flex Option Payment

Name of Course(s):

Number of Students:

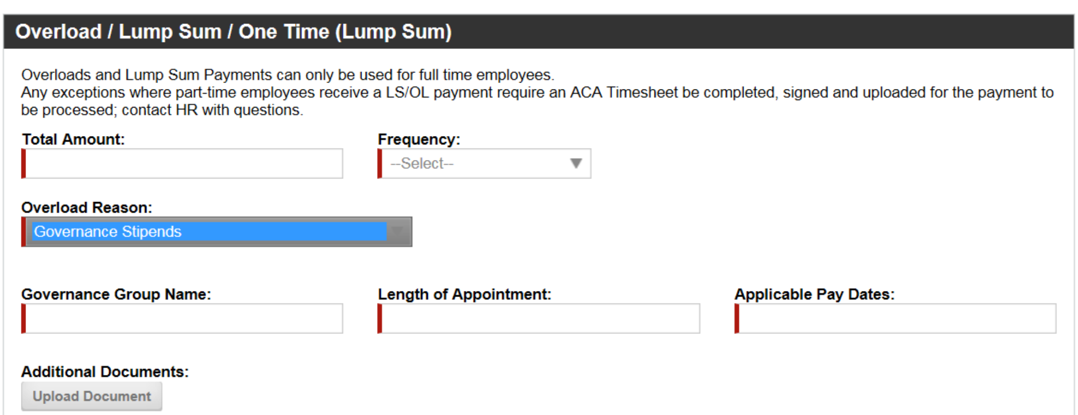
Number of Hours Allocated per Student:

Additional Documents:

Upload Document

STEP 4C - 6: OVERLOAD REASON – GOVERNANCE STIPENDS

- Select Governance Stipends
- Governance Group Name, Length of Appointment and Applicable Pay Dates



Overload / Lump Sum / One Time (Lump Sum)

Overloads and Lump Sum Payments can only be used for full time employees.
Any exceptions where part-time employees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to be processed; contact HR with questions.

Total Amount:

Frequency: --Select--

Overload Reason: Governance Stipends

Governance Group Name:

Length of Appointment:

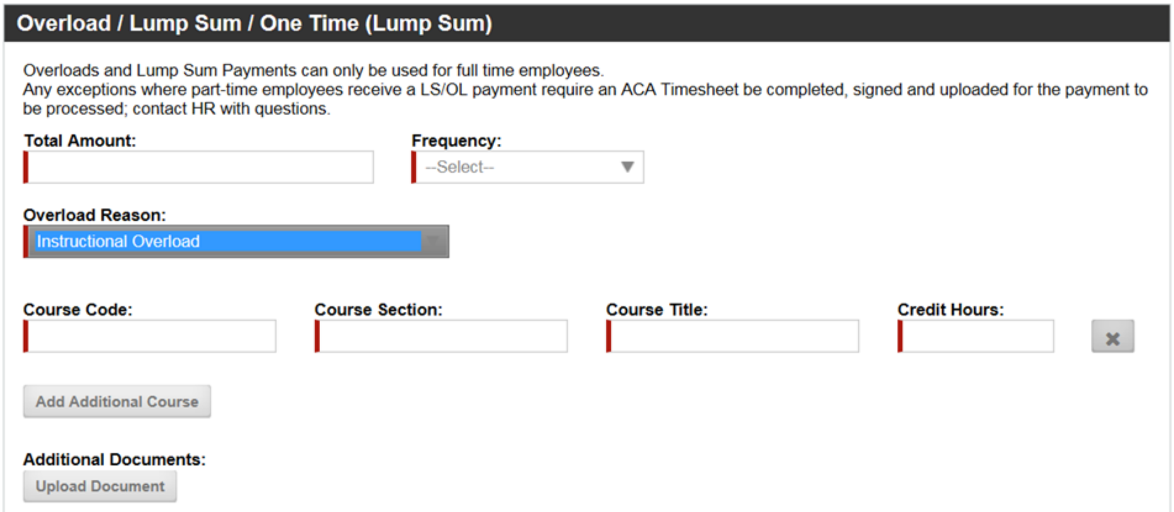
Applicable Pay Dates:

Additional Documents:

Upload Document

STEP 4C - 7: OVERLOAD REASON – INSTRUCTIONAL OVERLOAD

- Select Instructional Overload
- Enter Course Code, Selection, Title and Credit Hours.


Overload / Lump Sum / One Time (Lump Sum)

Overloads and Lump Sum Payments can only be used for full time employees.
Any exceptions where part-time employees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to be processed; contact HR with questions.

Total Amount:
Frequency: --Select--

Overload Reason: Instructional Overload

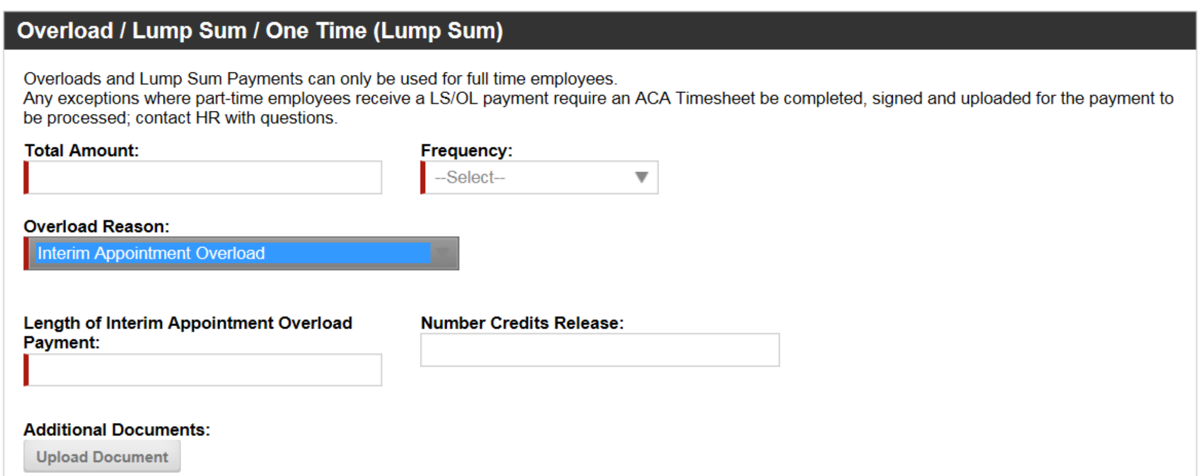
Course Code:
Course Section:
Course Title:
Credit Hours:

Add Additional Course

Additional Documents:
Upload Document

STEP 4C - 8: OVERLOAD REASON – INTERIM APPOINTMENT OVERLOAD

- Select Interim Appointment Overload
- Length of Interim Appointment
- Enter Number of Credits Released if applicable.


Overload / Lump Sum / One Time (Lump Sum)

Overloads and Lump Sum Payments can only be used for full time employees.
Any exceptions where part-time employees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to be processed; contact HR with questions.

Total Amount:
Frequency: --Select--

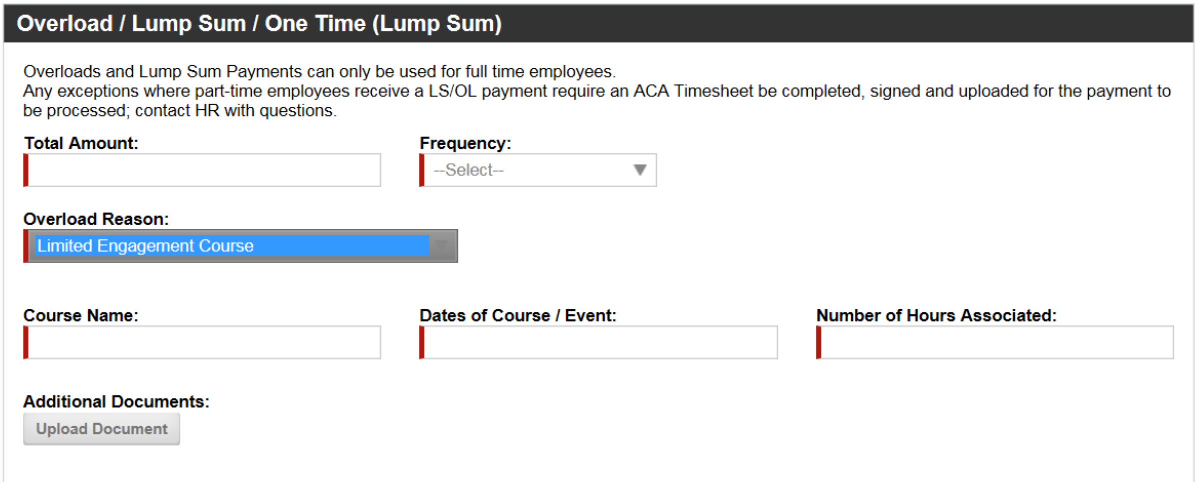
Overload Reason: Interim Appointment Overload

Length of Interim Appointment Overload Payment:
Number Credits Release:

Additional Documents:
Upload Document

STEP 4C - 9: OVERLOAD REASON – LIMITED ENGAGEMENT COURSE

- Select Limited Engagement Course
- Enter Course Name, Dates of Course/Event and Hours Associated.



Overload / Lump Sum / One Time (Lump Sum)

Overloads and Lump Sum Payments can only be used for full time employees.
Any exceptions where part-time employees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to be processed; contact HR with questions.

Total Amount:

Frequency: --Select--

Overload Reason: Limited Engagement Course

Course Name:

Dates of Course / Event:

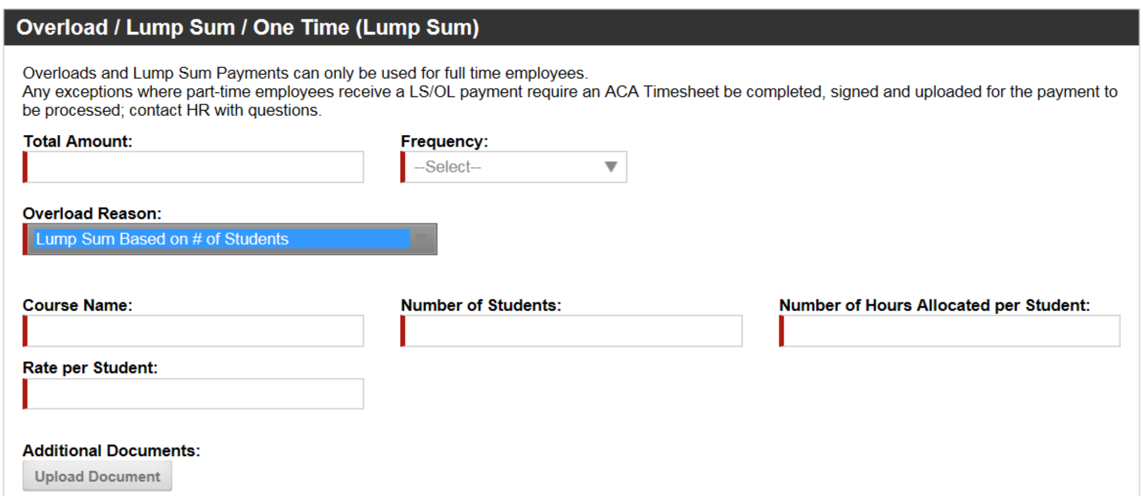
Number of Hours Associated:

Additional Documents:

Upload Document

STEP 4C- 10: OVERLOAD REASON – LUMP SUM BASED ON # OF STUDENTS

- Select Lump Sum Based on # of Students.
- Enter Course Name, # of Students and # of Hours Allocated per Student.
- Enter Rate per Student.



Overload / Lump Sum / One Time (Lump Sum)

Overloads and Lump Sum Payments can only be used for full time employees.
Any exceptions where part-time employees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to be processed; contact HR with questions.

Total Amount:

Frequency: --Select--

Overload Reason: Lump Sum Based on # of Students

Course Name:

Number of Students:

Number of Hours Allocated per Student:

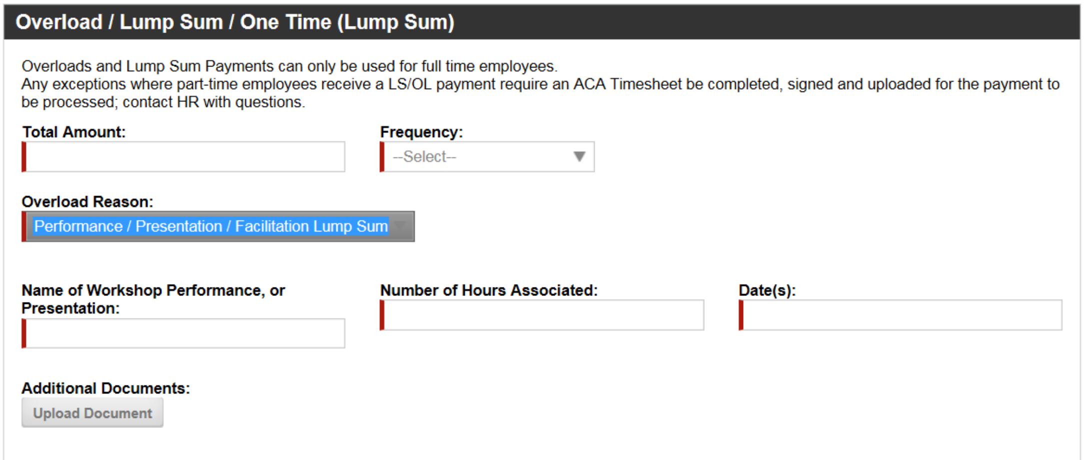
Rate per Student:

Additional Documents:

Upload Document

STEP 4C - 11: OVERLOAD REASON – PERFORMANCE, PRESENTATION, FACILITATION LUMP SUM

- Select Performance/Presentation/Facilitation Lump Sum
- Enter name of Workshop, Performance or Presentation and Hours and Dates.



Overload / Lump Sum / One Time (Lump Sum)

Overloads and Lump Sum Payments can only be used for full time employees.
Any exceptions where part-time employees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to be processed; contact HR with questions.

Total Amount:

Frequency: --Select--

Overload Reason: Performance / Presentation / Facilitation Lump Sum

Name of Workshop Performance, or Presentation:

Number of Hours Associated:

Date(s):

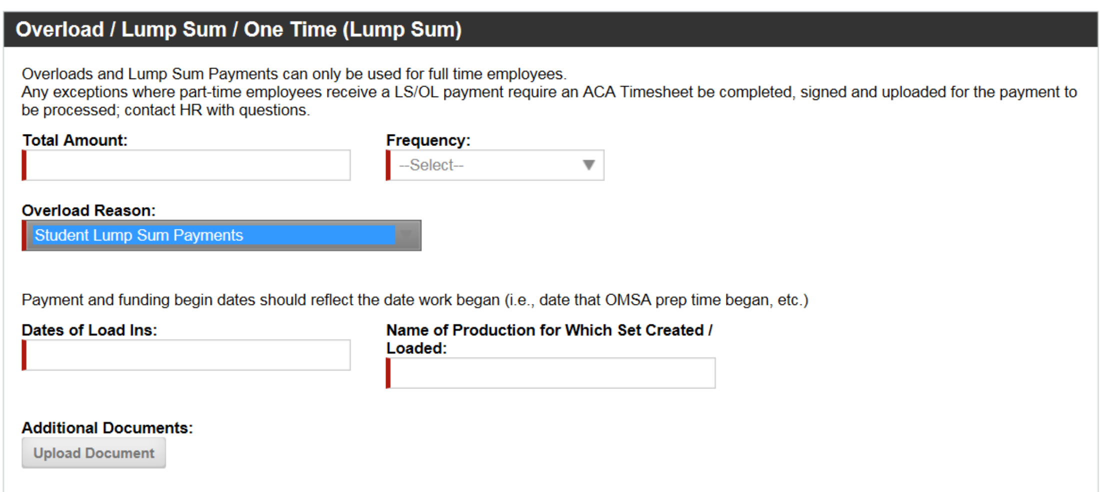
Additional Documents:

Upload Document

STEP 4C - 12: OVERLOAD REASON – STUDENT LUMP SUM PAYMENTS

- Select Student Lump Sum Payments
- Select Fireside Load in or Other.
- Fireside Load In:
  - o Enter Dates of Load Ins and Name of Production.
- Other:
  - o Enter Dates and Description of work completed.

This should only be used for RAs and event purposes. RAs must submit ACA Timesheets.



Overload / Lump Sum / One Time (Lump Sum)

Overloads and Lump Sum Payments can only be used for full time employees.
Any exceptions where part-time employees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to be processed; contact HR with questions.

Total Amount:

Frequency: --Select--

Overload Reason: Student Lump Sum Payments

Payment and funding begin dates should reflect the date work began (i.e., date that OMSA prep time began, etc.)

Dates of Load Ins:

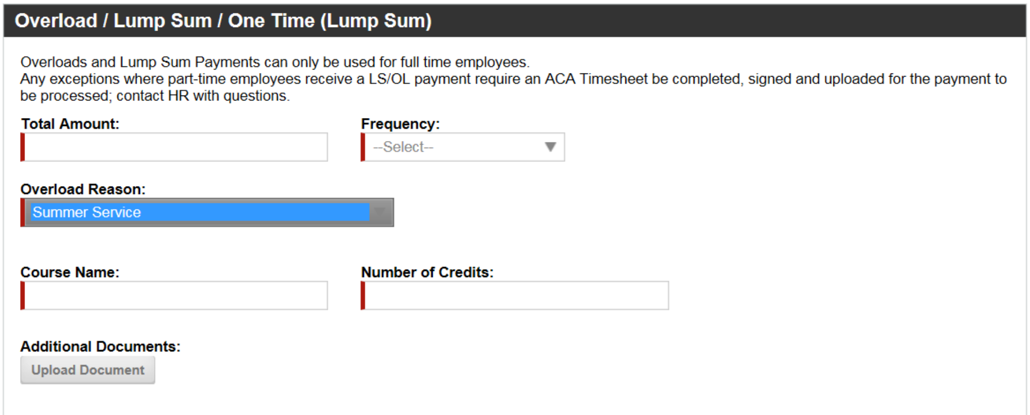
Name of Production for Which Set Created / Loaded:

Additional Documents:

Upload Document

STEP 4C - 13: OVERLOAD REASON – SUMMER SERVICE

- Select Summer Service / Summer Session
- Enter Coarse Name and Number of Credits

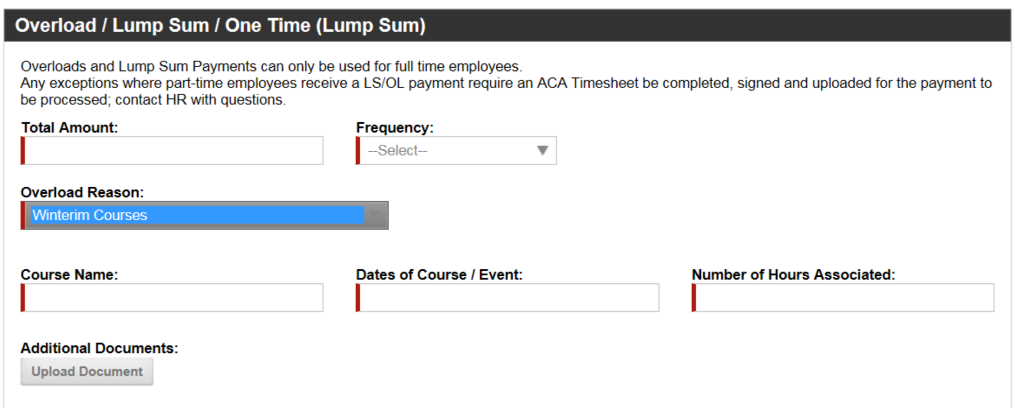

Overload / Lump Sum / One Time (Lump Sum)

Overloads and Lump Sum Payments can only be used for full time employees.
Any exceptions where part-time employees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to be processed; contact HR with questions.

Total Amount:
Frequency: --Select--
Overload Reason: Summer Service
Course Name:
Number of Credits:
Additional Documents:
Upload Document

STEP 4C-14: OVERLOAD REASON – WINTERIM COURSES

- Select Winterim Courses.
- **Course Name, Dates of Course/Event**
- **Number of hours associated.**


Overload / Lump Sum / One Time (Lump Sum)

Overloads and Lump Sum Payments can only be used for full time employees.
Any exceptions where part-time employees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to be processed; contact HR with questions.

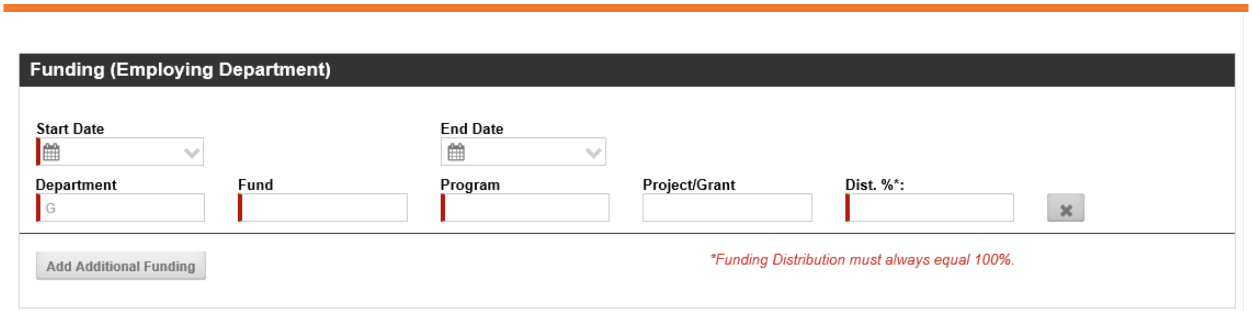
Total Amount:
Frequency: --Select--
Overload Reason: Winterim Courses
Course Name:
Dates of Course / Event:
Number of Hours Associated:
Additional Documents:
Upload Document

STEP 5: FUNDING

- Those with the **red bar**, it is required to be filled in.
- If you need to add additional funding > click in the gray box.
  - The Distribution of funding must always equal 100%. If you have multiple funding strings the total of all the funding strings should equal 100%.
- If you have questions regarding what funding strings you should use please contact Business Services.

Note the following for entering the digits:

- **Department is 6 digits**
- **Fund is 3 digits**
- **Program is 1 digit**
- **Project is 7 digits**



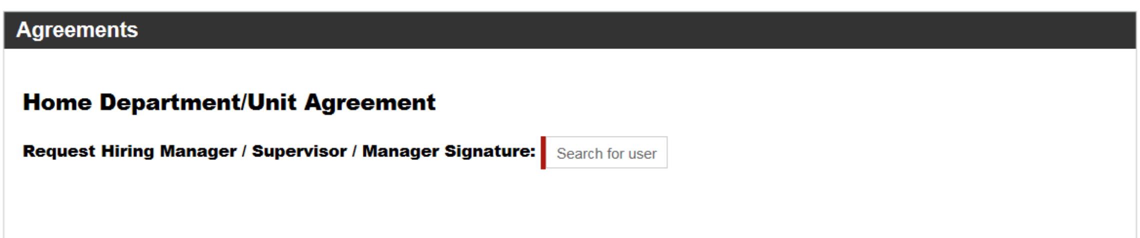
STEP 6: ADDITIONAL NOTES

- You are required to enter a justification for the payment being made for all lump sum payments. Please include a brief description of what the payment is for and any additional payment notes.

STEP 7: AGREEMENTS

- Please fill in the areas with the **red bar**, it is required.
- The Employee and Hiring Manager Name will be required.
- If a name does not populate this means the employee or supervisor have not logged into the BPL system. Contact the employee or supervisor to ask them to log into BPL so you can complete the processing.

  Do not sign for another employee.



STEP 8: SUBMIT

- Before you submit, please review all the entries entered.

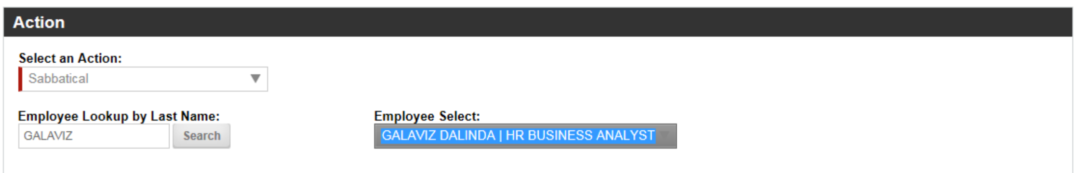
SECTION VII

SABBATICAL

Sabbaticals must be approved by UW System Board of Regents and Provost Office prior to submitting.

STEP 1: ACTION

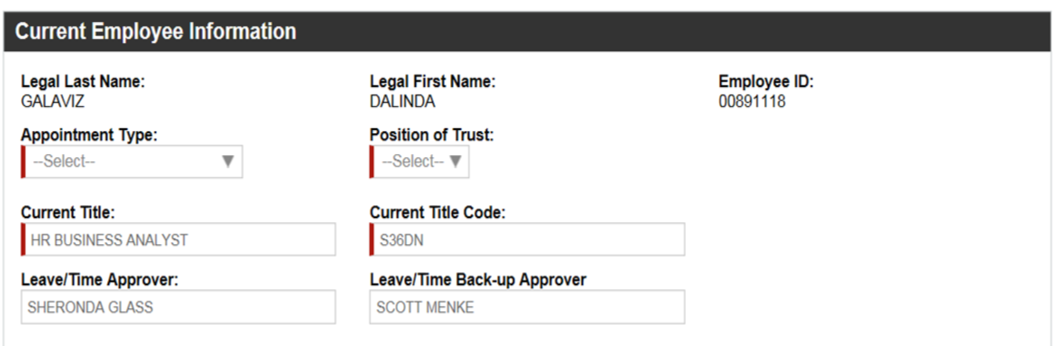
- Select Action
- Employee Lookup – enter Last Name
- Select Name

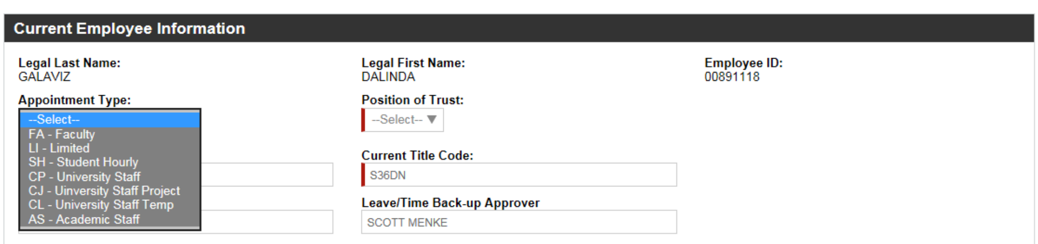


.

STEP 2: CURRENT EMPLOYEE INFORMATION

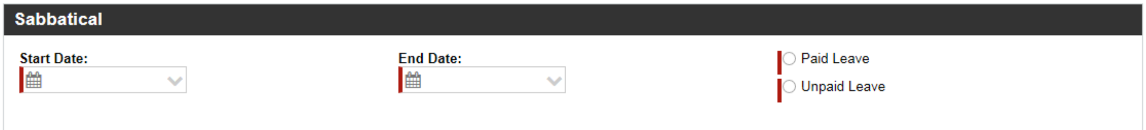
- Some areas will automatically populate.
- Those with the red bar, it is required to be filled in.
- Drop down the arrow and it will give you a selection for Appointment Type.





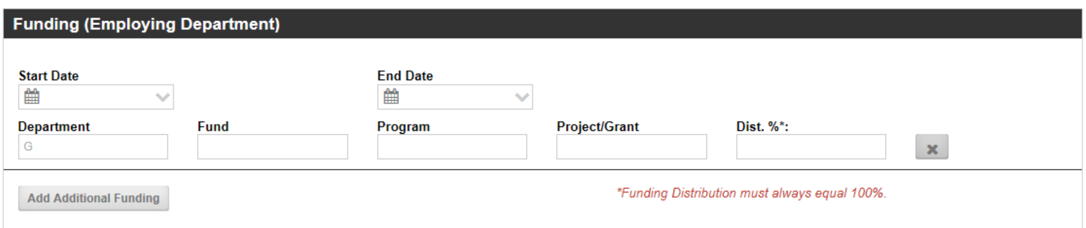
STEP 3: SABBATICAL

- Enter Start Date and End Date.
- Paid or Unpaid is required.



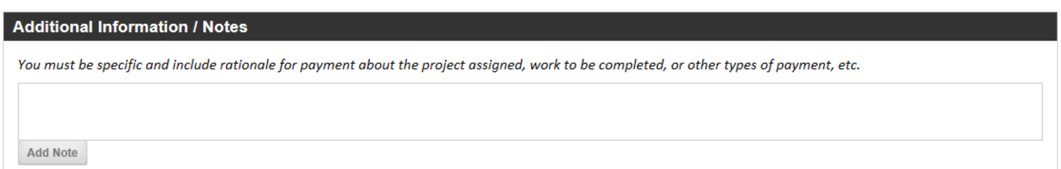
STEP 4: FUNDING

- Those with the **red bar**, it is required to be filled in.
- If you need to add additional funding > click in the gray box.
  - The Distribution of funding must always equal 100%. If you have multiple funding strings the total of all the funding strings should equal 100%.
- If you have questions regarding what funding strings you should use please contact Business Services.



STEP 5: ADDITIONAL NOTES

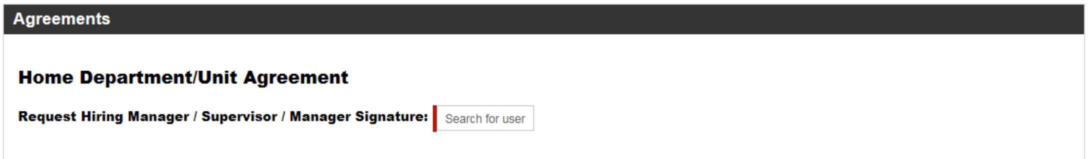
- Please always include additional information in the submission of this form as this helps tell the story of why this payment is to be processed.



STEP 6: AGREEMENTS

- Please fill in the areas with the **red bar**, it is required.
- The Employee and Hiring Manager's Name will be required.
- If a name does not populate this means the employee or supervisor have not logged into the BPL system. Contact the employee or supervisor to ask them to log into BPL so you can complete the processing.

Do not sign for another employee.



Step 7: SUBMIT

- Before you submit, please review all the entries entered.

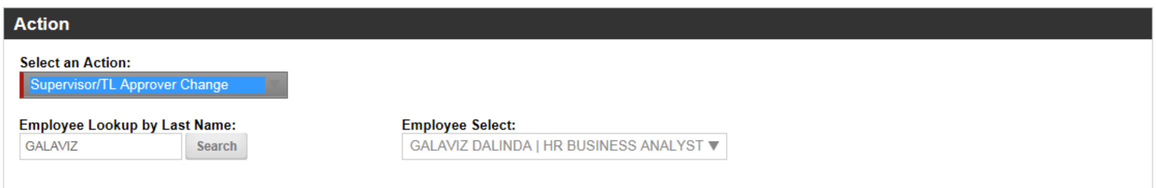
SECTION VIII

SUPERVISOR TL/APPROVER

If you have a large number of employees that you need to change the approver, please contact HR.

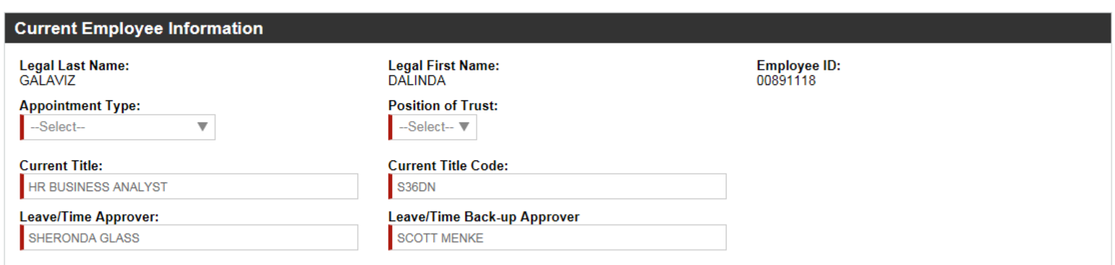
STEP 1: ACTION

- Select Action
- Employee Lookup – enter Last Name
- Select Name



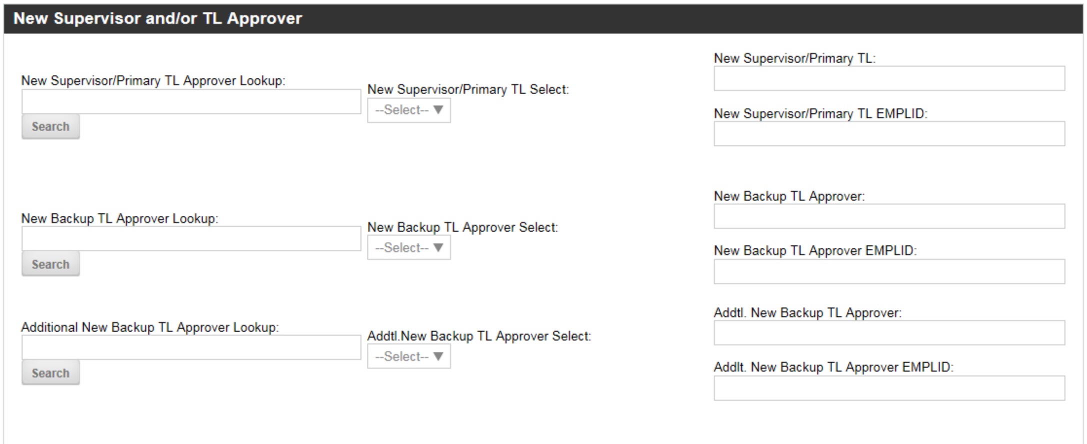
STEP 2: CURRENT EMPLOYEE INFORMATION

- Some areas will automatically populate.
- Those with the **red bar**, it is required to be filled in.
- Drop down the arrow and it will give you a selection for Appointment Type.



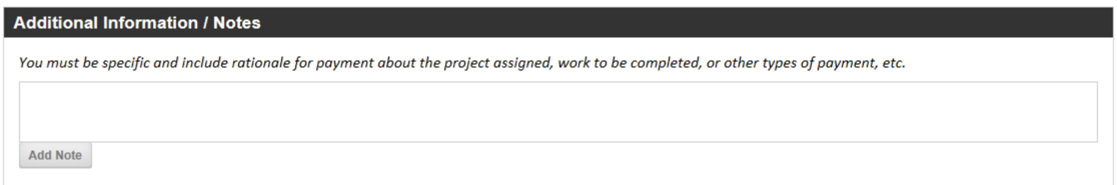
STEP 3: NEW SUPERVISOR AND/OR TL APPROVER

- Enter all areas that apply.



STEP 4: ADDITIONAL NOTES

- Please always include additional information in the submission of this form as this helps tell the story of why this payment is to be processed.



Step 5: SUBMIT

- Before you submit, please review all the entries entered.

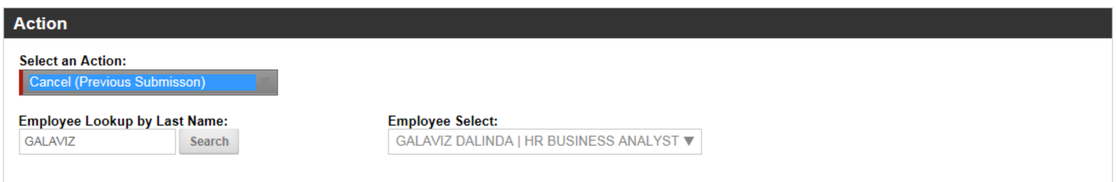
SECTION XI

CANCEL (PREVIOUS SUBMISSION)

This action will entirely cancel the items previously submitted. Any other changes you may need to have made to an item will need to be completed on a new form.

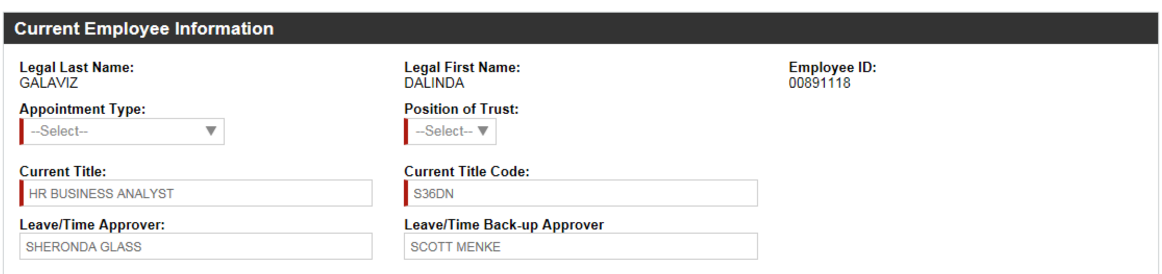
Step 1: ACTION

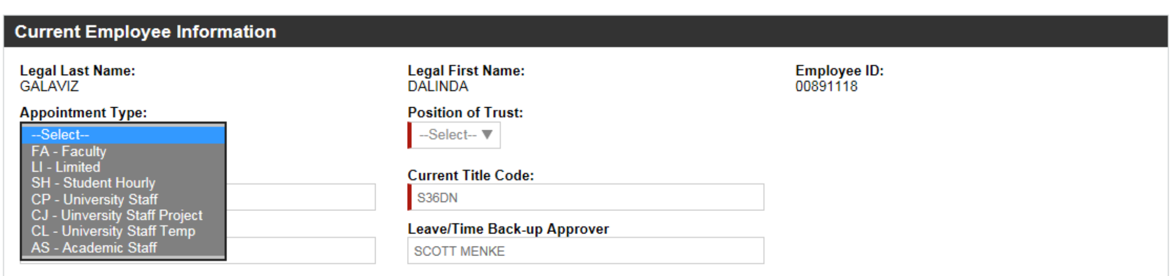
- Select Action
- Employee Lookup – enter Last Name
- Select Name



STEP 2: CURRENT EMPLOYEE INFORMATION

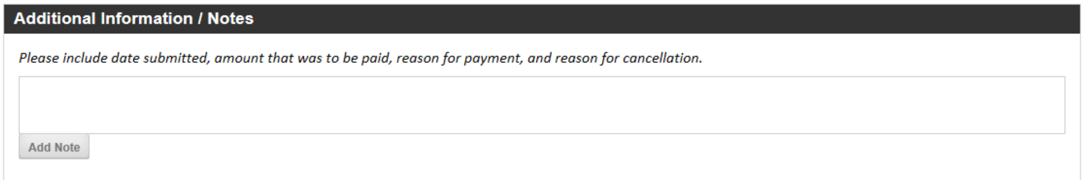
- Some areas will automatically populate
- Those with the **red bar**, it is required to be filled in
- Drop down the arrow and it will give you a selection for appointment type.





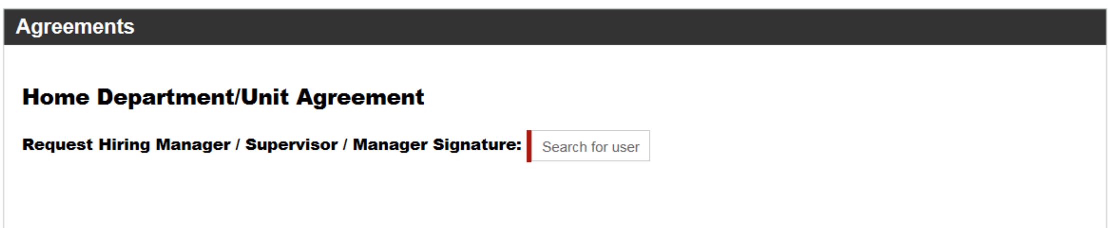
STEP 3: ADDITIONAL NOTES

- You must include the reason that you are canceling this item.



STEP 4: AGREEMENTS

- Please fill in the areas with the **red bar**, it is required.
- The Employee and Hiring Manager Name will be required.
- If a name does not populate this means the employee or supervisor have not logged into the BPL system. Contact the employee or supervisor to ask them to log into BPL so you can complete the processing.



Step 5: SUBMIT

- Before you submit, please review all the entries entered.