

# HR Forms Guide

# **Employee Payroll Change Form**



September 2020

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# **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 <u>hr@uwp.edu</u>.

#### **SECTION I**

# **RATE CHANGE**

# **Step 1: ACTION**

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

Action			
Select an Action:			
Rate Change	▼		
Employee Lookup by Last Name:		Employee Select:	
Galaviz Search		Select GALAV/Z DALINDA LHP BUSINESS ANALYST	
		CALLANZ BALINDA HIX DUSINESS ANALTSI	

# 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.

Current Employee Informatior	1		
Legal Last Name: GALAVIZ	<b>Legal First Name</b> : DALINDA	Employee ID: 00891118	
Appointment Type: Select	Position of Trust: Select ▼		
Current Title:	Current Title Code:		
HR BUSINESS ANALYST	S36DN		
Leave/Time Approver:	Leave/Time Back-up Approver		
SHERONDA GLASS	SCOTT MENKE		

#### 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
  - o Equity
  - o Market Factor / Outside
  - o Raise to Institution Minimum
  - Temporary Change in Duties
  - Temporary Employee Wage Increase
  - Student Help Increase
  - Performance
  - o 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: s	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 Program is 1 digit
- Fund is 3 digits Project is 7 digits

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

Funding (Employing Department)			
Start Date	End Date		
G Fund	Program	Project/Grant	Dist. %*:
Add Additional Funding		*Funding Distribu	ution 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'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.



# 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

Action		
Select an Action: Title Change		
Employee Lookup by Last Name:	Employee Select:	
Galaviz Search	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			
<b>Legal Last Name</b> : GALAVIZ	Legal First Name: DALINDA	Employee ID: 00891118	
Appointment Type:	Position of Trust:		
Select	Select 🔻		
Current Title:	Current Title Code:		
HR BUSINESS ANALYST	S36DN		
Leave/Time Approver:	Leave/Time Back-up Approver		
SHERONDA GLASS	SCOTT MENKE		

#### **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.)

End Date (If Applicable):
New Title Code:
Attach Job Description: Upload Document

### **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.)
  - $\circ$  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.

Start Date:	End Date (If Applicable):	Reason:	
<b>H</b> ~		Select	▼
Current Rate:	New Rate (Full-Time Equivalent):		
¢	\$		
\$	Ψ.		
ু Current Actual Rate:	New Actual Rate:		

#### **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\*\*

Funding (Employing Department)			
Start Date	End Date	Project/Grant	Dist. %*:
Add Additional Funding		*Funding L	Distribution must always equal 100%.

#### **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.

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 <u>Calculations</u>
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.

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

# Step 1: ACTION

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

elect an Action.			
Appointment Dered	ant / ETE Change		
Appointment Perce	ent / FTE Change		
mployee Lookup I	by Last Name:	Employee Select:	

# 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		
<b>Legal Last Name:</b> GALAVIZ	<b>Legal First Name:</b> DALINDA	Employee ID: 00891118
Appointment Type:	Position of Trust:	
AS - Academic Staff	Yes 🔻	
Current Title:	Current Title Code:	
HR BUSINESS ANALYST	S36DN	
Leave/Time Approver:	Leave/Time Back-up Approver	
SHERONDA GLASS	SCOTT MENKE	

## 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.

	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	

#### **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
- Program is 1 digit
- Fund is 3 digits
- Project is 7 digits

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

Funding (Employing Department)				
Start Date	End Date	Project/Grant	Dist. %*:	
G				×
Add Additional Funding		*Funding Distrib	ution 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.

Additional Information / Notes			
You must be specific and include rationale for payment about the project assigned, work to be completed, or other types of payment, etc.			
Add Note			

#### **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.

Agreements
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 IV**

# **APPOINTMENT EXTENSION RENEWAL**

# **Step 1: ACTION**

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

Action			
Select an Action:	ension / Renewal		
Employee Looku	p by Last Name:	Employee Select:	

### **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				
<b>Legal Last Name</b> : GALAVIZ	<b>Legal First Name:</b> DALINDA	Employee ID: 00891118		
Appointment Type: Select	Position of Trust: Select ▼			
Current Title:	Current Title Code:			
HR BUSINESS ANALYST	S36DN			
Leave/Time Approver:	Leave/Time Back-up Approver			
SHERONDA GLASS	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:			

## **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.

Start Date:	End Date (If Applicable):	Reason:	
<b>₩</b> ∨		Select	▼
Current Rate:	New Rate (Full-Time Equivalent):		
\$	\$		
Current Actual Rate:	New Actual Rate:		
\$	\$		

### **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

Start Date		End Date	~	
Department	Fund	Program	Project/Grant	% up to 2 decimals
G				(Must Fotal Too)

#### **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.

Additional Information / Notes
You must be specific and include rationale for payment about the project assigned, work to be completed, or other types of payment, etc.
Add Note

#### **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

Action			
Select an Action: Funding Change			
Employee Lookup	by Last Name:	Employee Select:	
Galaviz	Search	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	1		
<b>Legal Last Name:</b> GALAVIZ	<b>Legal First Name</b> : DALINDA	Employee ID: 00891118	
Appointment Type: -Select	Position of Trust: -Select-		
Current Title:	Current Title Code:		
HR BUSINESS ANALYST	S36DN		
Leave/Time Approver:	Leave/Time Back-up Approver		
SHERONDA GLASS	SCOTT MENKE		

#### **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 Program is 1 digit
- Fund is 3 digits Project is 7 digits

Start Date	End Date	
G Fund	Program Project/Grant Dist. %*:	

## **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.

Agreements	
Home Department/Unit Agreement	
Request Hiring Manager / Supervisor / Manager Signature: Search for user	

### **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

Action			
Select an Action: Overload / Lump Sum / Ad	Iditional Pay	Employee Select:	
Galaviz	Search	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	1		
<b>Legal Last Name:</b> GALAVIZ	<b>Legal First Name:</b> DALINDA	Employee ID: 00891118	
Appointment Type: Select	Position of Trust: -Select-		
Current Title:	Current Title Code:		
HR BUSINESS ANALYST	S36DN		
Leave/Time Approver:	Leave/Time Back-up Approver		
SHERONDA GLASS	SCOTT MENKE		

### 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.

Overloads and Lump Sum Payme Any exceptions where part-time e be processed; contact HR with qu	ents can only be used for full time emp employees receive a LS/OL payment r restions.	loyees. equire an AC	A Timesheet be completed, signed and uploaded for the payment to
Total Amount:	Frequency:		
	-Select-		
Overload Reason: Select	▼		
Additional Documents:			

#### **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 (L	.ump Sum)		
Overloads and Lump Sum Payments can only be Any exceptions where part-time employees rece be processed; contact HR with questions.	e used for full time emp ive a LS/OL payment re	oyees. quire an ACA Timesheet be completed, signed and up	loaded for the payment to
Total Amount:	Frequency:		
	-Select-	▼	
Overload Reason:			
Select	T		
Additional Documents: Upload Document			

### STEP 4C: OVERLOAD REASON - DROP DOWN SELECTIONS

• Select reason.

Overload / Lump Sum / One Time (L	ump Sum)
Overloads and Lump Sum Payments can only be	used for full time employees.
Any exceptions where part-time employees received	ve 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:
	Pay Across Entire Period
Overload Reason:	
Select	
Awarus Course Dovelenment / Assessment	
Dent Chair / Director Lumn Sum	
Early Adopters of Technology (i.e. Canvas ect.)	
Elex Ontion Payment	
Governance Stipends	
Instructional Overload	
Interim Appointment Overload	
Limited Engagement Course	
Lump Sum Based on # of Students	
Performance / Presentation / Facilitation Lump	Sum
Student Lump Sum Payments	
Summer Service	
Winterim Courses	

#### **STEP 4C - 1: OVERLOAD REASON – AWARDS**

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

Overload / Lump Sum / O Overloads and Lump Sum Paymer Any exceptions where part-time run be presented and the with any	ne Time (Lump Sum) Its can only be used for full time employees. ployees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to returner.
Total Amount:	Frequency: Pay Across Entire Period ▼
Award Name:	Award Year:
Additional Documents: Upload Document	

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

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

Overload / Lump Sum / One Tim	e (Lump Sum)
Overloads and Lump Sum Payments can on Any exceptions where part-time employees be processed; contact HR with questions.	nly be used for full time employees. receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to
Total Amount:	Frequency:
	Pay Across Entire Period ▼
-	
Overload Reason: Course Development / Assessment	
Course Name:	Course Section:
•	•
Additional Documents:	
Upload Document	

#### 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.

Overloads and Lump Sum Paymen Any exceptions where part-time en be processed; contact HR with que	- Its can only be used for full time employees. apployees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment t stions.
Total Amount:	Frequency: -Select-
Overload Reason:	
Dept Chair / Director Lump Sum	V
Number of Credits Release per S	semester:
Additional Documents:	

Prior Department Chair/Director		
Prior Department Chair/Director Lookup:	Chair/Director Select:	Prior Chair/Director Name:
Search		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 / O	e Time (Lump Sum)
Overloads and Lump Sum Paymer Any exceptions where part-time en be processed; contact HR with que	s can only be used for full time employees. loyees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to tions.
Total Amount:	Frequency:
	Select 🔻
Overload Reason: Early Adopters of Technology (i.d Name of Technology:	Danvas ect.)
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 / Or Overloads and Lump Sum Paymen Any exceptions where part-time em	te Time (Lump Sum) ts can only be used for full time employees. ployees receive a LS/OL payment require an ACA Timeshee	et be completed, signed and uploaded for the payment t
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: Overload Reason: Governance Stipends	Frequency: -Select-			
Governance Group Name: Additional Documents:	Length of Appointment:	Applicable Pay Dates:		

## STEP 4C - 7: OVERLOAD REASON - INSTRUCTIONAL OVERLOAD

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

be processed; contact HR with	h questions.		
	Select	V	
Overload Reason: Instructional Overload	1		
Overload Reason: Instructional Overload			
Overload Reason: Instructional Overload	Course Section:	Course Title:	Credit Hours:
Overload Reason: Instructional Overload	Course Section:	Course Title:	Credit Hours:

#### 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 (I	Lump Sum)
Overloads and Lump Sum Payments can only b Any exceptions where part-time employees rece be processed; contact HR with questions.	e used for full time employees. eive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to
Total Amount:	Frequency:
	Select 🔻
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.

	_	
otal Amount:	Frequency:	
verload Reason:		
Limited Engagement Course		
ourse Name	Dates of Course / Event	Number of Hours Associated
ourse Name:	Dates of Course / Event:	Number of Hours Associated:

#### 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 / C Overloads and Lump Sum Payme Any exceptions where part-time	One Time (Lump Sum) ents can only be used for full time employees. mployees receive a LS/OL payment require an ACA Times	heet be completed, signed and uploaded for the payment t
De processed; contact HR with qu	Frequency: -Select-	
Overload Reason: Lump Sum Based on # of Stude Course Name:	ents 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.

Select V	
Number of Hours Associated:	Date(s):
	np Sum

#### 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:
  - 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	me (Lump Sum)	
Overloads and Lump Sum Payments ca Any exceptions where part-time employ be processed; contact HR with question	only be used for full time employees. s receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the payment to	
Total Amount:	Frequency:	
	Select V	
Overload Reason: Student Lump Sum Payments Payment and funding begin dates shou	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 /	
Additional Documents: Upload Document		

## STEP 4C - 13: OVERLOAD REASON – SUMMER SERVICE

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

Overloads and Lump Sum Payme Any exceptions where part-time e be processed; contact HR with qu	<ul> <li>can only be used for full time employees.</li> <li>Jolgees receive a LS/OL payment require an ACA Timesheet be completed, signed and uploaded for the pay tions.</li> </ul>	ment
Total Amount: Overload Reason:	Frequency: Select-	
Summer Service	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.

Any exceptions where part-time e be processed; contact HR with q	employees receive a LS/OL payment require an ACA Timeshee uestions.	et be completed, signed and uploaded for the payment t
Total Amount:	Frequency: Select	
Overload Reason: Winterim Courses		

#### **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 Program is 1 digit
- Fund is 3 digits Project is 7 digits

Funding (Employing Department)		
Start Date	End Date	
Department Fund G	Program Project/Grant Dist. %*:	×
Add Additional Funding	*Funding Distribution must always eque	al 100%.

# **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.

Agreements
Home Department/Unit Agreement
Request Hiring Manager / Supervisor / Manager Signature: Search for user

#### **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

Action					
Select an Action:					
Sabbatical	W	7			
Employee Lookup by	y Last Name:		Employee Select:		
GALAVIZ	Search		GALAVIZ DALINDA   HR BUSINESS ANA	LYST	

#### **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.

Current Employee Information		
<b>Legal Last Name:</b> GALAVIZ	Legal First Name: DALINDA	Employee ID: 00891118
Appointment Type: Select	Position of Trust: Select- ▼	
Current Title:	Current Title Code:	
HR BUSINESS ANALYST	S36DN	
Leave/Time Approver:	Leave/Time Back-up Approver	
SHERONDA GLASS	SCOTT MENKE	
Current Employee Information	Legal First Name:	Employee ID: DR91119
GALAVIZ Appointment Type:Select	DALINDA Position of Trust: Select	00891118
FA - Faculty LI - Limited	Current Title Code	
SH - Student Hourly CP - University Staff	S36DN	
CJ - University Staff Project CL - University Staff Temp	Leave/Time Back-up Approver	
AS - Academic Staff	SCOTT MENKE	

#### **STEP 3: SABBATICAL**

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

Sabbatical		
Start Date:	End Date:	<ul> <li>○ Paid Leave</li> <li>○ Unpaid Leave</li> </ul>

#### **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.

Funding (Employing Departmer	t)		
Start Date	End Date		
Department   Fund     G	Program	Project/Grant Dist. %	×
Add Additional Funding		*Funding Distribution must al	iways 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.

Additional Information / Notes
You must be specific and include rationale for payment about the project assigned, work to be completed, or other types of payment, etc.
Add Note

#### **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.

Submit 🙁 Cancel

#### **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

Action		
Select an Action: Supervisor/TL Approver Change		
Employee Lookup by Last Name:	Employee Select:	
GALAVIZ Search	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 for Appointment Type.

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

#### **STEP 3: NEW SUPERVISOR AND/OR TL APPROVER**

• Enter all areas that apply.

ew Supervisor/Primary TL Approver Lookup:		New Supervisor/Primary TL:
Search	New Supervisor/Primary IL Select: -Select-▼	New Supervisor/Primary TL EMPLID:
ew Backup TL Approver Lookup:		New Backup TL Approver:
Search	New Backup IL Approver Select: -Select-	New Backup TL Approver EMPLID:
Iditional New Backup TL Approver Lookup:	Addtl.New Backup TL Approver Select:	Addtl. New Backup TL Approver:
Search	Select V	Addlt. New Backup TL Approver EMPLID:

# **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.

Additional Information / Notes			
You must be specific and include rationale for payment about the project assigned, work to be completed, or other types of payment, etc.			
Add Note			

# 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

Action		
Select an Action Cancel (Previou	<b>I:</b> us Submisson)	
Employee Looku	up by Last Name:	Employee Select:
GALAVIZ	Search	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 for appointment type.

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

#### **STEP 3: ADDITIONAL NOTES**

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

Additional Information / Notes		
Please include date submitted, amount that was to be paid, reason for payment, and reason for cancellation.		

#### **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.

Agreements	
Home Department/Unit Agreement	
Request Hiring Manager / Supervisor / Manager Signature:	Search for user
-	

## Step 5: SUBMIT

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

