Bates | HUMAN RESOURCES

Personnel Action Form
Quick Start Guide
Rev 7.7.22 | maw

** For a detailed explanation of what each request is used for and a line-by-line breakdown of the fields, see the **PAF - Detailed User Guide,** available at bates.edu/hr/supervisors

Employee Information

To begin – start by filling in the **First and Last name** of the individual this request is for.

Please notice that the form asks for the legal name of the individual! Banner does not allow searching by preferred name, and all HR/Payroll forms should have their legal name listed.

Next is the best part, select your **Reason for Request**

The request reason selected will populate the fields needed – it tells you what info to fill in!

Reason options include the following:

- New Hire – Budget Position
- New Hire – Temporary Position
- Current Employee – New Position
- Current Employee – Second Position
- Stipend/Payment Request
- Promotion
- Reorganization
- Campus Information Change
- Labor Distribution Change
- Pay Change
- Schedule/Status Change
- Supervisor Change
- Title Change Only
- Extension of Temporary Position
- Interim Position

Supervisors are expected to provide the **Bates ID** for any existing employees. Supervisors can access a list of their employees, along with their Bates ID#'s in Garnet Gateway, under Supervisor > My Employees

** This field will disappear if either of the "New Hire" requests are chosen

Start/Effective Date: Start/Effective dates should align with the Personnel Action Due Date Calendars

Biweekly Positions | Monthly Positions

End Date: This field is required for any temporary position requests, and available for a number of other requests that may be temporary, such as a supervisor change or stipend request

Personal Information – New Hire Only

Information regarding a New Hire – their **email** and **phone number** so that the Senior Talent Acquisition Specialist (STAS) may reach out to them regarding their offer.

New fields include an inquiry if the individual is a minor, and space to include any **additional agreements** so that the STAS knows to include any special information in their official offer letter.

Access Information – New Hire Only

** Access begins at 7am on the date given **

These dates will probably all be the same, unless there is a special agreement for early access.

It is the Supervisors responsibility to coordinate with the HelpDesk any applications or equipment needed for this employee. Filling in the New Employee service request is the preferred method of accomplishing this.

Supervisors are also responsible for requesting any keys needed for a new employee. Use this form from the Access Control office to request any necessary keys.

Position Information

In any required fields that are not applicable to your request, please put "N/A"

This information is used to enter the individual to the employee directory and to set up their position.

New fields include space for Zoom phone numbers, questions regarding remote work, and the opportunity to provide a position description if one has not been uploaded to PageUp.

Pay Information

All changes in pay must be approved by the Compensation and Benefit Analyst prior to submission

How often and how much will the individual be paid, and what line of the budget funds their job? For your convenience, view this list of Labor Orgs to make sure you're using the right number.

Stipend/Payment Information

This section is used for payments outside of an employee's normal payroll amount. Payments will not be issued for work until it has been performed.

** NEW - Supervisory Role Information

New sections: Supervisory Role Information - Previous and New Positions

HR and Payroll need to know who is supervising each employee and approving of their time sheets. This information can easily get forgotten as your department goes through a transition. HR is hoping that by asking these questions up front, we make the transition smoother for all involved.

These changes will be made in accordance with the Personnel Action Due Date Calendars.

In an employee's **previous** position… was this employee a…?

If yes to any of these questions, you will be asked to name **who** will take over this responsibility in the employee's absence and **attach a list** of people the employee oversaw.

** Please include names and Bates ID numbers in your attached list
** HR does not need to know who approves timesheets in the Kronos system

In an employee's **new** position… will this employee be a…?

If yes to any of these questions, you will be asked to **attach a list** of people the employee will oversee.

** Please include names and Bates ID numbers in your attached list
** HR does not need to know who approves timesheets in the Kronos system

Supervisor Acknowledgement

Comments/Etc: If you have further information to add, please do so here

Supervisor Signature: Means you are done!!! Make sure to **verify your email** after submitting the form to ensure HR receives it and can begin processing your request