
PERSONNEL ACTION FORM WORK INSTRUCTION (HRS-W001)
DCSS – Human Resources

1.0 SCOPE:

- 1.1 Any activity involving the appointment of a new employee or changes in a current employee's pay, position or appointment status. This request is made by completing and submitting a Personnel Action Form (PAF).

The online version of this document is official. All printed versions are uncontrolled copies.

2.0 RESPONSIBILITY:

- 2.1 Principal, Directors, Human Resources

3.0 APPROVAL AUTHORITY:

- 3.1 Human Resources Director

4.0 DEFINITIONS:

- 4.1 Requestor – The person that initiates the action.
- 4.2 PAF – Personnel Action Form
- 4.3 HR PAY – Human Resources payroll system.

5.0 PROCEDURE:

- 5.1 The Personnel Action Form (PAF) must be used for the following actions:
- A. New Hires
 - B. Salary Changes
 - C. Reactivations
 - D. Leave of Absence
 - E. Retirements
 - F. Terminations/Resignations
 - G. Transfers
 - H. Job Change
 - I. Program Change
- 5.2 A Job Requisition (Form HRS-F001) must be received from a Principal/Director or other professional staff in HRS to add a new position or fill a vacancy for advertisement.
- 5.3 Once the Job Requisition is approved, if applicable, HRS will advertise the position and the Principal/Director or other professional staff will interview and select the most qualified candidate for the position.
- 5.4 Once the candidate is selected, the Principal/Director or other professional staff must initiate a PAF. The requestor must complete all relevant sections of the Personnel Action Form (PAF).
- 5.5 The candidate selected must have a completed application on file and cleared security.

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5.6 The PAF should be completed at least three weeks before the action effective date. (Please refer to the tentative schedule of when information is due in HRS for Board Meetings)

5.7 INSTRUCTIONS FOR COMPLETING THE PERSONNEL ACTION FORM. This form is used to create the personnel/payroll record for a system employee. If you have questions completing the form, contact Human Resources.

5.7.1 ACTION TYPE

Select the action to be performed. This is used to add a new employee to a position or to change specific information pertaining to an employee currently hired. If Action Type is a "Change", more than one box may be selected.

- a) **Action Effective Date** - The date in which the action is to begin. Enter the date in a MM/DD/YY format. (Action: hire date, salary/location change, title change, leave(s), terminations, etc.; **all based on Board approval.**)
- b) **Social Security Number** – Enter social security number. A new hire cannot be processed without a valid U.S. social security number - **no exceptions.** Verify the accuracy of the social security number because it impacts taxation and social security accumulations.
- c) **Employee ID # - FOR PERSONNEL USE ONLY** - The employee's 4-digit ID number assigned by HR (Personnel).
- d) **Employee Type: FOR PERSONNEL USE ONLY** – The employee's payroll employee type assigned by the Accounting Office.
- e) **Name** - First, Middle, Last, Suffix. Middle initials are acceptable. Only use the legal name as it appears on the social security card. Do not use nicknames.
- f) **Home Address** - This will be used for communications sent to the home address. Enter the current street address and apartment number or Post Office box if applicable. Enter the city, state and zip code.
- g) **Home Phone Number** –Indicate active home phone. Be sure to include the area code.
- h) **Gender** - Indicate the individual's gender (male or female).
- i) **Date of Birth** - Indicate the date of birth in MM/DD/YY format.
- j) **Ethnicity** – Indicate race.
- k) **Marital Status** – Indicate S-Single or M-Married.
- l) **If New Hire:** - Indicate whether new hire is filling vacancy left by (identify Person) or New position, also indicate if employee is transferring from another system and name of system.
- m) **If Action Type is a Change** – Indicate details of change – (Example: FROM Albany Middle TO Radium Middle; FROM Teacher- Math 6th Grade TO Teacher –Math 5th Grade; FROM Assistant Bookkeeper TO Accountant).

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- n) **If Action Type is a Termination:** Indicate whether or not all terminating employee's sick and vacation leave has been updated on the Aesop system prior to the submission of this PAF.

5.7.2 LEAVE OF ABSENCE:

- 5.7.2.1 **Type of Leave** – Sick, Maternity, Family, Medical, Military, Sabbatical, etc.
- 5.7.2.2 **Reason for Leave** – Why the leave is being requested.
- 5.7.2.3 **Beginning Date** – Effective beginning date of leave
- 5.7.2.4 **Ending Date** – Date leave of absence will end.

5.7.3 RESIGNATION/TERMINATION/RETIREMENT

- 5.7.3.1 **Reason for Termination** – Indicate reason for termination.
- 5.7.3.2 **Effective Date**– Effective date of the Resignation, Termination or Retirement.
- 5.7.3.3 **Last Day Worked** – Last date the employee will physically work.
- 5.7.3.4 **Benefits Effective Date** – Date benefit status will change.

5.7.4 LOCATION/PROGRAM/POSITION/SCHEDULED HOURS/TYPE OF EMPLOYMENT

- 5.7.4.1 **Location** - Name of school or department where employed within the Dougherty County School System.
- 5.7.4.2 **Location Number** – System's 4 digit code for the school or department.
- 5.7.4.3 **Program Charged** –Funding source (For example: General Fund, Title I, ESP, CNS, etc.)
- 5.7.4.4 **Position and Job Title** - Employee position. (Example: Teacher, Bus Driver, Paraprofessional) and Job Title (Example: 7th Grade Math, K-5 EIP, Special Ed)
- 5.7.4.5 **Hrs/Dy Hrs/Wk** – The number of hours the employee is scheduled to work each day and each week. (Part-time: 3.92/day 19.6/wk or Full-time: 8hrs/day 40/wk -Teachers; 3hrs/day-Bus Drivers; Part-time Custodian-4hrs/day 20hrs/wk.)
- 5.7.4.6 **10-11-12 Month** –Type of annual employment period in months – (Example: 11 Month).

- 5.7.5** The requestor signs and dates the PAF and then forwards it to the Human Resource Department (HRS). **The requestor completes the applicable first FOUR sections of the PAF only. (NOTE: Once received by HRS (Personnel), the PAF and supporting documentation is reviewed for completeness. If PAF is NOT complete, it will be returned to the requestor if necessary.**

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5.7.6 HUMAN RESOURCE USE ONLY: The definition of the Data items to be used by HRS (Personnel),(Benefits),(Payroll) and Accounting are as follows:

- **Person/Emp Status** – Employment status such as “active”, “substitute”, “on leave”, “termination”, “new hire,” and “retired substitute.)
- **Certificate Type**–Level of Certificate.
- **Certificate Expiration Date**- Indicate date certificate will expire (if applicable).
- **Certified or Non-certified** – Indicate whether a certificate is required for the **POSITION**. (If the employee is to be paid from a Certified Salary Schedule such as the Teacher/Professional or the Para Salary Schedule then the position is a Certified position. If the employee is to be paid from any other schedule, the **POSITION** is a Non-certified **POSITION**.)
- **Years Experience** - Verified years of experience
- **Check Location** - Location where employee will receive pay check.
- **Pay Period: M or SM** - Indicate correct pay cycle- Monthly(M) or semi-monthly(SM).
- **Retirement: W/H or Not W/H** – Indicate correct retirement withholding status.
- **Salary Schedule** –Salary schedules as defined in McAleer: 10-Certified Teacher/Prof 190 Day Base; 20-Certified Teacher/Prof 195 Day base; 30-Admin 247 Day Base; 40-ROTC; 60-Semi-Monthly(Other than CNS, Paras); 70-Semi-Monthly CNS; 80-Semi-Monthly Paras
- **Rank & Step** –McAleer Rank and Step placement on schedule.
- **Contract Days**- The number of days the employee will work in a contract year.
- **Hours per Day**-The number of hours the employee will regularly work in a day.
- **Annual Base Salary (State)**– Annual base state salary.
- **Annual Base Salary (Local)** –Annual base local salary.
- **Leave Type:** Leave type identified at 5.7.2.1.
- **Pay Start/End Dates** – Date fiscal year begins and ends.
- **Eligible for Benefits: Y or N** – Indicate the correct response regarding the employee’s benefit eligibility. (Employee is eligible if 20 hours or more)

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5.7.7 HRS (Personnel) Procedures

- 5.7.7.1 HRS (Personnel) reviews all PAFs and supporting documentation for completeness. If the PAF is **NOT** complete, the PAF is returned to the requestor.
- 5.7.7.2 If the PAF is found to be complete and ready for processing HRS (Personnel) documents receipt of the PAF on electronic PAF Log.
- HRS (Personnel) documents the receipt of the PAF on an electronic PAF (Excel File) log. All PAF's processed will be documented on the log with the exception of new contract year reactivations.
 - The PAF Log will indicate the date the PAF was received, the employee name, position location, action effective date, action type, and status of approval by board and routing (date distributed and date returned).
- 5.7.7.3 HRS (Personnel) forwards the original PAF to Accounting for account coding and assignment of "Employee ID" and "Employee Type". Accounting returns the PAF to HRS (Personnel) on the same day.
- 5.7.7.4 HRS (Personnel) updates the necessary **AESOP screens and fields. (See Attachment "A" AESOP Work Instructions).**
- 5.7.7.5 HRS (Personnel) completes assigned items in the "HUMAN RESOURCE USE ONLY" section of the PAF and posts all relevant PAF data to the **McAleer Payroll Employee Maintenance screens and fields.**
- McAleer Payroll Employee Maintenance Screens assigned to HRS (Personnel) are as follows: Name & Address; Contact Data; Applicant Data; Education Data; Experience Data; Personnel Data; HQ & Test Data; Document Data; Certificate Data; Work Schedule; User Defined; Employee Data; Tax Data; and State Specific **(See Attachment "B" CPI Work Instructions).**
- 5.7.7.6 HRS (Personnel) makes three copies of the original PAF and gives one copy to HRS (Benefits), one copy to HRS (Payroll) and one copy to MIS (Management Information Services). Each department signs and dates original PAF indicating receipt of copy.

5.7.8 HRS (Benefits) Procedures

- 5.7.8.1 HRS (Benefits) posts the data contained in the "HUMAN RESOURCES USE ONLY" section to the relevant **McAleer Payroll Employee Maintenance** screens and fields. HRS(Benefits) then initials and dates their copy of the PAF.
- McAleer Payroll Employee Maintenance Screens assigned to HRS(Benefits): Deduction Data.
- 5.7.8.2 HRS (Benefits) files copy of PAF in Benefits notebook.

5.7.9 HRS (Payroll) Procedures

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5.7.9.1 HRS (Payroll) completes all applicable Payroll data items contained in the “HUMAN RESOURCE USE ONLY” section of the PAF, and posts the data to the assigned **McAleer screens and fields**. HRS (Payroll) then initials and dates their copy of the PAF.

- McAleer Payroll Employee Maintenance Screens assigned to HRS(Payroll): Salary Schedules; Job Record Data; Job Pay Record; Job Leave; Job G/L Distribution.

5.7.9.2 HRS (Payroll) files copy of the PAF in a Payroll notebook.

5.7.10 MIS (Management Information Services) Procedures

5.7.10.1 MIS uses the information reported on the PAF to set up and update Internet access and School Max information. MIS initials and dates the copy of the PAF.

5.7.10.2 MIS files a copy of the PAF in a notebook.

5.7.11 HRS(Personnel) files the original completed PAF in the employee’s Personnel file.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 HRS-F002 Personnel Action Form
- 6.2 Personnel Action Form Log, Excel Spreadsheet
- 6.3 HRS-F001 Job Requisition
- 6.4 Tentative Schedule for information to be in HRS for Board Meeting

7.0 RECORD RETENTION TABLE:

Identification	Storage	Retention	Protection	Disposition
Personnel Action Form	Hard copy in HRS	Employee’s Duration plus three year minimum	Maintained in a secure location	Discard as desired
Personnel Action Form Log	Electronically on server	Minimum of three years	Electronic backup	Discard as desired
Job Requisition	Hard copy in HRS	Employee’s Duration plus three year minimum	Maintained in a secure location	Discard as desired

8.0 REVISION HISTORY:

Date:	Rev.	Description of Revision:

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15-Dec-02	A	Initial Release
30-Oct-03	B	Added section 4.3. Changes in 5.2, 5.7, 5.7.6.2, 5.7.6.5, 5.7.6.7, 5.7.7.1, 5.7.8.1, 5.7.8.2, 5.2 and 7.0.
16-Jun-04	C	Changes in sections 5.1(F), 5.7.1(r), 5.7.6.5, 5.7.6.7, 5.7.7.1, 5.7.7.3, 5.7.8.1 and 5.7.8.3.
07-Sep-05	D	Deleted wording General Information in section 5.7.1 and replaced with Action Type to reflect PAF heading. Updated section 5.7.1. Changed section 5.7.2 to reflect Leave of Absence. Changed section 5.7.3 to Resignation/Termination /Retirement. Changed section 5.7.4 to Location/Program/Position/Scheduled Hours/Type of Employment. Changed sections 5.7.5 through 5.7.8 to reflect changes on the PAF. Added sections 5.7.9 through 5.7.11. Added Attachment "A" and "B".

***** End of Work Instruction *****

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ATTACHMENT “A”

AESOP WORK INSTRUCTIONS

AESOP Data Fields should be updated for all of the following Personnel Actions (PAFs):

1. New hire
2. Employee Type Change (existing employee)
3. Location Change (existing employee)
4. Daily Work Schedule Change (existing employee)
5. Terminations

AESOP Data Fields Required for all New Hires and Fields that must be updated:

Employee Name – (From PAF)

Employee Address- (From PAF)

Employee External ID –“Employee ID” From PAF

Employee External ID 2 – Four (4) character “Employee Type” from PAF

SS Number – (From PAF)

Home Phone Number- From PAF if available -otherwise enter unique number

Employee Type – Select correct “Position” –Same as “Position” from PAF (Such as Teacher, Bus Driver, etc.)

Job Title- From PAF (Such as Math-7th Grade)

Work Day Schedule – Time in and Time out with lunch taken at end of day.

Location Number – Leave Reporting Location –May be different from “Location” on PAF, for example ESP personnel’s Location is Exceptional Students. However, ESP personnel report their leave to different Departments i.e. ESP, ESP-Gifted, and ESP Pre-K.

Needs Fulfillment? Yes= utilize Sub locator when employee is out
No = Sub is not required when employee is out

Email – DCSS email address

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ATTACHMENT “B”

CPI WORK INSTRUCTIONS

CPI Data Fields should be updated for all of the following Personnel Actions (PAFs):

6. New employee
7. Assignment Change (existing employee)
8. Assignment % Change (existing employee)
9. Certificate Type Change
10. Field Code Change (existing employee)
11. Scheduled Work Day Hours Change (existing employee)
12. Secondary Fund Change (existing employee)
13. Subject Change (existing employee)

CPI Data Fields Required:

- Assignments
- Assignment %
- Certificate Type
- Field Code
- Secondary Fund
- Subject
- In Field (Y or N)

Include on Report (Certified or Classified)