

Form 500 Personnel/Budget Action – Preparation Instructions

A Form 500 is prepared to initiate a personnel or budget action. All sections on the form must be completed. The Current line is completed to show how the PIN is currently set up in the budget. The Recommend line is completed for only the sections where changes need to be made to the PIN in the budget.

A Form 500 can affect only one PIN. If changes are needed to multiple PINs, more than one Form 500 must be submitted.

Position Section

1. **Date** – The day the request is prepared. If all information is known, the Form 500 should be prepared, approved and submitted prior to the effective date of the personnel/budget action.
2. **PIN** (Position Identification Number) –
   1. Budgeted PIN – A five-digit number permanently assigned to a position within the budget preceded by the letter F (Texas A&M Forest Service). If the Form 500 creates a new budgeted position, use “F New” and when the Form 500 is entered by the payroll office, the computer system will assign a new PIN.
   2. Wage PIN – A nine-digit number preceded by the letter F and the number 8. If the Form 500 creates a new wage position, use “F New Wage” and when the Form 500 is entered by the payroll office, the computer system will assign a new PIN.
   3. Graduate Student PIN – A five-digit number preceded by the letter F and the number 9. If the Form 500 creates a new graduate student position, use “F New Grad Stud” and when the Form 500 is entered by the payroll office, the computer system will assign a new PIN.
3. **Fiscal Year** – The fiscal year that the personnel/budget action affects.
4. **Position ADLOC** (Position Administrative Location) – A six-digit adloc number that identifies the employee’s or PIN’s physical location and department. The first two digits are the employee’s or PIN’s physical location and the last four digits are the employee’s or PIN’s department code. Refer to the [Position Adloc](http://tfsfinance.tamu.edu/modules/finance/admin/procedures/Form%20500%20Position%20Adlocs.xls) list.
5. **Time Reporting ADLOC** (Time Reporting Administrative Location) – A six-digit adloc number that identifies the timekeeper’s location and the employee’s or PIN’s department. The first two-digits are the timekeeper’s location and the last four-digits are the employee’s or PIN’s department code. Refer to the [Time Reporting Adloc](http://tfsfinance.tamu.edu/modules/finance/admin/procedures/Form%20500%20Time%20Reporting%20Adlocs.xls) list.
6. **Effective Dates** – The period the requested changes will impact.  The dates run continuously and must be within an upcoming payroll period rather than retroactive to a prior payroll period. The effective From date for pay increases must be the first day of the next pay period. On the Current line, the From date is the beginning date for the current action. The Thru date is the ending date for the current action.  On the Recommend line, the From date is the beginning date for the new or revised action. The Thru date is the ending date for the new or revised action. The date format is MMDD.
7. **Title Code** – The title code assigned to the PIN. The title code must be in the TFS pay plan.  New title codes are assigned and approved by Human Resources. Vacant positions are dropped to the base career ladder title. See Administrative Procedure 10.02 Pay Plan.
8. **Position Action** – Action relating directly to the position. These actions are used on the Recommend line.

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| --- | --- | --- |
| Code | **Action** | **Description** |
| CR | Create | Establish a new PIN for either a budgeted or wage position |
| CT | Change Title | Change PIN’s title code |
| EL | Eliminate | Eliminate a budgeted PIN |
| OA | Other Action | Other action performed on a PIN |
| RA | Reassign Administrator | Change time reporting adloc |

**Occupant Section**

1. **Name** – The employee’s legal name. The name on the social security card should match the employee’s legal name. If the Current and/or Recommend status of the budgeted or wage PIN is vacant, enter the word “Vacant” on the appropriate line.
2. **UIN** (Universal Identification Number) – The employee’s UIN. For new hires and vacant PINs, leave this field blank. **For new hires, a copy of the social security card must be provided to the payroll office for tax purposes.**
3. **From PIN** – This is used when the recommended employee is transferring into the PIN from another PIN within TFS or the A&M System. Use this field on the Recommend line.
4. **To PIN** – This is used when the current employee is transferring from the PIN to another PIN within TFS or the A&M System. Use this field on the Current line.
5. **Occupant Action** – Action relating directly to an employee occupying a position.

**Actions for Current Line**

| Code | **Action** | **Description** |
| --- | --- | --- |
| DO | Demote Out | Employee leaves the current position or title due to a demotion |
| IT | Involuntary Terminated | Involuntary termination of an employee |
| PO | Promote Out | Employee leaves the current PIN due to a promotion; employee moves from a wage PIN to a budgeted PIN  (Note: Two Form 500s are required.) |
| PW | Promote Within | Career ladder promotion within same PIN |
| RE | Retire | Retirement of a budgeted employee |
| SL | Start Leave | Beginning of approved leave without pay |
| TO | Transfer Out | Employee transfers to another PIN within TFS or the A&M System without a break in service |
| VA | Vacant | PIN is vacant |
| VT | Voluntary Terminated | Voluntary termination of an employee |

**Actions for Recommend Line**

| Code | **Action** | **Description** |
| --- | --- | --- |
| CN | Change Name | Employee name change due to marriage, divorce, etc.; copy of new social security card must be provided to the payroll office for tax purposes |
| DI | Demote In | Employee enters the PIN or title due to a demotion |
| NH | New Hire | Initial employment of an employee with TFS |
| PI | Promote In | Employee enters the PIN due to a promotion; employee moves from a wage PIN to a budgeted PIN  (Note: Two Form 500s are required.) |
| RH | Reappoint/Rehire | Former TFS employee is rehired |
| RL | Return Leave | End of approved leave without pay |
| TI | Transfer In | Employee transfers from another PIN within TFS or the A&M System without a break in service |
| VA | Vacant | PIN is vacant |

1. **Office Mailing Address** – The employee’s office mailing address. If the employee is located in a temporary office, then a new Form 500 should be completed when the permanent office is established. When the mailing address changes for the office, email the payroll office of the change.
2. **County** – The county where the employee’s office is located. Refer to the

[County Code](http://tfsfinance.tamu.edu/modules/finance/admin/procedures/Form%20500%20County%20Codes%20for%20TFS%20Offices.xls) list.

1. **Phone #** – The employee’s office phone number.
2. **Previous State Employment** – Indicates whether the new employee has previously worked for any State agency.
3. **Supervisor/Team Leader name** – The name of the employee’s supervisor or team leader.

**Rate Section**

1. **Percent Effort** – The total effort of the budgeted PIN. All budgeted PINs must be 50% or greater. Leave this field blank for wage PINs.
2. **Pay Ind** (Pay Indicator) – A code that determines whether the PIN is paid on the monthly payroll or the biweekly payroll. It also determines whether the PIN is eligible for overtime pay at time and a half. Call the payroll office if you are unsure.

| **Code** | **Employee** | Percent Effort | Overtime Eligible | Rate of Pay |
| --- | --- | --- | --- | --- |
| A | Budgeted | 100% | No | Monthly |
| B | Budgeted | At least 50% and less than 100% | No | Monthly |
| C | Graduate Student (GAR/GAT) | Leave blank | No | Monthly |
| D | Budgeted | 100% | Yes | Biweekly |
| E | Budgeted | At least 50% and less than 100% | Yes | Biweekly |
| E | Wage | Leave blank | Yes | Biweekly |
| F | Student Worker or Graduate Student (GANT) | Leave blank | Yes | Biweekly |
| H | Wage Professional | Leave blank | No | Biweekly |

1. **FTE Monthly or Hourly Rate** (Full Time Equivalent Monthly or Hourly Rate) – For monthly employees, the monthly pay rate.  For biweekly employees, the hourly pay rate. For wage professional employees, calculate the hourly pay rate based on 2080 hours per year.
2. **FTE Annual** (Full Time Equivalent Annual Salary) – Complete for budgeted employees only. For monthly employees, the annual salary based on 100% effort. For biweekly employees, the hourly pay rate multiplied by the total number of hours for the fiscal year. Call the payroll office if you are unsure of the number of hours.
3. **Salary Action** – Action relating directly to the salary. These codes are needed for only Recommend actions.

**Actions for Departmental Use**

| **Code** | **Action** | **Description** |
| --- | --- | --- |
| CE | Change Effort | Change percent effort of a PIN |
| DE | Decrease | Employee returns to original salary from temporary salary increases; used for demotions |
| EQ | Equity Increase | Employee receives an equity increase |
| HS | Hiring Salary Adjustment | Recommend salary is greater than the minimum salary of the TFS pay plan, including an educational incentive provided to a new hire |
| IN | Increase | Existing employee receives a salary differential for educational incentive |
| ME | Merit Increase | Employee receives a merit increase |
| PI | Promotion Increase | Employee is promoted to a higher position with an increase in pay |
| PP | Pay Plan Adjustment | Salary is adjusted to the TFS pay plan minimum |
| SC | Source Change | Funding source account is changed |
| TS | Temporary Salary Increase | Employee receives a temporary salary increase |
| OA | Other Actions | Any other action causing a change in pay |

**Actions for Payroll Office Use Only**

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| --- | --- | --- |
| **Code** | **Action** | **Description** |
| AB | Across Board Increase | Employee receives an across-the-board salary increase |
| MA | Mandated Increase | Employee receives a salary increase mandated by the State |
| MW | Minimum Wage Increase | Minimum wage rate changes |
| OT | Other Salary Action | Any other action causing a change in pay |

1. **Benefit Replacement Pay** – Indicates a new hire who was employed by the State of Texas on August 31, 1995, and is transferring from another State agency or returning to work within 30 consecutive days of termination from a State agency.  Check Yes or No for each question and enter the amount, if applicable. Call the payroll office if you are unsure.

**Source Section** – If more than three source lines are needed, check the box and use the Extended Source Form.

1. **Title Code** – The title code assigned to the PIN. The title code should be the same as on the Position Recommend line. (See number 7 above.)
2. **Period From and Thru** – The period for each source from which the PIN is paid. Period must be from the position recommend effective from date to the end of the fiscal year. The format is MMDD. Budget and encumbrance amounts are calculated based on the *source recommendation period from date* and the *source recommendation period thru date*.
3. **Source PT** (Source Part Number) – The A&M System part number for TFS: always 11. If paid from another A&M System member, contact the payroll office for further instructions.
4. **Source Acct** (Source Account Number) – The account from which the PIN is paid.
5. **Source Sup Acct** (Source Support Account Number) – The support account from which the PIN is paid.
6. **Acct Analysis** (Accounting Analysis) – A code that controls how benefits for the PIN are funded. The payroll office enters this based on the funding source.
7. **Obj Class** (Expenditure Object Classification) – Expense codes for salaries and wages. These are the same codes used in the accounting system.

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| --- | --- | --- |
| **Code** | Employee | Title Classification |
| 1110 | Budgeted – Administrative – Professional | Non-Classified Titles |
| 1510 | Budgeted – Support Staff – Professional | Non-Classified Titles |
| 1515 | Budgeted – Support Staff | Classified Titles |
| 1525 | Budgeted – Graduate Assistant–Non-Teaching | Classified Titles |
| 1715 | Wage – Professional | Non-Classified Titles |
| 1720 | Wage – Support Staff | Classified Titles |
| 1740 | Wage – Student Worker | Wage – Student \* |

\* If the student is in the TAMU work-study program, contact the payroll office.

1. **Percent Effort** – The percentage to be charged to each source account.  The total of all the accounts must equal 100%.
2. **Requirement Acct, Sup Acct, Bud Pool** – The account with available budget to fund additional salary for a specific source. The requirement account, support account and budget pool are required on the Form 500 for budgeted employees when additional salary is required and when changing source accounts. When the recommended salary is greater than what the PIN is currently budgeted for, this section must be completed (salary increases, promotions, funding a new PIN, etc.) The requirement account must be the same type of funds as the source account being funded. The budget pool is the budget object classification code (1100, 1801, etc.) If this section is not completed correctly, the Form 500 process is halted until correct information is provided to the payroll office by the preparer. If unsure, call the payroll office.

**Other Information Section**

1. **Comments** – A brief explanation of the recommended action.
2. **Disposition of Lump Sum Leave** – Instructions for handling vacation and comp time leave balances. Complete this section for terminating budgeted employees who are eligible to be paid vacation leave and FLSA comp time hours. Provide a copy of Leavetraq balances for verification. State comp time cannot be paid or transferred. However, with management approval, an employee can remain on payroll to use State comp time hours.
3. **Disposition of Sick Leave** – Instructions for handling sick leave balance. Complete this section for terminating budgeted employees who wish to donate sick leave hours to the sick leave pool.
4. **Eligible for Rehire** – Indicates whether the terminating employee is eligible for rehire. Provide supporting documentation to the Employee Development office if No is checked.
5. **Termination Reason Code** – The Human Resources Manager will complete the termination reason code for an employee’s termination or retirement. (Occupant Action Codes IT, RE and VT.)

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| --- | --- |
| **Term Code** | **Termination Reason** |
| 59 | Resignation/Reasons unknown |
| 63 | At will termination |
| 64 | Reduction in force |
| 65 | Transfer to non-A&M System agency/institution with no break in service |
| 66 | End or expiration of contract or grant |
| 68 | Retirement |
| 69 | Death |

**Approvals Section**

1. **Preparer** – Name and date for the preparer of the form.
2. **Recommended By/Approved By** – Refer to Administrative Procedure 01.03 Director’s Delegations – Human Resource Administration for the required approvals and documents.
3. **Reviewed by Division Business Administrator** – Initialed by the division business administrator.

42. **FIAD** **Administrative Approval** – Signed by either the Human Resources Manager or the Payroll and Support Services Department Head. Refer to Administrative Procedure 01.03 Director’s Delegations – Human Resource Administration.

1. **Payroll Office Use Only** – Initialed and dated by the payroll office staff.

Texas A&M Forest Service – Form 500 Personnel/Budget Action

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| --- | --- | --- | --- | --- | --- | --- | --- |
| Date: 1 | | | PIN: 2 | | Fiscal Year: 3 | | |
| **POSITION** | Position ADLOC 4 | Time Reporting ADLOC 5 | Effective Date 6 | | | Title Code 7 | Position Action 8 |
| From | Thru | |
| Current |  |  |  |  | |  |  |
| Recommend |  |  |  |  | |  |  |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| OCCUPANT | Name 9 | | UIN 10 | | From PIN | To PIN | | Occupant Action 13 |
|  |  | |  | |  |  | |  |
| Current |  | |  | |  | 12 | |  |
| Recommend |  | |  | | 11 |  | |  |
| Office Mailing Address: 14 | | | | County: 15 | | | Phone #: 16 | |
| 17 Previous State Employment:  Yes  No | | Supervisor/Team Leader Name:       18 | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- |
| RATE | Percent Effort 19 | Pay IND 20 | FTE Monthly or Hourly Rate 21 | FTE Annual 22 | Salary  Action 23 | **Eligible for Benefit Replacement Pay:** 24  Yes  No |
| Current |  |  |  |  |  | **Benefit Replacement Pay Included in Salary:**  Yes  No |
| Recommend |  |  |  |  |  | Amount: |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **SOURCE** REQUESTED RECOMMENDATION  Extended Source Form attached | | | | | | | | | | | |
| Title Code 25 | | Period 26 | | Source | | | Acct Analysis 30 | Obj Class 31 | Percent Effort 32 | Requirement 33 | | |
|  | | From | Thru | PT 27 | Acct 28 | Sup Acct 29 |  |  |  | Acct | Sup Acct | Bud Pool |
|  | |  |  |  |  |  |  |  |  |  |  |  |
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| --- | --- | --- |
| **Comments:** | 34 |  |

|  |  |
| --- | --- |
| Disposition of Lump Sum Leave 35 | Disposition of Sick Leave 36 |
| Vacation Leave Hours to be Paid: | Sick Leave Hours Donated to Pool: |
| Biweekly Employees FLSA Comp Time to be Paid: | Sick Leave Hours Remaining after Donation: |
| **Eligible for Rehire**:  Yes  No (provide supporting documentation to HR) 37 | **Termination Reason Code:**  38 |

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| --- | --- | --- | --- | --- |
| Preparer Name: | 39 | Date: |  | **Recommended By:** 40 |

41 Signature Date

**Reviewed by Division Business Administrator:**

Initials

Signature Date

**FIAD Administrative Approval:** 42 **Approved By:**

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Signature Date Signature Date

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| --- | --- | --- | --- |
| \***PAYROLL OFFICE USE ONLY\*** 43 | | | |
| Budget Screen Entry |  | Emailed Preparer |  |
| People Screen Entry |  | Lump Sum Processed |  |
| |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | Timetraq Entry | |  | | Copy for New FY Budget | |  | | |  |  | |  |  |  | |  | | | | |