

**ADMINISTRATIVE PROCEDURES**

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| **30.01 Personnel Action Request** | **Revised: July 31, 2013** |

1. GOVERNING REGULATIONS

These procedures are governed by System Policy [31.01](http://policies.tamus.edu/31-01.pdf) Compensation, TFS Rule [31.01.08.F1](http://tfsfinance.tamu.edu/modules/finance/admin/rules/310108F1%20Merit%20Salary%20Increases.docx) Merit Salary Increases and Administrative Procedure [01.03](http://tfsfinance.tamu.edu/modules/finance/admin/admin_procedures/0103%20Director's%20Delegations%20-%20HR%20Admin.docx) Director’s Delegations – Human Resources Administration.

2. DEFINITIONS

Texas A&M Forest Service (TFS) routinely processes personnel actions including the following:

Personnel Actions – hire, rehire, promotion, pay increase, transfer in/out, demotion, termination, retirement, name change or leave without pay.

Position Actions – change effective dates, change title, change adloc or funding source; establish or eliminate position.

3. PROCEDURES

3.1 To initiate a personnel action, a [Form 500 Personnel/Budget Action](http://tfsfinance.tamu.edu/modules/finance/admin/procedures/Form%20500%20Personnel%20Budget%20Action.docx) (Form 500) is prepared. Refer to separate [Form 500 Preparation Instructions](http://tfsfinance.tamu.edu/modules/finance/admin/procedures/Form%20500%20Personnel%20Budget%20Action%20-%20Preparation%20Instructions.docx).

3.2 The completed Form 500 is approved and supported by requisite documentation, as indicated below on the matrix of Required Approvals and Documents prior to the action’s being initiated.

3.3 The Form 500 is submitted to the division budgeting coordinator for review and verification that the source accounts and budget data are correct. The approved Form 500 is forwarded to Employee Development (ED).

3.4 ED attaches a routing slip to the Form 500 to ensure requisite reviews and approvals occur. The AgriLife Human Resources (HR) Manager verifies that all approval and documentation requirements are met and that all Human Resources policies, regulations, rules and procedures are adhered to. The Form 500 is routed to the Director for approval if necessary.

3.5 The Form 500 is returned to ED. ED staff makes a copy for its files and forwards the original Form 500 and documentation to the payroll office.

3.6 The payroll office reviews the Form 500 to verify proper completion for the requested action and then enters the Form 500 information into the Budget/Payroll/Personnel System (BPP). The payroll office retains the original Form 500 and the original BPP-generated Form 500 in the employee’s payroll file. A copy of the BPP-generated Form 500 is provided to ED for the employee’s personnel file. An e-mail notification is sent to the division budgeting coordinator and to the preparer.

4. REQUIRED APPROVALS AND DOCUMENTS

| Action | Required Approvals1 | Required Supporting Documents/Actions |
| --- | --- | --- |
| Adloc Change | Timekeeper or Leave Administrator | Note: e-mail request accepted in lieu of Form 500. |
| Alternate Work Location | Director | Alternate Work Location Form and memorandum to Director with Associate Director’s recommendation |
| Disciplinary Action:  Personal Conference  Written Reprimand  2nd Written Reprimand | Department Head  Associate Director  Associate Director | Personal conference letter  Written reprimand letter  Written reprimand letter/termination letter |
| Employee Name Change | Employee | Employee Personal Data Form, copy of marriage license or divorce decree, copy of new Social Security card |
| Employee Transfer – same location | Associate Director | Division Budgeting Coordinator review |
| Employee Transfer – different location | Associate Director and Director | Division Budgeting Coordinator review |
| Establish New Position | Associate Director and Director | Approved Position Description and Hiring Request; Division Budgeting Coordinator review |
| Leave Without Pay | Director - if ≥10 days or exceptional circumstances; Associate Director - if 5 to 9 days; Department Head - if ≤ 4 days | Approved memorandum and Leave Form if ≥10 days or exceptional circumstances |
| New Hire – Budgeted | Associate Director and Director | Hiring Request; Division Budgeting Coordinator review |
| New Hire – Seasonal or Student Worker | Department Head | Division Budgeting Coordinator review |
| Pay Raise | Associate Director and Director | Raise request; Division Budgeting Coordinator review |
| Pay Source Change – Budgeted | Department Head | Division Budgeting Coordinator review |
| Pay Source Change – Seasonal or Student Worker | Department Head | Division Budgeting Coordinator review  Note: e-mail request accepted in lieu of Form 500. |
| Position Percent Effort Change | Director | Director approved request letter; Division Budgeting Coordinator review |
| Position Elimination | Associate Director and Director | Division Budgeting Coordinator review |
| Promotion | Associate Director and Director | Division Budgeting Coordinator review |
| Suspension | Associate Director | Letter of suspension |
| Termination – Budgeted – Voluntary | Department Head or Associate Director | Employee Out-Processing Checklist; LeaveTraq Summary |
| Termination – Budgeted – Involuntary | Associate Director | Employee Out-Processing Checklist; LeaveTraq Summary |
| Termination – Seasonal | Department Head or Associate Director | Employee Out-Processing Checklist |
| Termination – Student Worker | Supervisor | Employee Out-Processing Checklist |
| Title Change | Associate Director | Approved Position Description |

1Any action involving an Associate Director must have Director's approval.

CONTACT: [Payroll and Support Services Department Head](mailto:KSuehs@tfs.tamu.edu), 979/458-6620

and AgriLife Human Resources Manager, 979/845-8953