

**LEHIGH UNIVERSITY PAYROLL OFFICE**  
**PAYROLL ASSIGNMENT FORM (PAF) AND PAYROLL ASSIGNMENT**  
**CONFIRMATION/CHANGE FORM (PAC) INSTRUCTIONS**

This document is intended to assist users in understanding:

- A. The blank Payroll Assignment Form (PAF) and how to complete it for a new hire
  - B. The information on the Payroll Assignment Confirmation/Change Form (PAC) and how to complete it for existing employee changes
  - C. The Authorizations Required for All Changes
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**A. Completing a Payroll Assignment Form (fill in form)**

This form is to be used to pay an employee beginning a new position. You may need to complete this form for a new hire or for an employee transferring to a new position. Please remember that a separate Payroll Assignment Form is required for each position a person holds. Please keep a copy of all Payroll Assignment Forms that you send to the Payroll Office.

Specific instructions for each section of the form are as follows:

**Employee Information:**

Complete the Employee Name, LIN, and Check Distribution location. Check the appropriate box at the top of the form to indicate the reason for the change. If you select the "Other" box indicate in the comments section the reason for the change.

**Department Information:**

The Department where Payroll records are kept in the upper right hand corner indicates where future Payroll Assignment Confirmation/Change Forms for this person should be sent. Provide the Department Contact Person in the event that the Payroll Office has questions about the information submitted.

**Job Detail:**

The Position Title and Position Number should always be entered for Faculty or Staff Appointments in the Job Detail section of the form. You can find the position information on the Faculty or Staff Employment Request form that was prepared when the hiring process was initiated. Position Numbers are not necessary for RA/GA/TA appointments.

The Eclass (employee class) listing can be found on the back of the form, along with additional job change reasons.

The Full Time Equivalent (FTE), rounded to three decimal places, represents the hours worked per week divided by the normal work week for the position (usually 37.5 or 40). For example, an individual who works 40 hours per week and is assigned to a position which has a 40 hour work week, has an FTE of 1 (40 hours/40 hours). Whereas, an individual who works 20 hours per week and is assigned to a position which has a 37.5 hour work week, has a .533 FTE (20 hours/37.5 hours).

If you checked the box associated with New Hire, use NEWHI as the job change reason. Additional job change reasons appear on the reverse side of the form.

The Appt%, rounded to two decimal places, equals the number of months worked in the year divided by 12 for staff or 9 for faculty times 100. For example, a staff member who works 12 months out of the year would have an Appt% of 100.00 (12 months /12 months \*100). Similarly, an individual who works only 10 months during each year would have an Appt% of 83.33 (10 months/12 months \* 100).

Please consult with the Human Resources Office or the Payroll Office if you have any questions regarding FTE or Appt%.

#### Index Distribution:

Please list each index to be charged and the percentage allocation for each. Please note that the total percentage must equal 100%. The Financial Manager for each index must sign on the appropriate line.

#### Comments Section:

Please use the comments section to give any additional information that will be helpful in processing the form.

#### Authorizations Required for New Hires and New Positions:

Please refer to the below chart.

<i>PAF Authorizations Required for New Hires and New Positions</i>				
	<i>Financial Mgr</i>	<i>Dean/Director</i>	<i>Vice President</i>	<i>Provost</i>
<i>Students</i>	Yes	Yes	No	No
<i>Staff</i>	Yes	Yes	No*	No
<i>Faculty</i>	Yes	Yes	No	No*
<i>Faculty – Summer Support/Research/Teaching</i>	Yes	Yes	No	No

\*Please note that senior management approval has been obtained via the Human Resources hiring procedures and therefore the Vice President/Provost signatures are not required on the PAF for new hires except for new hires that are the Provost/Vice President office staff and direct reports.

Office of Research authorizations are required if the individual is to be charged to index numbers 212693 - 212999, 529XXX - 549999, 590XXX - 590999, and 603500 - 603999.

Please note, Payroll Assignment Forms for new hires and new positions should always be accompanied by the offer letter or faculty contract if not already on file from another source. Form I-9, W-4, Residency Certification Form, and work authorization from INS, if required, are needed if the employee has not been paid by Lehigh in the last six months.

Also, Fellowship awards must **always** be accompanied by a letter signed by the Department and student stating that the payment is a fellowship and no services are to be performed in return for payment.

## **B. Understanding and Completing Your Payroll Assignment Confirmation/Change Form**

This form is the Payroll Office turnaround document used to confirm that the changes you requested have been made accurately. This form should also be used to notify the Payroll Office of salary changes, terminations, index number changes, etc. Please remember, that a separate Payroll Assignment Confirmation/Change Form is required for **each position** a person holds. For example, an individual who is a full-time faculty member and also a Department Chair will have a separate Payroll Assignment Confirmation/Change Form for each job. Likewise, a Research Assistant position is different from a Teaching Assistant position and should be prepared on two separate forms.

### **Employee Information:**

Employee information will be prepopulated. Check the appropriate box at the top of the form to indicate the reason for the change. If you select the "Other" box indicate in the comments section the reason for the change.

### **Department Information:**

The Department where Payroll records are kept will be prepopulated and indicates where future Payroll Assignment Confirmation/Change Forms for this person should be sent. Provide the Department Contact Person in the event that the Payroll Office has questions about the information submitted.

### Job Detail:

The Job Detail section of the form confirms to you the employee's position and pertinent pay information. Please carefully review this section **as soon as you receive the form**.

Provide the New Annual Salary and Salary Effective date when making future changes to the employee's salary. Note that additional authorization from the Office of Research is required when charging salary dollars to a research index or cost share index (the ranges are listed below).

If you are changing the person's position, please indicate the end date for the existing position on your Payroll Assignment Confirmation/Change Form and use a new blank Payroll Assignment Form to indicate the new position number, title, salary and other job information. For example, these forms would be used in the following situations:

- A student completing a Graduate Assistantship position and starting a Fellowship position
- A student completing a Research Assistantship position and starting a Teaching Assistantship position

### Accounting Detail:

The left side of this section tells you the employee's accounting distribution as of the latest job change request and effective date. The right side shows the projected total salary expense for this person, by index and account code for the current fiscal year.

If you request an accounting change that is retroactive to prior pays, the Payroll Office will reallocate the dollars for you and you will see the reallocation on your monthly Payroll Management Report. However, note that the effective date and the projected fiscal year expense shown on the updated Payroll Assignment Confirmation/Change Form will reflect that change for future pays only.

For example, if an employee is paid through October and you request an accounting change for pays starting in July, the effective date of the change as shown on this form will be November 1<sup>st</sup> and the projected fiscal year expense will reflect the change from November forward. Payroll will reallocate the July through October salary dollars for you and this change will be reflected in Banner Finance and your Payroll Management reports. The retroactive date and reallocation of prior months' expense will not appear on the Payroll Assignment Confirmation/Change Form. Therefore, please always refer to your **Payroll Management Report** for a complete accounting of all fiscal year salary expense.

### Index Distribution:

This section of the form is used to change accounting distributions for any period of time. Please be sure to obtain the Financial Manager authorization and, if a research account or cost share account is involved, the Office of Research approval as well. If you are requesting a

change for future pays, you will receive a confirmation Payroll Assignment Confirmation/Change Form that shows the new accounting distribution.

### C. Authorizations Required for All Changes

Please refer to the below charts.

<i>PAC Authorizations Required for Labor Distribution Changes</i>				
	<i>Financial Mgr</i>	<i>Dean/Director</i>	<i>Vice President</i>	<i>Provost</i>
<i>Students</i>	Yes	No	No	No
<i>Staff</i>	Yes	No	No	No
<i>Faculty</i>	Yes	No	No	No
<i>Faculty – Summer Support/Research/Teaching</i>	Yes	No	No	No

<i>PAC Authorizations Required for Terminations</i>				
	<i>Financial Mgr</i>	<i>Dean/Director</i>	<i>Vice President</i>	<i>Provost</i>
<i>Students</i>	Yes	Yes	No	No
<i>Staff</i>	Yes	Yes	No*	No
<i>Faculty</i>	Yes	Yes	No	No*
<i>Faculty – Summer Support/Research/Teaching</i>	Yes	Yes	No	No

\*Please note that the Vice President/Provost signature is not required for terminations except for terminations of the Vice President/Provost office staff and direct reports.

<i>PAC Authorizations Required for All Other Changes (Salary, Position, FTE, Appt%, etc.)</i>				
	<i>Financial Mgr</i>	<i>Dean/Director</i>	<i>Vice President</i>	<i>Provost</i>
<i>Students</i>	Yes	Yes	No	No
<i>Staff</i>	Yes	Yes	Yes	No
<i>Faculty</i>	Yes	Yes	No	Yes
<i>Faculty – Summer Support/Research/Teaching</i>	Yes	Yes	No	No

Office of Research authorizations are required for index numbers 212693 - 212999, 529XXX - 549999, 590XXX - 590999, and 603500 – 603999.

Please make sure you have obtained all required authorizations for salary changes before you send the form to the Payroll Office.