Instructions for Employee Pay Action Form on Etrieve

(This form is not to be used for new hires)

Step 1: Login: Single Sign On

Step 2: Click on Etrieve

Step 3: Click on Forms

Step 4: Click on Employee Pay Action Form under the Human Resources section

Step 5: Complete the form (fields are response conditioned)

Breakdown of Form Options:

- Employee ID must be 7 digits long. For example, if the ID is 123456, it will be necessary to lead with a zero. (ex: 0123456)
- Classification of Pay Action is a dropdown box is what determines the classification for the pay action being completed. Classification of Pay Action has the following options:
  Adjunct – traditional adjunct faculty
  Adjunct – Hourly –a type of adjunct that typically does clinical work or grading which is paid by the hour
  Faculty – 9 month – traditional faculty position
  Faculty – 11 month – faculty member that is off during interims only
  Faculty – 12 month – faculty member that is working year round. This position earns annual leave.
  Faculty – One Year Temp – one year temporary, traditional faculty position
  Faculty – One Semester Temp – one semester temporary, traditional faculty position
  Staff – traditional 12 month staff and administrative position. Can be exempt or non-exempt.
  Staff – Hourly – routinely works 25 hours or less per week. Non-exempt positions only.
  Staff – 9 month – staff that will work August – May and off interims. Only accrues sick leave.
  Staff – 11 month – staff that will be off during interims only
  Staff – Temporary – staff that will be hired for 6 months or less
- Reason for Pay Action dropdown box that defines the pay action type
  Change in Position (Promotion/Transfer) – for employees who are changing positions and/or departments
  Change in Salary Only – for changes in base pay only
  Change in Status – for changes in weekly scheduled hours, moving between temporary and regular status, moving between exempt and non-exempt status, or promotion for faculty level (i.e. Associate Professor to Professor)
  Change in Title Only – title changes with no change in benefits/compensation
  Extra Pay – payment for work above and beyond the normal scope of their primary position
  Interim – payment for work done within the interim break; typically, only applies to faculty
  Overload – payment for course load above and beyond normal scope; faculty only
  Revision – please select when the pay action is replacing a previously approved pay action
  Summer – faculty only
  Temp Position (Adjuncts Only) – please select when hiring an adjunct that is not a new hire
  Other – reserved for rare circumstances only. Please consult HR before selecting this option.
- Budget Responsibility is a dropdown has five options: “Department Chair”, “Interim Department Chair”, “Budget Unit Head”, “Department Chair & Budget Unit Head”, and “None”.
- Current Primary Position is a freeform box; please indicate the current position/title of employee

- New Rank or Position Title is a freeform box will only appear when “Change in Position”, “Change in Status”, or “Change in Title Only” is selected. If unsure of the official title name, please contact HR.
- Please Specify Current Pay Action Date & Amount is a freeform box will appear when “Revision” is selected. Please be sure information is accurate to help prevent overpayment.
- What Is the Reason for the Pay Action Revision? is a freeform box that will help HR/Payroll identify the reason for the change.
- Grant Funded Position if “Yes”, then a Grant Funding Source box will pop up. This information is for the Grant Specialist for processing.
- Grant Funding Source identifies the type of Grant. The options are “Federal”, “State”, or “Private”. Please contact the Grant Specialist if unsure of the answer.
- Is This a Split Funded Position if “Yes”, another field for department, fund code, budget number, and percentage will appear. **Please note:** if the employee is in more than two departments, additional pay action forms will need to be completed to hire them in all intended departments. If “No”, then no other boxes will appear.
- Department use this dropdown field to select the appropriate department. Department names are identified by the names defined in Colleague. If unsure of which department to select, please contact HR or the Payroll Office for assistance.
- Fund Code is a dropdown field to select the funding for this position. If unsure of which fund code to select, please contact HR or the Payroll Office for assistance.
- Budget Number is a text box where the full 25 digit budget number is entered. Please be sure the budget number is correct. The old budget numbers that were used with the PX system will not be accepted. Contact the Payroll, HR, or Business Services Offices for help verifying the correct budget number(s).
- % is for the budget percentage. If there is only one department, the budget percentage will be 100%. If it is a split funded position, the percentages will need to equal 100%. **Please note:** typically employee positions are not split funded, but can have multiple positions.
- Type of Pay has four options:
  Hourly for under 30 hours or temporary status
  Monthly for Non-Exempt, Exempt, and Faculty base pay
  One-Time Pay for extra pays, stipends
  Semester for overload, summer pays
- Pay Frequency has six options: “Ongoing”, “One-Time”, “Semester – Fall”, “Semester – Spring”, “Semester – Summer”, and “Semester – Interim”. Each option will trigger a different field for payment type.
- Hourly Rate of Pay will appear when “Hourly” is selected on “Type of Pay”
- Annual Salary will appear when “Monthly” is selected on “Type of Pay” **Please note:** if the pay action includes a Chair and/or Dean stipend, please separate out the payment information. (i.e. Base salary $50,000 + Chair Stipend $3200 per year) if the pay action is for a stipend only, please put the per year stipend amount.
- Pay Amount will appear when “One-Time” or “Semester” is selected on “Type of Pay”
- Start Date needs to be the actual first day the employee will record hours.
- End Date (if applicable) is typically only used on temporary employments and semester pays. **Please note:** a termination form must be submitted to terminate an employee. The End Date does not drive the termination to be completed.
- Hours Per Week has six options on the dropdown. **Please note:** scheduled weekly hours are in 5-hour increments. Full time status does not guarantee benefits if the employee is hired on a temporary basis. Employees between 20-35 hours receive annual/sick leave on a prorated basis. Employees under 20 hours or on temporary status do not qualify for benefits of any kind.
- Credit Hours appear when “One-Time Pay” or “Semester” is selected for “Type of Pay”. This is for Faculty only.
- Building & Office Number is for HR/ITS to update location on the SWOSU webpage.

- Phone Number is for HR/ITS to update the telephone number on the SWOSU webpage.
- Is This a Replacement Position? if "Yes" is selected another box will appear
- For Whom? advises who the replacement position is for
- Is This Position Exempt? if unsure of the answer, please contact HR.
- Will This Individual Approve Time in Self Service? to ensure the employee has security access in a timely manner.
- Name of Supervisor is the person who the employee will report to.
- Type of Adjunct will only appear if "Adjunct" is selected on "Classification of Pay Action". There are two options. Definitions appear on the form for reference.
- Adjunct Location will appear if "Adjunct" or "Adjunct – Hourly" is selected on "Classification of Pay Action". There are three options: "On Campus", "Remote – In State", and "Remote – Out of State". If "Remote – Out of State" is selected a disclaimer will appear.

Step 6: When the form is complete, click "Submit". This form has a function known as "User Directed Routing" meaning the person who creates the form will decide who to send the form to first. **Please note:** within the Etrieve system, the "originator" (aka the person who creates the form) is considered the first approver; therefore, if an administrative assistant submits the form, it is with the understanding that the individual is acting on behalf of the Budget Unit Head and has received appropriate approval to do so.

Options for the first user directed routing are:

FLOW-Associate Deans
FLOW-Deans
FLOW-Grant Specialist (please select if grant funded)
FLOW-President (please select if Athletics or direct report)
FLOW-VP Finance (please select if a non-grant funded, direct report)
FLOW-VPs/Assoc Provost – this group includes: VP Public Relations and Marketing, VP HR, VP Student Affairs, and Associate Provost (please select if direct report)

Any questions concerning this form can be directed to the HR Office at extension 3275.