

Academic Rank/Class/Appointment Type Change Form (ARCA)

The Academic Rank/Class/Appointment Type Changes (ARCA) on-line documentation is divided into the following sections:

- **Section 1 — Introduction to the ARCA form**
 - [Overview of the Form](#)
 - [Structure of the Form](#)

- **Section 2 — Approval Cycle of the ARCA and ARCZ**
 - [When the Form is an ARCA](#)
 - [When the Form Changes to an ARCZ](#)

- **Section 3 — What is Needed to Complete the ARCA Form**
 - [What the Sending Area Needs](#)
 - [What the Receiving Area Needs](#)

- **Section 4 — Use of the ARCA Form**
 - [How to Pull Up a Blank Form](#)
 - [Cover Screen - Sending Area Information](#)
 - [Cover Screen - Receiving Area Information](#)
 - [Academic Rank/Class/Appt Type Changes - Screen 1](#)
 - [Paycheck Adjustment - Screen 2](#)
 - [Title Changes - Screen 3](#)
 - [New Pay Information - Screen 4](#)
 - [Salary Budget Distribution - Screen 5](#)
 - [Source/Destination of Fund - Screen 6](#)
 - [Salary Plan/FTE/Work Assignment Schedule Changes - Screen 7](#)
 - [Tenure Change - Screen 8](#)
 - [Notepad](#)

Introduction

Overview of the Form

The ARCA form is used to:

- **Make changes to a current Academic (STN, FTM, FT1, FT2) or Academic Administrator (STN, FT1, FT2)**
 - Rank
 - Appointment Type
 - Appointment Salary
 - Salary Plan (STN & FTM only)
 - Work Location
 - Months Not Worked
 - Work Assignment Schedule
 - Class
 -
 - Home Budget
 - (If you are only changing the budget and it is within the same administrative area, use the BUPR form.)
 -
 - Titles (academic, discipline and secondary)
 - If you are only changing the title, use the TITL form.
 -
 - Human Resource Representative Number
 - If you are only changing the Human Resource Representative Number, use the BUPR form.
 -
 - Salary Budget Distribution
 - If you are only changing the Salary Budget Distribution, use the BUPR form.
 -
 - Pay Budget
 - If you are only changing the Pay Budget, use the NEWP form.
- **Reappoint a current Academic (FT1, FT2) or Academic Administrator**
 - The changes mentioned under the first solid bullet can be done in conjunction

with the reappointment.

- The reappointment must occur less than 18 weeks after the previous appointment ends.
- FTM must be reappointed (extended) on the AEXT form.

• **Transfer a Non-Academic (STFF, TECH, ADMR) into an Academic (STN, FTM, FT1, FT2) or Academic Administrator (STN, FT1, FT2) position**

- WAG, ADJ, GRD, FEL and SCH cannot be processed on this form. Use the NAPP to place these people into an Academic position.

Structure of the Form

Table of Contents

```
SCREEN NAME
Academic Rank/Class/Type
0 Paycheck Adjustment
0 Title Changes
0 New Pay Information
0 Salary/Budget Distribution
0 Source/Destination of Fund
0 Sal Plan/FTE/Wrk Assignmen
0 Tenure Changes
Notepad
```

The Table of Contents area will

- indicate what screens could be included in the ARCA form.
- indicate optional screens with an O.
- indicate accessed screens with an X.

Sending Area

```
SSN:  _ - _ - _
Curr H Admin Area:
  Position #:  _
New Admin Area:  _
Is person leaving Curr dept?  _
Is this a reappointment?  _
```

The Sending Area is where

- the employee currently resides.
- current information on the employee will be entered.
- the new administrative area is indicated.

> **Note:** If the new administrative area is the *same* as the current administrative area and the employee is *not* leaving the current department, the Sending Area also needs to complete the Receiving Area information.

Receiving Area

Semester Info? N
Chng Eff PPd#: ___
Chng Eff Dte: ___ / ___ / ___

The Receiving Area is where

- the employee will be residing
- new information on the employee will be entered.

The Paycheck Adjustment Screen

Current

HAdmn/Pos#/Type: 024 20144-000 S
HBud/PRep#/WkLoc: 02-024-12 UP 110 UP-
Appt Beg/End Dte: 01/01/1991 05/31/1991
Appt Type/Pn/Se: FT1 P
Class/Rank: ACAD A40
Acad/Dspln Title: INSTR
Scnd Title: INSTR
Sal Plan/Pos FTE: 28W 0.778
MPSDte/CES Appr#:
Annualz/Appt Sal: 19980.00 11655.00
Patent Dte: 01/01/1991 Paychk Adj? _

The Current side is where

- the employee currently resides.
- the current information on the person exists.

> **Note:** If the new administrative area is *different* than the current administrative area or the employee is *leaving* the current department, the Sending area will only be permitted to answer the Paycheck Adjustment question.

Change To

024 ___ - ___ - ___
02 - 024 - 12 UP 110 UP - ___
01 / 01 / 1991 05 / 31 / 1991
___ P
ACAD A40 Promo?
INSTR _____
INSTR _____
28W 0.778
00 / 00 / 0000
___19980.00 ___11655.00
01 / 01 / 1991

The Change To side is where

- the employee will be residing.
- new information on the employee will be entered.

> **Note:** If the new administrative area is the *same* as the current administrative area and the employee is *not* leaving the current department, the Sending area also needs to complete the Receiving Area information.

Approval Cycle of the ARCA and ARCZ

When the Form is an ARCA

The Sending Area will enter the SSN, the New Admin Area, Is person leaving Curr dept?, Is this a reappointment? and press **Enter**.

If the New Admin Area is the same as the Curr H Admin Area and the person is not leaving the current department, the Sending Area will then complete the Receiving Area information.

The form will go through the Current Department's approval path as an ARCA form and go to the central office to be processed.

When the Form changes to an ARCZ

The Sending Area will enter the SSN, the New Admin Area, Is person leaving Curr dept?, Is this a reappointment? and press **Enter**.

If the New Admin Area is different than the Curr H Admin Area or the person is leaving the current department, the Sending Area can only answer the Paycheck Adjustment question.

The form will go through the Sending Area's approval path as an ARCA form and automatically submit to the Receiving Area's first default approver on the highest mnemonic or department as an ARCZ. This person will type CHG at Form Action, enter the new home budget and other information and press PF12.

The ARCZ form will then resubmit to the approval path of the mnemonic (department) associated with the new home budget entered. The ARCZ form will go through this approval path and go to the central offices to be processed.

> **Note:**

- If the Admin Area is the same but the person is leaving the current department, the form will go through the same process as the ARCZ but will bypass the Financial Officer on the ARCA. The Financial Officer will then approve the ARCZ form.

What is Needed to Complete the ARCA Form

What the Sending Area Needs

- To obtain the new administrative area number from the Receiving Area.
- To obtain the Change Effective Date that the Receiving Area is going to enter to help determine if this is a reappointment to the University.
- To determine if the employee is transferring in the middle of a pay period. If so, the Paycheck Adjustment screen may need to be completed.

What the Receiving Area Needs

- The Effective Date of the change.
- Position Number from the Financial Officer if the employee is changing to a STN or FTM position.
- A new Memorandum of Personal Service signed by the employee if the employee's appointment type or class is changing or a FT2 or FT1 is being reappointed.

> Note:

- Memorandums are kept in the work unit. You no longer send them to OHR.
- A CES Approval Number from the college approving the academic appointment (This only applies to Commonwealth Campuses).

> Note:

- This number can be viewed on IBIS by using the IAAP function.
- A University Intellectual Property Agreement signed by the employee. A new property agreement is needed if the employee is changing departments or administrative areas and when a Non-Academic employee is transferring to an Academic position.

Use of the ARCA Form

How to Pull Up a Blank Form

To go into the production environment;

- Select **CCOM** from the **Net-Pass Activity Table** to go into the production environment.
- Select **IBIS Admin Menus** at the **Com-Pass** screen.


```

ENTER 'SSN', 'NEW ADMIN AREA' AND ANSWER QUESTION, THEN PRESS <ENTER>
11/27/92          HUMAN RESOURCE CHANGE SYSTEM          ARCA
08:26:24.3      ACADEMIC RANK/CLASS/APPT TYPE CHANGES    ML12

Form Action: ADD  Document #:          Unit:          Confidential(Y/N): Y
                                           Document Status:

KEY INFORMATION                                TABLE OF CONTENTS
-- Sending Area --
  SSN: ① - - - - -
  Curr H Admin Area:
  Position #: -
  New Admin Area: ②
  Is person leaving Curr dept? ③
  Is this a reappointment? ④
-- Receiving Area --
  Semester Info? N
  Chng Eff PPd#: -
  Chng Eff Dte: - / - / -

Name:
Next Function: _____

Other Forms Awaiting Action (Y/N)? N
0 = Optional Screens
(menu,keys,end)

```

Sending Area Information

Enter SSN.

Example:

234 45 3548.

1. Enter the **New Admin Area number**. This is the administrative area of the employee's new or updated position. **PF1** will provide a list of administrative area numbers.

Example:

023

> Note:

- o If the employee's position is only being updated or if the employee is changing positions but not changing administrative areas, enter the current administrative area number.

2. Enter **Y** (yes) or **N** (no) to **Is person leaving Curr dept?**

> Notes:

- o If the **New Admin Area** is different than the **Curr H Admin Area**, always enter **Y** (yes).

Example:

Employee is transferring from Liberal Arts to Education.

- o If the **New Admin Area** is the same as the **Curr H Admin Area**, but the

employee's new or updated position is in a different department (mnemonic), enter **Y** (yes).

Example:

Employee is transferring from Nutrition to Nursing.

- If the employee's new or updated position is in the same **Curr H Admin Area** and **Curr department**, enter **N** (no).

3. Enter **Y** (yes) or **N** (no) to **Is this a reappointment?** (to the University).

> Notes:

- If the employee's current appointment end date is **greater** than the **Receiving Area's Change Effective Date**, enter **N**.

Example:

Employee's appointment end date is 5/31/1992 and the Change Effective Date on the **ARCA** is 4/1/1992.

- If the employee's current appointment end date is less than the Receiving Area's Change Effective Date, enter **Y**.

Example:

Employee's appointment end date is 5/31/1992 and the Change Effective Date on the **ARCA** is 7/1/1992.

- If this is a reappointment and only the appointment end date and the salary are changing, use the **RAPP** form.

Press **Enter** to display the **Curr H Admin Area** and **Position #**.

Cover Screen — Receiving Area Information

```

ENTER 'SSN', 'NEW ADMIN AREA' AND ANSWER QUESTION, THEN PRESS <ENTER>
11/27/92          HUMAN RESOURCE CHANGE SYSTEM          ARCA
08:26:24.3      ACADEMIC RANK/CLASS/APPT TYPE CHANGES  ML12

Form Action: ADD  Document #:          Unit:          Confidential(Y/N): Y
                                     Document Status:

KEY INFORMATION                                TABLE OF CONTENTS
-- Sending Area --
  SSN:  _ _ _ _ _
  Curr H Admin Area:
  Position #:  _
  New Admin Area:  _
  Is person leaving Curr dept?  _
  Is this a reappointment?  _
-- Receiving Area --
  Semester Info?  N
  Chng Eff PPd#:  _
  Chng Eff Dte:  _ / 1 / _

Name:
Next Function:  _____ (menu,keys,end)

Other Forms Awaiting Action (Y/N)? 2
0 = Optional Screens

```

If the **New Admin Area** is different than the **Curr H Admin Area** or **Y** (yes) is entered at **Is person leaving Curr dept?**, press **PF8** to continue to complete the **Paychk Adj?** (paycheck adjustment) question. The **ARCA** form will go through the Sending Area's approval path. The form will automatically become an **ARCZ** form and the **Receiving Area** will complete the **Chng Eff Dte**.

If the **New Admin Area** is the same as the **Curr H Admin Area** and **N** (no) is entered at **Is a person leaving Curr dept?**, complete the **Receiving Area** information.

Receiving Area Information

1. Enter **Chng Eff Dte** (effective date of the change).

Example:

08 01 1992.

2.

To see if there are any forms already added, submitted or in the approval cycle for this employee, enter **Y** (yes) at **Other Forms Awaiting Action?** and press **Enter**. If there are other forms awaiting action, they might impact how the data on your form is updated.

> Note:

- o When adding the form, if there are other forms in the system that are not yet processed for this employee, a pop-up window will appear once **Enter** or **PF8** is pressed to go to the next screen. This pop-up window will list any forms that are in the approval cycle for this employee.

Press **Enter** to display the **Chng Eff PPd#**.

Press **PF8** to continue.

Academic Rank/Class/Appt Type Changes — Screen 1

```
RESPOND TO THE 2 QUESTIONS & ENTER POS #, IF APPLICABLE, THEN <ENTER>
11/04/97          ACADEMIC RANK/CLASS/APPT TYPE CHANGES          ARCA
11:26:52.9                                     DAM3

                               Chng Eff Dte: 01/01/1997
                               SSN: 914-01-0123          Name: SNOWMAN, FROSTY
-----
Overlap Pos (Y/N)? 1 System Pos (Y/N)? 2 Semester Info (Y/N)? N
          C U R R E N T          C H A N G E   T O:
HAdmn/Pos#/Type: 073 23808-000 S          073 3 - - -
HBud/HRep#/WkLoc: 05-060-53 CL 240 CL-          05 - 060 - 53 CL 240 CL - ___
Appt Beg/End Dte: 06/01/1997 05/31/1998          06 / 01 / 1997 05 / 31 / 1998
Appt Type/Pr/Se: FT2 P          4 P
          Class/Rank: ACAD A10          ACAD A10          Promo?
Rank/Dspln Title: PROFESSOR T          PROFESSOR T _____
          Scnd Title: PROFESSOR T          PROFESSOR T _____
Sal Plan/Pos FTE: 48W 0.267          48W 0.267
MPSDte/CES Appr#: 07/01/1997          07 / 01 / 1997 _____
Annualz/Appt Sal: 6170.00 1234.00          ___6170.00 ___1234.00
          Patent Dte: 07/01/1997 Paychk Adj? _ 07 / 01 / 1997
-----
Other Title Chng (Y/N)? N          Pos Sal Change:          ---
          Budget Dist Chng (Y/N)? N          Reason Amount OR %
Work Assgn Sched Chng (Y/N)? N          - _____
New Pay Info (Y/N)? N View I-9 (Y/N)? N          - _____
```

1. Enter **Y** (yes) or **N** (no) at **Overlap Pos?** (overlap position). This would indicate that you want to place this employee into a position that is currently occupied by another employee.
2. Enter **Y** (yes) or **N** (no) at **System Pos?** (system position).

> Notes:

- o If the **CHANGE TO Appt Type** (appointment type) is **FT1** or **FT2**, enter **Y** at **System Pos?**. A position number will be system-generated when the form is processed. A **Pos #** (position number) does not need to be entered. One will be system-generated at update time or the current system position number will be reused.
- o If the **CHANGE TO Appt Type** is **STN** or **FTM**, enter **N** at **System Pos?**A

position must be created before an employee can be placed into it.

3.

Enter a **Pos #** (position number) if applicable.

> **Notes:**

- If the **CHANGE TO Appt Type** is **STN** or **FTM**, a **Pos #** must be entered. The **Pos #** can be obtained from your Financial Officer.
- If the **CHANGE TO Appt Type** is **FT1** or **FT2**, a **Pos #** does not need to be entered. One will be system-generated at update time or the current system position number will be reused.

4.

Enter the **CHANGE TO Appt Type** (appointment type) of the employee.

Example:

FT1, FT2, FTM, STN

> **Note:**

- If the Appt Type is not changing, the current appt type must be entered.

Press **Enter** to complete or update the **CHANGE TO** information.

```
RESPOND TO THE 2 QUESTIONS & ENTER POS #, IF APPLICABLE, THEN <ENTER>
11/04/97          ACADEMIC RANK/CLASS/APPT TYPE CHANGES          ARCA
11:26:52.9                                     DAM3
                                     Chng Eff Dte: 01/01/1997
                                     SSN: 914-01-0123          Name: SNOWMAN, FROSTY
-----
Overlap Pos (Y/N)? _      System Pos (Y/N)? _      Semester Info (Y/N)? N 5
      CURRENT                                CHANGE TO:
HAdmn/Pos#/Type: 073 23808-000 S          073 - - -
HBud/HRep#/WkLoc: 05-060-53 CL 240 CL- 6 05 - 060 - 53 CL 240 CL - 8
Appt Beg/End Dte: 06/01/1997 05/31/1998 06 / 01 / 1997 05 / 31 / 1998 9
Appt Type/Pr/Se: FT2 P          P
Class/Rank: ACAD A10          10 ACAD A11 11          Promo?
Rank/Dspln Title: PROFESSOR T          PROFESSOR T
Scnd Title: PROFESSOR T          PROFESSOR T
Sal Plan/Pos FTE: 48W 0.267          12 48W 0.267
MPSDte/CES Appr#: 07/01/1997          07 / 01 / 1997 13 14
Annualz/Appt Sal: 6170.00 1234.00          6170.00 15 1234.00
Patent Dte: 07/01/1997 Paychk Adj? 16 07 17 01 / 1997
-----
Other Title Chng (Y/N)? N 18
Budget Dist Chng (Y/N)? N 19
Work Assgn Sched Chng (Y/N)? N 20
New Pay Info (Y/N)? N 21 View I-9 (Y/N)? N 22
Pos Sal Change:
Reason Amount OR %
- - - - -
```

5. A **Y** (yes) can be entered at **Semester Info?**, if information is needed on the begin and

end dates of a specific semester.

6. Enter the **HBud** (home budget) if applicable.

Hint:

Budget 142-44 UP should be entered 01-042-44 UP.

> Notes:

- If this is an **ARCA** form, the **HBud** can only be changed to a budget that is within the same department or approval path as the current **HBud**.
- If this is an **ARCZ** form, once the **HBud** is entered, the form will be resubmitted to the approval path associated with that budget. See Page 4 for more information on **ARCZ** forms.

7. Enter the **PRep#** (Human Resources Representative Number) if it is different than what is indicated. Press **PF1** to find the appropriate code for each area.

8. The **WkLoc** (work location) is the campus location of where the employee is physically located. This field has not yet been defined.

9. Enter the **Appt End Dte** (appointment end date) if applicable.

> Notes:

- If **Y** (yes) was entered at **Is this a reappointment?**, a new **Appt End Dte** must be entered.
- If **N** (no) was entered at **Is this a reappointment?**, the **Appt End Dte** cannot be changed.

10. Enter the **Class** if it is different than what is indicated.

Example:

ACAD (academic), ACAM (academic administrator).

11. Enter the **Rank** if it is different than what is indicated. Press **PF1** to find the appropriate code for each rank.

Example:

A10 (Professor), A20 (Associate Professor).

> Note:

- The **Acad Title** (academic title) will be system-generated based on the **Rank**.
12. The **Sal Plan** (salary plan) can only be changed if this is a permanent position (**STN** or **FTM**). The salary plan for **Academic FT2** and **FT1** will be automatically calculated based on the appointment begin and end date entered.

13. Enter **MPS Dte** (Memorandum of Personal Service date). This is the date that the employee signed the **Memorandum of Personal Service**.

> Note:

- A new **MPS Dte** must be entered if employee's appointment type or class is changing, or a **FT2** or **FT1** being reappointed.

14. The **CES Appr #** (CES Approval Number) must be entered by the Commonwealth Campuses only. This number can be obtained for the college approving the academic appointment. This number can be viewed on IBIS by using the **IAPP** function.

15. Enter the **Appt Sal** (appointment salary) for this employee. The appointment salary is the amount listed in the offer letter.

16. If an adjustment needs to be made to the employee's regular paycheck, enter **Y** (yes) at **Paychk Adj?** (paycheck adjustment).

Example:

Retroactive pay, transfer in the middle of a pay period.

17. Enter the **Patent Dte** (patent date). This is the date that the employee signed the University Intellectual Property Agreement (formerly Patent Agreement).

> Note:

- A new patent is needed if the employee is switching departments and when a non-academic employee transfers into an academic position.

18. If the Academic title, Discipline title or secondary title needs to be changed, enter **Y** (yes) at **Other Title Chng?** (Other Title Change) and the **Title Changes** screen will be included in the form.

> Note:

- If the employee's title information is incomplete, the system will change the **N** to a **Y** at **Other Title Chng?** and will require you to complete the **Title Changes** screen.

19.

The **Budget Dist Chng?** (Budget Distribution Change) question is usually completed by the Financial Officer.

> **Note:**

- If the salary is changing on a permanent (**Academic FTM, STN** or **Academic Administrator STN**) position, the system will change the **N** to **Y** at **Budget Dist Chng?** and will require the Financial Officer to complete the **Budget Distribution Change** screen.

20.

If the employee's work assignment schedule needs to be changed, enter **Y** (yes) at **Work Assgn Sched Chng?**

> **Notes:**

- If the appointment end date is changed, the system will change the **N** to **Y** at **Work Assgn Sched Chng?** and will require you to update the **Work Assignment Schedule Change** screen.
- If the appointment is changing to an **Academic STN, FTM** or **STN Academic Administrator** and the **Salary Plan** is less than 48 weeks, the system will change **N** to **Y** at **Work Assgn Sched Chng?** and will require you to update the **Work Assignment Schedule** screen.

21.

If the employee's new pay information needs to be changed, enter **Y** (yes) at **New Pay Info?**

> **Note:**

- If the Home Budget is changed, the system will change the **N** to **Y** at **New Pay Info?** and will require you to update the **New Pay Information** screen.

22. If you would like to view the employee's **I-9/Foreign National information**, enter a **Y** (yes) at **View I-9?** The default value on this field is **N** (no).

Press **PF8** to continue.

Paycheck Adjustment — Screen 2

```

11/25/92          ACADEMIC RANK/CLASS/APPT TYPE CHANGES          ARCA
09:11:41.9      Paycheck Adjustment Screen                      MLI2

SSN: 175-01-7123   Name: LAUGHIN, BETTY C                       Status: ACT
HBud: 02-024-12 UP JobD Ttl: INSTR                             Grade: NA  Class: ACAD
-----
Pay Period #: _6   Amnt/PPd:                                     Pay Budget/Fund:  -  -
Pay Freq: MNTH                                         Appt Type: FT1

#Wks #Days #Hrs   Rate/Unit   Factor   Amount
1 Present Base Rate Pay:  -      -      -      -      -      -
  Holiday/Overtime/Othr:  -      -      -      -      -      -
    Vacation/Earned:      -      -      -      -      -      -
    Sick Allowance:       -      -      -      -      -      -
    Holiday Comp:         -      -      -      -      -      -
    Service (HY Only):    -      -      -      -      -      -
    Comp Time:           -      -      -      -      -      -
Shift Differentl/Prem:  -      -      -      -      -      -
  Time Off w/o Pay:      -      -      -      -      -      ( )
Meal/Lodging/Both Ded:  -      -      -      -      -      ( )
  Military Reduction:    -      -      -      -      -      ( )
2 Retroactive Pay:      -      -      -      -      -      ( )
Overpayment Deduction:  -      -      -      -      -      ( )
FOR PAYROLL USE ONLY: Fed Tax PPds: 0                      Total:

```

The **Paycheck Adjustment** screen will appear if a **Y** (yes) is placed at **Paychk Adj?** on the **Academic Rank/Class/Appt Type Changes** Screen.

This screen is needed if:

- The employee is receiving retroactive pay.

Example:

The employee missed a salary increase and needs to have the retroactive amount included in the regular paycheck.

To complete this screen for retroactive pay:

1. At the **Present Base Rate Pay** line, enter the employee's monthly rate at **Rate**, **M** (monthly) at **Unit** and the employee's regular paycheck amount at **Amount**.
2. At the **Retroactive Pay** line enter the retroactive amount in the **Amount** column.

Press **Enter** and the **Total** will reflect that amount the employee will receive for the specified **Pay Period #**.

Press **PF8** to continue.

- The employee is transferring to a different department or administrative area in the middle of a pay period.

To complete this screen for a transfer:

1. At the **Present Base Rate Pay** line, the *Sending Area* enters the employee's monthly rate at **Rate**, M (monthly) at **Unit** and the amount the employee will receive from the *Sending Area* at **Amount**.

Press **Enter** and the Total will reflect the amount the employee will be paid from the *Sending Area* for the specified **Pay Period #**.

Press **PF8** to continue.

Title Changes — Screen 3

```

11/27/92          ACADEMIC RANK/CLASS/APPT TYPE CHANGES          ARCA
11:26:10.4              Title Changes                          ML12

                Chng Eff Dte: 08/01/1992

                SSN: 175-01-7123          Name: LAUGHIN, BETTY C
-----
                C U R R E N T                                C H A N G E   T O:
HAdmn/Pos#/Type: 024  20144-000 S          024  20144-000 S
HBud/Per Rep #:  02-024-12 UP   110      02-024-12 UP   110
Appt Type/Pr/Se: FT1  P                FT1  P
Class/Rank:  ACAD  A40                  ACAD  A40

                Scnd Title: INSTR
Acad/Dspln Title: INSTR
ACAM/EXEC T1:  NA
ACAM/EXEC T2:  NA

                1 INSTR OF GEOGRAPHY_____
                  INSTR 2 GEOGRAPHY_____
                  NA 3
                  NA 4
  
```

The **Title Changes** screen will appear if a **Y** (yes) is at the **Other Title Chng?** question on the **Academic Rank/Class/Appt Type Changes** screen.

If there was a rank change, you should be sure to update the **Title** screen. Otherwise, **ARCA** will retain the secondary title that the employee had before the rank change.

1. At **Scnd Title** (Secondary Title), enter the title (s) that the employee wants to appear in the **Faculty/Staff Directory**. You can abbreviate the secondary title.

Example 1:

Asst Prof Exer & Spt Sci.

Example 2:

Prof/Chairman/Assoc Dean.

2. At **Dspln Title** (Discipline Title), enter the discipline in which the employee holds rank.

Example:

Ind & Fam Stds for a professor in Individual and Family Studies.

- 3.

At **ACAM/EXEC T1**, enter the primary University title code. Press **PF1** to find the appropriate code.

Example:

Department Head -E10

> Note:

- This is only required for Academic Administrators.

- 4.

At **ACAM/EXEC T2**, enter the secondary or dual **University title code** of an **Academic Administrator**, if applicable. Press **PF1** to find the appropriate code.

Example:

If the employee is a Department Head and Chairperson enter C20 at ACAM/EXEC T2.

> Note:

- This is only required for Academic Administrators.

Press **PF8** to continue.

New Pay Information — Screen 4

```

11/27/92          ACADEMIC RANK/CLASS/APPT TYPE CHANGES          ARCA
11:41:30.2              New Pay Information                          ML12

                          Chng Eff Dte: 08/01/1992

      SSN: 175-01-7123          Name: LAUGHIN, BETTY C          Class: ACAD
Home Budget: 02-024-12 UP Job Desc Ttl:                          Grade: NA
Per Rep #: 110                Job Desc #: AA40-0000              Step: NA
H Admin Area: 024            Pos #/Pos Type: 20144-000    S          Rank: A40
-----
Pay Period #: 6      Appt Type/Pr/Se: FT1 P          Sal Plan: 48W
                          Old Appt Sal: 11655.00          New Appt Sal: 11655.00

      Pay Freq: MNTH          Pay Budget: 02 1 024 - 12 UP          Pay Fund: 2
                          Check Sort: 100                PrePaid PPd #s: 3
-----
Remaining Complete PPds          Partial PPds
# PPds: 4          Amnt/PPd: 5          First PPd #:          Amnt:
Last PPd #:          Amnt:

```

The **New Pay Information** screen will appear if a **Y** (yes) is at the **New Pay Info?** question on the **Academic Rank/Class/Appt Type Change** screen.

1.

At **Pay Budget**, enter the budget that the employee is going to be paid from. If you have any questions, contact your Financial Officer.

> Notes:

- o If the employee's position is **STN** or **FTM**, the pay budget can be either a clearing account or the home budget.
- o If the position salary is being paid from two or more budgets, the pay budget *must be* a clearing account.
- o If the employee's position is system-generated (**FT1**, **FT2**), the pay budget can be any salary budget within that administrative area.

2. At **Pay Fund**, enter the fund that the employee is going to be paid from.

Example:

10010

3. If the pay period amount is to be charged to the next fiscal year, enter the pay period numbers at **PrePaid PPd #s**.

4.

At **# PPds** (number of pay periods), enter the number of *complete* pay periods that

remain in the appointment for **FT1** and **FT2**. Enter the number of complete pay periods that remain in the fiscal year for **FTM** and **STN** (do not include any partial pay periods).

> Note:

- If this is for a retroactive appointment, do not include the missed pay periods.

5. Enter the **Amnt/PPd** (amount per pay period). This is the amount that the employee will be paid for each full pay period.

| Partial PPds | | | |
|--------------|---|-------|---|
| First PPd #: | 1 | Amnt: | 2 |
| Last PPd #: | 3 | Amnt: | 4 |

The **Partial PPds** (partial pay periods) section needs to be completed if:

- The employee is receiving retroactive pay.

Example:

The employee missed a salary increase and needs to have the retroactive amount included in the regular paycheck.

To complete this section for retroactive pay:

1. At **First PPd #**, enter the pay period number that the employee will be paid this amount.
2. At **Amnt**, enter the employee's monthly rate plus the retroactive pay.

Hint:

This amount should be the same as the **Total on the Paycheck Adjustment** screen.

Press **PF8** to continue.

- The employee is transferring to a different department or administrative area in the middle of a pay period.

To complete this section for a transfer:

1. At **First PPd #**, enter the pay period number that the employee will be paid this amount.
2. At **Amnt**, enter the amount the employee will be paid from the **Receiving Area**.

Press **PF8** to continue.

- **The employee's appointment end date is in the middle of a pay period.**

To complete this section for a middle appointment end date:

3. At **Last PPd #**, enter the last pay period number that the employee will be paid.
4. At **Amnt**, enter the amount of the employee's last pay.

Press **PF8** to continue.

Salary Budget Distribution — Screen 5

| | Budget | Fund | AA# | Trn Cd | Sal % | Sal Amnt | Net Change |
|-----|-------------|----------|----------|----------|----------|----------------|------------|
| 1. | 02004 12 UP | 100 10 | 004 | — | — | 32392 | |
| 2. | 0500408 UP | 12 120 | 004 | — | — | 15000 | |
| 3. | 020 1555 UP | 100 10 | 015 | — | — | 15000 | |
| 4. | 1 | 2 | 015 | 3 | 4 | 7 -8000 | |
| 5. | 04004 12 UP | 100 10 | 6 | 10 | — | 5 8000 | |
| 6. | _____ | _____ | _____ | _____ | _____ | _____ | |
| 7. | _____ | _____ | _____ | _____ | _____ | _____ | |
| 8. | _____ | _____ | _____ | _____ | _____ | _____ | |
| 9. | _____ | _____ | _____ | _____ | _____ | _____ | |
| 10. | _____ | _____ | _____ | _____ | _____ | _____ | |

NEXT KEY:
NEXT FUNCTION: (HELP, MENU, END)

The Salary Budget Distribution will only appear for STN and FTM appointment types.

You can bypass this screen by pressing PF8 and the Financial Officer will complete this screen.

This is an example of a **Salary Budget Distribution** for a **STN** position. The Financial Officer may make the following changes:

• *For each budget distribution that you have financial responsibility for change as follows:*

1.

At **Budget:**

- If you are only changing the amount associated with the budget, do not change this field.
- If you are changing a budget, enter the new budget number for this distribution.
- The first distribution line must be the home budget and general funds. If there is no general fund charge to this budget and fund enter a zero in amount. (**ARL** is an exception to the general funds requirement.)

2. At **Fund**, change fund number associated with the budget for this distribution.

3. At **Trn Cd**, type in transaction code indicating source or destination of funds. Miscellaneous funds do not require a budget amendment.

4. At **Sal%**, *DO NOT* type in this column.

5. At **Sal Amnt**, type in the amount to be charged to this budget and fund.

• *For budget distribution(s) NOT under your financial responsibility:*

6. At **AA#**, type in administrative area number for which the funding is changing.

7.

At **Sal Amnt**, type in amount of adjustment for the administrative area. This may be an increase or decrease in funding.

> **Note:**

- This form must then be forwarded to each Financial Officer whose funding is changing on the position before the final approval of the home budget Financial Officer.

| | Budget | Fund | AA# | Trn Cd | Sal % | Sal Amnt | Net Change |
|----|------------|-------|-----|--------|-------|----------|------------|
| 1. | 0200412 UP | 10010 | 004 | — | — | 32392 | |
| 2. | 0500408 UP | 12120 | 004 | — | — | 15000 | |
| 3. | 0201555 UP | 10010 | 015 | — | — | 15000 | |
| 4. | _____ | _____ | 015 | 3 | 4 | -8000 | |
| 5. | 0400412 UP | 10010 | — | 10 | — | 8000 | |
| 6. | _____ | _____ | — | — | — | _____ | |
| 7. | _____ | _____ | — | — | — | _____ | |

Non-home budget area:

If this position is split with another area and you are the receiver of the forwarded form complete as follows:

If the budget and fund that you want to adjust is one of the current distributions, go to that line and change as follows:

3. At **Trn Cd**, type in transaction code indicating source of funds. Miscellaneous funds do not require a budget amendment.
4. At **Sal%**, *DO NOT* type in this column.
5. At **Sal Amnt**, type in new amount to be charged to this budget and fund.

| 04/16/93 11:32:50.9 | | ACADEMIC RANK/CLASS/APPT TYPE CHANGES SALARY BUDGET DISTRIBUTION | | | | Screen 2.0 ARCA ML12 | |
|-----------------------------|------------|---------------------------------------------------------------------|-----|---------------|-------|----------------------------|-------------------|
| H Admin Area: 004 | | Pos #: 00010-000 | | Pos Type: P | | Pos Status: UN | |
| Home Budget: 02-004-12 UP | | New Pos Salary: 62392.00 | | Obj Code: 104 | | | |
| Temp Pos BR: N | | Old Pos Salary: 64392.00 | | | | | |
| | Budget | Fund | AA# | Trn Cd | Sal % | Sal Amnt | Net Change |
| 1. | 0200412 UP | 10010 | 004 | — | — | 32392 | |
| 2. | 0500408 UP | 12120 | 004 | — | — | 15000 | |
| 3. | 0201555 UP | 10010 | 015 | — | — | 15000 | |
| 4. | 1 | 2 | 015 | 3 | 4 | -8000 | |
| 5. | 0400412 UP | 10010 | — | 10 | — | 8000 | |
| 6. | _____ | _____ | — | — | — | _____ | |
| 7. | _____ | _____ | — | — | — | _____ | |
| 8. | _____ | _____ | — | — | — | _____ | |
| 9. | _____ | _____ | — | — | — | _____ | |
| 10. | _____ | _____ | — | — | — | _____ | |
| NEXT KEY: NEXT FUNCTION: | | | | | | | (HELP, MENU, END) |

If the adjustment requires you to enter a new distribution, go to the line with your **admin**

If the Salary Budget Distribution screen was changed, the Source/Destination of Funds screen will appear except for miscellaneous funds. This screen must be completed when the Salary Budget Distribution is completed.

This screen may be the debit or credit side of the budget amendment.

If you removed a budget from the **Budget Distribution** screen, the reduction will automatically appear on the **Source/Destination of Funds** screen.

To complete this screen do as follows:

- Fill in this screen only for your area of financial responsibility.
- For each line that automatically appears on this screen complete as follows:
 1. At **Budget**, type in budget number to be credited or debited.

> Note:
 - Enter one line for each budget, fund and object category funding source.
 2. At **Fund**, type in fund number to be credited or debited.
 3. At **Obj Cd**, type in the **University object code** to be credited or debited.
 4. At **Trn Cd**, type in transaction code. This code must be the same transaction code entered on the previous screen, **Salary Budget Distribution** or entered on the line that automatically appeared on this screen.
 5. At **Incr/(-) Decr**, type in amount to be credited or debited to this budget, fund and object code.
 6. At **Position #**, if you are reducing an unfilled position to fund this position, type in the position number you are reducing.

If you are not the home budget area the form will return to the home budget area when you approve the form.

If you are reducing a position to provide funding, the position being reduced will be updated when the budget amendment has completed the approval cycle.

> **Note:**

- Refer to the **Position Management** documentation for more detailed information of the **Salary Budget Distribution** and **Source/Destination of Funds** screens.

Salary Plan/FTE/Work Assignment Schedule Changes — Screen 7

```
12/07/92          ACADEMIC RANK/CLASS/APPT TYPE CHANGES          ARCA
10:44:16.2       Salary Plan/FTE/Work Assgnmt Sched Changes      ML12

                Chng Eff Dte: 12/01/1992
                SSN: 175-01-7123          Name: LAUGHIN, BETTY C
-----
                C U R R E N T                C H A N G E   T O:
HRadm/Pos#/Type: 024  20144-000  S          024  20144-000  S
HBud/Per Rep #:  02-024-12  UP    110       02-024-12  UP    110
Appt Beg/End Dte: 08/01/1991  07/31/1992   12/01/1992  07/31/1993
Appt Type/Pr/Se: FT1  P                    FT1  P
Class/Rank:      ACAD  A40                  ACAD  A40
Grade/Step/JobD#: NA   NA   AA40-0000      NA   NA   AA40-0000
Job Desc Ttl:   INSTR
Sal Plan/Pos FTE: 28W                    32W
Mnths Not Wrkd: 0000 - 0000 ; 0000 - 0000  1 0000 - 0000 ; 0000 - 0000
                0000 - 0000 ; 0000 - 0000  0000 - 0000 ; 0000 - 0000
-----
                W O R K   A S S I G N M E N T   S C H E D U L E   A D J U S T M E N T
                Equiv Wrk %: 100.0          100.0
                #Credits/Credit %:          2
                NonTeach/NonCredit %:      3
```

The **Salary Plan/FTE/Work Assignment Schedule Changes** screen will appear if a **Y** (yes) is at the **Work Assgn Sched Chng?** question on the **Academic Rank/Class/Appt Type Changes** screen.

Months Not Worked

If the employee's appointment type is **STN** or **FTM** and the salary plan is less than 48 weeks, the **Mnths Not Wrkd** (months not worked) will need to be entered.

1.

At **Mnths Not Wrkd**, enter the beginning month (01 through 12) and day (01 through 31) not worked and the ending month and day not worked.

> **Note:**

If the time off is not consecutive, enter as many beginning and ending dates as needed.

Examples:

- If an employee's months not worked is June 1 through July 31, enter Mnths Not Wrkd as 0601 - 0731.
- If an employee's months not worked is June 1 through June 15 and July 1 through July 15, enter Mnths Not Wrkd as 0601 - 0615, 0701 - 0715.

Work Assignment Schedule Adjustment

1. If the employee's appointment type is **FT2**, the **Work Assignment Schedule Adjustment** section must be completed.
2. Enter the number of credits the employee is teaching at **# Credits**. The **Credit %** will be automatically calculated based on the number of credits entered.
3. Enter the non-teaching or non-credit percentage at **NonTeach/NonCredit %**.

> Note:

- The **Equip Wrk %** will be automatically calculated based on the **# Credits** and **NonTeach/NonCredit %** entered.

Press **PF8** to continue.

Tenure Change — Screen 8

```

12/07/92          ACADEMIC RANK/CLASS/APPT TYPE CHANGES          ARCA
11:42:54.5          TENURE CHANGE                                ML12

          Chng Eff Dte: 08/01/1992

          SSN: 175-01-7123          NAME: LAUGHIN, BETTY C
-----
          C U R R E N T          C H A N G E   T O:
HAdmn/Pos#/Type: 024  20144-000  S          024  00004-000  P
HBud/Per Rep #: 02-024-12 UP  110          02-024-24 UP  110
Appt Type/Pr/Se: FT1  P          STN  P
Class/Rank/Grade: ACAD  A40  NA          ACAD  A10  NA
Scnd Title: INSTR          INSTR OF THIS
Acad Title: INSTR          PROFESSOR THAT
-----
          1 P  EM
          2 0
          0
          08 / 01 / 1992
          07 / 01 / 1992
          00 / 00 / 0000
-----
          For OHR Use Only
          Tenr Memo?: -

```

The **Tenure Change** screen will only appear if the **Appt Type** on the **CHANGE TO** side is **STN** and if the rank is a tenure eligible rank.

1. The **Tenr Elig** field can only be **P** (on the tenure path).

> Note:

- o If the employee is granted tenure upon appointment to a **STN** position, contact the Office of Human Resources to update the tenure field with a **T** (tenured).

2. At **Prev Cr Tenr** (previous credit tenure), enter the number of previous years tenure credit that the Dean gives to the employee upon appointment to a **STN** position.

Press **PF8** to continue.

Notepad

```

12/08/92          ACADEMIC RANK/CLASS/APPT TYPE CHANGES          ARCA
09:32:20.4      Notepad -- Last Page                               ML12

Form Action: ADD   Document #:          Unit: GEOG   Confidential(Y/N): Y
                Document Status:

                SSN: 175-01-7123      Name: LAUGHIN, BETTY C
H Admin Area: 024   Pos #/Pos Type: 20144-000   S

                Chng Eff Dte: 12/01/1992

Note Pad Area: _____
                _____
                _____
                _____

Last Action:
Last Action Name:
Next Approver: _____

Next Function: _____ (menu,keys,end)

```

The **Note Pad Area** is where you can put any important information that other approvers will need to know in order to expedite processing of the form.

Press **PF12** to **ADD** the form.

Enter **SUB** (submit) at **Form Action** and press **PF12**. The form will route through the department's approval path.

> Note:

- When submitting the form, you will need to enter a **UserID** at the **Next Approver** field on the **Notepad** screen if the first approver is not a default approver.

Last Revised: 07/21/2003