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

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  - 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
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  - Academic Rank/Class/Apppt Type Changes - Screen 1
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  - Salary Budget Distribution - Screen 5
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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>
<thead>
<tr>
<th>Table of Contents</th>
<th>The Table of Contents area will</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCREEN NAME</td>
<td>● indicate what screens could be included in the ARCA form.</td>
</tr>
<tr>
<td>Academic Rank/Class/Type</td>
<td>● indicate optional screens with an O.</td>
</tr>
<tr>
<td>0</td>
<td>● indicate accessed screens with an X.</td>
</tr>
<tr>
<td>Paycheck Adjustment</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Title Changes</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
</tr>
<tr>
<td>New Pay Information</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Salary/Budget Distribution</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Source/Destination of Fund</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Sal Plan/FTE/Wrk Assignmen</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Tenure Changes</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Notepad</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sending Area</th>
<th>The Sending Area is where</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSN: ___ - ___ - ___</td>
<td>● the employee currently resides.</td>
</tr>
<tr>
<td>Curr H Admin Area: -</td>
<td>● current information on the employee will be entered.</td>
</tr>
<tr>
<td>Position #: -</td>
<td>● the new administrative area is indicated.</td>
</tr>
<tr>
<td>New Admin Area: ___</td>
<td></td>
</tr>
<tr>
<td>Is person leaving Curr dept? -</td>
<td></td>
</tr>
<tr>
<td>Is this a reappointment? -</td>
<td></td>
</tr>
</tbody>
</table>

> **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.
### The Receiving Area

<table>
<thead>
<tr>
<th>Semester Info?</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chng Eff Ppd#</td>
<td>___</td>
</tr>
<tr>
<td>Chng Eff Dte</td>
<td>___ / ___ / ____</td>
</tr>
</tbody>
</table>

The Receiving Area is where
- the employee will be residing
- new information on the employee will be entered.

---

### The Paycheck Adjustment Screen

#### The Current side is where
- the employee currently resides.
- the current information on the person exists.

#### 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 *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.

> **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.
1. At the NEXT FUNCTION line, type ARCA.

Press ENTER.

A blank ARCA form will appear, ready to be completed.

> Note:
To locate the WAGE forms within the IBIS menus, follow the steps below:

- At the M1M1 (IBIS Main Menu) menu, enter M2AS (EASY Electronic Approval System) at the Next Function line and press Enter.
- At the M2AS menu, enter M3FM (EASY forms) at the Next Function line and press Enter.
- At the M3FM menu, enter M3CS (Hum Res Chng Sys) at the Next Function line and press Enter.
- At the M3CS menu, enter ARCA at Next Function and press Enter.

Cover Screen — Sending Area Information
## 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:**
   
   - 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:**
   
   - 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.

   - 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
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:

- 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.

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**Academic Rank/Class/Appt Type Changes — Screen 1**

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:**

- 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.

- 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.

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**RESPOND TO THE 2 QUESTIONS & ENTER POS #, IF APPLICABLE, THEN <ENTER>**

**ACADEMIC RANK/CLASS/APPT TYPE CHANGES**

**ARCA**

**DAM3**

**Chng Eff Dte:** 01/01/1997

**ssh:** 914-01-0123

**Name:** SNOWMAN, FROSTVY

**CURRENT**

- **HRdmn/Pos#/Type:** 073 23908-000 S
- **HBud/HRRep#/WkLoc:** 05-060-53 CL 240 CL-
- **Appt Beg/End Dte:** 06/01/1997 - 05/31/1998
- **Appt Type/Pr/Se:** FT2 P
- **Class/Rank:** ACAD A10
- **Rank/Disp Title:** PROFESSOR T
- **Snd Title:** PROFESSOR T
- **Sal Plan/Pos FTE:** 48W 0.267
- **MPSDte/ESD Appr#:** 07/01/1997
- **Annualiz/Apt Sal:** 6179.00 1234.00
- **Patent Dte:** 07/01/1997

**CHANGE TO:**

- **Promo?**
- **HRdmn/Pos#/Type:** 073
- **HBud/HRRep#/WkLoc:** 05-060-53 CL 240 CL-
- **Appt Beg/End Dte:** 06/01/1997 - 05/31/1998
- **Appt Type/Pr/Se:** FT2 P
- **Class/Rank:** ACAD A10
- **Rank/Disp Title:** PROFESSOR T
- **Snd Title:** PROFESSOR T
- **Sal Plan/Pos FTE:** 48W 0.267
- **MPSDte/ESD Appr#:** 07/01/1997
- **Annualiz/Apt Sal:** 6179.00 1234.00
- **Patent Dte:** 07/01/1997

**Pos Sal Change:**

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:**
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

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

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.

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**New Pay Information — Screen 4**
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:**

  - If the employee's position is **STN** or **FTM**, the pay budget can be either a clearing account or the home budget.
  - If the position salary is being paid from two or more budgets, the pay budget **must be** a clearing account.
  - 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.

<table>
<thead>
<tr>
<th>Partial PPds</th>
</tr>
</thead>
<tbody>
<tr>
<td>First PPd #: 1</td>
</tr>
<tr>
<td>Last PPd #: 3</td>
</tr>
</tbody>
</table>

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**

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

If the adjustment requires you to enter a new distribution, go to the line with your **admin**
area number listed and change as follows:

1. At Budget, type in budget number for this distribution.

   > Note:
   - If you are going to split the amount that your area is responsible for between 2 or more budget/fund combinations, go to the next available blank line and fill in as above.

2. At Fund, type in the fund number associated with the budget for this distribution.

3. At Trn Cd, type in the transaction code indicating source of funding.

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.

Press PF8 to continue.

If the adjustment did not require you to use the line that the home Financial Officer entered on this screen, remove the line before sending the form back to the home Financial Officer.

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Source/Destination of Funds — Screen 6
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.
Salary Plan/FTE/Work Assignment Schedule Changes — Screen 7

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 Mths Not Wrkd (months not worked) will need to be entered.

1. At Mths 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 Equiv Wrk % will be automatically calculated based on the # Credits and NonTeach/NonCredit % entered.

Press **PF8** to continue.

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**Tenure Change — Screen 8**
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:
   - 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.
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