Procedure for completing and processing the Notification of Change and Personnel Transaction RH-T002 Form for personnel actions with no salary distribution

I. Introduction

This form is used for personnel transactions that will be fully paid (100%) from the default account of the organization in which the position of the employee is attached, or any other institutional or external account, that does not require distribution of salary and fringe benefits. Every step should be carefully evaluated as it may require the creation of schedule.

II. Definitions

A. Notification of Change and Personnel Transaction (RH-T002) – this form is used to carry out personnel transactions of the employee paid from the organization account (default account) where the position of the employee is attached and not necessary to perform salary and fringe benefits distribution.

B. Organization Default Account – Principal account assigned to an organization (cost center) to charge the components and elements of the salary of the employees of the organization that will not require distribution of salary through schedule.

C. Schedule – Transaction in a Labor Distribution (LD) responsibility that allows to perform employee's salary and fringe benefits distribution to an account or several accounts different to the organization default account.

III. Procedure for the Notification of change and Personnel Transaction RH-T002 Form

A. Personnel Transactions or Actions

The Human Resources Authorized Representative or other representatives in charge of the recruiting or transaction procedure should:

1. Complete the RH-T002 form to keep record of the personnel transaction or action that will be charged to the organization's default account in which the position of the employee is attached, or any other institutional or external account, that does not require distribution of salary and fringe benefits.

2. Obtain all the signatures required on the form, as appropriate.

3. Return the RH-T002 form to the Human Resources Office for verification and final prosecution, including the approval from the Budget Office, Finance Office or External Resources Office.

    ➢ In cases where the transaction has been approved through a letter by the appointing authority, this letter could be attached as evidenced of the approval without requiring the signature on the form.

4. Once the form is completed with the appropriated signatures, the authorized official in the Human Resources Office will register or update the assignment and the entries corresponding to the employee in the Oracle System (HRMS).

5. The authorized official in the Human Resources Office will verify if the account charged is the organization's default account in which the position of the employee is attached or any other account. Both accounts appear in the RH-T002 form.

➢ If the employee will be paid from the default account of his organization, the authorized official in the Office of Human Resources will process copy of the RH-T002 form to the Payroll Office.

➢ If the employee will not be paid from the default account of his organization, the authorized official in the Office of Human Resources will send the RH-T002 to the Office of Budget, Finance or External Resources to register the corresponding schedule. The form RH-T002 will be returned to the Human Resources Office to complete the process to the Payroll Office.

B. **Processing of transactions and personnel actions with Supra Campus tasks**

The concept of "supra campus" refers to the service provided by an employee (faculty or non-faculty) in another institutional unit or campus other than the base unit to which it belongs.

1. The Supra Campus unit (the one that pays for the services that will make the employee of another institutional unit) will send a communication to the base unit of the employee requesting the approval of the appointing authority for the required services (it can be a non-teaching incentive, additional compensation, among other actions). In some cases, such application will require an academic discharge, or summer salary for time spent by an employee on a project administered by the supra campus.

2. The communication will be signed by the nominating authority of the supra campus or by the official that this task was delegated. It will also be signed by the Principal Investigator (PI) of the projects requiring the service, where applicable. Should include the following information, as appropriate:

    - Full name of employee (faculty or non-faculty)
    - Employee number – Full name of the project
    - Award number assigned by sponsoring agency
    - Project's CFDA – Agency sponsoring the project
      Type of fund used to pay for academic discharge, summer salary or payment item that corresponds Authorized Execution Period
    - Percent of effort to be dedicated by researcher / employee
    - Total amount to be paid in the authorized period of execution
    - Signature of Principal Investigator and Nominating Authority
    - Account number (s) on Supra Campus with the corresponding distribution
    - Funds availability certification
    - Other information relevant to the transaction

3. After the appointing authority of the base unit authorizes the provision of the employee's services in the supra campus unit, it shall refer the documents to the Human Resources Office (of the base unit) to proceed with the preparation of the RH-T002 for the corresponding payment process.

4. After the form has been completed with all corresponding signatures, the authorized officer in the Human Resources Office will register or update the assignments and the corresponding element entries for the employee in the Oracle HRMS System.

5. If the employee is paid from the default account, he/she will send a copy of the documents to the Payroll Office for payment processing and will send a copy of the form RH-T002 to the supra campus unit for reference and file. If the employee *is not paid* from the default account, the authorized officer in the Human Resources Office will send the RH-T002 to the Budget, Finance

or External Resources Office for registration of the corresponding schedule and will subsequently refer it to the Payroll Office.

IV. Instructions for completing the Notification of change and Personnel Transaction RH-T002 Form

The notification of Change and Personnel Transaction form (RH-T002) contains the boxes that will be completed to enter the necessary data in the Oracle HRMS (Human Resources Management System) system. All data is required. To facilitate the process, this form has been created in Excel. The following instructions, indicate the steps to complete the form correctly.

- **Unit** – Indicate the employee base unit, according to the values offered in the list.

- **Fiscal Year-** Indicate the fiscal year corresponding to the personnel transaction.

- **Reference Number** – Indicate the internal control number used for the recording of processed personnel transactions, if applicable.

1. **Name** – Write the employee name in the following order: Last Names, Name and Initial.

2. **Employee Number** – Number automatically assigned by the HRMS Oracle System. If the employee is entered for the first time, the number will be indicated once the system generates it.

3. **Transaction** – indicate type of personnel transaction, according to the values offered in the list.

4. **Purpose** – indicate the purpose of the personnel transaction according to the list of values included in the form. If it is not in the list of values, it will be written in the space provided.

5. **Academic Qualification** – indicate the highest academic preparation of the employee, according to the list of values included in the form. If it is not in the list of values, it will be written in the provided space.

6. **Work Day** – Indicate if it's full-time or part-time with an X in the corresponding box. In case of part-time, indicate the total number of weekly hours that the employee will work.

7. **Effective Date** – Indicate the starting date of the personnel transaction in MM/DD/YYYY, which will be automatically converted to English through Excel as described below. For example: 01/01/2016 will convert it to January 1, 2016. However, for the registration in Oracle HRMS DD-MMM-YYYY format (01-JAN-2016) will be used.

8. **Termination Date** – Indicate the termination date of the personnel transaction in MM/DD/YYYY, which will be automatically converted to English through Excel as described below. For example: 01/01/2016 will convert it to January 1, 2016. However, for the registration in Oracle HRMS DD-MMM-YYYY format (01-JAN-2016) will be used.

9. **AEELA** – Mark with an X the appropriate box (Yes or No) to identify if the employee will contribute to the savings fund of the ELA Employees Association.

10. **Retirement** – Mark with an X the appropriate box (Yes or No) to identify if the employee will contribute to the UPR Retirement System.

11. **Health Insurance -** Mark with an X the appropriate box (Yes or No) to identify if the employee will receive the benefit of employer's contribution of health insurance.

12. **Type of Visa** – Write the type of Visa of the employee. For example: H, J, etc. If you are an American Citizen, mark with an X the box N/A.

13. **I-9 Effectiveness** – Indicate, if applicable, the date of effectiveness of the Employment Verification form (I9) in the format MM/DD/YYYY, which will be converted to English as described: 01/01/2016 will be converted to January 1, 2016. However, for the registration in Oracle HRMS the DD-MMM-YYYY format (01-JAN-2016) will be used. In cases where the employee has a VISA, the date of termination of the Visa and the date of effectiveness of the I9 must coincide.

14. **Exempt/Non Exempt** – Mark with an X the appropriate box if the position is exempt or non-exempt, according to the established classification.

15. **Pay Scale –** Refers to Category, Level, Five year salary increase or “quinquenniums”. Write in the box the corresponding pay scale according to the position of the employee, as described below:

    - Non-faculty staff – Example: Basic non-faculty. 05.1Q (CAT. 05, 1st “quinquenniums”). Indicate the current pay scale in the first column and then the change in the second column. The new appointments should indicate the current pay scale only.

    - Faculty staff – Write the corresponding pay scale. For example: Faculty.Basic.General.Instructor.Doctorate.5 less than 10.

    - Trust employee or Trust Position (“*Personal de Confianza*”) – complete this box only if the employee is a trust appointment (“nombramiento de confianza”) faculty. For Example: Department Directors, Deans, Chancellors, etc.

16. **Faculty, Department, Deanships, Office-** (Current) (After the change) – Choose the minimum unit of work to which the employee belongs according to the list of values included in the form. For example: Deanship of Administration – Finance Office. Indicate: Finance Office.

17. **Default Account of the Organization** – Write the account number assigned to the organization indictated in box 16, to which the employee is attached. If the employee belongs to an organization that does not have an assigned default account, such as "Special Projects", you will write "N/A" in that box.

18. **Title/Rank** (Current) (After the change) – Indicate the title of the job position or employee rank in the box according to the list of values included in the form. If it is not in the list of values, it will be written in the space indicated.

19. **Appointment Type (Current) (After the change)** – Indicate the type of appointment in the box according to the list of values included in the form. For example: Special, Probation, Permanent, Temporary Appointments, etc.

20. **Position Number (Current) (After the change) – write the position number assigned by the Oracle HRMS System in this box.**

21. **Type of service (Current) (After the change)** – Indicate the type of service that identifies the employee according to the list of values included in the form. For example: faculty or non-faculty.

22. **Element entries (Current) (After the change)** – Indicate the processing element entry in the box according to the list of values included in the form. For example: Scale salary; administrative duties; adjustment for faculty base salary, etc.

23. **Account Number -** Indicate the account to which the budgetary effect of the transaction being processed will be charged. If it is the same as the default account, you must repeat it.

24. **Amount to be paid** – Indicate the monthly salary to be paid in the transaction (annual salary paid in 12 months). In cases of additional compensation, non-faculty incentive, period payments or any other non-recurring payment (Element Entries), you must indicate the total amount that the employee will charge in the corresponding period.

25. **Annual Institutional Base Salary** – Indicate the annual salary of the employee.

26. **Time and Effort Report** – Mark Yes or No whether the employee must complete a Time and Effort Reports.

27. **Off-scale salary**

    • Authorized Amount above Pay Scale – indicate the monthly amount paid above pay scale authorized by the President.

    • Academic Preparation – indicate the monthly amount paid corresponding to academic preparation.

    • Authorized Increase – indicate the monthly amount corresponding to authorized increases.

    • Five year increase (quinquenniums) –Indicate the monthly amount corresponding to the five years increase retained for that employee who changes from one regime to another, and those granted to employees with more than thirty (30) years of service.

    Signatures and dates – Write the name of the official in print on each title and process signatures of each official responsible for accepting and authorizing the transaction, as applicable:

    • Employee
    • Immediate supervisor
    • Home Department Director
    • Dean or Office Department Director
    • Human Resources Director
    • Budget/Finance Director
    • Appointing Authority or Authorized Representative
    • Principal Investigator or Project Director

28. **Comments** – Write relevant information about the transaction.