

# Academic Payroll Transaction Matrix

Revised September 21, 2016

Action	Service Center <u>NOT</u> authorized to key	Pre-approval required before keying	Key and retain documentation for post-audit	Pre-Approved Actions		Post-Audit Actions (Keyed without prior approval)	
				What is required to be submitted for pre-approval?	Who is responsible?	Retain these documents as official office of record	Who is responsible?
<b>BSE</b> New Ladder Rank Appointment		X		<ul style="list-style-type: none"> <li>Approved Ladder Rank appointment in Advance</li> <li>Keying Instructions or Faculty Salary Calculator (FSC)</li> </ul>	<ul style="list-style-type: none"> <li>Generalist send all required documents to VPAA</li> </ul>		
<b>BSE</b> Temporary Assignment (non-Ladder Rank)		X		<ul style="list-style-type: none"> <li>Chair's memo requesting temporary assignment</li> <li>Faculty acknowledgement of awareness that support is temporary</li> <li>Keying Instructions or FSC</li> </ul>	<ul style="list-style-type: none"> <li>Generalist send all required documents to VPAA</li> </ul>		
<b>BSE</b> Change due to renewal, merit or promotion		X		<ul style="list-style-type: none"> <li>Packet Approved through Advance</li> <li>Keying Instructions</li> </ul>	<ul style="list-style-type: none"> <li>Generalist send Keying Instructions to VPAA</li> </ul>		
<b>BSE</b> Early termination of temporary assignment		X		<ul style="list-style-type: none"> <li>Keying Instructions or FSC</li> <li>Faculty acknowledgement of awareness that temp FTE is ending</li> </ul>	<ul style="list-style-type: none"> <li>Generalist send all required documents to VPAA</li> </ul>		

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<b>BSE</b> End Temporary Assignment			See comments in Post-Audit Actions			<ul style="list-style-type: none"> <li>Notification of termination of temporary FTE via e-mail or SRS</li> <li>Keying Instructions or FSC</li> </ul>	<ul style="list-style-type: none"> <li>Generalist send Keying Instructions or FSC to VPAA</li> </ul>
<b>Appointment</b> Brand New Faculty (Not in PPS)		X		<ul style="list-style-type: none"> <li>Packet Approved through Advance</li> <li>Approved Search or Search Waiver</li> </ul>	<ul style="list-style-type: none"> <li>Department prepare Faculty Salary Calculator (FSC)</li> <li>Generalist key into PPS using FSC</li> </ul>		
<b>Appointment</b> WOS Faculty		X		<ul style="list-style-type: none"> <li>Packet Approved through Advance</li> </ul>	<ul style="list-style-type: none"> <li>Generalist receive approval through Advance, request DPA information from Department and transmit keying information to Transaction Services Unit (TSU)</li> <li>TSU key appointment into PPS</li> </ul>		
<b>Appointment</b> Non-Faculty Academic		X		<ul style="list-style-type: none"> <li>Packet Approved through Advance</li> <li>Approved Search waiver or SPR</li> </ul>	<ul style="list-style-type: none"> <li>Generalist receive approval through Advance, request funding information from Department and transmit keying information to Transaction Services Unit (TSU)</li> <li>TSU key appointment into PPS</li> </ul>		

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<b>Appointment, Change in Series</b> Faculty (Already in PPS)		X		<ul style="list-style-type: none"> <li>• Packet Approved through Advance</li> <li>• Approved Search waiver or SPR</li> </ul>	<ul style="list-style-type: none"> <li>• Department key changes into MPM or prepare FSW upon approval</li> <li>• Generalist review keying instruction report or FSW and forward to TSU</li> <li>• TSU key appointment into PPS</li> </ul>		
<b>Appointment</b> New Joint		X		<ul style="list-style-type: none"> <li>• Chair's memo requesting joint appointment signed by Chairs of home and joint department</li> <li>• Dean's Office approval</li> </ul>	<ul style="list-style-type: none"> <li>• Send request to Dean's Office of appropriate school for approval</li> <li>• Generalist receive approved request, request DPA information from Jt. Department and transmit keying information to TSU</li> <li>• TSU key appointment into PPS</li> </ul>		
<b>Appointment</b> Transfer		X		<ul style="list-style-type: none"> <li>• Chair's memo requesting department transfer signed by Chairs of previous and proposed home departments</li> <li>• Dean's Office approval</li> </ul>	<ul style="list-style-type: none"> <li>• Send request to Dean's Office of appropriate school for approval</li> <li>• Generalist receives approved request; requests DPA information from new home department and transmit keying information to TSU</li> <li>• TSU key appointment into PPS</li> </ul>		

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<b>Appointment</b> Multi-location	X			<ul style="list-style-type: none"> <li>Multi-location appointment form</li> </ul>	<ul style="list-style-type: none"> <li>Department/HRSC submit multi-location appointment form to Dean's Office</li> <li>Dean's Office sends to VPAA for approval</li> <li>VPAA routes to employee's home campus for processing</li> </ul>		
<b>Advancement</b> Faculty (merit/promotion)		X		<ul style="list-style-type: none"> <li>Packet Approved through Advance</li> </ul>	<ul style="list-style-type: none"> <li>Department key changes into MPM upon approval</li> <li>Generalist review keying instruction report and forward to TSU</li> <li>TSU to key action into PPS</li> </ul>		
<b>Advancement</b> Non-Faculty Academic (merit/promotion)		X		<ul style="list-style-type: none"> <li>Packet Approved through Advance</li> </ul>	<ul style="list-style-type: none"> <li>Department prepare FCW upon approval</li> <li>Generalist review FCW and forward to TSU</li> <li>TSU to key action into PPS</li> </ul>		

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<b>Funding Changes</b> Faculty (non-BSE related)			X			<ul style="list-style-type: none"> <li>Department must obtain and keep e-mail funding confirmation for inter-Department/school support</li> </ul>	<ul style="list-style-type: none"> <li>Department key changes into MPM</li> <li>Generalist review keying instruction report and forward to TSU</li> <li>TSU key changes into PPS using keying instruction report</li> </ul>
<b>Renewal of Appointment</b> Senate Faculty including WOS, no BSE extension			X			<ul style="list-style-type: none"> <li>Annual Compensation letter</li> <li>Joint Department approval as applicable</li> <li>Inter-Department/school funding use approval as applicable (DEPARTMENT obtains and keeps)</li> </ul>	<ul style="list-style-type: none"> <li>Department key changes into MPM</li> <li>Generalist review keying instruction report and forward to TSU</li> <li>TSU key from MPM keying instruction report</li> <li>Department request and retain all necessary approvals</li> <li>Service Center retain annual comp letters</li> </ul>

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<b>Renewal of Appointment</b> Non-Senate Faculty including WOS; no BSE extension; NFA			X*	*Search waiver must be submitted and approved through new end date prior to renewal if position was not searched		<ul style="list-style-type: none"> <li>• APM 137 letter, if needed</li> <li>• Joint Department approval as applicable</li> <li>• Inter-department/school funding use approval as applicable</li> <li>• OPTIONAL: List of faculty being renewed from Department Chair</li> </ul>	<ul style="list-style-type: none"> <li>• For faculty, Department key changes into MPM</li> <li>• For NFA, Department prepare FCW</li> <li>• Generalist review keying instruction report or FCW and forward to TSU</li> <li>• TSU key from keying instruction report or FCW</li> <li>• Department request and retain all necessary approvals</li> <li>• Service Center retain APM 137 letters</li> </ul>
<b>Renewal of Appointment</b> Any faculty who were ineligible for 10/1/11 merit-based range adj				Check to see if faculty had an action that would make them eligible - otherwise follow renewal		<ul style="list-style-type: none"> <li>• Service Center retains annual compensation letter or APM 137 letter</li> <li>• Joint Department approval as applicable</li> <li>• Inter-department/school funding use approval as applicable</li> </ul>	<ul style="list-style-type: none"> <li>• Department prepare FSW</li> <li>• Generalist review FSW</li> <li>• TSU key from FSW</li> <li>• Department request and retain all necessary approvals</li> </ul>

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<b>Annual Renegotiation SOM/SOD/SON:</b> Increase OR decrease at 10% or less			X*	*See renewal of appointment		<ul style="list-style-type: none"> <li>For decrease in salary: employee request or acknowledgement</li> </ul>	<ul style="list-style-type: none"> <li>Department key changes into MPM</li> <li>Generalist review keying instruction report and forward to TSU</li> <li>TSU key into PPS from keying instruction report</li> </ul>
<b>Annual Renegotiation SOP:</b> Increase OR decrease at 10% or less		X		<ul style="list-style-type: none"> <li>Chair's e-mail (or Department manager e-mail for any increase or decrease in "Y" or "Z"</li> <li>For decrease in salary: employee request or acknowledgement</li> </ul>	<ul style="list-style-type: none"> <li>Dept. Manager sends e-mail to Nancy Walters with a copy to dept. Chair regarding any changes in "Y" or "Z" salary</li> <li>Nancy Walters sends file with all changes in "Y" highlighted to Dean w/ a copy to the Assoc. Dean.</li> <li>Dean reviews and concurs with the changes.</li> <li>Nancy Walters sends approval e-mail to Dept. and Service Center Mgr.</li> <li>Department key changes into MPM upon Dean's Office approval</li> <li>Generalist review keying instruction report and forward to TSU</li> <li>TSU key into PPS from keying instruction report</li> </ul>		

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<p><b>Over 10% Annual Renegotiation</b> For <b>SOM/SOD/SON</b>: increase &gt; 10%. For <b>SOP</b> follow annual renegotiation.</p>		X		<ul style="list-style-type: none"> <li>Chair's memo</li> </ul>	<ul style="list-style-type: none"> <li>Department draft and Department Chair signs memo</li> <li>Generalist sends memo to Dean's Office for final approval</li> <li>Department key changes into MPM upon Dean's Office approval</li> <li>Generalist review keying instruction report and forward to TSU</li> <li>TSU key into PPS from keying instruction report</li> </ul>		
<p><b>Mid-Year Renegotiation All Schools:</b> Mid-year salary renegotiation up or down (Y salary only).</p>		X		<ul style="list-style-type: none"> <li>Chair's memo</li> </ul>	<ul style="list-style-type: none"> <li>Department draft and Department Chair signs memo</li> <li>Generalist send memo to Dean's Office</li> <li>Dean's Office sends to VPAA for final approval</li> <li>Department key changes into MPM upon VPAA approval</li> <li>Generalist review keying instruction report and forward to TSU</li> <li>TSU key into PPS from keying instruction report</li> </ul>		



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Layoff/Involuntary Reduction In Time Non-Senate Faculty, Non-Faculty Academic		X		<ul style="list-style-type: none"> <li>• APM 145 Notification draft for Dean's Office vetting</li> <li>• If reducing from 100% to 51% or greater, signed comp plan statement</li> <li>• If reducing to less than 50%, use scale 0</li> </ul>	<ul style="list-style-type: none"> <li>• Department/Service Center draft layoff/reduction in time notice</li> <li>• Generalist send draft to Dean's Office for vetting</li> <li>• Department Chair sign notice and Service Center issue to Employee <ul style="list-style-type: none"> <li>◦ For reduction in time: Department key into MPM upon DO approval and Generalist reviews keying report</li> <li>◦ For layoff, Generalist instruct TSU on keying</li> </ul> </li> <li>• TSU key from keying instruction report</li> <li>• Service Center retain layoff notification</li> </ul>		

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<p><b>Change in Appointment Effort-Voluntary</b> Non-senate faculty and non-faculty academics</p>			X			<ul style="list-style-type: none"> <li>Employee request or acknowledgement</li> <li>If reducing from 100% to 51% or greater, signed comp plan statement</li> <li>If switching into comp plan membership, signed comp plan statement</li> </ul>	<ul style="list-style-type: none"> <li>Department key change into MPM</li> <li>Generalist review keying instruction report and forward to TSU</li> <li>TSU key from keying instruction report</li> </ul>
<p><b>Change in Appointment Effort-Voluntary</b> Senate faculty (Increase or Decrease)</p>		X		<ul style="list-style-type: none"> <li>Request from employee documenting reason (health or family care reasons) with Chair concurrence</li> <li>Comp plan statement (if applicable)</li> </ul>	<ul style="list-style-type: none"> <li>Employee request Chair approval</li> <li>Chair concurrence</li> <li>Service Center route to VPAA for approval</li> <li>Department key change into MPM upon approval</li> <li>Generalist review keying instruction report and forward to TSU</li> <li>TSU key from keying instruction report</li> </ul>		

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<b>Change in Pay Status for Faculty WOS w/o step, to Paid within a series:</b> WOS w/o step (includes faculty paid by staff title) to paid, step 1, same rank (includes Instructor)		X		<ul style="list-style-type: none"> <li>• Abridged packet approved through Advance</li> <li>• If entering comp plan, signed comp plan statement uploaded into Advance</li> <li>• Search waiver or SPR</li> </ul>	<ul style="list-style-type: none"> <li>• Department key changes into MPM upon receiving approval from Advance</li> <li>• Generalist review keying instruction report and forward to TSU</li> <li>• TSU to key action into PPS</li> </ul>		
<b>Change in Pay Status for Faculty WOS paid by affiliate to Paid by UCSF within a series:</b> WOS w/ step paid by affiliate to paid status, same rank and series			X			<ul style="list-style-type: none"> <li>• If entering comp plan, signed comp plan statement from employee</li> </ul>	<ul style="list-style-type: none"> <li>• Department submit request through SRS</li> <li>• Generalist review and forward to TSU</li> <li>• TSU key into PPS</li> </ul>
<b>Change in Pay Status for Faculty Paid to WOS w/o step within a series:</b> Paid (non-senate) to WOS w/o step (non-senate, same rank)			X			<ul style="list-style-type: none"> <li>• Employee's request, acknowledgement or letter of resignation from paid appointment</li> </ul>	<ul style="list-style-type: none"> <li>• Department submit request through SRS</li> <li>• Generalist review and forward to TSU</li> <li>• TSU key into PPS</li> </ul>

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<b>Change in Pay Status for Faculty Paid to WOS paid by affiliate, within a series:</b> Paid (all series) to WOS w/ step, paid by affiliate, same rank			X			<ul style="list-style-type: none"> <li>Employee's acknowledgement</li> </ul>	<ul style="list-style-type: none"> <li>Department submit request through SRS</li> <li>Generalist review and forward to TSU</li> <li>TSU key into PPS</li> </ul>
<b>Change in Pay Status for Recall Paid, to Recall WOS</b>			X			<ul style="list-style-type: none"> <li>Employee's request, or acknowledgement from paid appointment</li> </ul>	<ul style="list-style-type: none"> <li>Department submit request through SRS</li> <li>Generalist review and forward to TSU</li> <li>TSU key into PPS</li> </ul>
<b>Change in Pay Status for Recall WOS, to Recall Paid</b>			X			<ul style="list-style-type: none"> <li>If entering comp plan, signed comp plan statement</li> <li>Recall salary worksheet</li> </ul>	<ul style="list-style-type: none"> <li>Department submit request through SRS</li> <li>Generalist review and forward to TSU</li> <li>TSU key into PPS</li> </ul>

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<b>Change in Pay Status for Visiting Faculty and Visiting NFA:</b> WOS to paid		X		<ul style="list-style-type: none"> <li>Chair's memo</li> </ul>	<ul style="list-style-type: none"> <li>Chair draft and sign memo (Service Center can assist)</li> <li>Service Center routes to Dean's Office of appropriate School for approval</li> <li>TSU key into OPTRS upon approval</li> </ul>		
<b>Change in Pay Status for Visiting Faculty and Visiting NFA:</b> Paid to WOS						<ul style="list-style-type: none"> <li>Employee's request/ acknowledgement</li> </ul>	<ul style="list-style-type: none"> <li>Department submit request through SRS</li> <li>Generalist review and forward to TSU</li> <li>TSU key into PPS</li> </ul>
<b>Change in Pay Status for NFA WOS to paid</b> WOS to paid step 1, same series and rank (includes Junior rank)		X		<ul style="list-style-type: none"> <li>Appointment packet (reference letters <u>not</u> required) approved through Advance</li> <li>Search waiver or SPR</li> </ul>	<ul style="list-style-type: none"> <li>Department submit request through SRS</li> <li>Generalist review and forward to TSU</li> <li>TSU to key into PPS</li> </ul>		
<b>Change in Pay Status for NFA Paid to WOS</b> Paid to WOS, same series and rank (WOS specialists are not allowed unless on a visa)			X			<ul style="list-style-type: none"> <li>Employee's request/ acknowledgement</li> </ul>	<ul style="list-style-type: none"> <li>Department submit request through SRS</li> <li>Generalist review and forward to TSU</li> <li>TSU key into PPS</li> </ul>

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<b>Separations</b> Voluntary (non-BSE)			X			<ul style="list-style-type: none"> <li>Employee notification of resignation</li> </ul>	<ul style="list-style-type: none"> <li>Department notify Generalist via SRS</li> <li>Generalist instruct TSU on keying</li> <li>TSU key into PPS</li> </ul>
<b>Separations</b> Voluntary (w/ BSE)	X						<ul style="list-style-type: none"> <li>Department notify Generalist via SRS</li> <li>Generalist instruct TSU on keying</li> <li>TSU key into PPS</li> <li>Generalist send Keying Instructions or FSC to VPAA</li> </ul>
<b>Retirement</b> Ladder Rank	X					<ul style="list-style-type: none"> <li>Employee notice of retirement</li> </ul>	<ul style="list-style-type: none"> <li>Department notify Generalist via SRS</li> <li>Generalist instruct TSU on keying</li> <li>TSU key into PPS</li> <li>Generalist send Keying Instructions or FSC to VPAA</li> </ul>

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<b>Retirement</b> In Residence and Clinical X			X			<ul style="list-style-type: none"> <li>• Notice of retirement from employee</li> </ul>	<ul style="list-style-type: none"> <li>• Department notify Generalist via SRS</li> <li>• Generalist instruct TSU on keying (including emeritus appointment)</li> <li>• TSU key into PPS</li> <li>• If BSE, Generalist send keying instructions to VPAA</li> </ul>
<b>Retirement</b> Non-Senate Faculty			X			<ul style="list-style-type: none"> <li>• Notice of retirement from employee</li> </ul>	<ul style="list-style-type: none"> <li>• Department notify Generalist via SRS</li> <li>• Generalist instruct TSU on keying</li> <li>• TSU key into PPS</li> </ul>
<b>Retirement</b> Non-Faculty Academic			X			<ul style="list-style-type: none"> <li>• Notice of retirement from employee</li> </ul>	<ul style="list-style-type: none"> <li>• Department notify Generalist via SRS</li> <li>• Generalist instruct TSU on keying</li> <li>• TSU key into PPS</li> </ul>
<b>Recall Appointments</b> Initial (not to exceed 43%)		X		<ul style="list-style-type: none"> <li>• Packet approved through Advance</li> <li>• Recall Salary Worksheet, signed by the Chair and uploaded into Advance packet</li> </ul>	<ul style="list-style-type: none"> <li>• Department Chair signs Recall Salary Worksheet</li> <li>• VPAA Office review and approve</li> <li>• Department prepare FSC upon approval</li> <li>• Generalist review FSC and forward to TSU</li> <li>• TSU key appointment into PPS</li> </ul>		

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<b>Recall Appointments</b> Renewal (not to exceed 43%)			X			<ul style="list-style-type: none"> <li>• Comp plan statement (if applicable)</li> </ul>	<ul style="list-style-type: none"> <li>• Department prepare FSC upon approval</li> <li>• Generalist review FSC and forward to TSU</li> <li>• TSU key appointment into PPS</li> </ul>
<b>Emeritus Appointment</b> Senate Faculty			X			<ul style="list-style-type: none"> <li>• Key into PPS at time of retirement (within 120 days) <i>Automatic conferral</i></li> </ul>	<ul style="list-style-type: none"> <li>• Generalist instruct TSU on keying</li> <li>• TSU key into PPS</li> </ul>
<b>Emeritus Appointment</b> Non-Senate		X		<ul style="list-style-type: none"> <li>• Packet approved through Advance</li> </ul>	<ul style="list-style-type: none"> <li>• Generalist receive approval through Advance, request DPA information from Department and transmit keying information to TSU</li> <li>• TSU key appointment into PPS</li> </ul>		



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<b>One-Time Payment</b> BYK, BYZ, BYN (SoD, SoN)		X		<ul style="list-style-type: none"> <li>• SRS request</li> <li>• One-time payment form</li> </ul>	<ul style="list-style-type: none"> <li>• Department submit request through SRS</li> <li>• Generalist, DO review as needed. DO approves.</li> <li>• TSU key upon approval</li> </ul>		
<b>One-Time Payment</b> BYK, BYZ, BYN (SoM, SoP)			X				<ul style="list-style-type: none"> <li>• Department submit request through SRS</li> <li>• Generalist review</li> <li>• TSU key into OPTRS using one-time payment form</li> </ul>
<b>One-Time Payment</b> HON > \$1500		X		<ul style="list-style-type: none"> <li>• One-Time payment form</li> </ul>	<ul style="list-style-type: none"> <li>• Department/HRSC submit one-time payment form to VPAA for approval</li> <li>• TSU key into OPTRS upon approval</li> </ul>		
<b>One-Time Payment</b> HON not exceeding \$1500			X			<ul style="list-style-type: none"> <li>• Backup documentation</li> </ul>	<ul style="list-style-type: none"> <li>• TSU key into OPTRS</li> </ul>

Action	Service Center <u>NOT</u> authorized to key	Pre-approval required before keying	Key and retain documentation for post-audit	Pre-Approved Actions		Post-Audit Actions (Keyed without prior approval)	
				What is required to be submitted for pre-approval?	Who is responsible?	Retain these documents as official office of record	Who is responsible?
<b>One Time Payment</b> NON-UC HON not exceeding \$1500	X				<ul style="list-style-type: none"> <li>Department/HRSC sends payment request to accounting via Bearbuy or check request</li> </ul>		
<b>One Time Payment</b> NON-UC HON > \$1500	X			<ul style="list-style-type: none"> <li>HON exception request form (for NON-UC Employees)</li> </ul>	<ul style="list-style-type: none"> <li>Department/HRSC submits HON exception request form to VPAA for approval</li> <li>VPAA sends approved form back to Department/HRSC</li> <li>Departments/HRSC forward HON exception request form with check request to accounting OR upload HON exception request into Bearbuy and route to accounting</li> </ul>		
<b>Multi-location One Time Payment</b> HON any \$ amount	X			<ul style="list-style-type: none"> <li>Multi-location one-time payment form</li> </ul>	<ul style="list-style-type: none"> <li>Department/HRSC submit multi-location one time payment form to VPAA for approval</li> <li>VPAA routes to employee's home campus for processing</li> </ul>		

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				What is required to be submitted for pre-approval?	Who is responsible?	Retain these documents as official office of record	Who is responsible?
<b>Multi-location One Time Payment</b> "Other Payments" any \$ amount	X			<ul style="list-style-type: none"> <li>Multi-location one-time payment form</li> </ul>	<ul style="list-style-type: none"> <li>Department/HRSC submit multi-location one time payment form to Dean's Office</li> <li>Dean's Office sends to VPAA for approval</li> <li>VPAA routes to employee's home campus for processing</li> </ul>		
<b>STP/ST1 Payments</b>		X		<ul style="list-style-type: none"> <li>Chair's letter requesting STP with justification</li> </ul> <p><i>Note: Chair/ORU Director STP is initiated by Dean's Office</i></p>	<ul style="list-style-type: none"> <li>Department submit request through SRS, attaching chair's letter</li> <li>Generalist review and submit to Dean's Office for approval</li> <li>Department/service center key STP/ST1 into MPM upon approval</li> <li>Generalist review keying instruction report</li> <li>TSU keys using keying instruction report</li> </ul>		

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				What is required to be submitted for pre-approval?	Who is responsible?	Retain these documents as official office of record	Who is responsible?
Scheduled Other Comp (BYN, BYZ)			X				<ul style="list-style-type: none"> <li>• Department key additional comp into MPM</li> <li>• Generalist review keying instruction report</li> <li>• TSU key BYN into PPS from keying instruction report</li> <li>• Dean's Office review compliance report</li> </ul>
Leave Sabbatical – Senate Faculty	X			<ul style="list-style-type: none"> <li>• Sabbatical Leave request in Advance</li> <li>• Sabbatical Calculation Worksheet attached in Advance</li> </ul>	<ul style="list-style-type: none"> <li>• Generalist receives approval through Advance</li> <li>• TSU keys into PPS</li> </ul>		
Leave Professional Development – In Residence and Clin X	X			<ul style="list-style-type: none"> <li>• Sabbatical Leave request in Advance</li> <li>• Sabbatical Calculation Worksheet attached in Advance</li> </ul>	<ul style="list-style-type: none"> <li>• Generalist receives approval through Advance</li> <li>• TSU keys into PPS</li> </ul>		
Leave Maternity – Faculty	X			<ul style="list-style-type: none"> <li>• Leave Form</li> </ul>	<ul style="list-style-type: none"> <li>• Generalist submit leave form to VPAA</li> <li>• Payroll to key into PPS upon approval from VPAA</li> </ul>		
Leave Maternity – NFA		X		<ul style="list-style-type: none"> <li>• Leave Form</li> </ul>	<ul style="list-style-type: none"> <li>• Generalist submit leave form to VPAA</li> </ul>		

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				What is required to be submitted for pre-approval?	Who is responsible?	Retain these documents as official office of record	Who is responsible?
					<ul style="list-style-type: none"> <li>• TSU key into PPS upon approval from VPAA</li> </ul>		
<b>Leave</b> FMLA – Faculty	X			<ul style="list-style-type: none"> <li>• Leave Form</li> </ul>	<ul style="list-style-type: none"> <li>• Generalist submit leave form to VPAA</li> <li>• TSU keys into PPS upon approval from VPAA</li> </ul>		
<b>Leave</b> FMLA – NFA		X		<ul style="list-style-type: none"> <li>• Leave Form</li> </ul>	<ul style="list-style-type: none"> <li>• Generalist submit leave form to VPAA</li> <li>• TSU key into PPS upon approval from VPAA</li> </ul>		
<b>Leave</b> Others	X**	X**		<ul style="list-style-type: none"> <li>• Leave Form</li> </ul>	<ul style="list-style-type: none"> <li>• Generalist submit leave form to VPAA</li> <li>• TSU key into PPS upon approval from VPAA</li> </ul>		
<b>FHA</b> (w/out exception)		X		<ul style="list-style-type: none"> <li>• Payback provision agreement signed by faculty member</li> <li>• One-time payment form</li> </ul>	<ul style="list-style-type: none"> <li>• Department submits request through SRS, attaching one time pay form, provision agreement &amp; chair letter</li> <li>• HRSC review and submit to Dean’s Office for approval</li> <li>• TSU key into PPS upon approval from Dean’s Office</li> </ul>		

Action	Service Center <u>NOT</u> authorized to key	Pre-approval required before keying	Key and retain documentation for post-audit	Pre-Approved Actions		Post-Audit Actions (Keyed without prior approval)	
				What is required to be submitted for pre-approval?	Who is responsible?	Retain these documents as official office of record	Who is responsible?
FHA (w/ exception)		X		<ul style="list-style-type: none"> <li>Chair letter requesting FHA</li> <li>Payback provision agreement signed by faculty member</li> <li>One-time payment form</li> </ul>	<ul style="list-style-type: none"> <li>Department submits request through SRS, attaching one time pay form, provision agreement &amp; chair letter</li> <li>HRSC review and submit to Dean's Office for approval</li> <li>Dean's Office route to VPAA for approval</li> <li>VPAA route to HRSC for keying</li> </ul>		