

Personnel Action Form 3 – The Per 3

PER 3

The Per 3 is a multi-function form used to make changes to the HR, payroll, and/or accounting systems within PeopleSoft, including changes in rate of pay and distribution of salary charges to accounts – both prospectively and retrospectively. This form is also used to effect terminations, retirement, leave of absence, return from leave of absence, new work location (on campus), transfer to a new Department, promotion, tenure recommendation, name change, change in source of funds, continuation of appointment, pay additional compensation, change salary account distributions, and make other miscellaneous changes.

The Per 3 template is in Microsoft Excel. There are three different versions of the form that are used for three different types of employees.

Per 3 (Student Workers, House Officers, POA)

Per 3 (hourly) should be used for all classified employees.

Per 3 (salary) should be used for all salaried employees (Faculty and Staff) and for gratis employees.

A blanket Per 3 can be utilized in two instances. First, when three or more faculty members of the same pay group are being paid, and second, when terminating three or more students or Gratis Faculty. The remarks section of the blanket Per should contain the wording “see attached.” Since a blanket Per 3 does not contain the names of the individuals affected by the blanket, an extra copy of the supporting documentation for the Per should be attached behind the “Dean’s” copy of the Per.

When preparing a blanket Per to terminate a group of gratis or student employees, attached to the Per 3 must be a list which contains the following info: name, employee ID, title, and effective date of termination.

For blanket Per 3s that pay supplement, only one pay group per blanket Per is allowed. For example gratis employees (GR1), fulltime (NMF) and part time (NMP) employees must be on separate pers and have separate spreadsheets attached to each per. Attached to the blanket Per 3 must be a sheet outlining the distribution of salary for each employee by amount and source. The standard template format must be used and can be found at: U:\Public\SOM_Policy_and_Procedure.

Within each Per template spreadsheet, there are a *Directions* tab and subsequent tabs in two major sections. These two major sections are the same in their final product; the first set (tabs 2-6) is intended for manual entry and the second set (tabs 7-12) is to be automatically populated with data queried from PeopleSoft. Regardless of what section is used, all five tabs are required to be printed to make up a completed Per packet. The completed packet will contain 5 sheets labeled *Original*, *Personnel*, *Dept.*, *Sponsored Proj.*, and *Dean-Dir*. In the first major section the end user will have to manually input every required field. Data should be input only in the tab labeled “*Original*;” the next

four tabs will be automatically populated from the data that is manually input. The tab labeled *Datasheet* is used for pasting PeopleSoft query results. The datasheet is linked to the next five tabs. The data from PeopleSoft populates most of the fields. Those fields not filled in must be typed manually into the tab "*Original Query*." The next four tabs will then be automatically populated with both the query data and the data that was manually entered. As with the manual version of the forms, all five tabs need to be printed to generate a complete Per 3. The query data contains the header information (employee demographics) as well as their current salary distribution as it is listed in PeopleSoft HR. It is recommended that the query version of the Per 3 is used when possible. The reason is that using the query reduces the likelihood of data entry errors and guarantees that the current salary distribution matches what is currently in PeopleSoft.

Changes in Sources of Funds – "Retros"

Changes in Source of funds fall into two basic categories – retrospective (Retros) and prospective. The responsibility for processing changes in sources of funds lies in two areas of Central Administration. All prospective changes of base pay keyed into PeopleSoft HR by Human Resources. Payroll is part of Accounting Services and they key into the PeopleSoft Payroll module all scheduled, future supplemental payments to employees and any changes made to those scheduled payments. Accounting Services is also responsible for processing retroactive changes in sources of funds regardless of whether they are base or supplemental compensation.

A retroactive change in source of funds, as the name implies, retroactively changes what accounts employee's efforts are charged to. These forms represent a mistake – employee's efforts were charged somewhere where the employee was not working or where there was insufficient revenue to support him or her. Every effort should be made to minimize the use of Retros.

Retros for previous FYs are usually governed by different FB rates. When Accounting Services processes a Retro for a period governed by a different FB rate, the rate that is automatically created will apply the current rate to both the reversing entry(s) and the new one(s) that is created. The business manager should request from Accounting Services that manual entries be made to adjust for the difference between the current FB rate and the prior period. This is one reason why Retros with dates which cross FY's are not permitted.

A Retro posts in two places, in the HR module and in the General Ledger (GL). The HR module contains the official record of how every employee is charged since the inception of PeopleSoft in 2001. When a Retro is processed, the log is changed and all previous record of how an employee was charged is erased. In contrast, the GL contains standard double entry accounting entries; entries are never erased or wiped out. Instead, new entries are created that cancel out the effect of the prior transaction – and the two net to \$0. For example, if an employee is charged \$100.00 to account Y for the month of April and the Department wishes to move the salary for April to account Z, the \$100.00 expense to Y will always be posted to account Y in that period. When the Retro is processed, an additional entry will be posted (in the accounting period in which the Retro

no data check on the type of data keyed into the field. That means that the data keyed into this field is not always uniform in format and can be completely missing.

Can be found: First obtain PS Position Number, then go to Organizational Development>Position Management>Add/update Position Info>Specific Information (Tab) – Field labeled as “Mail Drop ID”

Name – Self explanatory

Title - Official University title, if the space furnished is insufficient, proper abbreviation is permissible

Can be found: Workforce Administration>Job Information> Job Data

School/Division -The administrative area (School) to which the employee's home Department is part of (e.g. Medicine, Nursing).

Department - The name of the Department which the employee is a member of (e.g. Surgery, Orthopedics).

Can be found: Workforce Administration>Job Information> Job Data

Dept. Code - The name of the Department which the employee is a member of (e.g. NO1494500). Note: All School of Medicine departmental IDs start with NO in PeopleSoft Human Resources; in PeopleSoft Financials the two letters preceding the Department are omitted.

Can be found: Workforce Administration>Job Information> Job Data

<i>Pay Grp.</i>	NMF	NMF - Full-time Faculty Staff (NO)	▼
<i>Emp. Cl.</i>	Indf No T	Unclass - Unclassified	▼
<i>Pay Type</i>	Salaried	Salary	▼
<i>Reg/Temp</i>	Regular	Reg	▼
<i>Country</i>	USA	USA	▼
<i>Visa</i>			▼

Pay Grp. - The employee's pay group. (NMF for Salaried FT employees)

Can be found: Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data >Payroll

Empl. Cl. - The employee's classification. This classification relates to the type of appointment that the employee is being appointed to. Unclassified employees (professional staff – Business Mangers, coordinators, etc.) are “*Indefinite/No Tenure*” appointments. Research Associates, Clinical Associates, and Post-Docs are “*Annual Appointments.*” For faculty appointments, refer to PM-23 which can be found at: <http://www.lsuhscc.edu/no/administration/pm/pm-23.aspx>

Can be found: Workforce Administration>Job Information> Job Data- “Job Information” tab

Pay Type - The employee's pay type – i.e. Salaried or Hourly. All Faculty and Staff are salaried, classified employees and Students are hourly.

Can be found: Workforce Administration>Job Information> Job Data- “Payroll” tab

Reg/Temp - Indicates whether the employee is a regular or temporary employee.

Can be found: Workforce Administration>Job Information> Job Data- “Job Information” tab

Country - Indicates the employee's country of citizenship.

Can be found: Workforce Administration>Personal Information>Citizenship

Visa - Indicates the type of visa and/or permit the employee is on. This field is not necessary for U.S. citizens.

Can be found: Administration>Personal Information>Citizenship>Visa/Permit Data

PROPOSED ACTION:

Mark (x) in the appropriate block or blocks indicating the action(s) being taken and fill in the required information.

(1) Termination – Human Resources should be immediately emailed upon gaining the knowledge that employee is to be terminated. This allows HR to place employee on LWOP if notice is extremely short or paperwork is delayed so that an employee is not overpaid.

1. *Termination effective* _____ *last day* _____ *cob.worked* _____ *Hrs. annual leave for which pay is due* _____
Reason _____

(a) Effective Date - This date is to be the effective date of termination that severs the individual from the employee-employer relationship with the LSU Health Sciences Center. It cannot ever be the same date as last day worked. Whole months should be used for salaried employees. Example: Employee’s last day worked is September 28, 2007 which is a Friday; the effective date should be, October 1, 2007.

(b) Last Day cob. worked - This should be the date of the last day of work at the close of business (c.o.b.). As in example above, last date worked would be September 28, 2007.

(c) Hours of annual leave for which pay is due – Do not fill in – will be completed by HR.

(d) Reason – Indicate reason employee being terminated.

All Per3s to terminate an employee must be accompanied by:

- Letter of resignation from employee
 - Preferably an original signed letter of resignation

- Facsimiles and emails are acceptable, or
- Evidence of proper notice of termination of employment - varying positions have different notice requirements – contact Human Resources if you are unsure.
- Period of Appointment employment document.
- If the termination date is less than two weeks from the submission of the Per 3, a printed copy of email notifying HR should be attached to all terminations so that the Dean’s Office knows that HR has placed the individual on Leave without Pay.
- Students, including Residents and House Officers, can be terminated without any supporting documentation.
- In the event that an employee cannot be located (this is considered abandonment of one’s job) HR should be contacted to place the individual on Leave Without Pay (LWOP). The Department should then work with HR to take appropriate steps for termination.

(2) Retirement

2. **Retirement** Regular Disability Effective _____ Teacher's La. State Empl.
Hours of unused leave to be applied to retirement: Annual _____ Sick _____
Hours for which pay is due Annual _____ Sick _____

- (a) Do not fill out any Pers for retirement – It is the responsibility of an employee to notify Human Resources of their intent to retire and HR will be prepare a Per 3 and route it to the Department for approval.

(3) Leave of Absence (email HR immediately upon notification to prevent overpayment in case Per is delayed)

3. **Leave of Absence effective** _____ *thru* _____ With pay Without Pay
 _____ *Justification* _____ Ins. Cont. Discontinued

- (a) Effective - The date of the first working day the employee is absent.
- (b) Thru -The last working day in which the employee is absent. (Include ONLY if Date is absolute – should not be listed if employee will be on LWOP for an extended period of time.)
- (c) With Pay/Without Pay - Mark the appropriate box. It is an extraordinary situation (such as Sabbatical) for someone to be on Leave with Pay – this should not be submitted without prior approval from the Dean’s Office and Central Administration.
- (d) Justification – Provide a brief justification. If Sabbatical, refer to PM-12 and make sure to attach documentation evidencing administrative approval. Note: When on Sabbatical, employee is charged to a Central Administration account that is funded from the Fringe Benefit pool that is created from charges against base salaries. This is the ONLY type of leave that is not charged to the employees current account distribution in PeopleSoft.
- (e) Insurance continued/discontinued - Mark the appropriate box so that the proper entries may be made to the insurance records and make sure an insurance leave without pay form is completed and submitted along with this form.

Required attachments by the School of Medicine:

- Letter of communication to employee, if not due to insufficient leave.

- Copy of email notification of HR if less than two weeks from submission.

(4) Return from Leave of Absence

4. *Return from Leave of Absence effective* _____

Effective - This is the first day the employee returns to work. It is required that this action be prepared in every case when an employee returns to work from any type of leave that required the processing of a form authorizing the leave.

(5) Transfer to New Department

5. *Transfer to New Dept.* _____ *Effective* _____
LSU Work Location _____
PS Location Code *PS Dept. Code* *Phone #* *New PCN#* *New PS. Pos#*

- (a) Department Name - the full name of the new Department to which the employee is assigned.
- (b) Effective Date - The date of the move to the new Department.
- (c) LSU Work Location

- (1) PS Location Code - The 9 digit PeopleSoft code that is used for distribution of campus pay checks and leave attendance sheets.
- (2) PS Dept Code - The PS Department code indicating the Department in which the employee will be working.
- (3) Phone # - The number where the employee can be contacted while at work.
- (4) New PCN# - Used to assign a new PCN.
- (5) New PS. Pos. # - The new 8 digit PeopleSoft Position number to which an employee has been assigned.

(6) Promotion and/or Change in Title to:

6. *Promotion and/or Change in Title to* _____ *Effective* _____
 Current *Last Incumbent* *Justification* _____

Note: Promotion to a new position or a change in title will require the changing of the PCN and PeopleSoft Position number in section 5.

- (a) New Title
- (b) Effective Date of new title
- (c) Current – should be left blank
- (d) Last Incumbent – should be left blank
- (e) Justification - A brief explanation is sufficient.

(7) Tenure Recommendation (For Faculty Ranks)

7. *Tenure Recommendation (For Faculty Ranks)* _____ *yr(s). Beginning* _____ *End Date* _____
 Tenure Track *Tenure Granted* *Probationary* *Non - Tenure*

accommodate an end date for a source of funds. Further, LSU cannot stop paying someone because a particular source of funds is no longer appropriate.

(c) AED - Appointment End Date – Do not fill in – to be completed by the Human Resource Management Department.

(d) Rate of Pay - The annual level amount divided by 12 or a specified amount when paid on a period of appointment for unclassified, salaried employees. For bi-weekly or hourly employees, it is the hourly rate. Mark the appropriate box for the employee's pay type.

(e) On the Basis of – Leave blank unless the position is a Period of Appointment.

(f) Percent of full time - Indicate the current percent of full-time effort.

(g) If Change: from ___ % to ___ % -

- Complete this section only when there is a change in percent of effort.
- No employee can have their percent of effort reduced without their written consent, which must be attached to the Per 3.
- Any faculty member who has a change in percent of effort must have either a new Letter of Offer or new Letter of Re-Assignment approved by the Dean's Office of Faculty Affairs. A copy of this letter must be attached to all changes in percent of effort for faculty.
- For any position going from less than 75% to 75% or greater, the position must be advertised and a competitive selection process must be conducted.
 - Exception: if the position was advertised and a competitive selection process was utilized for the original hiring of the person currently in the position, then no advertisement and selection process is necessary.

(h) The Chartstring(s) to which the salary(ies) affected by the Per will be charged to. (see Chapter 2 above for a more in depth discussion of Chartstrings)

(i)LSU Account # - The Legacy Account Number where the salary will be charged.

(j)LSU Description - Brief description of the source of funds

(k)Dept. Code # - The seven (7) digit PeopleSoft Department code for the funds

(l) Fund - The three (3) digit funding code from the chart string that identifies the type of funding.

(m) Program - The five (5) digit program code from the chart string that identifies the type of program.

(n) Class- The five (5) digit class code from the chart string that identifies the type of class.

(o) Project/Grant - This is the Project/grant number.

(p) PS Account - The six (6) digit PeopleSoft Account code.

(q) % Distribution - The ratio of each source of the proposed salary to the total proposed amount of pay. This field is calculated automatically, no user input is required.

(r) Present Amount – In the case of prospective base pay, this amount of pay by source shown in an annualized amount that a full-time employee is currently receiving on a full-time basis for a Fiscal Year. For those employees appointed for less than full-time, their annual level should reflect the part-time annual amount for the Fiscal Year. E.g. A position pays \$100,000.00 per year and a person reduces to 80% effort, the amount listed on the Per should show a “Proposed Annual” of \$80,000.00. Current, actual sources and amounts of funds as they are found in PeopleSoft for the time period in question should always be used. The single most common error on retroactive changes in source of funds is that an employee’s salary distribution is inaccurate. In the case of retros or prospective supplemental compensation, this should be the exact amount by source for the period in question.

(s) Proposed Annual – The new amounts and or sources.

(t) Totals - The sum of the present/proposed annual columns.

(u) Changes in Sources' of Funds (CSOF)

Changes in Source of funds fall into three basic categories – retrospective, prospective and a combination of the two. Prospective and retrospective changes to supplement can never be processed on the same per (PS Acct Codes 501300 and 501310). Retroactive CSOF can never be on a blanket Per.

It is extremely important that all salary expenses are allocated correctly. Employees must be paid proportionately from all sources where they expend effort and earn revenue. Employees can never be charged to a sponsored agreement or contract on which they did not work. If an employee expends effort on an activity behalf of the university that is not covered by a sponsored agreement, these efforts must be charged to an appropriate discretionary source of funding such as SGF's or indirect costs. These efforts must be in support of the school's mission of education, research, or patient care. Employees can refer to OMB circulars 110 and A-21 as well as the university's DS-2 for additional guidance.

Prospective Changes in Source of Funds– changes to where an employees salary will be paid in the future (changes that have a start date well after the submission of the Per 3).

- Pay careful attention to the dates on these forms.
 - Late submission of these forms can make them Retros if there are delays in processing.
 - If a prospective CSOF for supplement is not processed fully before the start date on the per, it cannot be processed.
- Processed by HR only
- Overridden by the budget dump which occurs at the beginning of each FY.
- Cannot be submitted with an effective date of July 1 for any fiscal year – except for employees not in the budget file, such as students.

Base Pay –

- List all base pay chartstrings and include the annualized amount
- List effective date of change
- Do not list an end date as there is no mechanism to turn off at particular time indicating a date will just lead to confusion.
- Current rate and sources of pay must match PeopleSoft.
- Both *Present Annual* and *Proposed Annual* columns must be equal.

Supplemental Pay

- This type of per is only to modify a **scheduled** supplemental payment which was submitted on another Per – it cannot change where someone has already been paid.
- Per must be on **hot pink** paper and contain the words “Supersedes” in the comments section.
- List **all** the pay chartstrings
- Always use only actual amounts – never use annualized amounts anywhere on per
- List effective date of change

- Current rate and sources of pay must match previous submission as displayed in PeopleSoft. (See Chapter 9 for looking up scheduled supplemental payments)
- Both *Present Annual* and *Proposed Annual* columns must be equal.
- May submit a blanket that replaces previous distribution for a group of employees
 - ALL future sources and amounts for the employee must be listed
 - All previous distributions will be turned off during processing of this per
 - Do not list employees and distributions for employees that are not changing

Retroactive Changes in Source of Funds

Base Pay – percentage or annual amount change

- List all base pay chartstrings
- List effective dates of change (end date must be listed and have occurred or is occurring soon)
- Existing rate and sources of pay must match **PeopleSoft HR**.
 - If two different rates of pay cover the period in question, two pers should be created
- Both *Present Annual* and *Proposed Annual* columns must be equal.
- If the “current amount” sources and amounts do not match what is in PeopleSoft for the date range in question, the retro should not be submitted.

Base Pay or Supplemental Pay – Exact amount or Lump Sum

- List **only** the pay chartstrings affected
- Always use only actual amounts – never use annualized amounts
- List effective dates of change (end date must be listed and have occurred or is occurring soon)
- Existing amounts and sources of pay must match **PeopleSoft HR**.
 - If two different rates of pay cover the period in question, two pers should be created
- Both *Present Annual* and *Proposed Annual* columns must be equal.
- Comments section of per should indicate “Please move exact amount”
- Per should only be used when necessary – percent of effort and displaying all sources of fund for the employee is generally more defensible and provide better information for the approver of the forms.

Attention to dates is critical when prospectively changing an employee’s source(s) of pay. Payroll typically runs at least a week before the actual pay date. Therefore, if a prospective change is submitted in that window of time, it is likely that the prospective change will be entered into PeopleSoft after payroll is run even though the Per is submitted well before payday. If this occurs, it is unlikely that anyone from Central Administration will contact the department to let them know that payroll ran before the change could be made. It is the responsibility of the department to be aware of these dates and process forms accordingly. As a consequence of these windows of time which can cause an intended prospective change in source of funds to be retroactive, the dean’s

office advises that prospective changes be submitted first. When the department sees that the prospective change has been made, a retro can be prepared with certainty that it contains the entire period necessary.

Do not utilize the wording “Journal Entry only.” When Pers are processed, they are keyed into the retro system. This is different from creating Journal Entries. The retro system will ultimately create GL entries, but this should not be confused with the creation of manual Journal Entries, which are never used to move salary.

The dates on a retro are extremely important. They should be reflective of how an individual expended their efforts. Departments are responsible for defending how individuals are charged. A common pitfall is to use broader dates than is appropriate – particularly when moving lump sums. The amount being moved will be charged equally across the entire period specified when moving a lump sum. If for example a department is \$300 under on a grant and wants to move the salary of an employee who worked on the project, but was not charged to it. If they specify a date range of six months, the salary in PeopleSoft will reflect \$50 per month on the account. This percent of effort would likely be difficult to defend to an auditor.

If a department receives a stamped Per back and notices that one of the pieces is not done, please contact the appropriate party. If necessary, prepare additional pers based on what is in PeopleSoft after the erroneous processing has occurred. DO NOT resubmit pers based on the previous submission or how you believe the person should be charged. Seek advice from the dean’s office if you have questions about what may appear as erroneous postings.

(v) Payments of Supplements

General Requirements for all Supplemental Pers

- Supplemental Compensation can be for a specific amount paid as a lump sum or a series of payments according to the date range listed in this section.
- Forms cannot be processed without effective dates and scheduled supplemental payments can never cross Fiscal Years.
- Comments should be filled out indicating why a supplemental payment is being requested
- Increases need to be approved by the dean’s office in advance to prevent delays in payment or payments from incorrect sources.
- All data should be typed; if a situation requires additional information to be handwritten, make sure the writing is legible.
- Regular supplements can be done in a “Blanket Per 3” if for 3 or more faculty.
 - Flaw of blanket pers is that unlike regular pers, a copy does not get put in the employee’s HR file. This makes audit trails more challenging.
 - Employees of different paygroups, such as gratis and regular faculty, cannot be combined on same blanket.

- Appropriate template needs to be utilized for payment of monthly supplements using a blanket Per.
- Template must show accurate prior rate of pay for previous period faculty supplements in the same format as the current period supplements (annualized or actual amount) with the percent change (if applicable). This information is essential for approvers to make judgments about the appropriateness of the payment.
- Regular monthly employees should not be paid supplement in off-cycle pay runs except in extraordinary circumstances for the following reasons:
 - The University incurs extra expense to run off-cycle payrolls.
 - Off-cycle payroll runs use physical checks rather than direct deposits.
- Off-cycle payments are permitted:
 - When an error has occurred due to no fault of the individual receiving the payments, such as forms which are misplaced in routing.
- Separate Per must be used for each PS Account type (501300 additional comp administrative vs. 501310 – Additional Comp – Patient care)
- For all Pers that are to change an EXISTING supplement – that is either the amount or the source – please print the **first copy (original)** of the Per 3 on the **hot pink** paper. The comments section should include the word “**SUPERSEDES**” as well. Both the color of the paper and the verbiage will let Payroll know that the Per is intending to effect a replacement of the existing supplement in PeopleSoft.
 - Do not confuse this type of per with a retro – it cannot be used to change where salary which has already been paid to an employee. This method can only be used to change where FUTURE payments that will be charged. A retro must be done to change where someone already has been paid.
 - Supplement cannot be changed retrospectively and prospectively on the same form
 - May submit a blanket that replaces previous distribution for a group of employees (prospective only)
 - ALL future sources and amounts for the employee must be listed
 - All previous distributions will be turned off during processing of this per
 - Do not list employees and distributions for employees that are not changing
- Pers should be routed promptly.

Support for Supplemental Compensation

Appropriate attachments should be attached including but not limited to checks, contracts, call schedules and other supporting documents for payment.

- **For all supplements, a copy of the most current account balance report issued by the dean’s office and located on the U drive must accompany the Per 3.**
 - Only those accounts from which supplements are being paid should be attached

- Exception for lump sum payments where other appropriate support is attached
- Supplements cannot be paid off of deficit accounts
 - Exception for cost-reimbursement accounts; however, they should not be more than 60 days in arrears.
- On call schedules and extra duty logs must have signed approval by someone other than the individual receiving the additional compensation.
- Supplements paid from Foundation Accounts need Board of Supervisors Approval in **advance** of being paid and must be routed with Approved Form signed by the President or CFO of the Foundation. Forms must be routed timely in order to make cut off for presentation at meetings. (see Foundation Form in Chapter 15)
- In the case of new employees whose pay is governed by a Letter of Offer, it should be attached
- Faculty Income Plan letters for all existing faculty must be signed and attached at the beginning of each Fiscal Year
- For all Pers that **pay** a supplement, please staple a **blank hot pink** page to the **top** of the Per 3 packet. This is to insure that these forms stand out in large stacks of pers to ensure that forms impacting employee pay are processed timely.

Filling out the Fields

- The “*Total Amount*” section should contain the actual gross amount that the employee will be paid for the entire time period for which the Per 3 is effective.
- Enter the actual amount in distribution section of the Per – Section 12.
 - E.g. Faculty getting paid \$5,000.00 per month for three months = an amount of \$15,000.00
- Dates
 - These dates should reflect when the pay effected by the per was earned
 - Sections 11 and 12 of the per should both have the same dates
 - Cannot cross FY’s – therefore the end date can never be later than June 30 of the FY for which the payment is being made
- All fields must be filled out under the account section of section 12 including *LSU Account* (when available) and *LSU Description*.

Types of Supplemental Pers

Regular – Per 3 to pay scheduled supplemental payments over time

- For one employee
- Only **annualized** amounts in “Present Annual” and “Proposed Annual” columns in section 12 of the Per 3.
- Number 11 of the Per 3 must contain the actual **TOTAL** amount that will be paid to the individual for the period in question.
- The amount in section 11 must always equal the figure in the bottom right of section 12.

Ex. 1 Paying faculty member \$120,000 annually for one fiscal year

- Payroll will use Four fields to key in the supplement and it is critical that they are accurate
 - EmplID
 - Project Grant (Account)
 - Amount
 - Date Range

Example of a blanket per to pay one-time supplements.

School of Medicine in New Orleans

Supplemental Compensation Worksheet
 October, 2007

Pay Group: NMF

NAME	EMPLID		449-77-6255	449-75-0043	Total
		Dept	1496500	1495500	
		Fund	113	114	
		Program	20001	01100	
		Class	40130	10205	
		Project	1496500093	449760005H	
Jones, Tom	0075580		5,000.00		5,000.00
Smith, Jaquelin	0075676		5,000.00		5,000.00
Q, Suzzie	0073957		5,000.00		5,000.00
Monthly Amount			15,000.00		15,000.00
Number of Months			1.00	1.00	1.00
Period of Payment			15,000.00		15,000.00

Example of a blanket per to pay supplements spanning a period of time.

Rev. 0505 LOUISIANA STATE UNIVERSITY HEALTH SCIENCES CENTER - NEW ORLEANS CAMPUS PERSONNEL STATUS CHANGE (PER 3 FORM) Salary

Soc. Sec. # see attached Empl.ID PCN PS. Pos.
 Name see attached Present Title
 School/Division Medicine Dept. Orthopaedics Dept. Code NO1494500
 Last First MI
 1. Termination effective cob.worked Hrs. annual leave for which pay is due Reason
 2. Retirement Regular Disability Effective Teacher's La. State Empl. Pay Grp. #N/A
 Hours of unused leave to be applied to retirement: Annual Sick Emp. Cl. #N/A
 Hours for which pay is due Annual Sick Pay Type Salary
 3. Leave of Absence effective thru With pay Without Pay Reg/Temp Reg
 Justification Ins. Cont. Discontinues Country #N/A
 4. Return from Leave of Absence effective Visa #N/A
 5. Transfer to New Dept. Effective
 LSU Work Location PS Location Code PS Dept. Code Phone # New PCN# New PS. Pos#
 6. Promotion and/or Change in Title to Effective
 Current Last Incumbent Justification
 7. Tenure Recommendation (For Faculty Ranks) yr(s). Beginning End Date
 Tenure Track Tenure Granted Probationary Non - Tenure
 X 8. Other Changes or Remarks supplemental compensation in accordance with faculty income agreements effective july 07.
 9. Continuation of Appointment: Last Appointment Effective thru
 This Appointment Effective thru
 10. Change in Source of Funds
 X 11. Additional Compensation: Total Amount \$94,095.84 Effective 07/01/07 thru 12/31/07
 Indicate Payment Dates and Amounts distributed as per attached worksheet
 Justification faculty income agreements
 12. SALARY AND DISTRIBUTION Effective 07/01/07 Funds End Date 12/31/07 AED
 Rate of Pay from \$ 0.00 to \$ 47,047.92 On the Basis of: From To
 Hourly X Monthly Per Period Hourly X Monthly Per Period Fiscal Year
 Percent of full time % If change: from % to % Period of Appt.

LSU Account #	LSU Description	Dept. Code #	Fund	Program	Class	Project/ Grant	PS Acct	% Dist	Present Annual	Proposed Annual
449-72-4251	MCLANO PRO Serv	1494500	113	20001	25200	149760009g	501310	2.13	0.00	12,000.00
445-72-0056	UMC IAT	1498268	114	00850	10205	449825001g	501310	22.49	0.00	127,000.02
449-72-0043	MCLANO RES SUP	1494500	114	00110	10205	449760005g	501310	7.44	0.00	42,000.00
449-72-6244	FGP FACULTY Comp	1494500	113	20001	35100	14976902DU	501310	35.07	0.00	198,000.00
449-72-6215	KR Res Sup	1494500	113	20001	35200	149450005a	501310	32.87	0.00	185,575.02
000-00-0000	NA	0	000	00000	00000	one	501310	0.00	0.00	0.00
000-00-0000	NA	0	000	00000	00000	two	501310	0.00	0.00	0.00
000-00-0000	NA	0	000	00000	00000	three	501310	0.00	0.00	0.00
000-00-0000	NA	0	000	00000	00000	four	501310	0.00	0.00	0.00
000-00-0000	NA	0	000	00000	00000	five	501310	0.00	0.00	0.00
Totals									0.00	564,575.04

Original