FACULTY SPECIFICS

Information is presented in the section for IRIS users who work with faculty data, hiring, Actions, and payments. While many of the same transactions and processes are used for all employees, there are key procedures to follow to ensure that faculty records and payments are correct in IRIS.

Tips and Reminders

- When a change is made to a faculty position, and the position is filled, the change must also be made to the employee’s record through PA 40.

- When creating a faculty position, the rank is used in the long title. This entry is case-sensitive (e.g., Associate Professor).

- Positions must be created for Summer Supplement assignments.

- Key *faculty* in the search field for Job key during position creation (ZPOS).

- When additional assignments (PA40) are created for overloads or summer supplements, the Amount field on Create Basic Pay (0008) must be blank. After the Action is completed, enter payment information via PA30, Recurring Payments (Infotype 0014) or Additional Payments (Infotype 0015).

- Refer to Concurrent Employment section for instructions on ending additional assignments.

- Cost distribution records for the full-time faculty are updated by FES processes.

- Faculty terminal vacation payouts are created through PA30, using Time Quota Compensation (0416). Be sure to select the correct quota type, based on the faculty member’s contract (10, 11, or 12 month).

- Faculty terminal vacation payouts cannot exceed 176 hours (22 days), regardless of the balance displayed.

- Terminal vacation payouts for post-doctoral scholars are created through PA30, using Employee Remuneration Info (2010).
Faculty Positions

Instructions for Faculty Position Creation (ZPOS)

ZPOS allows authorized users to create Faculty positions.

To create a new Faculty position:

1. Enter ZPOS in the Command field of the SAP Easy Access screen.

   ![SAP Easy Access Screen](image)

2. **Position info:**
   - Enter the word **test** in the Short text field.
   - Enter the **Rank** for Faculty positions.  View Title Series and Rank information.
   - **Position begin date:** Record date on which the position is valid.
   - **Position end date:** The system will default to 12/31/9999.
   - **Copy position** and **Number to create:** Leave blank for single Faculty position creation. If creating multiple positions, click on Copy position and enter number in Number to create field.
3. **Relationship Objects:**
   - Select the correct Organizational unit for the position to be linked to.
   - You may search for the *Job key* by using the title of job or the Job Classification Code. You may also enter *faculty* in the search field for *Job key*.
   - Be sure to enter an accurate combination of attributes.

4. **Cost Distribution:**
   - Enter **UK00** in the CtrA field, enter the correct Cost Center, and **100%** in the Pct field.

5. After completing the required fields in all three areas, press Enter and execute. [Submit]

Take note of the bottom section of the screen. This area will display the position number(s) created as a result of executing ZPOS.

**Errors.** When an invalid combination of employee group/subgroup and/or personnel area/subarea attributes is entered, an error message will appear. Correct the error, and execute again.
Changing Rank on a Faculty Position (PP01)

To change the rank on a faculty position:

1. Enter **PP01** in the Command field of the SAP Easy Access screen.

2. Choose **Position** in the Object Type field. Key the Position Number in the Object ID field and press Enter. Click on the button to the left of Object to highlight and click on the Copy icon.
3. Enter the effective date in the first Validity date field.

Enter the new rank in the Object name field and press Enter.

4. Click on YES when the dialog box appears.

5. The Maintain Object screen will appear with a message at the bottom that the record has been changed.
6. Click the box to the right of Object to highlight.

   Click the Display Infotype icon. Verify that information is correct.

   ![Display Object Screenshot]

7. To view historical data, click the next record icon.

8. If the position is vacant, no further entry is required. When the hiring process is completed, the correct rank will display.

   If the position is not vacant, carry out Position Update (PA40). The Reason for Action will be reclassification/re-evaluation.
Faculty Actions

Faculty Hire Action (PA40)

To carry out a Faculty Hire Action:

1. Enter **PA40** in the Command field on the SAP Easy Access screen.

2. When Personnel Actions appears, make sure the Person ID field is empty. Record the Start date.

3. Under Action Type, click the selection button to the left of Main Campus Create Assignment.

4. Execute.

5. Complete Employee Recognition Screen fields and continue.

6. In the Query box, choose **New Employee**.

7. On **Actions** (0000), enter **Faculty Hire** as the Reason for Action.

8. Key the position number and press Enter. Click the continue icon on the Default Value Pop-up Box, if it appears, and save.

9. Continue to enter and save through each Infotype.

10. Enter marital status if known on **Create Personal Data** (0002).

11. On **Organizational Assignment** (0001), verify that the Contract field value is **Faculty**.

12. On **Create Addresses** (0006), remember to enter the County field and check the Mail Code (org unit) field.

13. On **Basic Pay** (0008), enter correct Wage Type:
   - If receiving a new administrative stipend that is part of base pay, use **1110**; other salary is included in **1010**;
   - Enter **1210** if the new faculty hire is part-time (without benefits);
   - Use **1010** with an Amount of zero, when the hire is VA faculty receiving all salary from VA.

14. On **Basic Pay** (0008), enter the monthly salary in the Amount field and save.

Deferred Pay Reminders:
For a **nine-month appointment**, the amount is calculated by dividing the contracted salary by 9. For example, $90,000/9 = $10,000.
For a **ten-month appointment**, the amount is calculated by dividing the contracted salary by 10. For example, $90,000/10 = $9,000.
Note that the **Annual Salary** will appear overstated. The **True Annual Salary** will be calculated automatically.

15. For nine-month faculty hires, the Action Start date must be 08/01 of each fiscal year. If the true hire date is 08/15, however, adjust on **Change Date Specifications (0041)**.

16. The final Infotype is **Create Contract Elements (0016)**. Select the correct contract type and save. This completes the Action.
17. After completing the PA40 Action, use **ZHR_PAR** to create the PAR and obtain required signatures. Forward PAR and all other required documents to the Compensation Office.
Instructions for Faculty Summer Supplement (PA40)

Use PA40 to enter a faculty summer supplement Action. This Action is used when a 9- or 10-month faculty member is providing teaching, administration, or research in the summer. Payments will be entered on Recurring Payments/Deductions (0014) or Additional Payments (0015).

To carry out a Faculty Summer Supplement Action:
1. Enter **PA40** in the Command field on the SAP Easy Access screen.

2. When Personnel Actions appears, make sure the Person ID field is empty. Record the Start date (the first day of the month the supplement begins).

3. Under Action Type, click the box to the left of **Main Campus Create Assignment**.

4. Execute **Execute**.

5. The Employee Recognition box will appear.

6. Complete the following fields:
   - Last Name
   - First Name
   - Date of Birth
   - Gender
   - Social Security Number

   Click on the Continue **✔** icon.

7. When the Employees with Identical Data box appears, click once on the employee name and click the Continue **✔** icon.
8. The system will then prompt you for the type of Action you are trying to accomplish. Choose [New Personnel Assignment for Employee] and continue [✓].

Create Actions (0000) will then be called. Note that the Action Type is Additional Assignment.

9. Enter the Reason for Action (Main Campus Additional Assign).

Enter the Position number [56166231] and press Enter to allow the system to complete the information.

Note: The position should be called Summer Supplement or Winter Supplement, depending on the term during which the work will be performed.

10. Click the Continue [✓] icon on the Default Value Pop-up Box, if it appears.

11. Save this screen and proceed as with all other Actions.

Be sure to:

• Verify that Payroll area on 0001 is the same as that for the Main assignment.

• Leave the Amount field blank on Create Basic Pay (0008).

12. After the Additional Assignment Action is complete, go to PA30 Maintain Master Data and enter either Additional Payments (Infotype 0015) or Recurring Payments (Infotype 0014) for the faculty member’s pay.

13. After verifying and saving all Infotypes, use ZHR_PAR to create the PAR and obtain signatures. Complete any necessary departmental required forms. Send package to the Compensation Office.
Instructions for Faculty Overload (PA40)

Use PA40 to create an additional assignment for a Faculty Teaching Overload. Payments will be entered on Recurring Payments/Deductions (0014) or Additional Payments (0015).

To create a new assignment for a faculty teaching overload:

1. Enter PA40 in the Command field on the SAP Easy Access screen.
2. When Personnel Actions appears, make sure the Person ID field is empty. Record the Start date (the first day of the month the Teaching Overload begins).
3. Under Action Type, click the box to the left of Main Campus Create Assignment.
4. Execute.
5. The Employee Recognition box will appear.

6. Complete the following fields:
   - Last Name
   - First Name
   - Date of Birth
   - Gender
   - Social Security Number

   Click on the Continue icon.

   When the Employees with Identical Data box appears, click once on the employee name and click the Continue icon.

7. The system will then prompt you for the type of Action you are trying to accomplish. Choose New Personnel Assignment for Employee and continue.
8. **Create Actions (0000)** will then be called. Note that the Action Type is **Additional Assignment**. Enter the Reason for Action (**Main Campus Additional Assign**).

![Organizational assignment box with position number]

9. Enter the Position number and press Enter to allow the system to complete the information. (Note: The position should be called **Teaching Overload**.)

10. Click the Continue icon on the Default Value Pop-up Box.

11. Save and proceed as with all other Actions.

   Be sure to:
   - Verify that Payroll area on 0001 is the same as that for the Main assignment.
   - Leave the **Amount** field blank on Crate Basic Pay (0008).

12. After the Additional Assignment Action is complete, go to PA30 Maintain Master Data and enter either **Additional Payments (Infotype 0015)** or **Recurring Payments (Infotype 0014)** for the faculty member’s pay.

13. After verifying and saving all Infotypes, use **ZHR_PAR** to create the PAR and obtain signatures. Complete any necessary departmental required forms. Send package to the Compensation Office.
Instructions for Ending Additional Assignment (PA40)

To end an Additional Assignment or Overload:

1. Enter PA40 in the Command field on the SAP Easy Access screen.

2. On Personnel Actions, key the Person ID of the employee (or conduct search to find the employee’s record) and press Enter to populate the employee information.

3. Click on the Assignment pull-down list located to the right of the Pers. Assgn field.

4. Select the appropriate PERNR (Personnel Number) for the employee and press Enter. **This is the most important part of the process.** Double-check the selected PERNR before you start the Action and make sure it is the assignment in your area.

5. Enter the Start Date.
   - If the employee is non-exempt or exempt [but not being paid a salaried amount on Create Basic Pay (0008)], enter the day after the last day worked.
   - If the employee is exempt, enter the day after the last day of the last month in which the employee works, if the employee was paid a salaried amount on Create Basic Pay (0008).

6. Then select End of Additional Assignment and execute.

7. On Actions (0000), enter the Reason for Action: End of Additional Assignment and enter.

8. Enter through the system message and save.

9. Verify that position has defaulted to 99999999 on Organization Assignment (0001).

10. Use ZHR_PAR to create the PAR, obtain required signatures, attach any required documentation, and send to the Compensation Office.
Instructions for Reactivating Additional Assignment (PA40)

On occasion personnel administrators may need to reactivate an additional assignment that has ended. Reactivation is possible through PA40 action.

Guidelines for this Action:
- Use this Action when an employee has more than one Personnel number (PERNR) and you need to reactivate an assignment that has a “withdrawn” status.
- Do not use this Action if all assignments have ended. Instead, you must use the Rehire Action.
- If an employee has only one assignment, follow normal process for creating an additional assignment.

Example:
A faculty member with a nine-month appointment had an additional assignment to teach in the summer in 2006. This additional assignment was ended after the summer session (with End of Additional Assignment Action). The faculty member plans to teach in the summer of 2007. The personnel administrator can simply reactivate the prior summer assignment.

To carry out a Reactivate Additional Assignment Action:

1. Enter PA40 in the Command field on the SAP Easy Access screen.
2. When Personnel Actions appears, choose Reactivate Add Assignment from the Actions list.
3. Enter the Person ID or search for employee and then press Enter.
4. Examine the Pers Assign field carefully. Click on the list icon to find the withdrawn assignment. Double-click on the correct assignment.
5. After the assignment (PERNR) is selected, enter the Start date, highlight the Action and execute \( \text{execute} \).
6. Work through the following Infotypes as they appear, saving each after reviewing and entering information as needed.

Copy Action (0000)
  Create Organizational Assignment (0001)
  Create Planned Working Time (0007)
  Create Basic Pay (0008)
  Copy Date Specifications (0041)

7. Use ZHR_PAR to create the PAR, obtain required signatures, attach any required documentation, and send to the Compensation Office.
Instructions for Phased Retirement Action (PA40)

When a faculty member opts for Phased Retirement, business officers and personnel administrators must change the attributes of the position held by the employee and the status of the employee.

To carry out a Change in Status Action for Phased Retirement:

1. The faculty member’s position must be updated with the **Personnel Subarea for Phased Retiree (0014)** before any Action can occur. Faculty positions may be updated at the departmental or college level.

2. After the position has been updated to reflect the Phased Retiree Personnel Subarea, enter PA40 in the Command field on the SAP Easy Access screen.

3. Make sure the Person ID field is clear when PA40 appears.

4. Enter the Person ID or search for employee and then press Enter.

5. Enter the Start Date. Select Change in Status from the Actions list and execute.

![Personnel Actions](image-url)
6. In the Reason for Action field, select the **Phased Retirement** reason.

7. Remember to wipe out the position number, hit the Enter key and then re-enter the position number to bring in the new attributes of the position.

8. Save and continue, as with all other Actions.
9. When **Organizational Assignment (0001)** is called, check to see that the Personnel Subarea reflects the Phased Retiree value.

### Create Organizational Assignment (0001)

<table>
<thead>
<tr>
<th>Person ID</th>
<th>Pers Assign</th>
<th>Empl. %</th>
</tr>
</thead>
<tbody>
<tr>
<td>10544423</td>
<td>11021081 50128563 11021031</td>
<td>100.00</td>
</tr>
</tbody>
</table>

**Name**: Jane PhasedRetirement

**EE group**: Staff

**EE subgroup**: 03 Exempt Monthly

**Pers. area**: 1000 Main Campus

**Start**: 06/01/2007 to 12/31/9999

**CoCode**: UK00 University of Kentucky

**Pers area**: 1000 Main Campus

**Subarea**: 0614 Phased Retiree

**Cost Car**: 10120852460 HR Benefits

**Bus. Area**: 0161 UK web component units

**Fund**: 4999

10. When **Create Planned Working Time (0007)** is called, change the FTE (Generally, this is 50 %). If you leave it at 100%, you will get an error message and will be kicked out of the action.

### Create Planned Working Time (0007)

<table>
<thead>
<tr>
<th>Person ID</th>
<th>Pers Assign</th>
<th>Empl. %</th>
</tr>
</thead>
<tbody>
<tr>
<td>10544423</td>
<td>11021081 50128563 11021031</td>
<td>100.00</td>
</tr>
</tbody>
</table>

**Name**: Jane PhasedRetirement

**EE group**: Staff

**EE subgroup**: 03 Exempt Monthly

**Pers. area**: 1000 Main Campus

**Start**: 06/01/2007 to 12/31/9999

**Work schedule rule**

- **FT1C**: 8 h/w 40 h/w M-F

**Time Mgmt status**: 9 9 - Time evaluation of planned times

**Working week**: 01 Working Week Sunday - Saturday

**Part-time employee**

**Employment percent**: 50.00

**Daily working hours**: 4.00

**Weekly working hours**: 26.00

**Monthly working hrs**: 86.67

**Annual working hours**: 1048.00

**Weekly workdays**: 5.00

**Dynamic daily work schedule**

Min. Max.

- Min. Max.

- Min. Max.
11. Next update **Create Basic Pay (0008)**. Since the employee is paid a salary, you **must** change the salary to reflect the 50% pay. In the example below, the employee was earning $5,000 per month prior to the change to Phased Retirement. The pay rate has been updated to $2,500 per month to reflect the change.

![Salary Change Example](image)

12. After completing the PA40 Action, use **ZHR_PAR** to create the PAR and obtain required signatures. Forward PAR and all other required documents to the Compensation Office.
Faculty Payments and Payroll Information

Deferred Pay Information

Deferred Pay is the system solution used to meet the payroll needs for faculty members with 9- or 10-month appointments. Faculty employees with these contracts earn their salaries over the contract period (9 or 10 months), but receive pay over a 12-month period. New hires with 9- and 10-month contracts begin their assignments in August and receive pay over 11 months. Faculty salaries are charged to the appropriate accounts (based on Faculty Effort System) as the income is earned.

Key Dates

9-Month Contract: The faculty member earns salary from August 16 – May 15.

10-Month Contract: The faculty member earns salary from August 1 – May 31.

Deferred Pay Positions

Authorized users can establish new faculty positions with deferred pay using ZPOS. Deferred Pay faculty positions are defined by Employee subgroup code (19 for 9-Month Deferred; 20 for 10-Month deferred).

Existing positions can be checked with PP01 by highlighting the Employee Group/Subgroup Infotype and viewing the information.

Faculty Hire Action Reminders

Users carry out the Faculty Hire Action (PA40) for new faculty hires in deferred pay positions. On Create Basic Pay (0008), the monthly salary must be entered in the Amount field. For a 9-month appointment, the amount is calculated by dividing the contracted salary by 9. For a 10-month appointment, the amount is calculated by dividing the contracted salary by 10.

Basic Pay Examples:

9 Month Faculty Member with a contract salary of $90,000.
$90,000/9 = $10,000 monthly earned salary.

10 Month Faculty Member with a contract salary of $90,000.
$90,000/10 = $9,000 monthly earned salary.

See Deferred Pay Calculator for assistance with this process.
See Deferred Pay Calculator for Salary Changes to determine amount for 0008 for mid-year changes.
The **Annual Salary** will appear overstated. The **True Annual Salary** will be calculated automatically. True Annual Salary is used to calculate benefits, such as Optional Life Insurance.

### Deferral Buckets

Deferral Buckets are created for salary, employer paid taxes, and employer paid benefits. Payroll simulations may be run from **Create Basic Pay (0008)** to display the deferral amounts and amounts to be paid.

<table>
<thead>
<tr>
<th>Display remuneration form</th>
<th>Deferred Pay Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Last Name.</strong> Faculty_9</td>
<td><strong>Pay Period:</strong> 06/30/2008 - 08/31/2008</td>
</tr>
<tr>
<td><strong>Pay Frq:</strong> M1 Monthly</td>
<td><strong>Person ID:</strong> 18026233</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Earnings for Deferred Pay</th>
<th>Current</th>
<th>Deferral</th>
<th>Total</th>
<th>YTD Deferral</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deferred (1010)</td>
<td>24954</td>
<td>1,018.92</td>
<td>3,101.82</td>
<td>5,019.72</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employer Taxes for Deferred Pay</th>
<th>Current</th>
<th>Deferral</th>
<th>Total</th>
<th>YTD Deferral</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deferred (404)</td>
<td>24954</td>
<td>437.37</td>
<td>193.56</td>
<td>304.31</td>
</tr>
<tr>
<td>Deferred (406)</td>
<td>24954</td>
<td>116.46</td>
<td>45.29</td>
<td>71.17</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employer Benefits for Deferred Pay</th>
<th>Current</th>
<th>Deferral</th>
<th>Total</th>
<th>YTD Deferral</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deferred (Health)</td>
<td>24954</td>
<td>710.90</td>
<td>278.11</td>
<td>433.10</td>
</tr>
<tr>
<td>Deferred (Life Ind)</td>
<td>24954</td>
<td>6.20</td>
<td>2.41</td>
<td>3.75</td>
</tr>
<tr>
<td>Deferred (FSA Fee)</td>
<td>24954</td>
<td>2.75</td>
<td>1.07</td>
<td>1.66</td>
</tr>
<tr>
<td>Deferred (403b)</td>
<td>24954</td>
<td>810.10</td>
<td>310.10</td>
<td>500.00</td>
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</table>

<table>
<thead>
<tr>
<th>Employer Fringe for Deferred Pay</th>
<th>Current</th>
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<th>Total</th>
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<tbody>
<tr>
<td>Deferred (Fac Fringe)</td>
<td>24954</td>
<td>278.18</td>
<td>108.18</td>
<td>176.00</td>
</tr>
</tbody>
</table>
Deferral Buckets will normally hold negative balances in the fall, positive balances in the spring. All buckets should have a 0 balance at the end of June.

Deferred Bucket Example - Returning Faculty Employee with 9-month Contract

<table>
<thead>
<tr>
<th>Month</th>
<th>Paid</th>
<th>Earned</th>
<th>Deferred</th>
<th>YTD Deferred</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>$7,500</td>
<td>$ 0</td>
<td>-$7,500</td>
<td>-$7,500</td>
</tr>
<tr>
<td>Aug</td>
<td>$7,500</td>
<td>$ 5,000</td>
<td>-$2,500</td>
<td>-$10,000</td>
</tr>
<tr>
<td>Sept</td>
<td>$7,500</td>
<td>$10,000</td>
<td>$2,500</td>
<td>-$7,500</td>
</tr>
<tr>
<td>Oct</td>
<td>$7,500</td>
<td>$10,000</td>
<td>$2,500</td>
<td>-$5,000</td>
</tr>
<tr>
<td>Nov</td>
<td>$7,500</td>
<td>$10,000</td>
<td>$2,500</td>
<td>-$2,500</td>
</tr>
<tr>
<td>Dec</td>
<td>$7,500</td>
<td>$10,000</td>
<td>$2,500</td>
<td>$ 0</td>
</tr>
<tr>
<td>Jan</td>
<td>$7,500</td>
<td>$10,000</td>
<td>$2,500</td>
<td>$2,500</td>
</tr>
<tr>
<td>Feb</td>
<td>$7,500</td>
<td>$10,000</td>
<td>$2,500</td>
<td>$5,000</td>
</tr>
<tr>
<td>Mar</td>
<td>$7,500</td>
<td>$10,000</td>
<td>$2,500</td>
<td>$7,500</td>
</tr>
<tr>
<td>Apr</td>
<td>$7,500</td>
<td>$10,000</td>
<td>$2,500</td>
<td>$10,000</td>
</tr>
<tr>
<td>May</td>
<td>$7,500</td>
<td>$ 5,000</td>
<td>-$2,500</td>
<td>$ 7,500</td>
</tr>
<tr>
<td>June</td>
<td>$7,500</td>
<td>$ 0</td>
<td>-$7,500</td>
<td>$ 0</td>
</tr>
</tbody>
</table>

Deferred Bucket Example - New Faculty Employee with 9-month Contract

<table>
<thead>
<tr>
<th>Month</th>
<th>Paid</th>
<th>Earned</th>
<th>Deferred</th>
<th>YTD Deferred</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>$ 0</td>
<td>$ 0</td>
<td>$ 0</td>
<td>-$0</td>
</tr>
<tr>
<td>Aug</td>
<td>$8,182</td>
<td>$ 5,000</td>
<td>-$3,182</td>
<td>-$3,182</td>
</tr>
<tr>
<td>Sept</td>
<td>$8,182</td>
<td>$10,000</td>
<td>$1,818</td>
<td>-$1,364</td>
</tr>
<tr>
<td>Oct</td>
<td>$8,182</td>
<td>$10,000</td>
<td>$1,818</td>
<td>$454</td>
</tr>
<tr>
<td>Nov</td>
<td>$8,182</td>
<td>$10,000</td>
<td>$1,818</td>
<td>$2,272</td>
</tr>
<tr>
<td>Dec</td>
<td>$8,182</td>
<td>$10,000</td>
<td>$1,818</td>
<td>$4,090</td>
</tr>
<tr>
<td>Jan</td>
<td>$8,182</td>
<td>$10,000</td>
<td>$1,818</td>
<td>$5,908</td>
</tr>
<tr>
<td>Feb</td>
<td>$8,182</td>
<td>$10,000</td>
<td>$1,818</td>
<td>$7,726</td>
</tr>
<tr>
<td>Mar</td>
<td>$8,182</td>
<td>$10,000</td>
<td>$1,818</td>
<td>$9,544</td>
</tr>
<tr>
<td>Apr</td>
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<td>$1,818</td>
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<tr>
<td>May</td>
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</tr>
<tr>
<td>June</td>
<td>$8,180</td>
<td>$ 0</td>
<td>-$8,182</td>
<td>$ 0</td>
</tr>
</tbody>
</table>
Separations

If a 9- or 10-Month faculty appointee is not returning for the next academic year, the end-user would normally separate the employee on July 1. This results in normal payments through the end of the year. If it is necessary to separate the faculty member prior to July 1, however, the system will calculate the pay based on what is earned in the month of separation and the balance in the deferral bucket.

Example:
If a 10-Month faculty member separates on November 1, the last pay will be received on October 31. The system will calculate what was earned for October and then add the deferral balance from the end of September.
12,000 + (-6,000) = $6,000 paid.
Deferral balance is 0 after the October payroll runs.
Instructions for Faculty Terminal Vacation (PA30)

Use PA30 to process terminal vacation payouts for faculty retirement or separation. When a faculty member retires, the Retirement Office completes the Retirement Action on PA40. The employee’s department handles the quota payout.

Before creating quota payouts, users should review UK policy and procedure to determine eligibility status and the amount of payment for which the employee is eligible.

To process terminal vacation pay for a faculty member:

1. Enter PA30 in the Command field of the SAP Easy Access screen. (Some employees may complete this task with PA61.)

2. After entering the person ID, or conducting a search for the employee, press the Enter key to populate the screen with employee data.

3. Select **Time Quota Compensation (0416)**, which is found under the UK Time Data Tab, or enter the Infotype in the Direct selection box.

4. To create a record, click the Create icon. Choices for faculty will display.

5. Choose the appropriate payout type and press Enter.
6. The next screen will display the number of the vacation hours to be paid out.

7. Enter the number of hours to be paid in the **No. to compensate** field. Press **Enter** and save. Note that the payout cannot exceed 176 hours (22 days), regardless of the balance shown.

8. The record can be viewed for accuracy by clicking on the **icon on PA20.**

**Terminal Vacation for Faculty in Administrative Staff Positions**

Some employees with faculty status may be appointed to administrative staff positions. College deans, for example, are UK faculty with administrative appointments. When a terminal vacation payout is required for a member of the faculty in an administrative staff position, follow the general procedure outlined above for Time Quota Compensation (0416).

Choose this payout type:
The next screen will display vacation hours for the payout:

Note that the payout cannot exceed 176 hours (22 days), regardless of balance shown.
Instructions for Post-Doctoral Scholar Terminal Vacation (PA30)

To process terminal vacation pay for a post-doctoral scholar:

1. Enter **PA30** in the Command field of the SAP Easy Access screen.

2. After entering the person ID, or conducting a search for the employee, press the Enter key to populate the screen with employee data.

3. Carefully examine the **Pers Assign** field to ensure that the **correct assignment** is being changed.

4. Enter 2010 in the Infotype box in the **Direct Selection** section of the screen. Press Enter.

   ![Direct Selection Screen]

   **Employee Remuneration Info** will appear in the Infotype field.

5. Click the Create icon at the top of the screen.
6. The **Create Employee Remuneration Info** screen will appear. Enter the appropriate date in the **Date** field. Press Enter.

7. Use Wage type **3805** (Vacation Payout – Exempt). Enter the number of hours to be paid on the **Number/Unit** field.

8. Save . The Maintain HR Master Data screen will appear with a message that the data has been saved.

**Note:** Compensation does not need a screen print for this payment.