

Office of Faculty Administrative Services (OFAS)

Calendar of Changes – Summer 2017

Required documentation for compensation transactions related to academic business processes.

Academic event with compensation	Documents required through 6/7/2017 <ul style="list-style-type: none"> • Except new hires with a start date of 9/1/17 or later (see post 6/7/2017) 	Documents required post 6/7/2017 <ul style="list-style-type: none"> • For transactions with an effective date of 6/30/17 or earlier, send former documentation up to 6/30/17
Hire, Reappointment, or Promotion - <u>with</u> fully executed offer letter	<ul style="list-style-type: none"> • Charging Instructions Form with PTAE0 • Offer letter containing appointment description, dates of appointment, and compensation • FAS – refer to Chart of Required Documents for additional documents 	<ul style="list-style-type: none"> • Faculty Compensation Approval Form <ul style="list-style-type: none"> ○ Not required for FAS, Law and SOM • Offer letter containing appointment description, dates of appointment, and compensation • FAS – refer to Chart of Required Documents for additional documents
Hire, Reappointment, or Promotion - <u>without</u> fully executed offer letter	<ul style="list-style-type: none"> • Charging Instructions Form with PTAE0 • Offer letter containing appointment description, dates of appointment, and compensation • FAS – refer to Chart of Required Documents for additional documents 	<ul style="list-style-type: none"> • Faculty Compensation Approval Form • Offer letter containing appointment description, dates of appointment, and compensation • FAS – refer to Chart of Required Documents for additional documents
Secondary appointment or secondary assignment with compensation	<ul style="list-style-type: none"> • Charging Instructions Form with PTAE0 • Offer letter/memo containing appointment description, dates of appointment, and compensation • Refer to Chart of Required Documents for additional documents 	<ul style="list-style-type: none"> • Faculty Compensation Approval Form <ul style="list-style-type: none"> ○ Only if faculty member in other supervisory org • Offer letter/memo containing appointment description, dates of appointment, and compensation • Refer to Chart of Required Documents for additional documents
One-time payments - <u>with</u> Provostial Pre-approval Form	<ul style="list-style-type: none"> • Charging Instructions Form with PTAE0 • Pre-approval form 	<ul style="list-style-type: none"> • Pre-approval form • Supporting documentation <p>Note: If faculty member in different supervisory org, send copy of form and documentation to business office of home department.</p>
One-time payments - <u>without</u> Provostial Pre-approval Form	<ul style="list-style-type: none"> • Charging Instructions Form with PTAE0 • Supporting documentation 	<ul style="list-style-type: none"> • Faculty Compensation Approval Form • Supporting documentation
Other compensation changes, i.e. regular compensation, allowance plans, etc.	<ul style="list-style-type: none"> • Charging Instructions Form with PTAE0 • Supporting documentation 	<ul style="list-style-type: none"> • Faculty Compensation Approval Form • Supporting documentation