

## **Instructions for Personnel Action Reports (PAR) for payroll changes, new hires, etc.**

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A Personnel Action Report (PAR) MUST be submitted for any changes that affect an employee's employment or pay status (including leave of absence). Please make sure to always use the most recent form which is available on the employee website at <https://employees.cityofsanrafael.org/new-hire-orientation-documents/>.

Most fields are self-explanatory. For new hires, be sure to attach all the required forms as outlined in the New Hire Paperwork Checklist which is found in the *New Hire Orientation Documents list* under HR department (see link above).

Keep in mind that the accuracy of the information listed on the PARs is extremely important. **Incorrect information may result in processing delays and/or payroll errors.**

***NOTE:*** PARs should be received in HR no later than the date noted on the Payroll Calendar (e.g., PARs for 8/1-8/15 should be in HR by 8/13; PARs for 8/16-8/31 should be in HR by 8/24). PARs received after the cutoff date will be processed the following pay period.

Once they are entered in Eden, HR will e-mail you a copy of the final signed PARs for your department. If you believe a PAR you submitted is missing, please contact HR immediately so it can be resubmitted and processed asap.

If you have any questions or need assistance after reviewing these instructions, please contact HR at 485-3474.

**Always use the newest PAR form!** (available on the employee website: *New Hire Orientation Documents list* under HR department).

***Please contact HR if you need a list of employee details (EE #, grade code, step, etc.) for your department.***

### **I. GENERAL INFORMATION** (*partial notes*)

- \* **Employee #** - Always include for existing employees.
  - o **For new hires, HR will enter this information once the PAR has been processed.**  
Keep in mind that, because our payroll is processed 2 weeks behind, there is some lag time for when a new employee is activated in the HR/Payroll web. New employees may have to manually keep track of their hours worked until their online timesheet is available, usually by the last day of the pay period.
- \* **Cost Code** – Enter the Account Code(s) and percentage for each (if there is more than one). Please be sure the account code is correct. **Incorrect codes will result in a delay in processing and/or the position being charged to the wrong account.** *If unknown, information can be found in corresponding dept budget document.*
  - \* Regular positions should end in -8111
  - \* Temp positions end in -8112
  - \* Fixed-Term positions end in -8159.

**Be sure to include the program name** (i.e., Hamilton, Terra Linda Pool, Circulation) **or Project # if applicable.**

## II. EMPLOYMENT STATUS

- **Status** - Make sure to select the correct status and include Full-time equivalent (FTE %) for part-time employees. *If unknown, check with hiring manager.*
- **Previously Employed** – If yes, select the department and include prior employment dates, *if known.*

## III. REPORTED ACTION CHANGE

- **Effective Date** – This is the actual date of the action (not the payroll date). For example, if a person passed probation on 7/23 enter that date, not 7/16.
- **Action** – Select the appropriate action/change from the list. Note that changes in position or FTE (Reclass/Promo/Transfer) should be made at the beginning of the pay period (e.g., 7/1 or 7/16).

**An employee cannot be in 2 positions or have 2 pay rates in the same pay period. This is especially important when someone is moving from a PARS (less than 75%) position to an MCERA pension eligible position.**

- **Details of Action/Change** – Be clear and accurate about the details. Include any information that HR/Payroll needs to make changes correctly. Here are some common examples of what to include in the details:
  - *Carol is retiring effective 8/1/18; her last day of work will be 7/31/18. The effective date should be the last day worked (7/31).* This is important because we would need to process this in the 7/16-7/31 pay period so she will be classified as a retiree as of 8/1.
  - *Employee is eligible for Out of Class Pay from 8/16-8/22 (5 days). Be sure to include dates/# of days so payroll can calculate the pay correctly.* In this example, the date range is 7 days over a weekend, so the OC pay is only for 5 days.
  - *Employee is on FMLA and has exhausted all leave accruals. Please dock hours for 7/14-7/15 (15 hrs) and place on Leave w/out Pay effective 7/16. The number of hours should be the actual number of hours an employee was otherwise scheduled to work on the dates listed.* We don't always know if someone is on an alternate work schedule or what the schedule is for a part-time employee. LWOP status in Eden should begin at the start of a pay period (1<sup>st</sup> or 16<sup>th</sup>).
  - *Employee is eligible for a step increase effective 7/23 per attached Performance Evaluation. The date should coincide with the employee's anniversary / eligibility date.*

## IV. SALARY

- **Effective Date** – This is the actual date of the action (not the payroll date). For example, if a person passed probation on 7/23 enter that date, not 7/16.
- **From/Current** – This is the employee's CURRENT grade/step. You can also get this information from the Salary Schedules posted on our website at <https://www.cityofsanrafael.org/salary-schedules/>. **Make sure to use the appropriate year's schedule.** If you are still unsure of this information, please contact HR.
- Make sure to include any additional/specialty pays (education incentive, bilingual pay, shift differential, etc.)

- For temp/seasonal employees make sure to use the grade code & step for their MAIN position, not their Alternate Rate positions. **Details for Alternate Rate changes should be in the section above.**
- You do not need to enter this information for new hires (see below for To/New)
- **To/New** – This is the NEW grade/step/rate for promotions, step increases, change in specialty pay, etc. For new hires, enter their new position grade, step, etc.

## V. SIGNATURE

- Signatures are not required for Address changes.
- Department Director (or authorized representative) signature is required for ALL other PARs.
- City Manager approval is required in certain situations, such as:
  - Accelerated (“double”) step increases (moving from A to C versus just one step)
  - New hire above step C

If you need CM approval, please attach written documentation to support the action.

### **Important:**

- **Is the information correct?** Effective date, Acct code/program, employee #, grade code/step?
- **Be sure to submit PARs as soon as possible before the end of the pay period so that HR has adequate time to process/review entries.** The payroll calendar is available on the employee website under Finance department at <https://employees.cityofsanrafael.org/documents/2018-payroll-calendar/>.
- **Always use the newest PAR form!** (available on the employee website under HR department).