

## 8.1 DATA COLLECTION DOCUMENTS

### For Entering Data Into The PPS Via The Bundles

Action(s)	Bundle	Entered By	Data Collection Document(s)
Staff new hire	SHIR	Staff Human Resources (SHR) Employment	Staff Employee Request (ER) Form  Staff New Hire/Rehire DCD W4, BELI, I-9, State Oath, Patent Agreement, AA Transmittal, Non-citizen forms
Incoming intercampus transfer - staff	SHIR	Payroll Office	Incoming I/C transfer DCD, ER Form, separation documentation from other campus
Staff rehire	SREH	SHR Employment	Staff ER Form Staff New Hire/Rehire DCD W4, BELI, I-9, State Oath, Patent Agreement, AA Transmittal, Non-citizen forms
Staff permanent action - promotion,  demotion, transfer, reclassification, stipend, equity increase	SCLS	SHR Employment - promotion, demotion, or transfer via recruitment  Service Team - reclass, and transfer or demotion without recruitment	Staff ER form DCD for Staff Personnel Actions via Recruitment  BELI, if benefits are changing Employee Action Request (EAR) Form

Action(s)	Bundle	Entered By	Data Collection Document(s)
Staff renewal of appointment	SRNW	SHR Service Team	Renewal of Appointment DCD and/or other internal document BELI form, if benefits are changing
Staff merit	SMRT	SHR Service Team	Merits within cycle - process via merit mark-up listing Merits outside cycle (e.g., retro merit for reclassified employee) - Report of Salary Review or Merit Recommendation form
Staff leave without pay, change in leave return date	SLOA	SHR Service Team	Leave request letter from employee with supervisor's approval
Temporary Outgoing Intercampus Transfer - Staff	SLOA	Payroll Office	Temporary Outgoing I/C transfer DCD
Staff temporary action - promotion, demotion, transfer, reclassification, stipend, equity increase	STEM	SHR Employment - promotion, demotion, or transfer via recruitment  SHR Service Team - reclass, stipend, equity increase, and transfer or demotion without recruitment	Staff ER form  CD for Staff Personnel Actions via Recruitment BELI, if benefits are changing  Employee Action Request (EAR) Form with suggested revisions BELI, if benefits are changing

Action(s)	Bundle	Entered By	Data Collection Document(s)
Academic non-student new hire	AHIR	Academic Home Departments	Non-Student Academic Initial Hire/Rehire DCD W-4 or W-4NR, BELI, I-9, Oath/Patent Agreement, Demographic Data Transmittal, Direct Deposit Form Curriculum Vitae and/or Biography Form Appointment Letter <b>If incoming intercampus transfer:</b> Incoming Interlocation Memo Separation IDOC's from other campus  <b>If non-resident alien:</b> Non-Resident Alien Memo to Payroll W8-BEN Tax Treaty Statement and Form 8233, if applicable
Academic non-student rehire	AREH	Academic Home Departments	Non-Student Academic Initial Hire/Rehire DCD W-4 or W-4NR, BELI, I-9, Oath/Patent Agreement, Demographic Data Transmittal, Direct Deposit Form Curriculum Vitae and/or Biography Form Appointment Letter <b>If non-resident alien:</b> Non-Resident Alien Memo to Payroll W8-BEN Tax Treaty Statement and Form 8233, if applicable

Action(s)	Bundle	Entered By	Data Collection Document(s)
Academic student new hire	AUHI	Academic Home Departments	Student Academic Initial Hire/Rehire DCD W-4 or W-4NR, BELI, I-9, Oath/Patent Agreement, Demographic Data Transmittal, Direct Deposit Form <b>If incoming intercampus transfer:</b> Incoming Interlocation Memo Separation IDOC's from other campus <b>If non-resident alien:</b> Non-Resident Alien Memo to Payroll W8-BEN Tax Treaty Statement and Form 8233, if applicable
Academic student rehire	AURH	Academic Home Departments	Student Academic Initial Hire/Rehire DCD W-4 or W-4NR, BELI, I-9, Oath/Patent Agreement, Demographic Data Transmittal, Direct Deposit Form <b>If non-resident alien:</b> Non-Resident Alien Memo to Payroll W8-BEN Tax Treaty Statement and Form 8233, if applicable
Academic change - promotion, employment in different academic series	APRO	Academic Home Departments	Appointment or Promotion Letter

Action(s)	Bundle	Entered By	Data Collection Document(s)
Academic renewal of appointment	ARNW	Academic Home Departments	Reappointment Letter BELI, if benefits are changing
Academic merit increase	AMRT	Academic Home Departments	Merit Approval Letter
Academic leave of absence, including sabbatical	ALOA	Academic Home Departments	Sabbatical Leave Approval Letter or Approved Leave Request Form
Student new hire	UHIR	Career Center **	Student Employee Request Form Student Initial Hire/Rehire DCD W4, I-9, State Oath, Patent Agreement, AA Transmittal, Non-citizen forms
Student rehire	UREH	Career Center **	Student Employee Request Form Student Initial Hire/Rehire DCD W4, I-9, State Oath, Patent Agreement, AA Transmittal, Non-citizen forms

Action(s)	Bundle	Entered By	Data Collection Document(s)
Staff limited to career, career to limited, change from student to staff position	LIMI	SHR Employment - if via recruitment  SHR Service Team - if not via recruitment	Staff ER form  DCD for Staff Personnel Actions via Recruitment BELI, if benefits are changing  Limited to Career DCD
Additional employment - staff, academic, and student	ADDL	SHR Employment - if staff position, via recruitment  Service Team- if student position continuing in PPS  Career Center- if student position, via recruitment (i.e., non-W/S)  Academic Home Departments- if academic position	Staff ER form DCD for Staff Personnel Actions via Recruitment BELI form, if benefits are changing HAF for Student ER System  ER Form  Appointment Letter for non-student academics  Internal Documents (as appropriate) for student academics

Action(s)	Bundle	Entered By	Data Collection Document(s)
Separation - staff, academic, and student	SEPR	SHR Service Team  Academic Home Departments- if academic position	Separation DCD  UI Termination Report  Separation Packet (COBRA, UCRS distribution forms, etc.)
Outgoing I/C transfer – staff, academic, and student	SEPR	Payroll Office  Academic Home Departments- if academic position	Separation DCD  Outgoing Interlocation Memo to Payroll
Change in % of time - staff	PCNT	SHR Service Team	Involuntary - Layoff Worksheet, Layoff Notice  Voluntary - letter from employee with supervisor's approval  Change in Percent Time DCD  BELI form, if benefits are changing
Change in % of time - academic	PCNT	Academic Home Departments	Voluntary Increase or Decrease in Percent Time Approval Letter or Involuntary Reduction in Time Notification Letter  BELI form, if benefits are changing