

[Please click here for BU/BUMG Form Documentation/Comments for New Hires & Changes to Comp Plans](#)

| Scenario/Action | When Used | Forms in Order of Submission | Required Backup Documentation/Form Attachments |
|---|---|--|---|
| <p>HIRE New Staff Employee & HIRE New Faculty Employee</p> | <p>Hiring a NEW employee at Boston University</p> <ul style="list-style-type: none"> • If someone is brand new to the BU community that does not have a presence in SAP as currently active (this includes as an active casual or volunteer) • For someone who has worked at BU previously that had a termination date prior to 1/1/2011 • If the employee has a termination record in SAP (upon initiation of the new hire form, it will automatically change into a rehire form) <p><i>Note: If the employee is active in SAP (even as a volunteer or casual employee), then this would not be a new hire form. See Position Change or Transfer on Page 3</i></p> | <ol style="list-style-type: none"> 1. Create Position (OM Form) OR Maintain Position (OM Form) 2. Hiring Forms*, then depending on type of employee you are hiring initiate either the: <ul style="list-style-type: none"> - Hiring - Staff* (PA Form) - Hiring - Faculty* (PA Form) | <p>For all populations:</p> <ul style="list-style-type: none"> ○ Offer Letter ○ CV ○ IP Patent information (If applicable) ○ Signed Conflict of Interest letter <p>For Faculty: above plus:</p> <ul style="list-style-type: none"> ○ Amendment Letter (if applicable, for changes on start date, percent time or salary) ○ Appointment Letter (if approved) <p>For BU/BUMG Form Selection/Documentation click here</p> <p><i>Note: For temporary/casual workers (assignment duration < 9 months) and non-compensated employees, no attachment is needed but a descriptive comment in the Comments section is required.</i></p> |
| <p>REHIRE Staff Employee & REHIRE Faculty Employee</p> | <p>Rehiring an ex-employee who was previously terminated or retired from BU after 1/1/2011.</p> <p>Note: the HIRE Form will automatically change into a Rehire form if the person being rehired was already in SAP at any point. If not, then the Hire form will not change and you should contact HR before initiating to confirm their status</p> | <ol style="list-style-type: none"> 1. Create Position (OM Form) OR Maintain Position (OM Form) 2. Hiring Forms*, then depending on type of employee you are hiring initiate either the: <ul style="list-style-type: none"> - Hiring - Staff* (PA Form) - Hiring - Faculty* (PA Form) | <p>For all populations:</p> <ul style="list-style-type: none"> ○ Offer Letter ○ CV ○ IP Patent Information (If applicable) ○ Signed Conflict of Interest letter <p>For Faculty: above plus:</p> <ul style="list-style-type: none"> ○ Amendment Letter (if applicable) ○ Appointment Letter (if approved) <p>For BU/BUMG Form Selection/Documentation click here</p> <p><i>Note: For temporary/casual workers (assignment duration < 9 months) and non-compensated employees, no attachment is needed but a descriptive comment in the Comments section is required.</i></p> |

***NOTE:** When processing OM forms to update position information, you must wait until the form completes and the changes are visible in the PA forms **before** submitting the PA forms. The sync between OM data and PA forms runs every 2 hours. **If you do not wait until the changes are reflected in the PA forms, then the updates will NOT be reflected on the employee's record.**

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| <p>HIRE Faculty Employee into Concurrent Employment [CE]</p> | <p>A faculty employee has more than one Appointment either Academic & Administrative (i.e.: Professor & Chair); or Academic & Academic (i.e.: Professor in 2 different schools, colleges, units..etc...) [Note: the HIRE Form will automatically change into an Additional Assignment Hire form if the person has already been hired into their MAIN Assignment in SAP. If the form does not change, then you should <u>not</u> proceed.]</p> | <p>1. Create Position (OM Form) OR Maintain Position (OM Form) 2. Hiring Form - Faculty</p> | <p>For Faculty: <input type="radio"/> Offer Letter <input type="radio"/> Or Appointment Letter For BUMG, please click here</p> |
| <p>TERMINATE EMPLOYEE</p> | <p>An employee is leaving the university and is not: - Eligible for retirement (if so, follow Retirement steps) - Moving to Volunteer (if so, follow EPU with Reason of 'Move to Non-Comp Terminated' steps) Note: Termination should ONLY be used if employee is leaving the university. If employee is reducing percent time, please contact your HR Business Partner.</p> | <p>No OM Form Required (prior to PA form) 1. Termination (PA Form) 2. Maintain Position (OM Form) If the "regular/non-temporary" position has an immediate holder to mark the position open for hire OR to Post the position on the HR website 3. Delimit Position (OM Form) If position is no longer needed</p> | <p>For all populations: <input type="radio"/> Resignation Letter For Faculty: above: <input type="radio"/> OR email from the faculty</p> |
| <p>RETIRE EMPLOYEE</p> | <p>An employee is leaving the university and is retirement eligible (10 years of service after age 45). If not eligible, then follow the Termination steps. And as long as the employee is not: - Moving to Volunteer (if so, follow EPU with Reason of 'Move to Non-Comp Retired' steps) Note: Retirement should ONLY be used if employee is leaving the university. If employee is reducing percent time, please contact your HR Business Partner.</p> | <p>No OM Form Required (prior to PA form) 1. Retirement (PA Form) 2. Maintain Position (OM Form) If position will have an immediate holder to open the position for hire OR to Post the position on the HR website 3. Delimit Position (OM Form) If position is no longer needed</p> | <p>For all populations: <input type="radio"/> Resignation Letter For Faculty: above: <input type="radio"/> OR email from the faculty</p> |
| <p>ADDITIONAL PAYMENT</p> | <p>For a one time additional payment (overbase)</p> | <p>No OM Form Required (prior to PA form) 1. Additional Payment (PA Form)</p> | <p>For all populations:</p> |

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Form Selection & Matrix

Version 6.1 - 4/12/2021

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| | | | <ul style="list-style-type: none"> ○ Depending on amount and reason, check with department/School/College/Dean/Provost's Office for authorization email/letter |
| RECURRING PAYMENTS [for Faculty, CE Assignments ONLY] | To indicate amount paid for CE Assignment when additional pay is required for the appointment (especially for Administrative Assignments – i.e.: Chair....etc....) | <ol style="list-style-type: none"> 1. Maintain Position (OM Form) – Note additional pay for assignment in the Stipend field. (If Applicable) 2. Recurring Payment (PA Form) | For all populations: <ul style="list-style-type: none"> ○ Department/Dean/Provost Authorization |
| RECURRING PAYMENTS [for all other reasons] | For the same payment to be paid multiple times over an indicated period which is not to be included in their regular base salary pay. | No OM Form Required (prior to PA form) <ol style="list-style-type: none"> 1. Recurring Payment (PA Form) | For all populations: <ul style="list-style-type: none"> ○ Depending on amount and reason, check with department/School/College/Dean/Provost's Office for authorization email/letter |
| POSITION CHANGE (UNDER SAME MANAGER) | Currently: When employee is changing positions, but remaining with same manager | <ol style="list-style-type: none"> 1. Create Position (OM Form) OR Maintain Position (OM Form) 2. Position Change (PA Form) | For all populations: <ul style="list-style-type: none"> ○ Offer Letter (If applicable) |
| TRANSFER | Currently: When employee is transferring from: <ul style="list-style-type: none"> - one manager/department to another (in same school/college) - to a different school/college - across campuses | <ol style="list-style-type: none"> 1. Create Position (OM Form) by the receiving manager OR Maintain Position by the receiving manager 2. Transfer (PA Form) – initiated by PYC/MGR of where the employee is currently located 3. Transfer (PA Form) – picked up & completed by PYC/MGR of where the employee is moving to | For all populations: <ul style="list-style-type: none"> ○ Offer Letter |
| Employee percent time change (PT to PT Only) | When an employee is: <ul style="list-style-type: none"> - Part-time (under 100%) and is increasing/decreasing their %time remaining under 100% (i.e.: 70% to 80%.....etc.....) - having no other changes to their PA/PSA/EG/ESG | <ol style="list-style-type: none"> 1. Maintain Position (OM Form) 2. Employee Position Update (PA Form) | For all populations: <ul style="list-style-type: none"> ○ Department Authorization For BUMG click here |
| Employee percent time change (PT to FT or FT to PT) | When an employee is: <ul style="list-style-type: none"> - Less than 100% to 100% or from 100% to less than 100% | <ol style="list-style-type: none"> 1. Maintain Position (OM Form) 2. Employee Position Update (PA Form) | For all populations: <ul style="list-style-type: none"> ○ Dept. Authorization/Offer Letter (If applicable) ○ Salary Change email confirmation. |

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| | - having no other changes to their PA/PSA/EG/ESG | | For BUMG, note # of estimated hours in the Comments field. Please click here for instructions |
| Employee Personnel Area (PA) Change | <p>When an employee has a change to their Personnel Area (i.e.: from CRC to BUMC)</p> <p>PA Groups are Currently:</p> <ul style="list-style-type: none"> - Charles River Campus - BU Medical Campus - NEIDL - Boston Medical Ctr (BUMG Only) - Domestic Off-Campus - Overseas (Please contact HRBP) | <ol style="list-style-type: none"> 1. Maintain Position (OM Form) 2. Employee Position Update (PA Form) | <p>For all populations:</p> <ul style="list-style-type: none"> ○ Offer Letter (if applicable) <p>For Faculty: above plus:</p> <ul style="list-style-type: none"> ○ Appointment Letter <p>For BUMG, please click here</p> |
| Employee Personnel Subarea (PSA) Change | <p>When an employee has a change to their Personnel Subarea (i.e.: from Staff to Faculty)</p> <p>PSA Groups are Currently:</p> <ul style="list-style-type: none"> - NREP Faculty - NREP Staff - NREP Student - L494 SecOfficer - L615 Svc Maint (32BJ) - PSSA - BUPPA - BU PSA - L509 Adj Fac PT - L509 Sal Fac | <ol style="list-style-type: none"> 1. Maintain Position (OM Form) 2. Employee Position Update (PA Form) | <p>For all populations:</p> <ul style="list-style-type: none"> ○ Offer Letter (if applicable: i.e.: Staff to Faculty) <p>For Faculty: above plus:</p> <ul style="list-style-type: none"> ○ Appointment Letter <p>For BUMG, please click here</p> |
| Employee Group Change | <p>When an employee has only a change to their Employee Group (i.e.: from Full-time to Part-time)</p> <p>EG Groups are Currently:</p> <p>For NREP Faculty:</p> <ul style="list-style-type: none"> - Faculty Full-time - Faculty Part-time - Faculty Non-Comp <p>For NREP Staff:</p> <ul style="list-style-type: none"> - Staff Exempt FT | <ol style="list-style-type: none"> 1. Maintain Position (OM Form) 2. Employee Position Update (PA Form) | <p>For all populations:</p> <ul style="list-style-type: none"> ○ Email acknowledgement of changes from employee of any: <ul style="list-style-type: none"> - % time changes - Salary changes - Effective date ○ Offer Letter (if applicable) <p>For Faculty: above plus:</p> <ul style="list-style-type: none"> ○ Appointment Letter <p>For BUMG, please click here</p> |

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| | <ul style="list-style-type: none"> - Staff Exempt PT - Staff NonExempt FT - Staff NonExempt PT - Staff NonComp | | |
| Employee Subgroup Change (NOTE: Employee subgroup changes are not meant for moves from regular to temporary) | <p>When an employee has a change to their Employee SubGroup</p> <p>ESGs are tied to the EG selection and will only display what is available for that EG.</p> <p>Examples of ESG Changes include but not limited to:</p> <ul style="list-style-type: none"> - from Faculty to FY-Accrual (during open enroll May 1 thru June 15) - Temporary to Volunteer - Volunteer to Faculty - Admin<SG to Admin>SG - Admin-Rsrch>SG to Admin-Rsrch<SG - AcadRsrch-EE to FY-BUMG | <ol style="list-style-type: none"> 1. Maintain Position (OM Form) 2. Employee Position Update (PA Form) | <p>For all populations:</p> <ul style="list-style-type: none"> o Email acknowledgement of changes from employee of any: <ul style="list-style-type: none"> - % time changes - Salary changes - Effective date o Offer Letter (if applicable) <p>For Faculty: above plus:</p> <ul style="list-style-type: none"> o Appointment Letter <p>For BUMG, please click here</p> |
| Employee Work Schedule Change (NOTE: To turn an employee's pay on and off. See LOA scenario for processing leave requests) | <p>When an employee's work schedule is the ONLY characteristic that needs to be changed/updated</p> | <p>No OM Form Required (prior to PA form)</p> <ol style="list-style-type: none"> 1. Employee Position Update (PA Form) | <p>For all populations:</p> <ul style="list-style-type: none"> o For Faculty: Appointment letter/Checklist |
| Title Change with/without Salary Change | <p>When a faculty member's rank and/or salary need to be changed/updated</p> | <ol style="list-style-type: none"> 1. Maintain Position (OM Form) 2. Employee Position Update (PA Form) | <p>For all populations:</p> <ul style="list-style-type: none"> o Offer letter <p>For Faculty:</p> <ul style="list-style-type: none"> o Offer/Appointment Letter |
| Mail Code Change | <p>When mail code changes for position and person</p> | <ol style="list-style-type: none"> 1. Maintain Position (OM Form) 2. Employee Position Update (PA Form) | |
| Education Maintenance | <p>When the employee's education, memberships or CIPCodes needs to be updated</p> | <p>No OM Form Required (prior to PA form)</p> <ol style="list-style-type: none"> 1. Faculty Education Update (PA form) | |
| Non-Continuance (For Faculty ONLY) | <p>When a faculty employee appointment or funding is no longer being supported</p> | <ol style="list-style-type: none"> 1. Maintain Position (OM Form) – If applicable, depending on rank. See Faculty Handbook | <p>For Faculty:</p> <ul style="list-style-type: none"> o Notice of non-continuance letter/non-reappointment letter |

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| | | 2. Employee Position Update (PA Form)/Salary Change form | |
| Leave of Absence (LOA) (NOTE: IF FMLA related email hr@bu.edu) | When employee needs a Leave of Absence which is a non-FMLA type of absence (e.g. Sabbatical; paid, half paid or unpaid leave) For sick absence greater than 3 business days, contact hr@bu.edu | No OM Form Required (prior to PA form) LOA (PA form) | For all populations: ○ Department Authorization email/letter For Faculty: ○ Sabbatical approval |
| Return From Absence | Once the leave is approved, the Return from Absence form must be submitted | No OM Form Required (prior to PA form) Return from Absence (PA form) | |
| Salary Change | Salary change is ONLY for updating an employee's monthly/hourly rate <i>(If any other changes such as employee's essential duties, budget, % time or the Enterprise Structure, see EPU section).</i> | 1. Maintain Position (OM Form) 2. Salary Change (PA Form) | For all populations: ○ Department Authorization email/letter For BUMG population, please click here |
| Salary Change for Additional Duties | When a non-exempt employee performs additional work temporarily, the Salary Change form can be used with Action Reason " Commence Additional Duties " | No OM Form Required (prior to PA form) Salary Change (PA Form) | |
| Salary Cost Distribution Change | When the existing Salary Cost Distribution is to be changed or ended for an employee NOTE: This does not to start or stop pay to the employee. Refer to Work schedule rule to start/stop pay. | No OM Form Required (prior to PA form) Salary Cost Distribution (PA form) | For all populations: ○ If Grant related, must follow PAFO guideline in Salary Cost Distribution form |
| Secondary Payment | When a non-exempt employee works for a different department with a different master cost center and at an hourly rate that is different from his/her existing hourly rate | No OM Form Required (prior to PA form) Secondary Work Payment (PA form) | For Staff Only: ○ Department Authorization email/letter |

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BUMG FORM Selection/ Backup Documentation/Comments for New Hires & Changes to Compensation Plans

| Transaction | | Documentation/Comments |
|---|--|---|
| New Hire | <ul style="list-style-type: none"> OM form (set up position): <u>Note in Comments</u>: "Setting up for New Hire" | <ul style="list-style-type: none"> Offer Letter Offer Letter Amendment if applicable (for changes on: start date, percent time or salary) Faculty appointment letter, if approved Note in Comments: "<i># of estimated hours per week</i>" (Needed to determine setup as FT or PT) |
| | <ul style="list-style-type: none"> PA form (hire employee) | <ul style="list-style-type: none"> Offer Letter Offer Letter Amendment if applicable (for changes on: start date, percent time or salary) Salary letter Faculty appointment letter, if approved Note in Comments: "<i># of estimated hours per week</i>" (Needed to determine setup as FT or PT) |
| Maintain & EPU (if change to Salary & %time) or & Salary Change (if only change to Salary) | <ul style="list-style-type: none"> Increase or decrease to salary -per comp plan | <ul style="list-style-type: none"> <u>Note in Comments</u>: "<i>Change per BUMG compensation plan</i>" |
| | <ul style="list-style-type: none"> Increase to salary - outside comp plan | <ul style="list-style-type: none"> <u>Note in Comments</u>: "<i>BUMG Change outside comp plan</i>" |
| | <ul style="list-style-type: none"> Decrease to salary - outside comp plan (with decrease to % time) | <ul style="list-style-type: none"> <u>Note in Comments</u>: "Decreasing Salary & %time, please see attached." Letter of notification or email acknowledgement by faculty |
| | <ul style="list-style-type: none"> Decrease to salary - outside comp plan (remaining at 100% time - must be 40 or more hours per week) | <ul style="list-style-type: none"> <u>Note in Comments</u>: "<i># of estimated hours per week</i>" (needed to determine setup as FT or PT) |

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