

**Preparing Personal Data Salary (PD) Forms
For Faculty, Research Scientists, Senior Research Associates, Research Associates, Research
Scholars, Post Doc Fellows and Post Doc Scholars**

Case Western Reserve University
School of Medicine
Office of Faculty Affairs and Human Resources
<http://casemed.case.edu/facultyaffairs/>

A **Personal Data Salary Authorization (PD) form** is the document that we use to communicate with the Case Western Reserve University (CWRU) payroll system. The PD details the salary to be paid via a CWRU paycheck. Completing PD forms for faculty (full/part/visiting/emeritus), Research Scientists/Senior Research Associates/Research Associates, Research Scholars and Post Doc Fellows/Scholars is the responsibility of each School of Medicine (SOM) department.

A PD form must be completed for every **new** salary; **change** in salary; annually to **reappoint**; and to **stop** a salary (**salary will only terminate if a PD and proper documentation are submitted**). All PD forms submitted to Patty Urbon in the SOM Office of Faculty Affairs and Human Resources (FAHR) will be processed in conjunction with the SOM Finance Office and forwarded to the CWRU Department of Human Resources.

New to payroll:

All faculty, Research Scientists/Senior Research Associates/Research Associates, Research Scholars, and Post Doc Fellows/Scholars new (and some who are returning after a break in service) to CWRU payroll must visit the CWRU Human Resources office to complete tax forms and the hiring process.

Faculty

Full time, part time, and visiting faculty may receive some or all of their pay through CWRU. A sizeable and detailed packet of information is necessary to nominate someone to the faculty. One piece of the packet is a completed **Approval of Faculty Salary form or, for UH Clinical Departments, a UHMG PSA Exhibit A** (for more details concerning faculty appointments please see the Faculty Appointments, Promotions and Tenure Procedures Manual on our website). Full time faculty appointments may take months to processed and approved by the University's Board of Trustees. All paperwork flows through the SOM Office of Faculty Affairs and Human Resources. In order to place a faculty member on payroll, the department submits a completed PD.

Full time faculty who receive all of their professional salary through CWRU payroll are Benelect eligible. Full time faculty who do not receive all, but do receive 50% or more of their professional salary through CWRU payroll, are also Benelect eligible. Full time faculty who receive less than 50% of their professional salary through CWRU payroll, although not Benelect eligible, are still able to participate in certain University benefit options.

Part time faculty appointments are approved by the dean. In order to place a new part time, emeritus, or visiting faculty member on payroll, the department must submit a draft letter of employment (templates available). After reviewed and approved, the department will be given the go-ahead to send

the letter to the faculty member. In order to place a part time, emeritus, or visiting faculty member on payroll, the department submits a signed employment letter and a completed PD.

Research Scientists/Senior Research Associates/ Research Associates (RS/SRA/RA)

A description of the process and paperwork necessary to hire a new Research Scientist/Senior Research Associate/Research Associate position can be found in the Research Associate, Senior Research Associate, Research Scientist Policy and Procedures manual on our website. In order to place a RS/SRA/RA on CWRU payroll, the department submits a copy of the signed letter of appointment and a completed PD.

Research Scholars

All Research Scholars are foreign visitors, financially supported in large part by their home institutions, their home governments, or their own personal funds. Research Scholars are not employees and do not earn a salary. A department may wish to give Research Scholars who receive funding from their home institution or government a small stipend. The stipends, although not salary, are paid thru the CWRU payroll system. The process for sponsoring a Research Scholar can be found on our website. In order to get the CWRU stipend paid, the department submits a copy of the letter of appointment and a completed PD.

Post Doc Fellows/Scholars

All foreign and domestic post doc fellow/scholar appointments are made through the School of Graduate Studies. The application process runs thru the Student Information System (SIS). All approvals are done thru SIS. Once approved, the School of Graduate Studies generates a letter of offer. Direct all questions to Diana Fox, 368-0947, diana.fox@case.edu. In order to place a post doc fellow/scholar on payroll, the department submits a copy of the letter of offer and a completed PD.

Changes: A change in salary for faculty will require a PD and a completed **Approval of Faculty Salary Increase/Decrease form or, for UH Clinical Departments, a UHMG Amended Exhibit A**. A change for all others requires a revised letter and completed PD.

Reappointment:

Every faculty member is reappointed annually. In the spring, preprinted PDs and directions for reappointment are distributed to the departments. Departments complete the PD forms in conjunction with their budget for the next fiscal year.

Research Scientists, Senior Research Associates and Research Associates must be reviewed and reappointed on their anniversary date. Post Doc Fellows and Post Doc Scholars are reappointed through the Office of Graduate Studies on their anniversary date. The department must submit a copy of the letter and a PD in order to make a change in salary at reappointment time.

Terminating Salary

Salary will only terminate if the department submits a PD and proper documentation (letter of resignation, **Personnel Action Form**).

Completing a pd form:

Personal Information:

Employee ID number, if already assigned. Please do not note Social Security Number (SSN) on Payroll Data (PD) Form.

Action Codes:

- N -** New to Case Western Reserve payroll system – must then complete personal information: gender, home street address, apt. no., home phone, city, state, postal code, work phone, hire date, business title, department ID, department name.
- C -** Change to personal information already in the payroll system – must complete area(s) of change
- D -** Deletes record from the payroll system, i.e. retirement, resignation, etc. and should include a term date (last day worked for which the employee is to be paid). When doing this, one must attach necessary documentation, e.g. a letter of resignation , completed PAF.

Last Name, First Name, etc.

Salary Information:

Only one salary action may be noted on a PD form.

GL Pay Type – (what used to be known as the expense class):

111001	Professor
111501	Adjunct/Clinical Professor
112001	Associate Professor
112501	Adjunct/Clinical Associate Professor
113001	Assistant Professor
113501	Adjunct/Clinical Professor
114001	Sr. Instructor/Instructor
114501	Adjunct/Clinical Sr. Instructor/Instructor
119001	Visiting Faculty
725001	Post Doc Fellow
132001	Post Doc Scholar
127010	Research Scholar
131001	Research Associate
138001	Senior Research Associate
133001	Research Scientist

Annual Rate – the only salary reported on the PD form is the salary that is paid through the Case Western Reserve payroll system; enter the annual amount to be paid

Starting/Effective Date – for a new salary line, enter the first day of the appointment; for a changed salary line, enter the date of change

Gross Pay – annual amount divided by 12

Comments - Please feel free to write any comments/remarks of explanation on the PD form.

We make every effort to process PD forms in order to meet monthly payroll cutoff dates. If you have any questions please contact Patty Urbon at 216-368-2011 or patricia.urbon@case.edu.