New Appointment Form Procedure - (Chapter 1B)
Appointment Form Instructions

Following are line by line instructions for completing an appointment form. This form is used to add Faculty and Students to the HR/Payroll system. Appointment forms for Staff are completed via PittSource as part of the job posting process.

A fill-in version of the form is available through University Business Forms at my.pitt.edu. (Log into my.pitt.edu, select my resources, select University Business Forms, select forms library. The appointment form appears on the list.)

**Line 01:**

- Complete the name field in the format of Last, First, Middle Initial, and Suffix (if applicable). **The name must be entered identical to the name shown on the employee’s Social Security Card.**
- Enter the employee’s gender.
- Enter the Social Security Number. **The number must match the number shown on the employee’s Social Security Card.**
- Enter the original University of Pittsburgh hire date in the Date First Hired Box.
- Enter the start date of the current period of employment in the Latest Start Date box.
- Enter the date of birth.

**Line 02:**

- Marital Status – For benefit eligibility purposes only. **Does not affect taxes.** M - Married S – Single
- Disability Type – Use the drop down arrow on the online form for a list of values.
- Ethnic Origin – Use the drop down arrow on the online form for a list of values.
- Nationality/ Citizenship – Use the drop down arrow on the online form for a list of values.
- I-9 Status- For new appointments the I-9 status should be Pending (P).
- I-9 Expiration Date – only applies to Non-Immigrants and Lawful Permanent Residents.
- Visa Type – Leave blank.
- Visa Number – Leave blank.

**Line 03:**

- Education- Use the drop down arrow on the online form for a list of values.
- Institution – Available at www.cfo.pitt.edu/prism Select HR Glossary of Definitions located under the reference section.
- CIP/Expertise - Available at www.cfo.pitt.edu/prism Select HR Glossary of Definitions under the reference section.
- Veteran Status - Use the drop down arrow on the online form for a list of values
- Union Information/ Bargaining Unit- Only used for those employees belonging to a Union – (Biweekly employees) Use the drop down arrow on the online form for a list of values.
• Date Entered Union – Date employee entered Union

**Line 04:**

• Address: Street address and Apartment number (if applicable), complete appropriate US city, US state and US Postal Zip code. The **address must match the address provided by the employee on the Residency Certification Form.**

**Line 05:**

• Home telephone, include area code. Directory Print – Indicates if person’s home telephone is to be printed in the Faculty/Staff Directory.

**Line 06:**

• Job (Type Family Classification) Available at [www.cfo.pitt.edu/prism](http://www.cfo.pitt.edu/prism) Select HR Glossary of Definitions under the reference section.
• Position (Department Code) Enter the person’s five digit department number, if applicable.

**Line 07**

- Organization – Available at [www.cfo.pitt.edu/prism](http://www.cfo.pitt.edu/prism) Select HR Glossary of Definitions under the reference section.
- Location – Available at [www.cfo.pitt.edu/prism](http://www.cfo.pitt.edu/prism) Select HR Glossary of Definitions under the reference section.
- Pay year type - Use the drop down arrow on the online form for a list of values.
- Campus – Use the drop down arrow on the online form for a list of values.
- UPP- identifies if a Faculty member is associated with UPP(University of Pgh Physicians)
- UPP2-identifies if a Faculty member is associated with UPP2. Departments must place a “2” in the box under UPP to designate a UPP2 employee.
- UDHS – identifies if a Faculty member is associated with UDSH (University Dental Health System)

**Line 08**

- Assignment Effective Date – most recent assignment start date
- Assignment Category- Use the drop down arrow on the online form for a list of values.
- Payroll – Use the drop down arrow on the online form for a list of values.
- Percent of Effort – Enter 100% of full time, or reduced % for less than full time.
- CDC code – This code indicates the department responsible for reviewing the Payroll Register for this employee, and distributing paper pay checks if applicable. If unknown, contact Payroll.

**Line 09**
• Assignment Status – Available at www.cfo.pitt.edu/prism Select HR Glossary of Definitions under the reference section
• Leave Type – Not applicable to a new appointment.

**Line 10**

• A Faculty/Executive person may be awarded a Joint(or Secondary) Appointment in another Department.

**Line 11**

• **Salary Effective Date** - The date the salary rate is effective. This should agree with Line 1 and Line 8
• **Salary/Hourly Rate** – If Salaried person, complete field with a Monthly salary.
  If Hourly person, complete field with a Hourly salary rate
• **Reason** – Enter “New Hire”
• **Earning Element Name**- this section holds information relating to additional payments
• Enter the earning element information in the Earning Element Name field and include the monthly amount, and **start and end dates**.

**Line 15**

• **Costing Information**- Costing Information must be completed when hiring a salaried person at the University. Distribution is driven by the charge accounts and percentages listed. The account numbers must be valid in the General Ledger, the regular percentage must total 100% and the cost sharing percentages must be equal to or less than the regular percentage.

**Line 16**

• **Faculty Details**- Start and End dates of faculty contract. These dates must correspond to the pay year type if less than annual.