



## 7. Personnel Reports Policy

### Policy Statement

The University of Georgia shall maintain the proper documents to record personal information about employees, which is required for business, regulatory, compliance with federal and state law, and legal purposes

### Reason for policy

The University of Georgia must establish a mechanism for employing units to submit information on employees to establish a master payroll record.

### Procedures

Information submitted on the personnel form is used to establish the master payroll record and is critical to the proper processing of payroll payments. Hiring departments must submit the form by the published deadline (found at <http://www.busfin.uga.edu/payroll/calendar.html>) for the month the employee is to be paid to ensure timely and accurate payment to employees. Personnel reports should be submitted online via "Web DFS" found below in "Appendices."

- **Joint Staff**

If an individual is employed in one position but is paid by two different departments, only one personnel report should be submitted. The home base department to which the employee is primarily responsible should initiate the personnel report and then forward it to the other departments paying the individual. Such a joint staffed position is shown as a single position in the University budget with EFT and amount allocated to two or more departments or accounts.

- **Employee Holding Two or More Jobs**

An employee holding two different jobs at the University is not considered joint-staffed; therefore, a separate personnel report is necessary for each job held.

### Forms/Instructions

Detailed instructions for processing personnels can be found at (<https://webdfs.uga.edu/WebDFS>).

### Additional contacts

#### Julie Camp

**Phone Number:** 706-542-3431

### Policy definitions

- **Personnel Report:** Form used to document the employment, termination, or change in status of all personnel.
- **Joint Staff:** An individual who is employed in one position that is funded by two or more departments.

### Responsibilities

**Responsible University Administrator:** Vice President for Finance & Administration

**Policy Owner:** Payroll

**Policy Contact:** Julie Camp

**Phone Number:** 706-542-3431

### Record Retention

**Explanation:** This series documents the classified employee's work history at the institution and includes routine evaluative materials and non-evaluative information such as job title, full-time equivalency (FTE) or appointment percentage, dates of employment, salary, employing department, education and employment background. Some

documents in this series contain confidential information such as social security number, birth date, and marital status. Records may include but are not limited to: employment applications which may include skill code sheets; resumes; selected memos such as agreement or request for position change, merit increase requests and notices, request for re-employment (letter of hire), resignation letters from employees, and termination letters from employer; commendations; recommendations; reprimands; work plans; forms documenting personnel actions; personnel performance evaluations; pay/budget action forms; leave records; time and attendance records; designation of beneficiary forms; union dues information; resumes; layoff notices; awards; licenses and certificates; college credit information; employee Social Security number disclosure forms; home address/telephone disclosure authorizations, related correspondence, Certifications, Licenses and References. Records may be exempt from public disclosure.

(Board of Regents: [\(Employee Personnel Records 0472-04-016\)](#))

**Record Copy:** Payroll will retain a copy of the Personnel Report.

**Retention:** 7 years following separation of employee

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#### Policy Appendices

- [Web DFS Login](#)
- [UGA Self-Service Website](#)
- WebDFS training materials: <https://busfin1.busfin.uga.edu/webdfs/training.htm>

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#### FAQs

- **I have changed marital status. How do I change my name on my payroll records?**

If your name changes due to a change in marital status, your department payroll representative will need to submit a new personnel report to change your name on the payroll records.

- **I have moved. How do I change my address?**

If your home address changes, go to the "UGA Self-Service Website" (found above in "Appendices"). Select "My Address – Home" and follow the directions to update your address. If you are no longer employed by UGA and want to update your home address so your W2 will be sent to the correct address, send an email with your name, last four digits of your social security number and your new address to the Payroll Department.

- **I have changed departments. Do I need to complete new forms (W-4, direct deposit, etc.)?**

You do not need to submit a new W-4 or direct deposit form as a result of changing the department you work for at UGA.

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#### Related information

Completed Personnel Reports must be approved by department heads, deans and/or directors and appropriate vice presidents. Approvals will be set up in the WebDFS system. After approval by all necessary individuals, the Personnel Report is electronically routed to the Budget Office, then to Human Resources, and finally to the Payroll Department.

[< Payroll Adjustments Policy](#) | [Hold List Policy](#) >

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#### Policy Dates

Effective Date:

Date Last Updated: 06/13/2017

Date of Last Review:

Date of Approval:

Previous Version of Policy: