INSTRUCTIONS

New Hire paperwork; Transfer Paperwork, Promotion Paperwork and Termination Paperwork

DO NOT Send paperwork to the Dean's Office, it must be sent to the GME Office first.

DO NOT send incomplete paperwork or missing required documents. Incomplete New Hire Packets will be returned to the Department/Coordinator for Completion which will prolong the signature and input process.

Appointment Forms

- Auto-Populated Data Form on GME Website. House Officers that are transferring to other LSU Programs NOT on July 1 will be included on Appointment form for both Programs.
- Verify ALL House Officers that will be in the program July 1, 2013, including those terminating or transferring during any dates during July or after July.
- Verify appointment dates for each House Officer.
- Verify House Officer Salary.
- Verify House Officer FMG Status.
- Incorrect information in New Innovations will appear on form. Correct data in NI and it will be corrected the next day.
- Verify form is correct, by signing the form, submit to GME by due date.

House Officer Agreement of Appointment -

- Print Auto-Populated House Officer Agreement of Appointment on GME website.
- Verify dates of Agreement, House Officer Level, and salary.
- Attach Proof of TB Testing and results with Agreement of Appointment.
- Route for Original signatures by Program Director and Department head; then sent to the GME office Coordinators
 <u>CANNOT</u> sign for Program Director or Department Head even with their signature authority. This Document MUST BE
 SIGNED by those individuals.

New Hire paperwork

- 1. Send ALL New Hires the New Hire Packet PDF file received from the GME Office. Refer to New Hire Check list for forms.
- 2. House Officers MUST send the completed New Hire packet with required copies, to the Program Coordinator, Not to GME
- 3. I-9 Form Date of hire should be in the Certification Section and NOT the date it was filled out –Date is: July 1, 2013 unless Off-Cycle.
 - I-9 VERY IMPORTANT!!! ALL I-9 documents MUST BE included and acceptable before routing packet. The list of acceptable I-9 documents are listed on page 5 of I-9 section. Coordinators must fill out the certification section of the I-9 form as the hiring department, (include: date of hire, signature, printed name, title, business and date). House Officer MUST sign the I-9 document. DO NOT submit the I-9 Instructions or list of acceptable documents with the packet. If the I-9 form is not complete, the entire packet will be routed back to the department.
- 4. DO NOT send the Policy documents-only the signature pages.
- 5. Note N/A on form and submit forms that are not applicable to the House Officer
- 6. DO NOT send MSPE's (aka Dean's Letter) ONLY Medical School Diplomas are accepted.
- 7. Refer to Check List of Required Items—New Hire House Officers, and submit Check List with completed Packets including all required and applicable forms and copies to GME before June 1, 2013. Late submissions can cause problems for Orientation Day due to not being in PS HR System.

BIOGRAPHICAL PAGE

- House Officer MUST list Undergraduate School and Graduation Date and Medical School and Graduation Date.
- House Officer MUST sign bottom of Biographical Page

PERSONAL DATA SHEET FOR GME OFFICE

Account for all time in Chronological Order from Medical School Graduation to the Present. A continuous and inclusive
list of internships, residencies, fellowships, staff positions, leave of absences, etc must be provided from Medical School
graduation through the current internship, residency or fellowship with no gaps in dates

PER 2s

- DO NOT complete any sections above #1 on PER 2
- PS Pos # DO NOT put Position #s on Per 2 HR assigns ALL Position #s
- Social Security #1 Must be included. If they do not have one, put applied for or pending, and submit a copy of the Social Security Card ASAP to HR and GME when received.
- Effective Date #1 Must be included (July 1, 2013 unless Off-Cycle).
- Name #2 The name submitted on the per 2 must match what's on the social security card or the legal documentation copies submitted. Cannot use nicknames, married names or maiden names if it doesn't match. The names submitted on the per 3 must match what's on file in PeopleSoft. List Last name in Last name section and first name in first name section.
- Title #3 Must be included (House Officer ??)
- School or Division #7 Must be Included
- **Department #7** Must be Included with Program Name following Department Name. (e.g. Medicine-Cardiology, Pediatrics-Neonatology, Surgery-Vascular Surgery, etc)
- **Department Codes and Location Codes #8** PPS Dept Code and Location Code are auto-populated on the Appointment Form. If you are not sure of the Location Code, it is the code used to run the Beginning of the Month and End-of-the Month reports. The CORRECT CODES MUST BE INCLUDED (HR sees too many errors in this area, such as, codes not included or wrong location codes included). Include Department phone # in this section too.
- Home Address #9— If they do not have a local address yet, or a permanent address to use, we use the address of the department. It is their responsibility to notify HR of address changes by submitting a Change in Status Form. The Address on their Pay Stub is the address on file and when W2s or Due Proccess letters, if applicable, are mailed out they will be sent to that address. Therefore it is important the address they wish to receive mail must be correct
- **Home Phone #9** DO NOT use the Department telephone # in the home section. Look on the Biographical data form the House Officer completed and use what is listed.
- Home and Work Phone #s 8 & 9 Computer service's needs this information for the global address list.
- Parish #9 (Louisiana Residents) This is mandatory for PeopleSoft
- Date of Birth #10 Must be included
- Place of Birth #10 City, State and Country Must be included
- Citizenship #10- Must be included Verify Correct Citizenship is listed DO NOT just Default to U.S.
- Sex/Marital Status Ethnicity Race #11 Must be included OTHER is not an option
- I-9 Verification Documents #12 Only CORRECT copies of documents received are to be entered in this section.
- Educational level or College Degrees #14
 - MUST include any degree's-Bachelors and above ONLY. THIS MEANS MEDICAL SCHOOL TOO.
 - LSU/BR codes is 002010; LSUHSC (Medical/Dental School) Code is 002014; DO NOT use Code 008745 for LSU. When providing school codes, please make sure they are accurate.
 - ➤ DO NOT USE Medicine Discipline for Osteopathic Osteopathic has their own code 181301 and they are NOT coded as MDs they are DOs.
 - MUST put School names and CORRECT graduation Date and discipline.
- **EMPL ID #15** if the House Officer is a graduating LSU Senior and the EMPL ID is known, enter it in this space, if the House Officer was previously employed by LSU-N.O., EKLMC, UMC, Bogalusa, Lake Charles, OLOL; use the EMPL ID issued at that time of employment.
- Salary and Distribution # 17 Pay Rate—Please include the Hourly Rate in the salary and distribution section.

 Please be sure to use the most current pay scale on the GME Website.
- Salary and Distribution #17 LSU Account When Legacy accounts were used the LSU Account number was
 449/422 ??-9901, When PS account codes were developed, some Legacy accounts were give a PS account and
 some were not, check with Business Managers to verify account to use DO NOT USE ACCOUNTS ENTER IN PSRTS ON PER 2S.
- Signed PER 2 Must have business manager's signature and submitted with New Hire Paperwork.
- **Staples** Please refrain from stapling the forms with more than 1 staple paperclips are preferred. This is very time consuming in processing these forms.

PER 3s:

- PER 3s to Promote and Terminate are only required for the following: Off-Cycle Promotions; Off-Cycle Terminations; Transfers-with and without promotion; Residents promoting to Fellow and Fellow promotions (House Officer 3 7 to House Officer 8,9,10; and House Officer 8-10); House Officers paid by Military Promotion and Termination; House Officers that do not complete or graduate from the training program or resign from the program including those with a June 30 date, (a copy of a letter of resignation must be included if resigning, or reason for termination must be stated on PER 2).
- Submit a PER 3 for each House Officer promoting, do not submit one PER 3 with See Attached Spreadsheet. This was approved in the past when PER 3s were submitted for All House Officers.

SECTIONS of PER 3 MUST be Completed for ALL PER 3s

- Social Security # Found in file in New Innovations.
- Empl ID Found in file in New Innovations and on Beginning and End of the Month reports
- **PS Pos # -** Found in file in New Innovations.
- Names The names submitted on the per 3 must match what's on file in PeopleSoft. List Last name in Last name section and first name in first name section.
- Present Title Current House Officer Level not the level promoting to if PER 3 is for Promotion.
- Action select box for the action the PER 3 is being submitted.
 - Fermination #1 Include effective date and Last day cob work date (effective date is the 1st date to NOT pay the House Officer and the last day cob worked date is the last day to pay the House Officer June 30 terminations have an effective date of July 1 and last day cob worked date as June 30). <u>Include Reason for Termination</u> (Completed Training, Resigned-with letter of resignation attached, Contract not renewed, other).
 - ➤ Transfer to New Dept #5 Department and Program Name, PS Location code, PS Dept Code, Phone number and Effective Date MUST be included for the Department-Program the House Officer is transferring to (many of the numbers can be found in New Innovations or on the Beginning of the Month or End-of-the Month reports). House Officers can Transfer and NOT promote based on Training requirements for the program.
 - ➤ **Promotion/or Change in Title # 6** Include New Level w/effective date Most transfers are promotions too and both sections #5 and #6 must be completed if applicable.
 - > Other Changes or Remarks #8 This action is used to note specific changes for the House Officer; Correct Appointment Dates; to note if the PER 3 corrects another PER 3 that was submitted; and especially for paying, or correcting accounts and percent of effort data for certain dates during the month; it is also used to communicate specifically why the PER 3 is being submitted to avoid any errors.
 - Chg in Source of Funds #10 This action is selected to correct account codes in PS Resident Schedule that must be changed to reflect the House Officer's correct rotation. PER 3s with this action MUST be submitted with the Endof-the Month Report.
 - Additional Compensation #11 This option is most commonly used when submitting PER 3s to pay extra compensation for Chief Residents for programs that do pay additional compensation for Chief duties.
 - Salary and Distribution #12 Include effective and funds end date and hourly rate of pay (for promotions, include current hourly rate and promoted hourly rate). If Money is owed to the House Officer the LSU Account, if applicable, and other Account code data MUST be the Account Code that is entered in PS-RTS to assign the House Officer for the month. If the PER 3 is to Promote/Transfer/Terminate, then follow: LSU Account When Legacy accounts were used the LSU Account number was 449/422 ??-9901, When PS account codes were developed, some Legacy accounts were give a PS account and some were not, check with Business Managers to verify account to use. Complete both columns—Present Amount and Proposed amount for Promotions and change in Source of Funds.
 - > % Dist column if the % effort the House Officer is assigned to the account code for specific dates is NOT 100% include the % effort here and include the specifics of the assignment in #8 (Other Changes or Remarks), including dates, account code and percent effort for the date(s) and account code).

Complete all required sections on the PER 2 and PER 3. DO NOT omit promotion effective dates (#6 on PER 3); DO NOT Omit PS Location Code and be sure to use the correct code for the training program

March 15, 2013, programs begin reviewing data that is auto-populated into the Appointment form and Spreadsheets on the GME Website. If the House Officers that will definitely promote, and/or Transfer July 1, and Terminate June 30 are known, it would be best to submit their paperwork before the results of the Main Residency Match are posted. Once these results are posted, the New Hire paperwork process will begin.

Promoting & Continuing House Officers:

- 1. Refer to and submit required documents listed on Instruction Sheet Documents for continuing House Officers.
- 2. Refer to "Instructions-New Hire paperwork, Transfer Paperwork, Promotion Paperwork and Termination Paperwork"

Transferring House Officers to another LSU Program:

- 1. Verify Auto-Populated Appointment Form includes Transferring House Officer. House Officers NOT transferring July 1, will appear on both program's appointment form.
- 2. Verify FMG Status for Transferring House Officer.
- 3. Submit a PER 3 to Transfer to New Programs. On PER 3 this is option #5--New Dept (#5 on PER 3). Include the new program's PS Location Code (D-Code); and change the LSU account to the present 9901 legacy account/PS account code equivalent; enter the transferred to Program's 9901 account/PS account code equivalent in the proposed column (#12 on PER 3). If Title is changing, select change in title, type title and the effective date (#6 on PER 3). ONE PER 3 per House Officer, DO NOT submit one PER 3 with see attached and a spreadsheet attached. This was approved in the past when PER 3s were submitted for All House Officers.
- 4. If promoting indicate the Promotion to and the effective date (# 6 on PER 3). Communicate with the Coordinator in the program the house officer is transferring to for July and decide which program will be responsible for processing the transfer paperwork to GME to avoid duplication.
- 5. Refer to and submit required items listed on the Check List of Required Items-Transferring House Officers.
- 6. Attach Checklist for Transferring House Officers to Packet.

Terminating House Officers:

1.	Refer to and submit required documents listed on the Instruction Sheet - Terminating House Officers

If you have any questions, contact GME.

Per 2

LSU HEALTH SCIENCES CENTER - NEW ORLEANS CAMPUS Personnel Appointment (Per 2), Form

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Rev. 12/07

LOUISIANA STATE UNIVERSITY HEALTH SCIENCES CENTER - NEW ORLEANS CAMPUS PERSONNEL STATUS CHANGE (PER 3 FORM)

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