Staff Regular Employees PTR Form
Data Field Definitions

NAE Demographic Information

Complete all applicable data fields.

Obtain most demographic information from employment application such as name and address.

Please complete campus address, phone number and email at time of form completion if known. If off campus please indicate location.

Subsequent PTRs can include just name and Datatel Number in demographic fields

Position Information

Position Title-As stated on approved Position Control Requisition and Job Description

Department Name –full name or acronym

Preferred Start Date-tentative start date that will be finalized between HR and applicant (HR will notify department if actual start date is different than preferred date).

Termination Date-submit a PTR utilizing this field only at the time of an employee termination.

Position Type Code-
Permanent Full Time-PEFT
Permanent Part Time-PPTM
Temporary Part Time-TPTM (stipends)

FTE Status-depending on hours expected to work in the week, (i.e. 40 hours=1 FTE, 20 hours=.5 FTE)

Job Classification Code-

- *Academic Administrative-AA*
- *Administrative Officer-AD*
- *Administrative Staff-AS*
- *Clerical/Secretarial-CS*
- *Professional Staff-PS*
- *Skilled Crafts-SC*
- *Service Maintenance-SM*
- *Technical –TP*

Pay Cycle-
End of Month (monthly salaried, supplemental stipends)-EM
Mid Month (employee hourly)-MM

Regular Staff Employment Hiring Guidelines

All regular full time and part time positions have the following employment recruitment and hiring process unless the position is filled through a Presidential exemption. The department begins the process by submitting a memorandum to the respective Vice President and then the President requesting permission to initiate the hiring process with justification for the position. Once the President authorizes the position hiring process, the applicant recruitment and selection process is initiated.

The applicant recruitment and selection process is initiated when the referring department completes the Position Control Requisition (PCR) in conjunction with a completed Job Description Form which includes Exemption From Overtime Requirements Checklist for approval on a new position or an existing position vacancy. These forms provide the information to classify a position and establish appropriate salary grades between the department and Human Resources.

The PCR Form and the Job Description Form are forwarded through the proper organizational chain of command up to the Vice President level then forwarded to Human Resources for proper form review and affirmative action review. The forms are forwarded to the Budget Office for review of budgeted fund availability (special grant money goes through Grant Accounting) and then forwarded to the President's Office for signature. At the time the President signs the PCR, the recruitment and selection process can officially begin.

Once proper signatories are completed and the position fill is approved, the PCR and Job Description Form paperwork comes back to Human Resource. The respective department is notified of the approved paperwork and the next decision point is how to advertise the job opening.

Job Advertisement

This initiates the recruitment process with the department being asked to complete the Job Advertisement Form and submit it to Human Resources.

On the Job Advertisement Form, the hiring departmental authority indicates if the position should be posted internal only; or externally advertised concurrently with the internal notification. If external advertising is done, the department must identify what newspapers or publications to advertise and what dates to advertise. Positions can be advertised as being open until filled or with a defined application deadline no shorter than 7 business days. Position salary or wage information can be specified if desired by the department. The cost of advertising is charged back to the appropriate department.

The position is then posted and advertised based on the department's request. All job vacancies are posted internally on the University Human Resource Services Bulletin Board for a minimum period of seven business days. Additionally, all jobs are posted on the Lincoln University website on the HR webpage.

The University encourages career progression within the University and supports employees in preparing for job advancement; therefore, employees that meet minimum qualifications are given consideration for those position openings. When a vacancy occurs, current employees should notify the Human Resource Office of their interest to insure that the necessary information is on file along with the submittal of a new cover letter and other documents as requested.

Employment Application and Support Documentation

All employment applications and support documentation should be forwarded to in the Human Resource Services Office, where the applications are logged and filed in the respective job application folders. Authorized departmental representatives are able to come and pick up the applications throughout the selection process by signing a log-tracking sheet. Only applications received during a position's recruitment period will be considered for hire. If applications are on file from previous job inquiries, reference to that job inquiry needs to be made by the applicant for accessing of the documents, an updated letter of interest will be needed at a minimum.

An applicant interested in applying for a position must submit the following:
Lincoln University Application for Employment
Cover Letter (if applicable)
Resume (if applicable)
Official academic transcripts (if applicable)
Three letters of general reference

Screening and Selection Process

Lincoln University uses search and screening committees in the employment process for positions: Executive, Administrative Staff, Academic Faculty, Professional Staff, Administrative Office Support, Technical, Skilled Crafts, and Service and Maintenance Staff.

The search and screening committee's objective is to ensure that Lincoln University hires the best available candidate for each job without regard to race, sex, national origin, religion, and age or disability condition. In fulfilling the responsibilities of recruitment, efforts are to be made to actively

seek out and identify qualified women and minorities and applicants with handicapping conditions, informing them of vacancies and encouraging them to apply for available positions.

The hiring authority (director, department head, and dean) will submit a list of recommended search and screening committee members on the Position Control Requisition for approval as part of the requisition process. The search and screening committee may have at least five (5) members. In addition, the affirmative action officer will serve as an ex-officio member on all search and screening committees. In so far as possible, the committee should be race and gender balanced. The members should also be knowledgeable about the duties, responsibilities, and qualification requirements of the position. Where appropriate, the committee should include persons from the following categories: administration, faculty, staff and students. Some departments currently have departmental recruitment committees established and functioning in this capacity.

The departmental authority approves the membership on the search and screening committee and will notify the members of their selection, and explain the committee's duties and responsibilities. The committee will elect a chairperson (if one has not been designated by the hiring authority). It is also the committee's responsibility to develop formal and consistent criteria for evaluating each applicant's credentials in relation to the specific qualifications and job responsibilities included in the vacancy announcement/job description.

Hiring Process

The search and screening committee will meet and do the following:

- ✓ Compile a list of all candidates in the applicant pool;
- ✓ Acknowledge receipt of each candidate's application/resume and send an AA/EEO card (available in the Affirmative Action Office) to each candidate;
- ✓ Identify if candidates have materials missing from the applicant file (e.g., letters of reference, official transcripts, official application form, etc.);
- ✓ Review applications and select semifinalists;
- ✓ Send letters of notification to applicants not selected as semifinalists;
- ✓ Call semifinalists for initial screening interview, if deemed necessary;
- ✓ Check references (e.g., persons who wrote letters, prior employers, and peers);
- ✓ Make written recommendation(s) to the hiring authority which may include but not be limited to the following: (a) recommend finalists to be interviewed; (b) recommend changes in the specifications or salary and begin a new search; (c) recommend an extension of the search to attract additional candidates;
- ✓ Detailed notes of interviews must include dates of interviews, considerations and deliberations leading to the final selection of a candidate, and other relevant information. A weighted ranking sheet is encouraged to be utilized.
- ✓ After all finalists have been interviewed, whenever possible, the committee will recommend three to five unranked or ranked final candidates to the hiring authority. That recommendation may indicate the committee's preference for a particular candidate or candidates. The hiring authority will meet with the committee to receive its input and reactions to final candidates and may ask committee members specific questions about the candidates;
- ✓ When a final candidate is selected for the job offer, the hiring authority will contact this finalist, make the initial proposed job offer and confirm the terms of employment. If both parties agree to terms, this recommendation is forwarded to the respective Vice President

and then the President for formal and official authorization to hire. If the successful candidate does not accept, the hiring authority may offer the position to one of the other finalists;

Finalizing Employment Offer

After the final selection recommendation has been made, the departmental hiring authority completes a Personnel Transaction Report Form and submits to the Human Resource Services Office along with the other necessary support documentation of the selection process. The PTR Form can be completed online through the HR webpage on the LU website as long as it is printed on the proper 3 part carbon paper; or the department can utilize the type set 3 parts carbon PTR form and manually type the employee information.

There are two selection process forms that should be submitted along with the completed Personnel Transaction Report Form. The Summary of Employee Selection Process Part A-Applicant Listing that indicates all applicants who applied for the position and those applicants considered for interview.

Additionally the Summary of Employee Selection Process Part B-Interview that indicates all applicants interviewed and the preferred candidate chosen for recommendation.

Additionally, all the applicants' information and related documents are forwarded to the Human Resource Services Office for affirmative action review and record maintenance.

When the successful candidate accepts, the departmental hiring authority is responsible for contacting all other applicants and informing those candidates that the position has been filled.

Activating Employment

The Human Resources Office will be responsible for establishing the employment start on new employees. If the actual start date is different than the PTR preferred date, the department will be notified by HR of the actual date. All regular staff should have a start date of either: the first working day of the month or the 15th of the month.

Human Resources will utilize the electronic verification system (E Verify) to verify work eligibility on all new employees on the first date of employment but no later than the 3rd day. All new employees must report immediately to Human Resources on the first day of employment and complete an I-9 Work Authorization Form.

PTR Process

The Department through chain of command authority imitates new employee hiring through submittal of a Position Transactions Report (PTR). The department identifies on the PTR the "preferred start date".

Human Resources receive the PTR for preliminary review of the hiring packet and become responsible for initiating the new employment process.

The PTR for new employment is routed for further administrative approval {budget grant accounting, president}. The PTR is approved and routed back to HR.

Human Resources contact the perspective employee to establish a start date:

- ✓ The prospective employee is called by telephone, if that isn't possible then a letter will be sent.
- ✓ The prospective employee is given the option of two start dates – 1st day of the month (next working day); or the 15th of the month (next working day).
- ✓ Based on the mutually agreed start date, HR documents the start date, on the PTR form and notifies the department via an email.

The new employment is in a pending employment status until the new employee reports to HR on the designated first day of employment.

The employee reports to HR the designated first day of employment:

- ✓ The prospective employee completes the I-9 work authorization form
- ✓ HR staff e-verify work eligibility
- ✓ Employee completes tax forms
- ✓ Employee receives benefits orientation and employee handbook
- ✓ New employee reports to respective department

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