AMBC DOCUMENT ROUTING GUIDELINES FOR UNIT PERSONNEL

These guidelines only address the initial routing from the units. They do not address any subsequent routing (e.g., from AMBC HR to Central HR).

For information regarding contacts for your unit, go to: http://oregonstate.edu/fa/bc/ambc/directory

**Documents/questions routed to AMBC Payroll contact for your unit (HOV 108)**

- Account code corrections (except work-study)
- Direct Deposit Authorization forms, including account number verification documents
- Direct Deposit Authorization-Individual employees can alternatively use self-service option.
- Retroactive pay
- Labor distributions past and future (for AES Stations only)
- W-4 for new employees

**Documents/questions routed to AMBC Finance & Accounting contact (HOV 108)**

- Invoices
- Travel and personal reimbursements (other than unit heads. See AD guidelines)
- Procurement Card documentation
- Procurement Card transaction log
- Problem solving and resolution regarding payroll related errors found in Banner
- Labor distributions – retro and future (except work-study)
- Gift Certificates
- ARF and OSUF reimbursements
- PAR forms (signed)
- Purchase Orders $5,000 and over
- Purchase Orders with BOLI implications
- Personal Services Invoices
- Personal/Professional Services Contracts
- Internal and External Fees

**Documents/questions routed directly to Central Payroll (Kerr 106)**

- “Auto-loaded” mass salary increase for faculty, classified or grad pay, summer leave spreadsheets
- “Triples” related deductions adjustments and processing
- Account code corrections (work-study only)
- All tax deduction changes including State, Federal, FICA. All voluntary deductions including parking, Dixon, union dues, etc.
- Deferred pay 9/12 option for unclassified and classified
- Direct Deposit Authorization updates, including account number verification documents
- Draws – final approval
- Emergency Payroll Draw Request
- Employee Pay Requests
- Labor redistribution for work-study
- Overpayment Notices
- Payroll Disbursement Request
- Summer Leave spreadsheet entry to put position on leave
- Termination Pay Requests
- Time entry changes, additions after PYAHOURL closes
- Update NBAJOBS directly from spreadsheets for faculty or grad salary changes
- W-4 updates (Federal and State withholdings)
- W-2 Forms-Sent via U.S. Mail by January 31st each year. Contact Central Payroll if not received.
- W-2 Form is offered through MyOSU portal under Employee tab.
**Documents/questions routed directly to the Office of Human Resources (Kerr 204)**

Employee benefits (health insurance, PERS, etc.)
Family Medical Leave Act (FMLA)
OSU Report of Accident
Pension (TDI 403(b) plan, etc.)
Report of Job Injury or Illness
Retirement / leaving OSU service
Workers compensation claims

**Documents/questions routed to AMBC HR (Hovland 01 & Hovland 02)**

Award Pay
Classification and compensation (HRC2s)
Job forms and attachments\(^1\)
LWOP and DOC Pay determinations
Name Change and attachments
Special letters/notices
Temporary Employment Agency Requests
Vacation Cashout Form\(^2\)

For forms not listed, see applicable "info" buttons in OSCAR, which are located to the left of the document link, for more information pertaining to attachments and routing locations.

\(^1\)See applicable "info" buttons in OSCAR, which are located to the left of the appointment type in the Recruit/Appoint section, for more information regarding attachments.

\(^2\)Consult with AMBC Finance and Accounting staff before submission to AMBC HR

**Documents Routed to Associate Deans**

Application and Contract for Sabbatical Leave\(^2\)
Communication Allowance Agreements\(^2\)
Letter of Non-Renewal
Nomination to Affiliate Faculty / Reappoint to Affiliate Faculty
Nomination to Courtesy Faculty / Reappoint to Courtesy Faculty
Nomination to Emeritus Faculty
Nomination to Graduate Faculty
OSU Moving / Relocation Agreement
Overload Compensation Request\(^2\)
Performance Appraisal/Evaluation (unclassified and only if needs college level signature
Request for Approval of Professional Outside Activities
Telecommuting Agreement

*For instructions regarding routing documents to the Associate Deans for signature, please see the Routing Documents to Associate Deans*

\(^2\)Consult with AMBC Finance and Accounting staff before submission to Associate Deans