FY14 COLA

December 4, 2013
9:30-11:00
SON Auditorium
Agenda

• HR Processing Deadlines
• COLA-
  – Review of critical dates
  – Review of guidelines
  – Training on Payroll Increase Transaction page (PITP)
  – Timetable for paycheck results
• HRMS Upgrade Update
Presenters

• Human Resource Services
  – Jackie Ball
  – Emily Runser

• Financial Services
  – Susan McKechnie

• Financial Systems
  – Kevin Curley
Human Resource Services
Employment Actions and Processing Update
Upcoming Activities Affecting HRS & Payroll Processing

• Short Processing Time - HRS & Payroll Closed 12/25/13 – 1/1/14
• COLA Processing – Effective Date 1/1/14
• Significant HRS, CITS & Payroll staff time will be spent testing PeopleSoft 9.1 and ePAF
• Implementation of new NEX Pay Scale – effective 1/12/14
• PS 9.1 Go-Live 2/17/14 – HRMS down starting 2/12/14
Human Resource Services  
HRSC Processing  

December Deadlines for Processing Employment Actions  

**Wednesday, Dec 4th at Noon** (for paycheck 1/3/14)  
- Processing Dates: Tuesday, Dec 17\textsuperscript{th} - Thursday, Dec 19\textsuperscript{th}  
- Because of short processing cycle, **new hires attending orientation** on Monday, Dec 16\textsuperscript{th} will be processed on Tuesday, Dec 17\textsuperscript{th}  
- All other new hires and terminations will be processed after paperwork submitted for orientation has been processed. Time permitting, other transactions will be entered Wednesday and Thursday.  
- **Transactions not entered by Thursday, Dec 19\textsuperscript{th} will be entered Jan 3\textsuperscript{rd}, 2014**
December Deadlines for Processing Employment Actions

**Wednesday, Dec 18\(^{th}\) at Noon** (for paycheck 1/17/14)

- Processing Dates: Thursday, Jan 2\(^{nd}\) - Friday, Jan 3\(^{rd}\)
- New hires and terminations will be processed first
- Remaining transactions from Dec 4\(^{th}\) deadline will be processed on Friday, Jan 3\(^{rd}\)
Human Resource Services
HRSC Processing

January Deadlines for Processing Employment Actions

Thursday, Jan 9\textsuperscript{th} at Noon (for paycheck 1/31/14)
  – Processing Dates: Monday, Jan 13\textsuperscript{th} - Thursday, Jan 16\textsuperscript{th}

Thursday, Jan 23\textsuperscript{rd} at Noon (for paycheck 2/14/14)
  – Processing Dates: Monday, Jan 27\textsuperscript{th} - Friday, Jan 31\textsuperscript{st}
Human Resource Services
HRSC Processing

February Deadlines for Processing Employment Actions

Thursday, Feb 6th at Noon (for paycheck 2/28/14)
– Processing Date: Monday, Feb 10th
– Processing will be for onboarding new hires only
– System shut down for PeopleSoft Go-Live Feb 12th

Thursday, Feb 20th at Noon (for paycheck 3/14/14)
– Processing Dates: Monday, Feb 24th - Friday, Feb 28th
Human Resource Services
Compensation Processing

Actions Requiring Compensation Review/Assessment

• Compensation will only process Position Requisitions received between Dec 1\textsuperscript{st} and Jan 19\textsuperscript{th}
• All other actions (reevaluations, reassignments, acting, etc.):
  – Actions received before 12/1/13 will be made effective on 12/1/13
  – Actions received from 12/1/13 to 1/2/14 will be made effective on 1/19/14 (after COLA and new NEX salary rates are applied)
• Faculty Actions & C I contracts received during this time will be processed under HRSC Deadlines
Human Resource Services
Compensation Processing

Actions Requiring Compensation Review/Assessment

• Beginning Nov 3rd, effective dates of all Compensation-approved actions will be set for the 1st day of the pay period
• Retroactive effective dates will not be approved, unless by exception review by the AVP, HRS
FY14 Actions Eff Prior to 1/1/14

• If an employee action was submitted late or a retroactive date was approved by HR-Comp and the effective date was prior to 1/1/14 then an additional EA form for the COLA must be submitted

• If the employee does not appear on the PITP and should be getting a COLA increase then a manual entry must be done and it may not happen until the following pay period
Questions or Comments on HR Deadlines
Cost of Living Allowance (COLA) Increase
## Critical Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 6&lt;sup&gt;th&lt;/sup&gt;</td>
<td>CITS loads data to PITP</td>
</tr>
<tr>
<td>January 6&lt;sup&gt;th&lt;/sup&gt;-12&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Department Pay Increase Initiators/Approvers review</td>
</tr>
<tr>
<td>January 13&lt;sup&gt;th&lt;/sup&gt;-14&lt;sup&gt;th&lt;/sup&gt;</td>
<td>HR-Compensation Review and Approve</td>
</tr>
<tr>
<td>January 14&lt;sup&gt;th&lt;/sup&gt; overnight</td>
<td>CITS loads PITP to Job record</td>
</tr>
</tbody>
</table>
## Critical Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 15&lt;sup&gt;th&lt;/sup&gt;-17&lt;sup&gt;th&lt;/sup&gt;</td>
<td>HR-Service Center manual entries if required</td>
</tr>
<tr>
<td>January 21&lt;sup&gt;st&lt;/sup&gt;</td>
<td>Payroll processing begins using new salaries with retro payments</td>
</tr>
<tr>
<td>January 21&lt;sup&gt;st&lt;/sup&gt;-23&lt;sup&gt;rd&lt;/sup&gt;</td>
<td>Dept PR Reps review cost center/payroll register reports to validate pay</td>
</tr>
<tr>
<td>January 24&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Gross pay transmitted to CPB</td>
</tr>
<tr>
<td>January 31&lt;sup&gt;st&lt;/sup&gt;</td>
<td>Pay day #14-15</td>
</tr>
</tbody>
</table>
Guidelines

• Effective date: 1/1/14
• COLA is 3%
• Eligible Employee Classes:
  – Faculty (01, 02, 03, 15)
  – *Post Docs/Trainees (19)
  – Regular Staff (20, 33)
  – Contingent 2 Staff (22, 35)

*subject to school policy
Guidelines

• Employee must be ACTIVE on 12/31/13 AND 1/1/14
  – Employees terminating/retiring on 12/31/13 do not get COLA even though last paycheck and payout is done in 2014

• Eligible Comp Rate Codes:
  – ANNLEL- Annual
  – ACSPEL- Academic Subsidy
  – ADSPEL- Administrative Subsidy
Eligibility Preview

• Two queries have been created to review who is eligible and not eligible for COLA
  – UMB_CM_ELIG_EES (EE’s on PITP)
  – UMB_CM_NOTELIG_EES (EE’s Not on PITP)

• PR Reps should run these queries now to see if they find any discrepancies that can be addressed now
PITP

• What is it?
  – A custom eUM page to facilitate the review and approval of mass updates to salary

• Who has access in departments?
  – Employees with roles of:
    • Pay Increase Initiator
    • Pay Increase Approver
PITP Access

• PR Reps should look at department security to see who has Payroll Increase roles:

1- Enter UMB_PAYINC in Role Name field
2- Sort by Role Name
3- Click Fetch button
PITP Access

- Results:

<table>
<thead>
<tr>
<th>Access DeplID</th>
<th>Role Name</th>
<th>Empl Name</th>
<th>Empl ID</th>
<th>Status</th>
<th>EE Job DeplID</th>
<th>Details</th>
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</thead>
<tbody>
<tr>
<td>15100000</td>
<td>UMB_PAYINC_APPROVE</td>
<td>Doe, Lotta</td>
<td>345678</td>
<td>Active</td>
<td>15100000</td>
<td>Details</td>
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<tr>
<td>15100000</td>
<td>UMB_PAYINC_APPROVE</td>
<td>Leeve, Ivana</td>
<td>987654</td>
<td>Active</td>
<td>15100000</td>
<td>Details</td>
</tr>
<tr>
<td>15100000</td>
<td>UMB_PAYINC_INIT</td>
<td>Tryan, Ima</td>
<td>123456</td>
<td>Active</td>
<td>15100000</td>
<td>Details</td>
</tr>
</tbody>
</table>
PITP Access

• Each dept should have at least 1 person with UMB_PAYINC_INIT and 1 with UMB_PAYINC_APPROVE

• A person cannot have BOTH UMB_PAYINC_INIT and UMB_PAYINC_APPROVE roles
PITP Roles

• UMB_PAYINC_INIT (Initiator)
  – Can update Eligibility field

• UMB_PAYINC_APPROVE (Approver)
  – Can update Approve field

• If no one in your department has either of these roles you need to submit a new eUM HRMS User Authorization form by Fri 12/13

http://www.umaryland.edu/cits/communications_forms/forms/
PITP Defaults

• Data in the PITP will include all employee information entered by HRSC through Jan 3rd
• PITP will be loaded on Monday, Jan 6th
• All eligible comp rates for all eligible employee classes will default with a 3% increase and it will be defaulted to an approved status
PITP Defaults

• Action by department is only required for exceptions
• Many departments should not have to do anything
PITP Exceptions

• Types of exceptions that may require action:
  – SOM Post Docs
  – Other Post Docs on NRSA grants
  – C2s with incorrect comp rate codes
  – Regular staff and faculty with wrong comp rate codes
  – Unprocessed Terminations
  – Others?

• Changes to PITP require supporting documentation be submitted to HR-Compensation
Using the PITP

- **Home** > **Administer Workforce** > **Administer Workforce (GBL)** > **Use** > UMB Pay Increase Transaction
- Data is by Dept and Empl Class

![UMB Pay Increase Transaction Form](image-url)
Using the PITP

• Leave criteria blank to search for all you have access to
Using the PITP - Initiator

- Sample view for Pay Inc Initiator - 33 Exempt Regular

<table>
<thead>
<tr>
<th>Name</th>
<th>EmpID</th>
<th>EmpID Req</th>
<th>Effective Date</th>
<th>Emp Class</th>
<th>GFT</th>
<th>Std Hrs</th>
<th>FTE</th>
<th>Pay Inc Type</th>
<th>Elig Stat</th>
<th>Seq Num</th>
<th>Reason</th>
<th>Comp Rate Code</th>
<th>Current Comp Rate</th>
<th>Change Amount</th>
<th>Change Percent</th>
<th>Comp Rate New</th>
<th>Approved?</th>
<th>Hire/Rehire Dt</th>
<th>Job Code</th>
<th>Visa/Perm Type</th>
<th>Load to JOB?</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Bing, Chandler</td>
<td>524196</td>
<td>0</td>
<td>01/01/2014</td>
<td>33-Ex Reg</td>
<td>40</td>
<td>1.00</td>
<td>COLA</td>
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<td>52020.000000</td>
<td>1560.600000</td>
<td>3.000</td>
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<td>12/17/2012</td>
<td>E0719D</td>
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<td>Bing, Chandler</td>
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<tr>
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<td>0.50</td>
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<td></td>
<td>69972.000000</td>
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<td>72071.160000</td>
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<td>09/10/2012</td>
<td>E0719E</td>
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<td>Bing-Geller, Monica</td>
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<td>Buffay, Phoebe</td>
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<td>E12471</td>
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<td>Geller, Ross</td>
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<tr>
<td>Green, Rachel</td>
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<td>33-Ex Reg</td>
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<td>Green, Rachel</td>
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<tr>
<td>Tribiani, Joseph</td>
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</tbody>
</table>
Using the PITP- Initiator

- Initiator can only change Elig Stat and Reason
Using the PITP- Initiator

• Don’t forget to click the SAVE button if a change is made!
Using the PITP- Initiator

- Approved column is grayed out
  - If Elig Stat field is Eligible then Approved = Yes
  - If Elig Stat field is Ineligible then Approved = No
  and requires dept approval

![Table Example](image-url)
Using the PITP- Samples

- Faculty with ADSPEL

<table>
<thead>
<tr>
<th>Name</th>
<th>EmpID</th>
<th>EmpID</th>
<th>Effective Date</th>
<th>Emp Class</th>
<th>Std Hrs</th>
<th>FTE</th>
<th>Pay Incr Type</th>
<th>Elig Stat</th>
<th>Seq Num</th>
<th>Comp Rate Code</th>
<th>Current Comp Rate</th>
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<th>Change Percent</th>
<th>Comp Rate New</th>
<th>Approved?</th>
<th>Hire/Retire Dt</th>
<th>Job Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welby, Marcus</td>
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<tr>
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<td>01-FacTen</td>
<td>23.32</td>
<td>0.58</td>
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</table>

- Faculty with ADSPIN
### Using the PITP- Approver

- **Sample view for Pay Inc Approver**

<table>
<thead>
<tr>
<th>Name</th>
<th>EmpID</th>
<th>Empl Rcn Nbr</th>
<th>Effective Date</th>
<th>Empl Class</th>
<th>GFT</th>
<th>Std Hrs</th>
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<th>Pay Incr Type</th>
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<td>E0719D</td>
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<td>33-ExReg</td>
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<td>01/01/2014</td>
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<tr>
<td>Geller, Ross</td>
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<td>Green, Rachel</td>
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<td>Tribeni, Joseph</td>
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<td>08/17/1983</td>
<td>E12371</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Using the PITP - Approver

- Approver can only change Approved field
- Elig Stat or Reason cannot be updated by Approver
Using the PITP- Approver

• Don’t forget to click the SAVE button if a change is made!
Using the PITP- Approver

• Approved status should be set to YES for all employees by the department before Monday, January 13th
  – Status is Eligible and Approved = YES
  Or
  – Status is Ineligible and Approved = YES
Using the PITP- HR Comp

- HR Comp has final approval and they use the Load to Job field
Using the PITP- HR Comp

IMPORTANT!

• HR-Compensation must have documentation to support the reason why a dept made an employee ineligible to receive COLA
Job Data Updates

• Only 1 new job data row will be inserted even if there are multiple PITP rows (i.e. ANNLEL with ADSPEL)
• Ineligible comp rate codes will be inserted on new job data row with the updated eligible comp rates (i.e. ANNLEL with ADSPIN)
• Depts can view the job data rows on morning of Wednesday, Jan 15th
Paycheck Communications

• E-mail template will be sent to PR Reps to customize and send to your employees
• Please distribute by Friday, Dec 20th
• Employees should be referred to your department payroll rep if they have questions about their paychecks
Paycheck results

• PP# 14-13- Payday 1/3/14
  – No changes to gross salary
  – Benefits deductions may change based on open enrollment selections

• PP# 14-14- Payday 1/17/14
  – No changes to gross salary
Paycheck results

• PP# 14-15- Payday 1/31/14
  – New gross salary includes 3% increase
  – Additional retro pay for period Jan 1\textsuperscript{st} - 11\textsuperscript{th} COLA

• PP#14-16- Payday 2/14/14
  – Normal gross salary includes 3% increase and will continue until next Employee Action
Key Contacts

• HR- Compensation- 6-6338
  – Eligibility questions

• CITS- 6-HELP(4357)
  – Security/access questions

• FS- Payroll- 6-1243
  – Retro pay questions
Questions or Comments on COLA Processing
HRMS Upgrade
PeopleSoft 8.3 to 9.1