



UNIVERSITY *of* MARYLAND  
THE FOUNDING CAMPUS

# 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<sup>th</sup> - Thursday, Dec 19<sup>th</sup>
- Because of short processing cycle, **new hires attending orientation** on Monday, Dec 16<sup>th</sup> will be processed on Tuesday, Dec 17<sup>th</sup>
- 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<sup>th</sup> will be entered Jan 3<sup>rd</sup>, 2014**

# Human Resource Services

## HRSC Processing

### December Deadlines for Processing Employment Actions

**Wednesday, Dec 18<sup>th</sup> at Noon** (for paycheck 1/17/14)

- Processing Dates: Thursday, Jan 2<sup>nd</sup> - Friday, Jan 3<sup>rd</sup>
- New hires and terminations will be processed first
- Remaining transactions from Dec 4<sup>th</sup> deadline will be processed on Friday, Jan 3<sup>rd</sup>

# Human Resource Services

## HRSC Processing

### January Deadlines for Processing Employment Actions

**Thursday, Jan 9<sup>th</sup> at Noon** (for paycheck 1/31/14)

– Processing Dates: Monday, Jan 13<sup>th</sup> - Thursday, Jan 16<sup>th</sup>

**Thursday, Jan 23<sup>rd</sup> at Noon** (for paycheck 2/14/14)

– Processing Dates: Monday, Jan 27<sup>th</sup> - Friday, Jan 31<sup>st</sup>



# Human Resource Services

## HRSC Processing

### February Deadlines for Processing Employment Actions

#### **Thursday, Feb 6<sup>th</sup> at Noon** (for paycheck 2/28/14)

- Processing Date: Monday, Feb 10<sup>th</sup>
- Processing will be for onboarding new hires only
- System shut down for PeopleSoft Go-Live Feb 12<sup>th</sup>

#### **Thursday, Feb 20<sup>th</sup> at Noon** (for paycheck 3/14/14)

- Processing Dates: Monday, Feb 24<sup>th</sup> - Friday, Feb 28<sup>th</sup>

# Human Resource Services Compensation Processing

## Actions Requiring Compensation Review/Assessment

- Compensation will only process Position Requisitions received between Dec 1<sup>st</sup> and Jan 19<sup>th</sup>
- 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 3<sup>rd</sup>, effective dates of all Compensation-approved actions will be set for the 1<sup>st</sup> 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

Date	Action
January 6 <sup>th</sup>	CITS loads data to PITP
January 6 <sup>th</sup> - 12 <sup>th</sup>	Department Pay Increase Initiators/Approvers review
January 13 <sup>th</sup> - 14 <sup>th</sup>	HR-Compensation Review and Approve
January 14 <sup>th</sup> overnight	CITS loads PITP to Job record

# Critical Dates

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



# 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:


[Home](#) > [UMB Utilities](#) > [UMB Utilities](#) > [Inquire](#) > UMB Roles/Dept Security

UMB User Roles Inq   Umb Sec Role Vw

Role Name:    Access DeptID:

Sort Order

Access DeptId   Role Name  Employee Name

  [Press FETCH to get results](#)

Access DeptID	Role Name	Empl Name	Empl ID	Status	EE Job DeptID	Details
---------------	-----------	-----------	---------	--------	---------------	---------

- 1- Enter UMB\_PAYINC in Role Name field
- 2- Sort by Role Name
- 3- Click Fetch button

# PITP Access

- Results:

Home > UMB Utilities > UMB Utilities > Inquire > UMB Roles/Dept Security

UMB User Roles Inq   Umb Sec Role Vw

Role Name:     Access DeptID:

Sort Order

Access Deptid    Role Name    Employee Name

  Press FETCH to get results

Access DeptID	Role Name	Empl Name	Empl ID	Status	EE Job DeptID	Details
15100000	UMB_PAYINC_APPROVE	Doe, Lotta	345678	Active	15100000	<a href="#">Details</a>
15100000	UMB_PAYINC_APPROVE	Leeve, Ivana	987654	Active	15100000	<a href="#">Details</a>
15100000	UMB_PAYINC_INIT	Tryan, Ima	123456	Active	15100000	<a href="#">Details</a>

View 100   First ◀ 1-50 of 470 ▶ Last

# 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 3<sup>rd</sup>
- PITP will be loaded on Monday, Jan 6<sup>th</sup>
- 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

[Home](#) > [Administer Workforce](#) > [Administer Workforce \(GBL\)](#) > [Use](#) > UMB Pay Increase Transaction

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**UMB Pay Increase Transaction**

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**Find an Existing Value**

SetID:

Department:

Employee Classification:

Description:

[Basic Search](#)

# Using the PITP

- Leave criteria blank to search for all you have access to

**UMB Pay Increase Transaction**

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**Find an Existing Value**

SetID:

Department:

Employee Classification:

Description:

[Basic Search](#)

**Search Results**

View All First  1-6 of 6  Last

SetID	Department	Employee Classification	Short Description	Description
PSUMB	15100000	01	01-FacTen	Aromatherapy
PSUMB	15100000	03	03-FcN/NT	Aromatherapy
PSUMB	15100000	19	19-Trainee	Aromatherapy
PSUMB	15100000	20	20-NEX Reg	Aromatherapy
PSUMB	15100000	33	33-ExmReg	Aromatherapy
PSUMB	15100000	35	35-ExmC2	Aromatherapy

# Using the PITP- Initiator

- Sample view for Pay Inc Initiator- 33 Exempt Regular

Department: 15100000 Aromatherapy

UMB Pay Increase Transaction																						
Name	EmpID	Emp Rcd Nbr	Effective Date	Empl Class	GFT	Std Hrs	FTE	Pay Incr Type	Elig Stat	Seq Num	Reason	Comp Rate Code	Current Comp Rate	Change Amount	Change Percent	Comp Rate New	Approved?	Hire/Rehire Dt	Job Code	Visa/Permit Type	Load to JOB?	Description
Bing, Chandler	524196	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible ▼	1		ANNLEL	52020.000000	1560.600000	3.000	53580.600000	Yes	12/17/2012	E0719D		Yes	
Bing-Geller, Monica	523732	0	01/01/2014	33-ExmReg		20.00	0.50	COLA	Eligible ▼	1		ANNLEL	69972.000000	2099.160000	3.000	72071.160000	Yes	09/10/2012	E0719E		Yes	
Buffay, Phoebe	523277	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible ▼	1		ANNLEL	43860.000000	1560.600000	3.000	45420.600000	Yes	07/05/2012	E2913C		Yes	
Geller, Ross	504974	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible ▼	1		ANNLEL	114994.800000	3449.844000	3.000	118444.644000	Yes	09/30/1984	E12471		Yes	
Green, Rachel	5012310	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible ▼	1		ANNLEL	57556.980240	1560.600000	3.000	59117.580240	Yes	10/31/2005	E1215D		Yes	
Tribiani, Joseph	502816	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible ▼	1		ANNLEL	137340.723360	4120.221701	3.000	141460.945061	Yes	08/17/1983	E1237J		Yes	

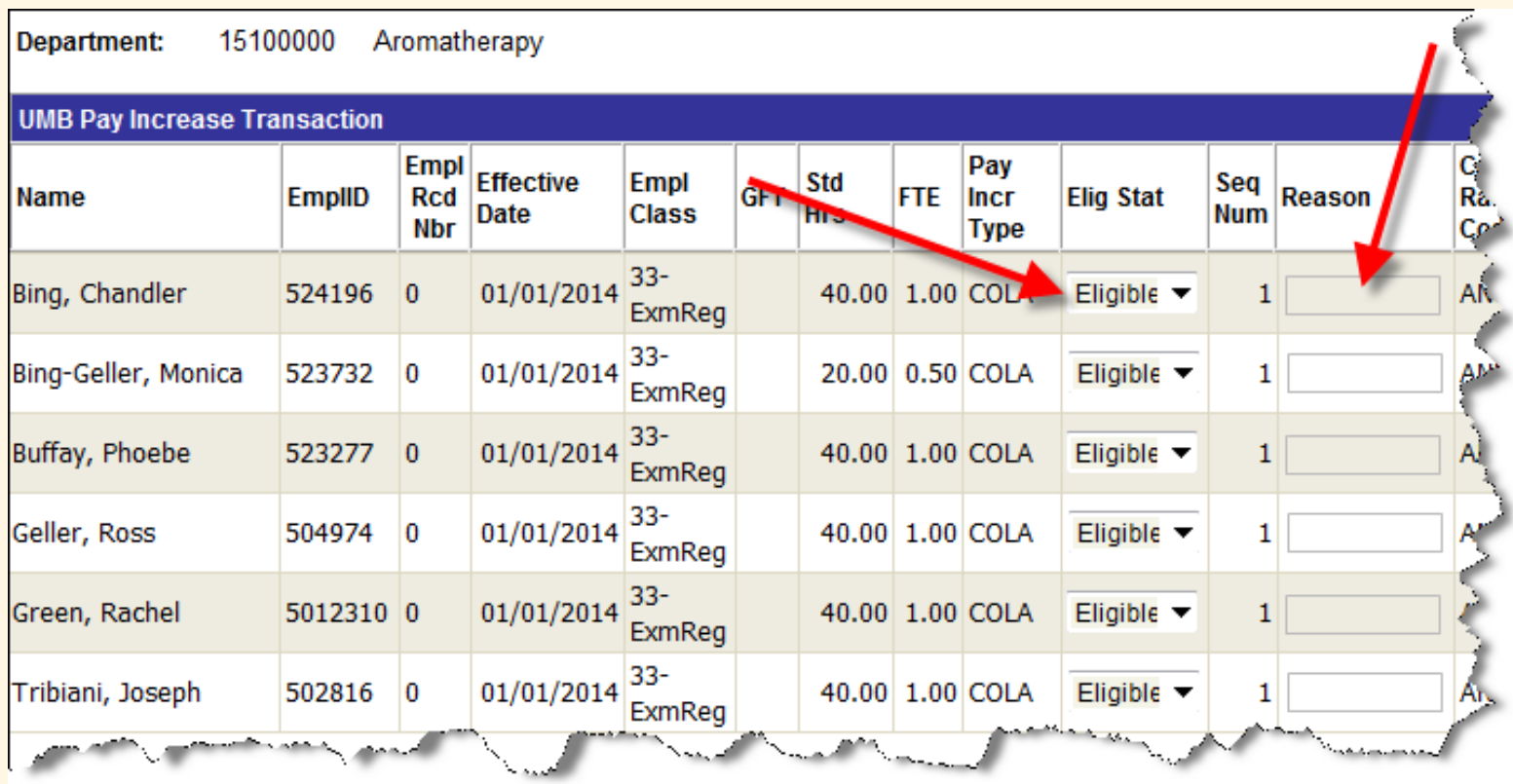
# Using the PITP- Initiator

- Initiator can only change Elig Stat and Reason

Department: 15100000 Aromatherapy

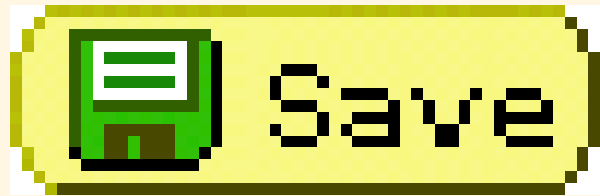
UMB Pay Increase Transaction

Name	EmplID	Empl Rcd Nbr	Effective Date	Empl Class	GPI	Std Hrs	FTE	Pay Incr Type	Elig Stat	Seq Num	Reason	C Ra Co
Bing, Chandler	524196	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible ▼	1	<input type="text"/>	AM
Bing-Geller, Monica	523732	0	01/01/2014	33-ExmReg		20.00	0.50	COLA	Eligible ▼	1	<input type="text"/>	AM
Buffay, Phoebe	523277	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible ▼	1	<input type="text"/>	A
Geller, Ross	504974	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible ▼	1	<input type="text"/>	A
Green, Rachel	5012310	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible ▼	1	<input type="text"/>	A
Tribiani, Joseph	502816	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible ▼	1	<input type="text"/>	A



# Using the PITP- Initiator

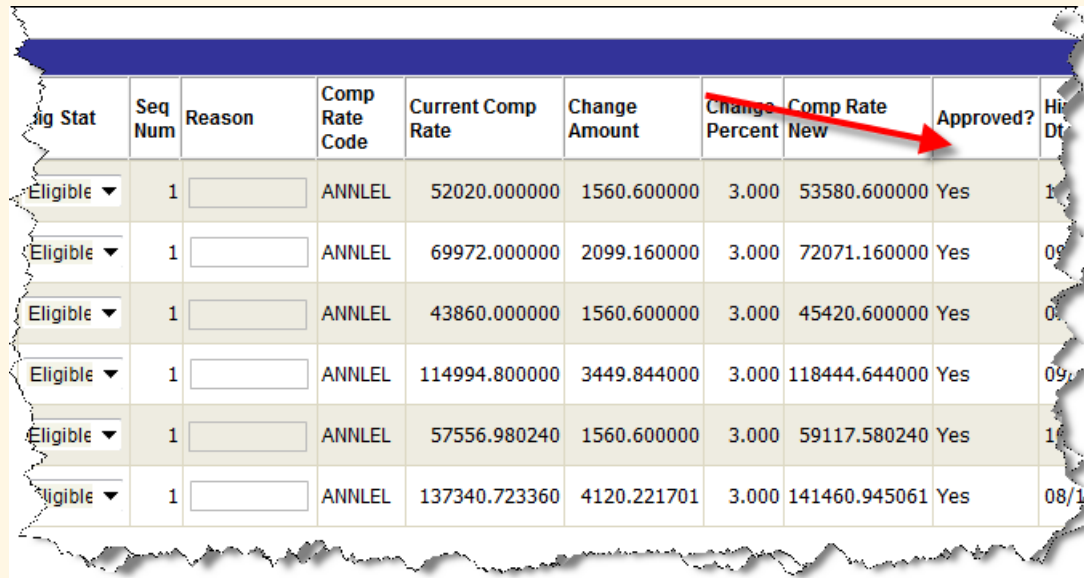
- Don't forget to click the SAVE button if a change is made!





# 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



Elig Stat	Seq Num	Reason	Comp Rate Code	Current Comp Rate	Change Amount	Change Percent	Comp Rate New	Approved?	Hi Dt
Eligible ▾	1	<input type="text"/>	ANNLEL	52020.000000	1560.600000	3.000	53580.600000	Yes	1/
Eligible ▾	1	<input type="text"/>	ANNLEL	69972.000000	2099.160000	3.000	72071.160000	Yes	09/
Eligible ▾	1	<input type="text"/>	ANNLEL	43860.000000	1560.600000	3.000	45420.600000	Yes	0/
Eligible ▾	1	<input type="text"/>	ANNLEL	114994.800000	3449.844000	3.000	118444.644000	Yes	09/
Eligible ▾	1	<input type="text"/>	ANNLEL	57556.980240	1560.600000	3.000	59117.580240	Yes	1/
Eligible ▾	1	<input type="text"/>	ANNLEL	137340.723360	4120.221701	3.000	141460.945061	Yes	08/1

# Using the PITP- Samples

- Faculty with ADSPEL

Department: 15100000 Aromatherapy

UMB Pay Increase Transaction																				
Name	EmpID	Empl Rcd Nbr	Effective Date	Empl Class	GFT	Std Hrs	FTE	Pay Incr Type	Elig Stat	Seq Num	Reason	Comp Rate Code	Current Comp Rate	Change Amount	Change Percent	Comp Rate New	Approved?	Hire/Rehire Dt	Job Code	Visa/Per Type
Welby, Marcus	501667	0	01/01/2014	01-FacTen	Y	23.32	0.58	COLA	Eligible	1		ADSPEL	58099.200000	1560.600000	3.000	59659.800000	Yes	01/01/1997	149101	
Welby, Marcus	501667	0	01/01/2014	01-FacTen		23.32	0.58	COLA	Eligible	1		ANNLEL	232396.800000	6971.904000	3.000	239368.704000	Yes	01/01/1997	149101	

- Faculty with ADSPIN

Department: 15100000 Aromatherapy

UMB Pay Increase Transaction																				
Name	EmpID	Empl Rcd Nbr	Effective Date	Empl Class	GFT	Std Hrs	FTE	Pay Incr Type	Elig Stat	Seq Num	Reason	Comp Rate Code	Current Comp Rate	Change Amount	Change Percent	Comp Rate New	Approved?	Hire/Rehire Dt	Job Code	Visa/Per Type
Welby, Marcus	501667	0	01/01/2014	01-FacTen		23.32	0.58	COLA	Eligible	1		ANNLEL	232396.800000	6971.904000	3.000	239368.704000	Yes	01/01/1997	149101	

# Using the PITP- Approver

- Sample view for Pay Inc Approver

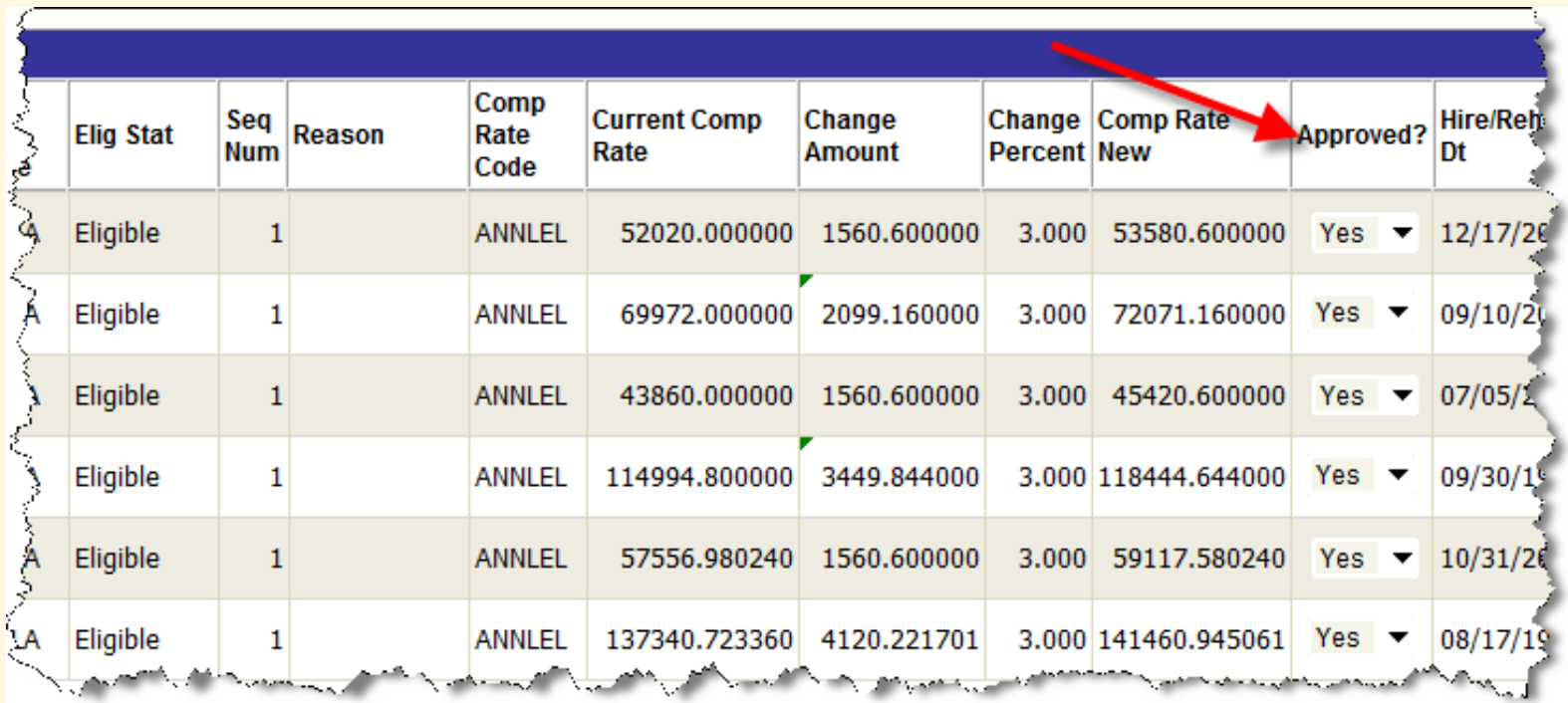
Department: 15100000 Aromatherapy

UMB Pay Increase Transaction Find | View All First 1-10 of 31 Last

Name	EmpID	Empl Rcd Nbr	Effective Date	Empl Class	GFT	Std Hrs	FTE	Pay Incr Type	Elig Stat	Seq Num	Reason	Comp Rate Code	Current Comp Rate	Change Amount	Change Percent	Comp Rate New	Approved?	Hire/Rehire Dt	Job Code	Visa/Permit Type	Load to JOB?	Description
Bing, Chandler	524196	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible	1		ANNLEL	52020.000000	1560.600000	3.000	53580.600000	Yes	12/17/2012	E0719D		Yes	
Bing-Geller, Monica	523732	0	01/01/2014	33-ExmReg		20.00	0.50	COLA	Eligible	1		ANNLEL	69972.000000	2099.160000	3.000	72071.160000	Yes	09/10/2012	E0719E		Yes	
Buffay, Phoebe	523277	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible	1		ANNLEL	43860.000000	1560.600000	3.000	45420.600000	Yes	07/05/2012	E2913C		Yes	
Geller, Ross	504974	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible	1		ANNLEL	114994.800000	3449.844000	3.000	118444.644000	Yes	09/30/1984	E12471		Yes	
Green, Rachel	5012310	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible	1		ANNLEL	57556.980240	1560.600000	3.000	59117.580240	Yes	10/31/2005	E1215D		Yes	
Tribiani, Joseph	502816	0	01/01/2014	33-ExmReg		40.00	1.00	COLA	Eligible	1		ANNLEL	137340.723360	4120.221701	3.000	141460.945061	Yes	08/17/1983	E1237J		Yes	

# Using the PITP- Approver

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

A screenshot of a data table with a blue header bar. A red arrow points from the top right towards the 'Approved?' column. The table has 10 columns: Elig Stat, Seq Num, Reason, Comp Rate Code, Current Comp Rate, Change Amount, Change Percent, Comp Rate New, Approved?, and Hire/Reh Dt. There are 7 rows of data, all with 'Eligible' in the 'Elig Stat' column and '1' in the 'Seq Num' column. The 'Approved?' column contains a 'Yes' dropdown menu for each row.

Elig Stat	Seq Num	Reason	Comp Rate Code	Current Comp Rate	Change Amount	Change Percent	Comp Rate New	Approved?	Hire/Reh Dt
Eligible	1		ANNLEL	52020.000000	1560.600000	3.000	53580.600000	Yes ▼	12/17/20
Eligible	1		ANNLEL	69972.000000	2099.160000	3.000	72071.160000	Yes ▼	09/10/20
Eligible	1		ANNLEL	43860.000000	1560.600000	3.000	45420.600000	Yes ▼	07/05/20
Eligible	1		ANNLEL	114994.800000	3449.844000	3.000	118444.644000	Yes ▼	09/30/19
Eligible	1		ANNLEL	57556.980240	1560.600000	3.000	59117.580240	Yes ▼	10/31/20
Eligible	1		ANNLEL	137340.723360	4120.221701	3.000	141460.945061	Yes ▼	08/17/19

# 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 13<sup>th</sup>
  - 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

Find | View All First 1-

Pay Type	Elig Stat	Seq Num	Reason	Comp Rate Code	Current Comp Rate	Change Amount	Change Percent	Comp Rate New	Approved?	Hire/Rehire Dt	Job Code	Visa/Permit Type	Load to JOB?
COLA	Eligible	1		ANNLEL	52020.000000	1560.600000	3.000	53580.600000	Yes	12/17/2012	E0719D		Yes
COLA	Eligible	1		ANNLEL	69972.000000	2099.160000	3.000	72071.160000	Yes	09/10/2012	E0719F		Yes
COLA	Eligible	1		ANNLEL	43860.000000	1560.600000	3.000	45420.600000	Yes	07/05/2012	E2913C		Yes
COLA	Eligible	1		ANNLEL	114994.800000	3449.844000	3.000	118444.644000	Yes	09/30/1984	E12471		Yes
DLA	Eligible	1		ANNLEL	57556.980240	1560.600000	3.000	59117.580240	Yes	10/31/2005	E1215D		Yes
	Eligible	1		ANNLEL	127340.722260	4120.221701	3.000	141460.945061	Yes	08/17/1983	E1222J		Yes

# 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 15<sup>th</sup>

# Paycheck Communications

- E-mail template will be sent to PR Reps to customize and send to your employees
- Please distribute by Friday, Dec 20<sup>th</sup>
- 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<sup>st</sup> - 11<sup>th</sup> 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**