FY15 Commitment Accounting Processing

Thursday, June 12, 2014
10am-11:30am
School of Nursing- Room 130
Presenters

• Susan McKechnie-
  – Controller- Financial Services

• Linda Ward-
  – Manager- Costing & Compliance
Agenda

• FY15 Fringe Benefit Rates
• Direct Retros
• EFP Rollover
• 14-26 and 15-01 Actuals Distribution & Encumbrances
• Other Payroll Topics
FY15 FRINGE BENEFIT RATES & DIRECT RETROS
FY15 Fringe Rates

- FY15 Fringe Benefit Rates will be applied starting PP15-01
- The new fringe rate is applied to the entire pay period even though the fringes related to 6/29-6/30 will be posted to FY14
- The rates will be posted on the Costing & Compliance webpage:
  http://www.cost.umaryland.edu/fringebenefitrates.cfm
FY14 Retroactive Distributions

- Direct retros for all types of projects* will be processed on or before 7/1 (posted in FY14)

- No direct retros can be processed from 7/2 to 7/6

- Direct retros for all types of projects except for Physician Service Contract projects can be processed from 7/7 and forward (posted in FY15)

* Subject to Costing & Compliance approval
# Direct Retro Cut Off Dates

<table>
<thead>
<tr>
<th>When Received</th>
<th>Pay Period Entered</th>
<th>HRMS FY Post</th>
<th>Financials FY Post</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up through 6/19</td>
<td>14-25</td>
<td>2014</td>
<td>2014</td>
</tr>
<tr>
<td>Up through 6/27 at 2PM</td>
<td>14-26</td>
<td>2014</td>
<td>2014</td>
</tr>
<tr>
<td>After 6/27 at 2PM</td>
<td>15-01</td>
<td>2015</td>
<td>2015</td>
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</table>
DR Processing

• Reminder- a direct retro and a budget retro cannot be processed in same pay period- plan accordingly!!!
Questions or Comments Fringes or DR Processing
EFPS & DISTRIBUTIONS & THE FY15 ROLLOVER
FY15 EFP Rollover

• The process where we take the last EFP used for actuals distribution in FY14 and copy it to FY15

• Will occur after 6PM on Tuesday, 7/1

• Rollover is done in same timeframe as PP14-26 Actuals Distribution

• After the rollover is done EFPs for FY14 cannot be changed

• The EFP that is used for PP14-26 is also used for the FY14 portion of PP15-01 (via “fix” EFP)
PP14-26 (6/15-6/28) Distribution

- **Wednesday-7/2**: Actuals Distribution process is run for PP14-26 with no encumbrances

- **Thursday-7/3**: Validate that payroll expenses were distributed correctly using HRMS *Payroll Charges Detail (PCD)*

- **Friday-7/4**: Validate that payroll expenses were distributed correctly using Raven *Statement of Payroll Charges (SPC)*
FY14 EFP Cut Off Date

• **Tuesday- 7/1/14** – all EFPs for FY14 must be approved in eUMB before 6 PM
  – EFPs entered but not approved by the deadline will be deleted

• No budget retros for FY14 after 7/1/14, 6pm
WHAT TO DO
BEFORE THE FY15 EFP ROLLOVER

From today until 6pm on Tuesday, 7/1/14
Before the FY15 EFP Rollover

• Make sure **all** employees have a FY14 EFP
  – Run Funding Summary Report and/or
  – Run query UMB_CA_NO_EFP

• Administrative depts tend to forget to set up EFPs for new employees- means more work at budget time!
Before the FY15 EFP Rollover

• Review all funding sources that end 6/30/14 or earlier and determine redistributions
  – Use EFP Query or Funding Summary Report

• Complete redistributions by entering & approving new EFP for a Budget Retro
  – Approve new EFP by 2pm on Friday, 6/20 for PP14-25
  – Approve new EFP by 6pm on Tuesday, 7/1 for PP14-26 and PP15-01 distribution (6/29-6/30)
Before the FY15 EFP Rollover

- Check ALL Funding End Dates (FED) on EFPs:
  - No FED $\Rightarrow$ no change required
  - FED > 6/30/14 $\Rightarrow$ no change required
  - FED < 6/30/14 $\Rightarrow$ change now so that payroll expenses do not charge PCA
  - FED = 6/30/14 $\Rightarrow$ OK to change now; must be changed in FY15 to avoid charging PCA
Before the FY15 EFP Rollover

• Funding End Dates on EFPs:
  – For sponsored projects, the funding end date is required and it can be extended to the lesser of the project end date or 6/30/19 (current FY + 5 years)
  – For all other projects, an end is not required or recommended but if entered it cannot be greater than the end of the current fiscal year
Before the FY15 EFP Rollover

• Check for EFPs that cite PCA:
  – Run Query UMB_CA_EFP_BY_PROJ_ID
    • Enter Department PCA for project
  – If EFP is found where PCA is cited, consider changing it

• Reminder: PCAs should be zeroed out by end of the fiscal year (*except for overpayments*)

• PCA with Funding End Date of 6/30/2099 as a result of last year’s Redirect process
  – Funding End Date was removed if a new EFP was not created before the 9.1 upgrade
  – Will not appear on the Funding Summary Report when PCAs Only option is checked
Before the FY15 EFP Rollover

Run Funding Summary Report using an “as of” date of 6/30/14 and select the “PCAs Only” report choice. Only the following will be returned:

1. Lines marked as ‘DP’
2. Lines with Funding End Dates of 6/30/14 or earlier
Setting Up Funding Summary Report:

Checking EFPs Before 14-26 Distribution

Using 6/30/14 will help you insure that charges through the end of the fiscal year are using the correct combo code.

The default setting (“No”) returns EFPs for active employees only. Select “Yes” if you also need to display EFPs for terminated employees.

Use PCAs Only Report Choice to isolate the EFPs that will default to the PCA/Dept level.
Reviewing Funding Summary Report: Checking EFPs **Before 14-26 Distribution**

<table>
<thead>
<tr>
<th>EMPLOYEE ID</th>
<th>RC#</th>
<th>NAME</th>
<th>STATUS</th>
<th>LEVEL</th>
<th>FUNDING</th>
<th>PCBU</th>
<th>PROJ ID</th>
<th>ACTV</th>
<th>GRAM</th>
<th>FUND</th>
<th>ACCOUNT CODE</th>
<th>DIST. %</th>
<th>END DATE</th>
<th><em>PCA</em></th>
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</tr>
</tbody>
</table>

Total Number of Employees Processed: 54

Displays problem EFPs in effect as of 6/30/14

**PCAs Only Version**

Only the portion of the EFP that will be charged to the PCA is displayed—*not* the full EFP.

AP= Appointment Level Profile (EFP is in eUM); DP= Department Level Profile (EFP is NOT in eUM and payroll-related expenses will be charged to departmental PCA!)

(now thru 7/1)
FY15 EFP ROLLOVER  
(AFTER 6PM ON TUESDAY, 7/1/14)
FY15 Rollover

• The last FY14 EFP will be used to programmatically:
  – Create the Initial 7/1/14 EFP
  – Create the “fix” EFP to be used for any earnings associated with dates prior to 7/1/14 paid in FY15
FY15 Rollover

• The “fix” EFP:
  – Will have a Funding Begin Date of 3/23/03, employee’s hire date, or date transferred to department -- whichever is latest
  – Used to distribute FY14 payroll expenses (based on pay earnings dates) that are paid in FY15 (ex. Shift, OVT, hourly employees)
  – Cannot be created if an employee has no FY14 EFP before 7/1/14
    • Prior fiscal year retro pay (<7/1/14) will be charged to PCA and the department will submit a DR to move expenses
FY15 Rollover

• EFPs will programmatically be created for both active employees and employees who were terminated after 1/1

  – No action is required on your part for terminated employees (unless you have a payout in FY15)
WHAT TO DO AFTER THE ROLLOVER & BEFORE PP15-01 ACTUALS DISTRIBUTION

From Wednesday, 7/2/14 until 6pm on Tuesday, 7/15/14
Before PP15-01 Actuals Distribution

• Make sure **all** active employees have a **valid** 7/1/14 EFP
  – Review 7/1/14 EFP to be sure it is valid (check combo codes, funding end dates, % distributions)
  – Create a **valid** 7/1/14 EFP if it is not there

• 7/2/14, 6AM – 7/15/14, 6PM (Two Week period):
  – Departments review and create additional 7/1/14 EFPs as needed to reflect valid combo codes, funding end dates, % distributions
Creating New FY15 EFPs

- EFP will display the salary in effect at the time the EFP is created

- If an employee action is submitted effective 7/1/14 but it hasn’t been entered in eUMB then the old salary will be reflected on the EFP page - this is OK

- Reminder- salary displayed on the EFP is informational only and may not reflect the actual amount distributed.
Cost Sharing for Payroll Expenses

• NIH Salary Cap is $181,500- check employees who may go over the cap with 7/1 pay increases
  – Amount is based on annualized salary- Ex. FTE=.20 and amount paid at UMB= $40K ➔ Annualized= $200K

• This only applies to NIH agencies- if you don’t know whether a sponsor is under the NIH umbrella check the following website: http://www.nik.gov/icd/index.html

• Position owner creates EFP but may be unaware that a project from another department requires OTC- communicate!
Checking FY15 EFPs Before 15-01 Distribution

Run Funding Summary Report using an “as of” date of 7/12/14 and select the “PCAs Only” report choice. Only the following will be returned:

1. Lines marked as ‘DP’
2. Lines with Funding End Dates of 7/12/14 or earlier
Setting Up Funding Summary Report: (7/2 thru 7/15) Checking FY15 EFPs **Before 15-01 Distribution**

This report displays the “problem” EFPs in effect “as of” the last day of PP 15-01.
Reviewing Funding Summary Report: Checking FY15 EFPs Before 15-01 Distribution

PCAs Only Version

Displays EFPs in effect as of 7/12/14

ALERT! Funding sources expiring 06/30/14 and earlier require your quick attention or your PCA will be charged.

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<table>
<thead>
<tr>
<th>EMPLOYEE ID</th>
<th>RCD#</th>
<th>NAME</th>
<th>STATUS</th>
<th>LEVEL</th>
<th>PCBU</th>
<th>PROJ ID</th>
<th>ACTV</th>
<th>GRAM</th>
<th>FUND</th>
<th>ACCOUNT CODE</th>
<th>FUNDING CODE</th>
<th>&quot;PCA&quot; END DATE</th>
<th>EMPLOYER Payroll-related expenses will be charged to the departmental PCA!</th>
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<td>Benes, Elaine</td>
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<td>100.000</td>
<td>***</td>
<td>***</td>
</tr>
</tbody>
</table>

Total Number of Employees Processed: 54

ALERT! If Funding Level = DP (Department Level Profile), employee **DOES NOT HAVE EFP** in eUMB. Payroll-related expenses will be charged to the departmental PCA!

(7/2 thru 7/15)
FY15 REDIRECT EFPS TO PCA PROCESS

On Tuesday, 7/15/14 after 6pm
FY15 Redirect EFP Process

• If the FY15 EFP has a funding end date of 6/30/14 or earlier, on Tuesday, July 15th after 6pm, the EFP will be changed by the system.

• A process will run to replace any combo code with an expired funding end date with your department default combo code- AKA your PCA- with funding end date of 7/1/2014.
The initial FY15 EFP created effective 7/1/14 with combo codes expiring before 7/1/14 was not fixed before 7/15/14 at 6pm.

A redirect process will run on Tuesday, 7/15/14 to remove combo codes with funding end dates prior to 7/1/14 and add the PCA/Dept Default combo code equal to the percent of combo codes removed.

### FY15 EFP on 7/15/14

<table>
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<tbody>
<tr>
<td>State</td>
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<tr>
<td>Grant#1</td>
<td>5/31/2014</td>
<td>20%</td>
</tr>
<tr>
<td>Grant#2</td>
<td>6/30/2014</td>
<td>30%</td>
</tr>
<tr>
<td>Grant#3</td>
<td>7/31/2014</td>
<td>25%</td>
</tr>
<tr>
<td>Grant#4</td>
<td>8/31/2014</td>
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</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>100%</strong></td>
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</table>

### FY15 EFP on 7/16/14

<table>
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<tr>
<td>State</td>
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<tr>
<td>Revolving</td>
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</tr>
<tr>
<td>Grant#3</td>
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<tr>
<td>PCA</td>
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<td>50%</td>
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<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>100%</strong></td>
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</table>
PP15-01 ACTUALS DISTRIBUTION & ENCUMBRANCES

On Wednesday, 7/16/14
PP15-01 (6/29-7/12) Distribution

• **Wednesday-7/16**: Actuals Distribution process is run for PP15-01 with encumbrances calculated from 7/13/14 forward

• **Thursday-7/17**: Validate that payroll expenses were distributed correctly using PCD

• **Friday-7/18**: Validate that payroll expenses were distributed correctly using SPC
PP15-01 Actuals Distribution

- Two Week period = 6/29/14-7/12/14
- Using FY15 Fringe Benefit Rates for entire PP15-01 (6/29-7/12)
- For PCD reporting purposes, we refer to period of 6/29-6/30 as PP14-27 (AKA the payroll accrual) and 7/1-7/12 as PP15-01
- For SPC reporting purposes, we refer to the entire pay period as 15-01 and use the Fiscal Year field to segregate 6/29-6/30 from 7/1-7/12
• PP15-01 covers payroll expenses associated with both FY14 and FY15 - when the actuals distribution is run:
  
  – FY14 payroll expenses (based on pay earnings dates) will be distributed based on the “fix” EFP (Ex. Shift, OVT, hourly employees)
  
  – FY15 payroll expenses (based on pay earnings dates) will be distributed based on the 7/1/14 EFP in effect
When a valid EFP is not set up before the 15-01 actuals distribution process is run:

- Payroll expenses associated with earnings dates greater than the Funding End Dates on your EFPs will be distributed to your PCA
- You will need to do a budget retro
- You will have LARGE encumbrance balances on your PCA
Setting Up Funding Summary Report: (starting 7/16)

Checking FY15 EFPs **Used** in 15-01 Distribution

This report displays the “problem” EFPs in effect “as of” the last day of PP 15-01.
Reviewing Funding Summary Report: Checking FY15 EFPs Used in 15-01 Distribution

Displays problem EFPs in effect as of PP15-01

PCAs Only Version

Example where no changes were made to FY15 EFPs

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<thead>
<tr>
<th>EMPLOYER ID</th>
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<th>NAME</th>
<th>STATUS</th>
<th>LEVEL</th>
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<th>END DATE</th>
<th>FUNDING</th>
<th><em>PCA</em></th>
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</tr>
</tbody>
</table>

Total Number of Employees Processed: - 54

End of Department

**ALERT!** Funding sources expiring 6/30/14 and earlier were changed by the redirect process to charge your PCA

(starting 7/16)
# Key Dates Summary

<table>
<thead>
<tr>
<th>Action</th>
<th>Dates in 2014</th>
</tr>
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<tbody>
<tr>
<td>Depts submit Direct Retros for FY14</td>
<td>Friday, June 27\textsuperscript{th}- 2pm</td>
</tr>
<tr>
<td>Depts create new FY14 EFPs</td>
<td>Now until Tuesday, July 1\textsuperscript{st} – 6pm</td>
</tr>
<tr>
<td>EFP Rollover: Copy forward FY14 EFPs to create FY15 7/1/14 EFP and “Fix” EFP</td>
<td>Tuesday, July 1\textsuperscript{st} after 6pm</td>
</tr>
<tr>
<td>PP14-26 Actuals Distributions</td>
<td>Wednesday, July 2\textsuperscript{nd}</td>
</tr>
<tr>
<td>Depts create new FY15 EFPs</td>
<td>Wednesday, July 2\textsuperscript{nd} – Tuesday, July 15\textsuperscript{th} at 6pm</td>
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<tr>
<td>EFP Redirect process</td>
<td>Tuesday, July 15\textsuperscript{th} after 6pm</td>
</tr>
<tr>
<td>PP15-01 Actuals Distribution with FY15 Fringe Benefit Rates and FY15 encumbrance</td>
<td>Wednesday, July 16\textsuperscript{th}</td>
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Tools for Checking EFPs

• Use Funding Summary Report
  – Main Menu>Set Up HRMS> Product Related> Commitment Accounting> Reports> Funding Summary USA

• Use queries (recommend using pivot tables with download to Excel)
  – Main Menu> Reporting Tools> Query> Query Viewer
    • UMB_CA_EFP_BY_EMPL_ID (one employee)
    • UMB_CA_EFP_BY_DEPT_ID (all employees)
    • UMB_CA_NO_EFP (for missing EFPs)
    • UMB_CA_EFP_BY_PROJ_ID (check PCA)
PP15-01 Reminders

• Since we are using the real service dates on the PA form, the earnings will be distributed to the appropriate fiscal year according to those dates

• Write the appropriate fiscal year on the top of the PA form

• Pay earnings prior to 7/1/14 will be distributed using the “Fix” EFP unless a combo code is entered on the form
# Payroll Adjustment Form

**FY14**

### Payroll Adjustment Form

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<th>Details</th>
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</tr>
<tr>
<td>(Last, First):</td>
<td></td>
</tr>
<tr>
<td>Empl ID/Rcd#/ Paygroup:</td>
<td></td>
</tr>
<tr>
<td>Empl Class:</td>
<td></td>
</tr>
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<td></td>
</tr>
<tr>
<td>Department ID:</td>
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<tr>
<td>Check one:</td>
<td></td>
</tr>
<tr>
<td>Type of Pay Adjustment:</td>
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<tr>
<td>Description/Notes:</td>
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<td>Earnings Codes:</td>
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<td>Pay Period Processed (FY-PP):</td>
<td>15-01</td>
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<td>Dates of Service:</td>
<td>6/1-6/30/14</td>
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<td>Contact phone:</td>
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</tr>
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(University of Maryland, The Founding Campus)
PP 15-01 Reminders

• Salary Pay is calculated on 14ths instead of 10ths- Ex. New faculty employee who starts 7/1/14 will received 12/14ths pay; exempt employee terminating 6/30/14 will receive 2/14ths pay

• Hourly Pay (Non-exempt and hourly employees) is calculated based on hours entered on timesheet or scheduled
Questions or Comments on CA Processing
OTHER PAYROLL TOPICS
Introduction to eUMB HRMS

• Introduction to eUMB HRMS course includes 3 topics:
  – Overview of eUMB HRMS
  – eUMB HRMS Components in Detail
  – Summaries, Queries and Reports

• Starting June 2014, this course has been changed to a self-paced course in online format

• This is a required course for gaining access to eUMB HRMS and a pre-requisite to Department Payroll Processing (DPP) and Commitment Accounting (CA) courses
Introduction to eUMB HRMS

- After completing the online Introduction to eUMB HRMS tutorials, employee is required to follow the instructions to print the certificate, sign, and submit it.

- Employees who wish to take courses Department Payroll Processing (DPP) and/or Commitment Accounting (CA) must complete the online Introduction to eUMB HRMS before attending the DPP and/or CA courses.

- Instructions on how to take the online course Introduction to eUMB HRMS can be found at FSPR website at: [http://cf.umaryland.edu/cits_training/](http://cf.umaryland.edu/cits_training/)
Actuals Distribution & Enc Run

- Currently actuals distribution and encumbrance processing is run Saturday after each pay day

- **NEW Schedule** Starting FY15, actuals distribution and Enc processing will be run payday week Wednesday (normal payroll cycle)
  - PCD will be ready for validation Thursday after actuals distribution (payday week)
  - Raven SPC will be ready for validation Friday (payday week)
  - EFP and DR due dates will be changed from pay week Friday at 2pm to pay week Tuesday at 6pm

- Payroll calendar has been updated and published
F&A Processing

• For PP14-26 and PP15-01 F&A will run on Thursday (following actuals dist) in addition to the weekend run so when viewing payroll charges in Raven on Friday you will see the related F&A

• Beginning Monday, July 28th F&A will run NIGHTLY
Paper Payroll Checks

• Anticipate a change in payroll check pickup starting September 2014

• Payroll checks will be changed from pick up and distribution by the departments to direct mailing to employees

• FSPR will mail payroll checks to employees upon receipt from System Payroll (normally the day before payday)
  - If no address printed on the payroll check, FSPR will use the address listed in eUMB
Paper Payroll Checks

• What do you need to do before the change?
  – Encourage direct deposit
  – Make sure the CPB address is correct to avoid getting lost in the mail
    ✓ Address at CPB
      o validate from paycheck
    ✓ Address at UMB
      o validate from UMB Self Service>UMB Personal Information
Paper Payroll Checks

• How to update an address if necessary
  – Payroll address at CPB
    • Online at CPB’s Payroll Online Service Center (POSC) at
    • Payroll Address Form
      http://www.fincsvc.umd.edu/payroll/images/AddressForm1.pdf
  – Payroll address in eUMB
    • BY employee: via UMB Self Service>UMB Personal Information
    • By Payroll Rep: via UMB Self Service Manager>UMB Employee Home Address
  – Additional instructions for benefits or retirement are here:
    http://hr.umd.edu/Current_Employees/Emp_Self_service#addr
If Autocomplete is “Yes”- the system will suggest values as you begin typing in a field. By selecting “No” and clicking “OK” you will not see any values selection lists which will improve performance on all HRMS search pages.
Key Contacts

• FS- Payroll- 6-1243
  – EFP rollover process
  – DL-BFPayrollHelp@af.umaryland.edu

• Costing & Compliance- 6-2987
  – Direct Retros
  – effort@af.umaryland.edu

• CITS- 6-HELP(4357)
  – Security/access or query/report issues
  – help@umaryland.edu
Questions or Comments on Payroll Topics
Next Meeting

• Merit increases effective 7/1/14
  – Next week on Wednesday, June 18th
  – School of Pharmacy- Room N-103
  – 10:00 - Noon