Payroll Reps meeting
FY15 COLA

December 12, 2014
9:30-11:00
SON Auditorium
Please print your name on the attendance sheet
Agenda

• Contractual Employee Changes
• HRS Employment Actions & Processing Updates
• ePAF Processing
• COLA-
  – Review of critical dates
  – Review of guidelines
  – Payroll Increase Transaction page (PITP) Processing
  – Timetable for paycheck results
• Timesheets/ETS Approver update
• Training database demo
Presenters

• Human Resource Services
  – Emily Runser

• Financial Services
  – Susan McKechnie

• Financial Systems
  – Robin Reid
Contractual Employee Changes

WEBSTER DICTIONARY:
CONTRACT - BINDING AGREEMENT BETWEEN TWO OR MORE PERSONS OR PARTIES; ESPECIALLY: ONE LEGALLY ENFORCEABLE
Affordable Care Act (ACA)

• All UMB employees who work 30 or more hours per week or 130 hours per month
• State will provide 75% subsidy to federal mandated insurance to eligible employees
  – Subsidy will be charged back to UMB (date TBD)
• Employee who fails to have insurance
  – Employee receives penalty from IRS –
    • 2015 - 2% household income
      – $50000 = $1000
  – Employer receives penalty -
    • 2015 - $2000 per employee not covered
    • ~5500 eligible employees only 3500 utilized UMB insurance
      – if 500 go un-insured then cost will be $1,000,000 to UMB
1/1/15 - C2 Amended Contracts

• Amended contracts will be needed for all C2s who currently have any health, prescription, or dental allowances effective 1/1/15

• State will provide 75% assistance for health and prescription
  – therefore if they have assistance and an amended contract is not submitted UMB must honor the contract and provide assistance until an amended contract is received
> 50% Contingent Employees

- **C1 = Temporary** - maximum 1 year assignment
  - 6 month initial contract
  - 6 month extension contract

- **C2 = Contractual** – 1 year renewable contract

- Both subject to ACA compliance of 30 or more hours per week
Processing Future Staff Temporary C1s

50% Exempt or Nonexempt C1s

- Original Hire Temporary Contract may be 6 Months maximum
- Extended Contract can be submitted for an additional 6 months, however you must
  - Attach a memo from administrator with intended end date (must be within 6 months) and Termination of Benefits form with action
  OR
  - Submit a C2 or Regular Recruitment paperwork
Adjunct Faculty

• Effective Spring semester 2015
• Adjunct Faculty will have FTE assigned based on course load for each semester
• Assist UMB in tracking ACA compliance

<table>
<thead>
<tr>
<th>No. credits taught per semester</th>
<th>Assigned FTE</th>
<th>Must offer State Insurance or Waiver with Contract</th>
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<tr>
<td>12</td>
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<td>9</td>
<td>.75</td>
<td>Yes</td>
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<tr>
<td>8</td>
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<td>No</td>
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<td>6</td>
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<td>No</td>
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<td>3</td>
<td>.25</td>
<td>No</td>
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<tr>
<td>1</td>
<td>.083</td>
<td>No</td>
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</table>
Inactive Course Load Adjunct Faculty

• Submit ePAF –
  – Adjust FTE to 0.01
  – Attach annual reappointment letter to ePAF
    • Letter states that they are reappointed for a year as adjunct

• Faculty may remain in an inactive course load adjunct role up to 3 years or 6 consecutive semesters at which time their employment will be terminated
Human Resource Services
Employment Actions and Processing Update
Upcoming Activities Affecting HRS Activities:

- **Short Processing Time** - HRS & Payroll Closed 12/25/2014 – 1/2/2015
- **COLA Processing** – Effective Date 1/1/2015
- **Salary Structure Change** - Nonexempt and Exempt structures move 2% with COLA – Effective 1/1/2015
- **Maryland NEW Minimum Wage of $8.00** – Effective 1/1/2015
- **Compensation Actions Received on or after 12/1/2014** – will have an effective date of 1/11/2015
  - Actions should include COLA increase
December Deadlines for Processing Employment Actions

**Wednesday, Dec 17**\(^{th}\) **at Noon** (for paycheck 1/16/15)

- Processing Dates: Monday, Jan 5th
- New hires and terminations will be processed first
- Remaining transactions from December will be processed during the month of January
January Deadlines for Processing Employment Actions

Thursday, Jan 8th at Noon (for paycheck 1/30/15)
- Processing Dates: Wednesday, 1/14 - Friday, 1/16 for COLA actions

Thursday, Jan 22nd at Noon (for paycheck 2/13/15)
- Processing Dates: Monday, 1/26 – Friday, 1/30
ePAF Processing
ePAF Processing

• Job changes in ePAF will be closed during COLA period
• Job changes in ePAF with a 1/1/15 or later date will be recycled. Resubmit the ePAF once COLA has been processed
• Eff Jan 16th all departments are on ePAF (all EA forms will be returned to the dept)
Employee Action Sequencing

- The order of actions as defined by USM Policy VII.9.20 is as follows:
  1. COLA
  2. Merit
  3. Salary Structure
  4. Probation
  5. Promotion, Appointment, and Reevaluation
  6. Other (Administrative, Incentive, ...)

18
FY15 Actions Effective Prior to 1/1/15

• If an ePAF is submitted late or a retroactive date was approved by HR-Comp and the effective date was prior to 1/1/15
  – then an additional EA form (HRS-COL) for the COLA must be submitted to Compensation

• If the employee does not appear on the PITP and should be getting a COLA increase then a EA form will need to be submitted to Compensation and it may not be applied until the following pay period
Actions dated 1/1/2015 or after must be entered AFTER COLA has been entered into the employee’s record.

Actions received before PIT-P is loaded will be recycled.
C1s Bump to New Minimums

• NEX and EX C1s who are bumped to new minimum of new pay structures will be loaded 12/16-12/18/14 for effective date of 1/1/15

• No Amended Contract is required for this action

• Renewals should include the new 1/1/15 rate
Questions or Comments on HR Updates
Cost of Living Allowance (COLA) Update
Guidelines

• COLA is 2% regardless of funding source
• Effective date: 1/1/15
• Employee must be ACTIVE on 12/31/14 AND 1/1/15
  – Employees terminating/retiring on 12/31/14 do not get COLA even though last paycheck and payout is done in 2015
Guidelines

• PDPs are not required for COLA-employees with an Unsatisfactory or Below Standards PDP are eligible for COLA

• Employees on probation are eligible for COLA

• Employees may go over the maximum salary range due to a COLA increase
Guidelines for Terminations

- Terminations effective between Jan 2^{nd} and Jan 11^{th} (*last day worked between 1/1 and 1/10*) will require **TWO** action forms by December 17^{th}
  - COLA action effective January 1, 2015
  - Termination action (includes COLA ANNLEL) - effective date of term

- If actions are not submitted in time for HRSC processing, FSPR can accept PA forms to stop the regular pay due to termination but they cannot accept a PA form to add the COLA pay
  - COLA will then be processed in the pay period after it is entered in the system
Guidelines

• Eligible Employee Classes:
  – Faculty (01, 02, 03, 15)
  – *Post Docs/Trainees (19)
  – Regular Staff (20, 33)
  – Contingent 2 Staff (22, 35)

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

*subject to school policy
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_ELIG_EES_CMPRT_INELIG (EE’s Not on PITP)
• PR Reps should run these queries now to see if they find any discrepancies that can be addressed next week
## 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; (mid-day)</td>
<td>CITS loads data to PITP</td>
</tr>
<tr>
<td>January 6&lt;sup&gt;th&lt;/sup&gt;-11&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Department Pay Increase Initiators/Approvers review</td>
</tr>
<tr>
<td>January 12&lt;sup&gt;th&lt;/sup&gt;-13&lt;sup&gt;th&lt;/sup&gt;</td>
<td>HR-Compensation Review and Approve</td>
</tr>
<tr>
<td>January 13&lt;sup&gt;th&lt;/sup&gt; overnight</td>
<td>CITS loads PITP to Job record</td>
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## Critical Dates

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<th>Action</th>
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<tr>
<td>January 14&lt;sup&gt;th&lt;/sup&gt;-16&lt;sup&gt;th&lt;/sup&gt;</td>
<td>HR-Service Center manual entries if required</td>
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<tr>
<td>January 20&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Payroll processing begins using new salaries with retro payments</td>
</tr>
<tr>
<td>January 20&lt;sup&gt;th&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 23&lt;sup&gt;rd&lt;/sup&gt;</td>
<td>Gross pay transmitted to CPB</td>
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<td>January 30&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Pay day #15-15</td>
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### January 2015

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<td>UMB closed</td>
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<td>Department/School PITP Review/Approval</td>
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<td>FSPR Payroll Processing</td>
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<td></td>
<td>Departmental review of new gross pay with retro</td>
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<td>31</td>
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<td>Pay Day with COLA</td>
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Cost of Living Allowance (COLA) Processing
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
    • Pay Increase Viewer
PITP Defaults

• Data in the PITP will include all employee information entered by HRSC through Jan 5th

• PITP will be loaded mid-day on Tuesday, Jan 6th
  – After HR finalizes audits
  – After PR sends weekly maintenance file to CPB
PITP Defaults- Non-SOM

• All depts except School of Medicine
  – All eligible comp rates for all eligible employee classes will default with a 2% increase and it will be defaulted to an approved status
  – Amount and percent cannot be changed
  – Action by department is only required for exceptions/corrections
  – Most non-SOM departments should not have to do anything other than review
PITP Defaults- SOM

• School of Medicine
  – COLA will default with a 2% increase for eligible comp rates with an approved status for empl classes:
    • 19- Trainee (*those with ANNLEL*)
    • 20- Non-exempt Regular
    • 22- C2 Non-exempt
    • 33- Exempt Regular
    • 35- C2 Exempt
  – Action by department is only required for exceptions/corrections
PITP Defaults- SOM

• School of Medicine
  – A COLA row will default with a 2% increase for eligible comp rates and a FYChg row will appear both rows will be in a not-approved status for empl classes:
    • 01- Faculty Tenured
    • 02- Faculty NT/TT
    • 03- Faculty NT/NTT
  – Initiators can enter FYChg FTE changes- FYChg amounts are not allowed
  – Approvers must approve each employee (not each row)
PITP Exceptions/Corrections

• Types of exceptions that may require action:
  – Employees with incorrect comp rate codes
  – Unprocessed Terminations
  – Pre-1/1/15 employee actions

• When in doubt contact HR-Comp

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

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

• A person cannot have BOTH roles

• People who have each of these roles must be available to enter/review/approve between January 6th and January 11th
PITP Access

• SOM approvals will be done in the department not the Dean’s Office
  – Users who previously had the approver role taken away for FY15 merit have been given the role again
How do you know who has 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:

If you need to add or change roles in your department you must submit a new eUM HRMS User Authorization form by next Friday 12/19

http://www.umaryland.edu/cits/it-request-forms/
PITP Roles

• **UMB_PAYINC_INIT (Initiator)** can:
  – Update *Elig Stat* field and enter *Elig Override Reason* if changed to ineligible
  – Update *New FTE* field on FYChg row
  – Enter a *Comment* (new field)

• **UMB_PAYINC_APPROVE (Approver)** can:
  – Update *Department Approved* field (if not approved)
  – Enter a *Comment* (new field)

• **UMB_PAYINC_VIEWER**
  – Can view PITP pages but not update any fields
PITP Roles

• No role allows a department user to change the percent or amount on the COLA row
Using the PITP- Init & Appr

- Main Menu> Workforce Administration> Job Information> UMB Pay Increase Transaction
- Data is processed by Dept and Empl Class
Using the PITP- Init & Appr

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

- Sample view: Empl Class 33 Exempt Regular (left side of grid)

<table>
<thead>
<tr>
<th>Name</th>
<th>Empl ID</th>
<th>Empl Record</th>
<th>Effective Date</th>
<th>GFT</th>
<th>Std Hrs</th>
<th>New Standard Hours</th>
<th>Current FTE</th>
<th>New FTE</th>
<th>Pay Incr Type</th>
<th>Seq Num</th>
<th>Elig Stat</th>
<th>Elig Override Reason</th>
<th>Comp Rate Code</th>
<th>Current Comp Rate</th>
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<tbody>
<tr>
<td>Bing, Chandler</td>
<td>524196</td>
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<td>01/01/2015</td>
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<td>Ineligible</td>
<td>Pending term</td>
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<td>Eligible</td>
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<td></td>
<td>Not Applicable</td>
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</table>

All fields here are view only except Elig Stat and Elig Override Reason
Using the PITP- Initiator

- Sample view: Empl Class 33 Exempt Regular (right side of grid)

When changed to Ineligible the approval was changed to No

New field- can be updated
Using the PITP - Initiator

- Department 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
Using the PITP- Initiator

Sample view: SOM Faculty with FYChg and ADSPEL

<table>
<thead>
<tr>
<th>Name</th>
<th>Empl ID</th>
<th>Empl Record</th>
<th>Effective Date</th>
<th>GFT</th>
<th>Std Hrs</th>
<th>New Standard Hours</th>
<th>Current FTE</th>
<th>New FTE</th>
<th>Pay Incr Type</th>
<th>Seg Num</th>
<th>Elig Stat</th>
<th>Elig Override Reason</th>
<th>Comp Rate Code</th>
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<tbody>
<tr>
<td>Grey, Meredith</td>
<td>514587</td>
<td>0 01/01/2015</td>
<td>Y</td>
<td>22.40</td>
<td>22.40</td>
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<td>108460.340050</td>
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<td>Shepherd, Derek</td>
<td>525349</td>
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</table>
Using the PITP-Initiator

SOM Faculty

New FTE field can be updated for FYChg row

A COLA and FYChg row is inserted for each Comp Rate code
Using the PITP- Initiator

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

- Sample view for Pay Increase Approver- Emp Class 33

<table>
<thead>
<tr>
<th>Change Amount</th>
<th>Change Percent</th>
<th>Comp Rate New</th>
<th>Department Approved?</th>
<th>Hire/Rehire Date</th>
<th>Job Code</th>
<th>Visa/Permit Type</th>
<th>Load to JOB?</th>
<th>Load Override Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0.00</td>
<td>0.0000</td>
<td>52020.0000000</td>
<td>No</td>
<td>12/17/2012</td>
<td>E0719D</td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>$1399.44</td>
<td>2.0000</td>
<td>71371.4400000</td>
<td>Yes</td>
<td>09/10/2012</td>
<td>E0719E</td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>$877.20</td>
<td>2.0000</td>
<td>44737.2000000</td>
<td>Yes</td>
<td>07/05/2012</td>
<td>E2913C</td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>$2299.90</td>
<td>2.0000</td>
<td>117294.696000</td>
<td>Yes</td>
<td>09/30/1984</td>
<td>E1247I</td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>$1151.14</td>
<td>2.0000</td>
<td>58708.119845</td>
<td>Yes</td>
<td>10/31/2005</td>
<td>E1215D</td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>$2746.81</td>
<td>2.0000</td>
<td>140087.537827</td>
<td>Yes</td>
<td>08/17/1983</td>
<td>E1237J</td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

For all COLA eligible employees except SOM faculty, approvers only have to approve if employee is marked ineligible
Using the PITP- Approver

- Elig Stat or Elig Override Reason fields cannot be changed by Approver
Using the PITP- Approver

- Sample view for Pay Increase Approver - Empl Class 33

<table>
<thead>
<tr>
<th>Change Amount</th>
<th>Change Percent</th>
<th>Comp Rate New</th>
<th>Department Approved?</th>
<th>Hire/Rehire Dt</th>
<th>Job Code</th>
<th>Visa/Permit Type</th>
<th>Load to JOB?</th>
<th>Load Override Reason</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0.00</td>
<td>0.0000</td>
<td>52020.000000</td>
<td>No</td>
<td>12/17/2012</td>
<td>E0719D</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$1399.44</td>
<td>2.0000</td>
<td>71371.440000</td>
<td>Yes</td>
<td>09/10/2012</td>
<td>E0719E</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td>LDW 12/24 ePAF is in process</td>
</tr>
<tr>
<td>$877.20</td>
<td>2.0000</td>
<td>44737.200000</td>
<td>Yes</td>
<td>07/05/2012</td>
<td>E2913C</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$2299.90</td>
<td>2.0000</td>
<td>117294.696000</td>
<td>Yes</td>
<td>09/30/1984</td>
<td>E12471</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$1151.14</td>
<td>2.0000</td>
<td>58708.119845</td>
<td>Yes</td>
<td>10/31/2005</td>
<td>E1215D</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$2746.81</td>
<td>2.0000</td>
<td>140087.537827</td>
<td>Yes</td>
<td>08/17/1983</td>
<td>E1237J</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Approver can’t update the Elig Override Reason but they can enter a Comment if needed.
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 12th
  – Status is Eligible and Approved = YES
  Or
  – Status is Ineligible and Approved = 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
PITP Reporting

• Run the PITP Review query -

  **UMB_CM_PITP_REVIEW**

  – Can only run it between Jan 6th and Jan 13th
  – Query cannot be run after data has been loaded to job record after close of business on Tuesday, January 13th
Job Data Updates

• Only 1 new job data row will be inserted for COLA even if there are multiple PITP rows (i.e. ANNLEL with ADSPEL)

• If the FTE was updated for FYChg then a second job row will be inserted (with multiple comp rates if applicable)

• 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 14th
Paycheck Communications

• E-mail template will be sent to PR Reps to customize and send to your employees
• Please distribute by Friday, Dec 19th
• Employees should be referred to your department payroll rep if they have questions about their paychecks
Paycheck results

• PP# 15-13- Payday 1/2/15
  – No changes to gross salary
  – No health deductions

• PP# 15-14- Payday 1/16/15
  – No changes to gross salary
  – New health deductions based on open enrollment selections
Paycheck results

• PP# 15-15- Payday 1/30/15
  – New gross salary includes 2% increase
  – Additional retro pay for period Jan 1st - 10th
    COLA

• PP#15-16- Payday 2/13/15
  – Normal gross salary includes 2% 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
Timesheets/ETS Approver Update
Timesheets

• Leave rollover will occur January 27th and all timesheets must be in “Loaded to Payroll” status in order for the balances to be correct

• Current stats:

<table>
<thead>
<tr>
<th>School/Div</th>
<th>Closed</th>
<th>Open</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>04</td>
<td>17</td>
<td>13</td>
<td>30</td>
</tr>
<tr>
<td>06</td>
<td>1</td>
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<td>1</td>
</tr>
<tr>
<td>08</td>
<td>3</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>09</td>
<td>3</td>
<td>16</td>
<td>19</td>
</tr>
<tr>
<td>10</td>
<td>115</td>
<td>63</td>
<td>178</td>
</tr>
<tr>
<td>11</td>
<td>2</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>12</td>
<td></td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Total</td>
<td>141</td>
<td>103</td>
<td>244</td>
</tr>
</tbody>
</table>
Timesheets

• If employees cannot/will not do timesheets then supervisors should do it for their employees
ETS Approver Change

• All ETS Approvers get the e-mails regarding supervisor set up table
  – If person who is not regularly involved in the payroll process has the ETS approver role then it should be removed- we cannot stop e-mails to individuals

• Supervisors who are also ETS Approvers cannot approve timesheets until the pay period opens
Questions or Comments on ETS
Training Database Update
Changes & Enhancements to Enterprise Systems Training Database

• Enterprise Systems Training Database was upgraded on December 1, 2014.

• Changes include:
  – **Login** with UMID + Portal password (prevents duplicate records
  – **View** your own training record
  – **Add** and **Drop** classes through the day prior to the class date
  – **Re-register** for a refresher (for most classes)
Changes & Enhancements to Enterprise Systems Training Database

• Get more information at http://www.umaryland.edu/media/umb/cits/eumb/changes-enhancements_enterprise-training-db.docx

• Get assistance from Campus Help Desk
  – by email at help@umaryland.edu
  – by phone from on campus 6-HELP (6-4357)
  – by phone from off campus 410-706-4357
Questions or Comments on Training Database