Payroll Rep Meeting

Thursday, August 20, 2015
9:30am-11:30am
School of Pharmacy- Room N103
Presenter

• Susan McKechnie
  – Controller- Financial Services
Agenda

• Current Pay Period Unpaid Leave *NEW*
• Exempt/Faculty Electronic Timesheets *NEW*
• Payroll Hodgepodge (a motley assortment of things)
CURRENT PAY PERIOD UNPAID LEAVE
Current PP Unpaid Leave

• Background: Prior to 9.1 upgrade, TL Initiator could enter **unpaid** leave Time Reporting Codes (TRC) on the WET page in eUMB to reduce pay for non-exempt employees for the current pay period

• After 9.1 upgrade, the WET page was no longer available
  • When departments wanted to process unpaid leave for NEX employees in the current pay period, a PAF was required due to restriction of submitting ETS in the current pay period

• Exempt employees are paid based on Job so a Payroll Adjustment Form (PAF) is always required to reduce pay
Current PP Unpaid Leave

• New Current PP unpaid leave procedure went live on July 8, 2015
• FSPR has been working with departments with employees who have reported unpaid leave
• ETS Approvers are now allowed to approve ETS for current pay period when unpaid leave is reported on ETS on at least one day
• Unpaid leave reported and approved in current pay period will generate salary reduction of non-exempt employees- No PAF is necessary
Current PP Unpaid Leave Procedure

Non Exempt Employees:

• Complete ETS with Unpaid TRCs for the current pay period with “Loaded” status before last Time Admin Day (payroll processing Wednesday in normal payroll cycle)

• No PAF is needed

• Unpaid hours will not appear on the paycheck or the cost center/payroll register report
Current PP Unpaid Leave Procedure

Exempt Employees:

• Complete ETS with Unpaid TRCs for the current pay period with “Loaded” status by PAF deadline (see payroll calendar for deadlines) or by last Time Admin Day at the latest

• Prepare a PAF with a copy of the current Pay Period ETS as backup and submit the PAF to FSPR by deadline
  – Use negative “RGS” hours on PAF equal to the unpaid hours from the ETS (don’t use unpaid codes on PAF) ex. -8 RGS
Current PP Unpaid Leave Process

• All regular hours and paid leave reported on current pay period ETS with “Loaded” status will be processed

• Normally “Leave Taken” is processed a pay period late because ETS for current pay period is not entered until the following pay period

• Leave accrual will process “Leave Taken” reported on all (more than 1) ETS that are approved in the current pay period
Unpaid Leave Example- NEX Employee

• Scenario: Department needs to process unpaid leave in the current pay period to avoid any overpayment as the non-exempt employee has exhausted his leave:

  • Employee John has taken 8 hours unpaid leave in the current pay period

  • John is instructed to complete and submit his current pay period ETS for approval

  • Supervisor and ETS Approver approved his ETS before Wednesday in normal pay processing week

    – Goal is to complete this process before payroll processing starts so you can see it on the first cost center report/payroll register
Unpaid Leave Example- NEX Employee Cont’d:

– Unpaid 8 hours will NOT be reflected on paycheck or cost center report/payroll register with unpaid earnings code- total paid hours will be reduced by 8 i.e. 72 hours will be on report

– Paid leave reported in current pay period (and prior period if applicable) will be reflected on Leave Inquiry Page after Leave Accrual is run

– Leave Earned rate is based on service hours- unpaid leave reduces service hours so vacation and sick accrual will be reduced
Unpaid Leave Example- NEX Employee
ETS- From 3/22-4/4/15

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<tr>
<td>Sat 04/04</td>
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</table>

Total: 72.00 hours

Unpaid Leave

Total: 32 hours
1. EE submitted ETS with unpaid code reported from 3/1-3/7/15 (prior pay period), negative 40 hours because EE was paid in prior pay period
2. Employee reported 6 hours Accident Leave in the current pay period 3/22-3/28/15
3. Employee reported 26 regular hours in the current pay period 3/22-3/28/15, system did not pay 8 unpaid hours
4. Employee reported 32 regular hours in the current pay period 3/29-4/4/15
5. Employee reported 8 vacation hours in the current pay period on 3/30/15
Note: No offsetting RGH hours for ACC and VCH because the ETS is processed in real time (current pay period)
Unpaid Leave Example - NEX Employee
Leave Inquiry - PPE 4/4/15

<table>
<thead>
<tr>
<th>Pay Period End Date: 04/04/2015</th>
<th>Benefit Program: NEX Regular Non Exempt Program</th>
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<tbody>
<tr>
<td>Empl ID:</td>
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<tr>
<td>Previous Balance: 03/21/2015</td>
<td>Annual: 94.553644</td>
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<tr>
<td>- Taken: 03/21/2015</td>
<td>Holiday: 32.000000</td>
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<tr>
<td>+ Adjusted: 03/21/2015</td>
<td>Personal: 22.000000</td>
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<tr>
<td>+ Earned: 04/04/2015</td>
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<tr>
<td>- Lost: 04/04/2015</td>
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<td>Ending Balance: 04/04/2015</td>
<td>Advance Sick: 0.000000</td>
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<td></td>
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</table>

Leave taken on 3/30

Taken: Processed 8 vacation hours reported in ETS in the current pay period (PPE 4/4/15)
Earned: Reduction in leave accrued rate due to service hour reduction
Questions or Comments on Current Pay Period Unpaid Leave
NEW ELECTRONIC TIMESHEETS FOR EXEMPT STAFF AND FACULTY
New Timesheets- Exempt & Faculty

• New policy and procedures are in process
• Policy at high level indicating all employees of UMB need to complete a **bi-weekly** timesheet on a **timely** basis and have it **approved** by authorized personnel
• Procedures will delineate by empl class the exact requirements- exceptions will apply
• Under the US DOL Fair Labor Standards Act, Faculty and Exempt Staff are treated the same- they are all exempt from FLSA requirements- at UMB they will now use the same timesheets
• Introduces concept of “Duty Day” to exempt staff
New Timesheets-What is a duty day?

A period of time dedicated to performing the tasks related to an employee’s position for each scheduled workday of a bi-weekly pay period.
New Timesheets-What is a duty day?

Faculty and exempt staff are paid an established salary and are expected to fulfill the duties of their position regardless of hours worked.
New Timesheets-What is a duty day?

A full time employee is expected to work (or use earned leave to account for) a minimum of 80 hours per pay period.
New Timesheets- What is a duty day?

The privilege of flexing hours worked within the pay period is not an employee entitlement and should only be done with the pre-approval of the employee’s supervisor and/or department head.
New Timesheets-What is a duty day?

In order to provide maximum flexibility in the application of a duty day, each operating unit (school/division/department, etc) is entitled to set duty day standards of practice to accommodate their specific operational needs.
New Timesheets- Exempt Staff

• No longer report work hours on timesheets; report “D” for duty days

• Required to report hours for leave taken

• Acceptable to report Paid Leave (Hours) and “D” duty day on the same day

• Reminder- Exempt employees’ pay hours and earnings are from Job/Compensation page- pay can be changed only by PAF
New Timesheets- Exempt Staff

• T&L Schedules are no longer used for EX ees- no need to change for FTE or compressed schedules
  – Schedules will be replaced by ‘timesheet profiles’ that are entered and maintained by the employee, supervisor, or ETS Approver
• Minimal (physical) changes to current ETS page
• UPKs/videos will be available to highlight new features
• Target implementation PP 16-07 (Sept 20- Oct 3, 2015)- First new timesheet due beginning Oct 5, 2015
New Timesheets- Faculty

• Move to bi-weekly time reporting (currently monthly); continue use of Duty Days
• Collegial leave TRC in addition to current TRCs
• For clinical departments- a blank ETS can be submitted- warning will be generated
• Authorized approver (supervisor needs to be established in the system)
• Leave will be accrued bi-weekly in hourly increments for 12 month faculty
New Timesheets- Faculty

– Annual leave will be front loaded in hourly increments for 10 month faculty-
  • 10 month period will be from 8/15 – 6/15
  • Annual leave will be lost as of 6/15
  • Sick leave will be accrued bi-weekly
  • Holidays will be earned on holiday dates

– Faculty will be able to see their leave balances just like everyone else
New Timesheets- Faculty

- Must establish accumulated leave balances for each faculty member for Annual, Personal, Sick and Holiday as of Oct 31, 2015 -
  - convert to hours
    - GFT faculty balances should be based on full-time status (i.e. 100% FTE)
    - Non-GFT faculty balances should be prorated based on FTE
    - Run query “UMB_PR_CURRENT_GFTS- Current Faculty Coded as GFT” to validate GFT employees
  - Online page for PR Reps to enter accumulated balances will be available Nov 2-15, 2015
- Target implementation PP 16-10 (Nov 1-14, 2015)- First faculty timesheet due beginning Tuesday, Nov 17, 2015
### Faculty Leave Balances

**As of Date**: 05/03/2015

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<thead>
<tr>
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<th>Empl/Record</th>
<th>Name</th>
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<th>Department ID</th>
<th>Department Description</th>
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New Timesheets- Exempt & Faculty

• Introducing a new role- UMB ETS INITIATOR
  • Ability for user to create an ETS for Exempt and/or Faculty employees
  • Once an ETS has been created, employee will immediately receive an email notification; a daily e-mail will be sent until it is approved/submitted by employee
  • Employee must submit his/her own timesheet for supervisor approval
  • Role is assigned by the ETS Approver via the Supervisor Setup Page
  • Not required and should be limited to few people
Rules/Edits (partial)

Employee can not be his/her own ETS Initiator

ETS Initiator can not be employee’s Supervisor or ETS Approver

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<tr>
<th>ETS Initiator1</th>
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<th>ETS Initiator 2</th>
<th>Name</th>
<th>Bypass Employee</th>
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<th>By</th>
<th>Last Update Date/Time</th>
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<td>01/12/2015 6:00:39 AM</td>
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</table>
New Timesheets- Exempt & Faculty

– New ETS status of “SE”= Sent to Employee- after ETS Initiator creates it and before Employee approves/submits ETS

– ETS with status of SE will appear in the “Not-submitted” column on the ETS Statistics page
  • Equivalent to “Entered” Status
New Timesheets- Exempt

- Menu item “UMB Employee Timesheet Profile” is available for employees to enter default profile
- Timesheet profile can be set up to auto fill duty days “D” when “Apply Profile” button is clicked on timesheet, but not required
- Defaulted profile is blank
- Profile also shows ETS Initiator info
### ETS Initiator info...

#### Your ETS Initiators

<table>
<thead>
<tr>
<th>Name</th>
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</thead>
</table>

#### You are ETS initiator of following employees

<table>
<thead>
<tr>
<th>Name</th>
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### Timesheet Profile Setup

#### Exempt Timesheet profile setup

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Enter 'D' only for duty days.
**EXEMPLARY FACULTY TIMESHEET**

**Name:** Curley, John K.
**Empid:** 001750 - 0
**Empid:** 001750 - 0
**Department:** Financial Systems
**Standard Hours:** 40
**Pay Period:** 15.26

**Status:** Not Submitted

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**UMB MESSAGE**

- Enter 'D' only for duty days

| Description | Time Reporting Code | Sun 06/14 | Mon 06/15 | Tue 06/16 | Wed 06/17 | Thu 06/18 | Fri 06/19 | Sat 06/20 | Sun 06/21 | Mon 06/22 | Tue 06/23 | Wed 06/24 | Thu 06/25 | Fri 06/26 | Sat 06/27 | Total Hours |
|-------------|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Regular     | Duty Days          |           |           |           |           |           |           |           |           |           |           |           |           |           |           |

**PAID LEAVE**

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<th>Tue 06/23</th>
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<th>Fri 06/26</th>
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**Total Leave Hours**

|        |        |        |        |        |        |        |        |        | 4.00     | 4.00     | 8.00      |

**UNPAID LEAVE**

| UnPaid Leave |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        | 0.00        |

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**Save As Draft**  
**Apply Edits**  
**Correct Timesheet**  
**Submit**

**Employee Email Address:** kcurley@umaryland.edu

**Primary Supervisor:** Gregory Bitner
1- Pay Period Total column reflects leave hours only

2- TRC Total for Duty Days reflects the number of Duty days- i.e. 5D = 5 Duty Days
Prepare for New Timesheets- Exempt

• Employees were allowed to submit ETS for up to 6 pay periods into the future

• Due to change from old ETS format to new ETS format starting with PP16-07 (beginning 9/20/15)- old ETS format cannot be entered for periods after PP16-06

• After go live, employees will be able to enter ETS for 6 pay periods into the future as before
New Timesheets- Exempt

- Due to change from old ETS format to new ETS format starting with PP16-07 (beginning 9/20/15) - employees will lose the ability to create old format ETS

- **All delinquent ETS must be cleaned up ASAP!!!**

- Last day to submit **any** exempt timesheets through PPE 9/19/15 is Friday, 9/25/15

- Retro New Hires (Exempt only) with effective date prior to 9/20/15 must enter ETS ASAP; after 9/25/15 must enter paper timesheets
Prepare for New Timesheets- Exempt

• Any outstanding timesheets that are not in “Loaded” status by COB 9/25/15 must be submitted on paper
  
  • A Payroll Adjustment Form (PAF) is required for any leave reported on paper timesheets
  
  • Paper timesheets must be “reconciled”- requires comments to be entered on the ETS Statistics Page
  
  • Timesheets not in the “Loaded” status will be available for reconciliation immediately on the ETS Statistics Page after 9/25/15 because they will be considered as “Closed” pay periods
New Timesheets- Exempt

• New menu item “UMB Exempt/Faculty Timesheet” will be available for exempt employees on Monday, 9/28/15

• Supervisor set up page with ETS Initiator changes will be available on Monday, 9/28/15
New Timesheets- Exempt

• An email will be sent to Department Administrators and Payroll Reps with a “video” to introduce Exempt ETS changes

• An email will be sent to Department Administrators and Payroll Reps when the revised UPK Training is ready

• Departments should advise employees about these tools- there will be no in-person training
Prepare for New Timesheets - Faculty

– Complete ETS Supervisor Set up - mid-October (date TBA)

– Faculty ETS will go live for PP16-10 beginning 11/1/15

– Gather faculty timesheets through 10/31/15 and update leave balances in current dept leave system/spreadsheet

– Departments will enter balances on Faculty Leave Balances Load Page from Monday, 11/2/15 - Sunday, 11/15/15

  • WARNING! if leave is not entered during this period it will have to be submitted on a PAF and faculty will not be able to use any leave until it is processed

– Faculty leave balances will be loaded to eUMB leave system on Monday, 11/16/15
Prepare for Faculty e-Timesheet

– Retro New Hires with effective date prior to 11/1/15 requires PAF to update leave balances if any

– New ETS is available for use Tuesday, 11/17/15
## Exempt/Faculty ETS

### Key Dates Summary

<table>
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<th>Action</th>
<th>Dates</th>
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<tr>
<td><strong>Exempt Employees</strong></td>
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<tr>
<td>New Exempt ETS Go Live</td>
<td>Sunday, 9/20/15 (PP16-07)</td>
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<tr>
<td>Last day to submit and approve old Exempt ETS</td>
<td>Friday, 9/25/15</td>
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<tr>
<td>New Exempt ETS Available for use</td>
<td>Monday, 9/28/15</td>
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<tr>
<td>Reconcile old Exempt ETS (including open pay periods)</td>
<td>Monday, 9/28/15</td>
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<td><strong>Faculty</strong></td>
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<td>Sunday, 11/1/15 (PP16-10)</td>
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<td>Update Faculty Leave Balances</td>
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<td>Enter Leave Balances As of 10/31/15 in eUMB</td>
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<td>Load Faculty Leave Balances</td>
<td>Monday, 11/16/15</td>
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<td>Begin Supervisor Set Up</td>
<td>Mid October - will be announced</td>
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<td>New Faculty ETS Available for use</td>
<td>Tuesday, 11/17/15</td>
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Questions or Comments on Exempt/Faculty ETS
PAYROLL TOPIC HODGEPODGE
OTHER ETS POINTERS
ETS Supervisor Set up

• OLA Auditors are looking very carefully at Alternate 1 and Alternate 2 supervisors
  – How do these people know whether an employee worked or not?
  – Departments need procedures on when Alternate should approve or when timesheet approval should be delayed

• Remember- Supervisors should NEVER be subordinate to the employee
Timesheet History- NEW for all ETS employees

UMB Timesheet Inquiry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Search Criteria

- Empl Record:
- End Date:
- Pay Run ID:
- Sequence number:
- Timesheet Load Status:
- Timesheet Status:

[Buttons: Search, Clear, Basic Search, Save Search Criteria]
DAY OF SERVICE
DAY OF SERVICE

• UMB will participate in Maryland Service Days 2015

• All regular faculty and staff employees are eligible to participate in the Day of Service from Saturday, August 15, 2015 through October 10, 2015.

• Employees must complete the UMB Maryland Unites Participation Agreement before the participation

• The nonprofit organization to which your employee contributed his/her service must complete a Verification of Volunteer Service

• Both forms must be submitted to employee’s supervisor and forwarded to Human Resource Services, information can be found at: http://www.umaryland.edu/uce/volunteer-opportunities/
TRC CODES FOR DAY OF SERVICE

• President Perman has granted Paid Day of Service for maximum of 4 hours for employees who participate.

• Effective 8/15- 8/22- Participating employees should record Day of Service on their ETS as:
  – Exempt: “ADMS” – Administrative Leave Salary
  – Non Exempt: “ADMH” – Administrative Leave Hourly

• Effective 8/23- 10/10- Participating employees should record Day of Service on their ETS as:
  – Exempt: “DSS” – Day of Service Salary
  – Non Exempt: “DSH” – Day of Service Hourly
DUAL EMPLOYMENT
DUAL EMPLOYMENT

– Last week USM sent us a system-wide Official procedures and requirements for dual-employment

– We are questioning the intent of some of the procedures and seeking clarification

– Requires all USM employees to notify their employing institution of a dual employment situation

– Good news is that faculty will be excluded

– Bad news is that all other employees MUST be documented

– More to come as we get the details...
CONTINGENT 2 LEAVE
CII Employee Leave

• According to Policy Section VII-1.40(A), CII employees are eligible to receive a leave package **per contract year** (prorated for part time and/or less than a full year employees)

• Leave hours are awarded at the beginning of the contract year

• Departments must submit a “CII Employee Leave Form” to FSPR to front load leave balances
CII Employee Renewals- Leave

• When the contract year is ended, all leave must be zeroed out

• There is no option for leave to carry over or payout

• Therefore, departments should submit one CII Employee Leave forms including the following:
  • Zero out the old leave balances (process first)
  • Front load leave balances for a new contract year (process 1 pay period later)
CII Employee Leave

• Departments should send the forms promptly to FSPR because employees cannot report leave on ETS if no leave is available

• Reminder: Submit leave adjustment on a PAF before payroll deadline to avoid any delay
PAYROLL ADVANCES
Payroll Advances

• Payroll Advance is a “loan” on the amount of money owed to an employee and will be recovered from the employee’s next paycheck.

• Payroll Advance is usually requested for new hire employees when the department was unable to get the employee in eUMB on time to receive a regular paycheck.

• FS-Payroll can approve for 50% of the gross amount due to the employee.
Payroll Advances

• FSPR cannot approve payroll advances for:
  • An Hourly or SPC employee
  • Employee who did not submit a timesheet on time
  • Late timesheet approval from supervisor or ETS Approver
  • Any salary increases
  • Employee hardship
  • Leave payout
  • Last pay for an employee
  • Pay difference of what actually received vs should have received
  • Lost paychecks
EMPLOYEE PAYROLL ASSISTANCE
Employee Payroll Assistance

• Recently FS-Payroll has received many phone calls and walk-ins requesting assistance on their paychecks, taxes, Glacier, and W-4 forms, etc.

• Most of the employees told us that their department asked them to seek help from FS-Payroll or CPB

• Department Payroll Reps should be the main contact in the department if employees have any payroll related issues
Employee Payroll Assistance

• Department Payroll Reps should not direct their employees to seek help from FS-Payroll or CPB

• If you encounter any problems, you should contact FS-Payroll for assistance and then get back to your employees

• FSPR will not take any paperwork from your employees and direct them back to the department for payroll related assistance
PAYROLL ONBOARDING
Payroll Onboarding

• Department Payroll Reps need to meet with new employees on the 2\textsuperscript{nd} Day of Onboarding

• Topics related to Payroll should include the following:
  • When employee should expect to receive the first paycheck
  • Notification that first paycheck is always a paper paycheck and is mailed to employee’s home
    – Inform employees where to validate their home/check addresses in eUMB to make sure the first paper paycheck will be mailed
  • Advise taking eUMB Electronic Timesheets online training
Payroll Onboarding

• Payroll topics continued:
  
  • Collect Glacier packet if an employee is a foreign national
  
  • Provide employees with a copy of pay period schedule and timesheet due dates
  
  • Collect W4 forms, review for completeness and obvious errors, forward it to FS-Payroll after review
  
  • Provide your contact email and phone number
TRAINING FOR EMPLOYEES IN NEW HRMS ROLES
## eUMB Training

Training is required for certain User Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Required Training</th>
<th>Format</th>
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</thead>
<tbody>
<tr>
<td>Department HR Representative</td>
<td>Introduction to eUMB HRMS</td>
<td>Online- Required Completion Certificate</td>
</tr>
<tr>
<td>Department Administrator</td>
<td>Introduction to eUMB HRMS</td>
<td>Online- Required Completion Certificate</td>
</tr>
<tr>
<td>ETS Approver</td>
<td>Introduction to eUMB HRMS</td>
<td>Online- Required Completion Certificate</td>
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<td></td>
<td>eUMB Electronic Timesheets</td>
<td>Online</td>
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<td></td>
<td>Departmental Payroll Processing (DPP)</td>
<td>Classroom</td>
</tr>
<tr>
<td>Commitment Accounting Approver</td>
<td>Introduction to eUMB HRMS</td>
<td>Online- Required Completion Certificate</td>
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<tr>
<td>Commitment Accounting Reviewer</td>
<td>Commitment Accounting (CA)</td>
<td>Classroom</td>
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<tr>
<td>Commitment Accounting Initiator</td>
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ADVANCE SICK LEAVE
Advanced Sick Leave

• A new query has been created for you to view if your ASL employees have been enrolled in ASL Plan in eUMB
  
  • UMB_HR_ADVSICK_REPORT

• Any questions with ASL set up contact HR-ELR 6-7302
Questions or Comments on Payroll Hodgepodge
Please print your name on the attendance sheet
Key Contacts

• FS- Payroll- 6-1243
  – DL-BFPayrollHelp@umaryland.edu

• CITS- 6-HELP(4357)
  – Security/access or query/report issues
  – help@umaryland.edu