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

$\Rightarrow$ 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

No. credits taught per semester	Assigned FTE	Must offer State Insurance or Waiver with Contract
12	1.00	Yes
9	.75	Yes
8	.66	No
6	.5	No
3	.25	No
1	.083	No

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

Human Resource Services
HRSC Processing

<u>December Deadlines for Processing Employment Actions</u>

Wednesday, Dec 17th 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

Human Resource Services
HRSC Processing

<u>January Deadlines for Processing Employment Actions</u>

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, …)

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 <u>AFTER COLA</u> 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 2nd and Jan 11th *(last day worked between 1/1 and 1/10)* will require **TWO** action forms by December 17th
  - 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

Date	Action
January 6th (mid-day)	CITS loads data to PITP
January 6th-11th	Department Pay Increase Initiators/Approvers review
January 12th-13th	HR-Compensation Review and Approve
January 13th overnight	CITS loads PITP to Job record

Critical Dates

Date	Action
January 14th-16th	HR-Service Center manual entries if required
January 20th	Payroll processing begins using new salaries with retro payments
January 20th - 23rd	Dept PR Reps review cost center/payroll register reports to validate pay
January 23rd	Gross pay transmitted to CPB
January 30th	Pay day #15-15

January 2015

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
12/29	12/30	12/31	1	2	3	4
UMB closed						
5	6	7	8	9	10	11
HRSC finalizes actions	PITP Load (mid day)					
	Department/School PITP Review/Approval					
12	13	14	15	16	17	18
HR- Comp PITP Approval		**HRSC Updates**				
	Job Data Load (COB)					
19 MLK	20	21	22	23	24	25
UMB closed	**FSPR Payroll Processing** **Departmental review of new gross pay with retro**					
26	27	28	29	30	31	
				Pay Day with COLA		

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 <u>eligible</u> comp rates for all <u>eligible</u> 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 <u>eligible</u> 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:

UMB User Roles Inq | Umb Sec Role Vw

Role Name: UMB_PAYINC 🔍   **Access DeptID:** [ ]

Sort Order

○ Access DeptId   ⦿ Role Name   ○ Employee Name   **FETCH**   **Press FETCH to get results**

Personalize | Find | View All | 🔲 | 🔳 First ◀ 1-50 of 71 ▶ La...

Access DeptID	Role Name	Empl Name	Empl ID	Pay Status	EE Job DeptID	Details
15100000	UMB_PAYINC_APPROVE	Doe, Lotta	345678	Active	15100000	Details
15100000	UMB_PAYINC_APPROVE	Leeve, Ivana	987654	Active	15100000	Details
15100000	UMB_PAYINC_INIT	Tryan, Ima	123456	Active	15100000	Details

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

UMB Pay Increase Transaction

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

Find an Existing Value

▼ Search Criteria

Set ID:	= ▼	PSUMB 🔍
Department:	begins with ▼	🔍
Employee Classification:	begins with ▼	🔍
Description:	begins with ▼	

[Search] [Clear] Basic Search 📇 Save Search Criteria

Search Results

View All — First ◀ 1-5 of 5 ▶ Last

Set ID	Department	Employee Classification	Short Description	Description
PSUMB	15100000	01	01-FacTen	Aromatherapy
PSUMB	15100000	02	02-FcNT/TT	Aromatherapy
PSUMB	15100000	03	03-FcN/NT	Aromatherapy
PSUMB	15100000	20	20-NEX Reg	Aromatherapy
PSUMB	15100000	33	33-ExmReg	Aromatherapy

Using the PITP- Initiator

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

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)*

New field- can be updated

When changed to Ineligible the approval was changed to No

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

Elig Stat	Elig Override Reason	Comp Rate Code	Current Comp Rate	UMB Performance Rating	Change Amount	Change Percent	Comp Rate New	Department Approved?	Hr D:
Ineligibl ▼	Pending term	ANNLEL	52020.000000	Not Applicable	$0.00	0.0000	52020.000000	No	1
Eligible ▼		ANNLEL	69972.000000	Not Applicable	$1399.44	2.0000	71371.440000	Yes	09
Eligible ▼		ANNLEL	43860.000000	Not Applicable	$877.20	2.0000	44737.200000	Yes	0{
Eligible ▼		ANNLEL	114994.800000	Not Applicable	$2299.90	2.0000	117294.696000	Yes	0{
Eligible ▼		ANNLEL	57556.980240	Not Applicable	$1151.14	2.0000	58708.119845	Yes	1{
Eligible ▼		ANNLEL	137340.723360	Not Applicable	$2746.81	2.0000	140087.537827	Yes	0{

Using the PITP- Initiator

Sample view: SOM Faculty with FYChg and ADSPEL

Favorites | Main Menu > Workforce Administration > Job Information > UMB Pay Increase Transaction

New Window

Department: 15100000 Aromatherapy   **Empl Class** 01-FacTen

UMB Pay Increase Transaction

Name	Empl ID	Empl Record	Effective Date	GFT	Std Hrs	New Standard Hours	Current FTE	New FTE	Pay Incr Type	Seq Num	Elig Stat	Elig Override Reason	Comp Rate Code	Current Comp Rate	U
Grey, Meredith	514587	0	01/01/2015	Y	22.40	22.40	0.5600	0.5600	COLA	1	Eligible ▼		ANNLEL	108480.340050	No
					22.40	22.85	0.5600	0.5712	FYChg	2	Eligible ▼		ANNLEL	110649.946851	No
Shepherd, Derek	525349	0	01/01/2015	N	40.00	40.00	1.0000	1.0000	COLA	1	Eligible ▼		ANNLEL	211150.000000	No
					40.00	40.00	1.0000	1.0000	FYChg	2	Eligible ▼		ANNLEL	215373.000000	No
Bailey, Miranda	508835	0	01/01/2015	Y	40.00	40.00	1.0000	1.0000	COLA	1	Eligible ▼		ADSPEL	156415.885800	No
													ANNLEL	364968.959400	
					40.00	40.00	1.0000	1.0000	FYChg	2	Eligible ▼		ADSPEL	159544.203516	No
													ANNLEL	372268.338588	

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

Empl Class 01-FacTen

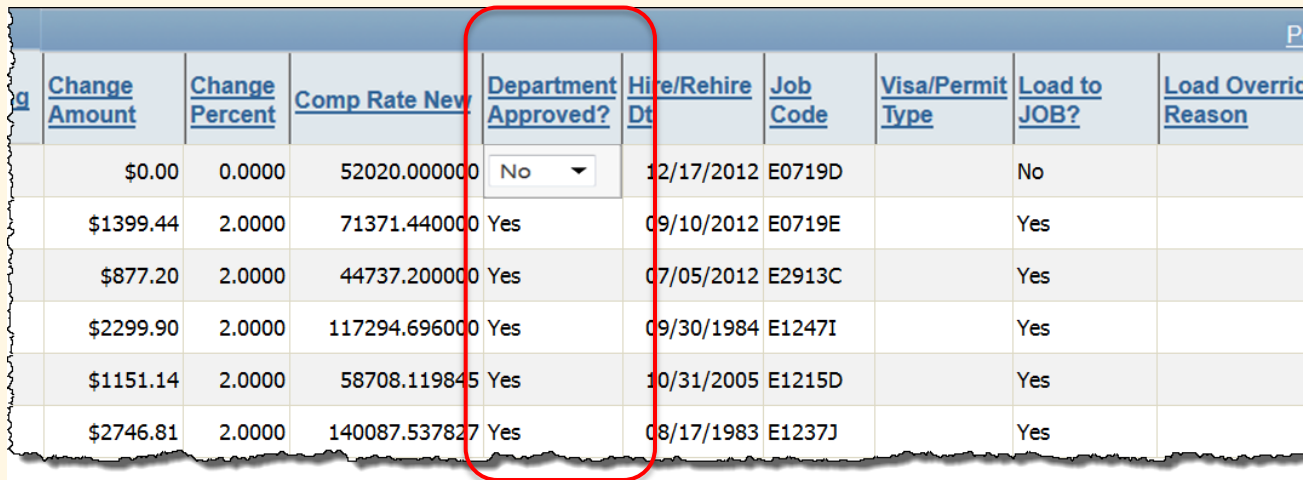| Std Hrs	New Standard Hours	Current FTE	New FTE	Pay Incr Type	Seq Num	Elig Stat	Elig Override Reason	Comp Rate Code	Current Comp Rate
22.40	22.40	0.5600	0.5600	COLA	1	Eligible ▼		ANNLEL	108480.34
22.40	22.85	0.5600	0.5712	FYChg	2	Eligible ▼		ANNLEL	110649.94
40.00	40.00	1.0000	1.0000	COLA	1	Eligible ▼		ANNLEL	211150.00
40.00	40.00	1.0000	1.0000	FYChg	2	Eligible ▼		ANNLEL	215373.00
40.00	40.00	1.0000	1.0000	COLA	1	Eligible ▼		ADSPEL	156415.88
								ANNLEL	364968.95
40.00	40.00	1.0000	1.0000	FYChg	2	Eligible ▼		ADSPEL	159544.20
								ANNLEL	372268.33

Using the PITP- Initiator

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

Using the PITP- Approver

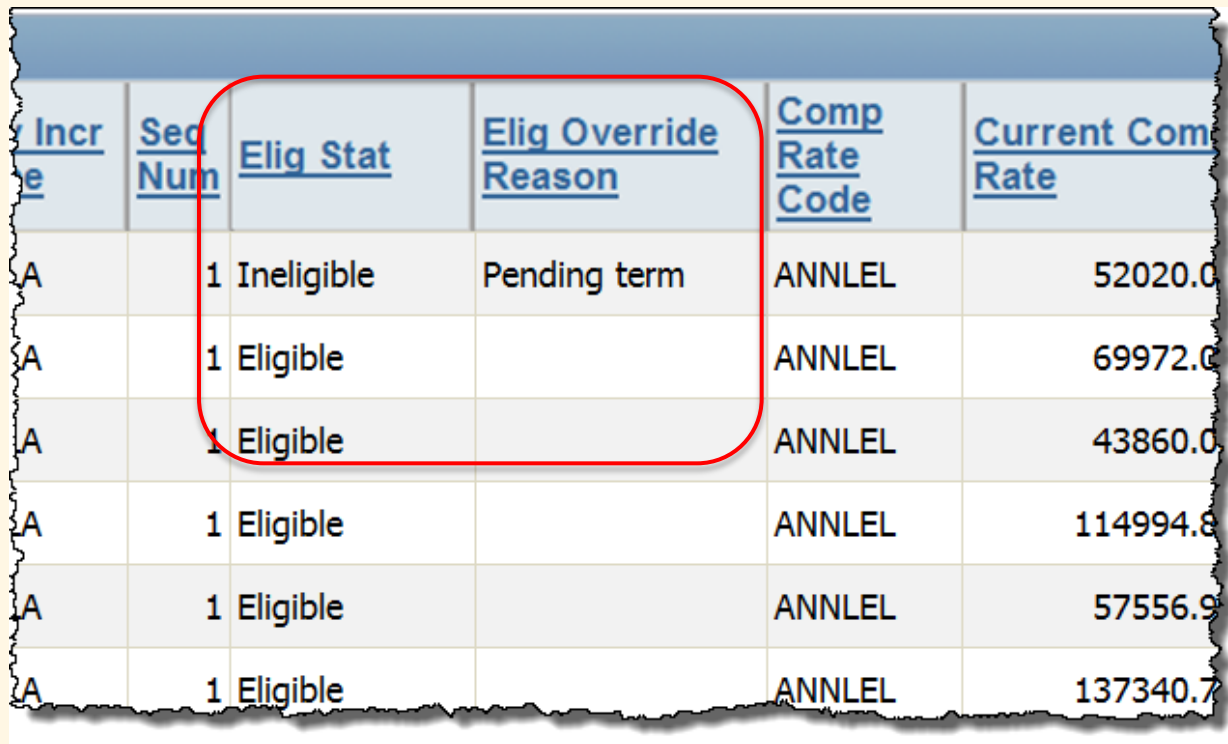- Sample view for Pay Increase Approver- Empl Class 33

g	Change Amount	Change Percent	Comp Rate New	Department Approved?	Hire/Rehire Dt	Job Code	Visa/Permit Type	Load to JOB?	Load Overric Reason
	$0.00	0.0000	52020.000000	No	12/17/2012	E0719D		No	
	$1399.44	2.0000	71371.440000	Yes	09/10/2012	E0719E		Yes	
	$877.20	2.0000	44737.200000	Yes	07/05/2012	E2913C		Yes	
	$2299.90	2.0000	117294.696000	Yes	09/30/1984	E1247I		Yes	
	$1151.14	2.0000	58708.119845	Yes	10/31/2005	E1215D		Yes	
	$2746.81	2.0000	140087.537827	Yes	08/17/1983	E1237J		Yes	

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

	Change Amount	Change Percent	Comp Rate New	Department Approved?	Hire/Rehire Dt	Job Code	Visa/Permit Type	Load to JOB?	Load Override Reason	Comment
g	$0.00	0.0000	52020.000000	No	12/17/2012	E0719D		No		LDW 12/24 ePAF is in process
	$1399.44	2.0000	71371.440000	Yes	09/10/2012	E0719E		Yes		
	$877.20	2.0000	44737.200000	Yes	07/05/2012	E2913C		Yes		
	$2299.90	2.0000	117294.696000	Yes	09/30/1984	E1247I		Yes		
	$1151.14	2.0000	58708.119845	Yes	10/31/2005	E1215D		Yes		
	$2746.81	2.0000	140087.537827	Yes	08/17/1983	E1237J		Yes		

Personalize | Find | First 1-6 of 6 Last

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:

School/Div	Closed	Open	Total
04	17	13	30
06	1		1
08	3	3	6
09	3	16	19
10	115	63	178
11	2	2	4
12		6	6
Total	141	103	244

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