Payroll Reps Meeting

March 6, 2014

SON Auditorium

10AM - Noon

Agenda

- Contingent 1 Hiring Process Changes
- Action/Action Reason Changes
- HRMS to HCM Upgrade Update
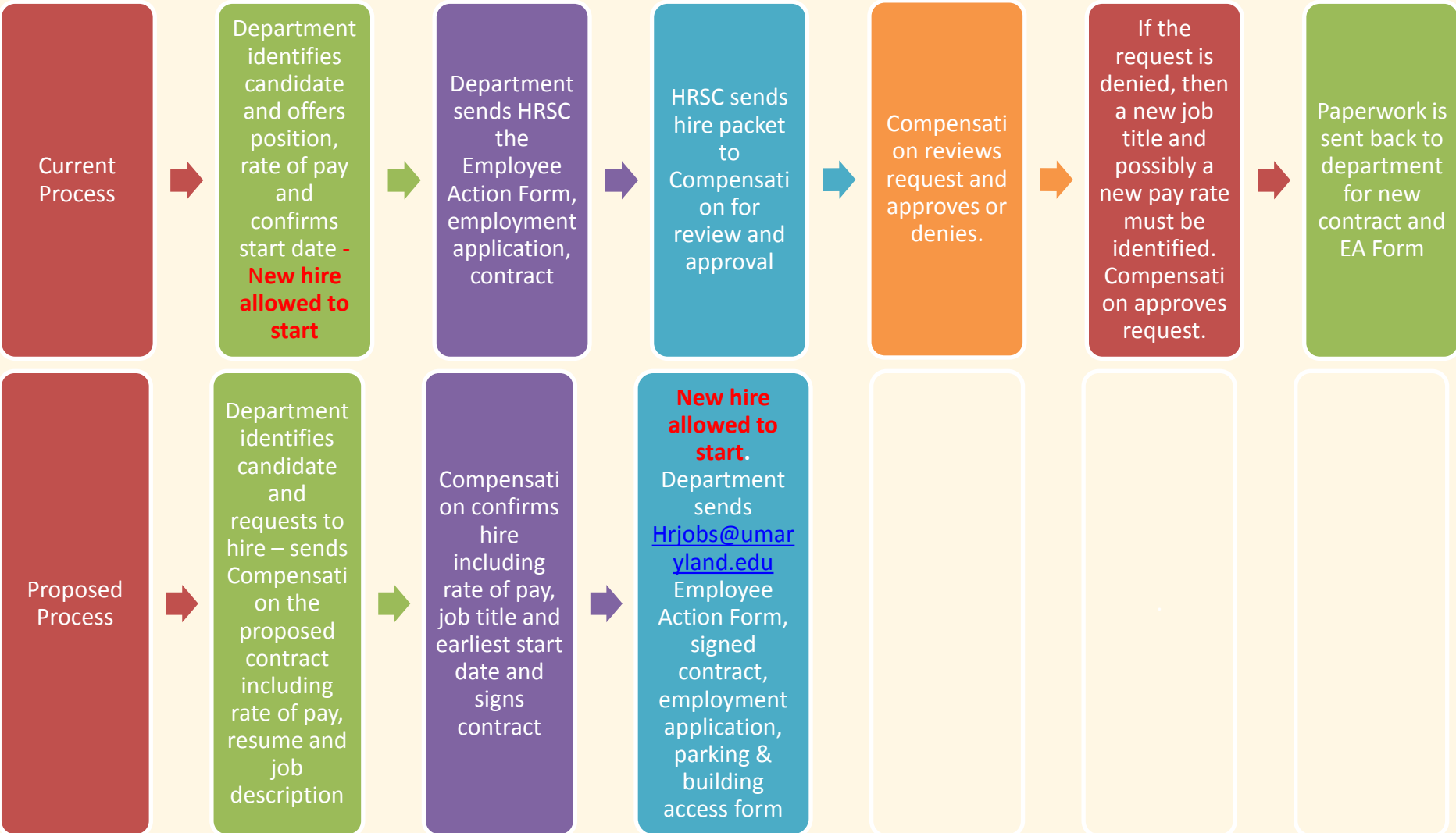- Payroll Reminders

Presenters

- Human Resource Services
  - Juliet Dickerson
  - Jackie Ball
- Financial Systems
  - Kevin Curley
- Financial Services
  - Susan McKechnie

Human Resource Services presents

CHANGES TO THE HIRING PROCESS FOR CONTINGENT CATEGORY I STAFF

Changes to Staff Contingent Category I Hiring Process

Current Process → Department identifies candidate and offers position, rate of pay and confirms start date - **New hire allowed to start** → Department sends HRSC the Employee Action Form, employment application, contract → HRSC sends hire packet to Compensation for review and approval → Compensation reviews request and approves or denies. → If the request is denied, then a new job title and possibly a new pay rate must be identified. Compensation approves request. → Paperwork is sent back to department for new contract and EA Form

Proposed Process → Department identifies candidate and requests to hire – sends Compensation the proposed contract including rate of pay, resume and job description → Compensation confirms hire including rate of pay, job title and earliest start date and signs contract → **New hire allowed to start**. Department sends Hrjobs@umaryland.edu Employee Action Form, signed contract, employment application, parking & building access form

Changes to Contingent Category I (CI) Hiring Process

- Former process:
  - Hiring Manager identifies CI candidate and selects job title and rate of pay
  - CI allowed to start – creates compliance issues
  - Paperwork sent to HRSC, then forwarded to Compensation for approval
  - Compensation reviews department's request to use job title and pay

Changes to Contingent Category I (CI) Hiring Process

- New process:
  - Hiring manager prepares offer letter (Compensation to provide template offer letter)
  - Hiring manager sends offer letter and contract to CI candidate for signatures
  - Hiring Manager sends EA Form, approved contract, job offer letter, and employment application to hrjobs@umaryland.edu
  - CI employee scheduled for onboarding intake session (regular or CII) which will be their first day of employment

Onboarding for Contingent Category I (CI) Hiring Process

- HRS sends welcome letter from UMB

- HRS oversees completion of new hire paperwork during onboarding intake session (regular or CII)

- HRS directs new hire to the campus center for photo ID

- Hiring manager coordinates where the new hire reports to after photo ID processed

- Hiring manager assigns building access and parking

Human Resource Services presents

EMPLOYEE ACTION CHANGES

Employee Action Changes

- There are new action reasons in POS, PAY, LOA, PLA, and TER.

- The action code DTA has been inactivated; Action reasons in this code have been realigned between PAY and POS.

- Any action reasons no longer in use have been inactivated (history is still maintained).

- Some action reasons are located under PAY and POS.

Employee Action Changes (Cont'd)

- Some action reasons have employee class restrictions.

- All new action/action reason codes/documentation required and EA forms will be available on the HR website effective March 10, 2014.

- EA forms that are submitted without documentation will be held or returned to the department.

- Any questions with regards to action/action reason codes must be sent to HRServiceCenter or HRWeb.

Action Codes

Current Action Codes	Action Codes as of 03/17/2014	Definition
HIR	HIR	New to UMB System
REH	REH	To bring back an employee for reemployment
DTA	INACTIVATED	N/A
POS	POS	Only used when a job change impacts the employee's position only (PAY is not impacted)
PAY	PAY	Only used when a job change impacts the employee's position and pay
LOA	LOA	To place an employee on a unpaid Leave of Absence
PLA	PLA	To place an employee on a paid Leave of Absence
SWB	SWB	To place an employee on a short work break (restricted to employee class 04 and 36)
RWB	RWB	To bring back an employee from a short work break (restricted to employee classes 04 and 36)
TER	TER	To separate employees from UMB

Examples of Changes

Example of inactivated action reason

- DTA/ADR (Address)- This action reason is no longer active because employees can update their address through self-service. The restriction on updating the state has been removed.

Example of an action reason code in PAY and POS

- DTA/CTR (Contingent II to Regular)- The action reason is listed in PAY and POS.
  - If the conversion of a CII has an impact on an employee's pay, then the action reason code to use is PAY/CTR.
  - If the conversion of a CII has an impact on an employee's position (no pay change), then the action reason code POS/CTR is used.

Examples of Changes

Examples of an action reason code w/documentation

- PLA/SAT (Sabbatical/12 months)- Dean's Office approval, Department Memo

- PAY/ACT (Acting Capacity) - Memo of approval from Compensation

- POS/EXT(Extended Probation)- Memo from School/Department

- TER/LAY (Layoff)- Approved Layoff Request from HRS

Examples of a new action reason codes

Action	Old	New
Employee Class Change	DTA/EMP	POS/EMP
FTE Change	DTA/FTE	PAY/FTE

EA Form Changes

- Starting March 10, 2014, EA forms are available for HIR, REH, and TER (when submitted with REH for leave payout purposes) actions only.

- For all other actions the departments should use the Employee Pre-Print:

HCM 9.1: Menu>Workforce Administration>Job Information>Reports>UMB Employee Pre-Print Form

Financial Systems presents

HRMS UPGRADE PEOPLESOFT 8.3 TO 9.1

Project Year-to-Date Salary Encumbrances in HCM 9.1

What's Not Changing

- EFPs (Employee Funding Profiles) are managed and maintained per employee, per funding source.

- EFPs are keyed by Fiscal Year and must be entered and fully approved by 2pm on payday Friday.

- A fiscal year end EFP 'rollover' will continue.

What's Not Changing

- Salary encumbrances are created by running a set of independent/sequential processes…
  - Each pay period salaries and fringes are distributed in the GL.
  - The previous pay period's calculated salary encumbrances are liquidated or eliminated.
  - The System (re) calculates & posts new salary encumbrances

What's New and Different

- Employee Funding Profile (EFP) now recognizes Project Funding End Dates that extend beyond the current fiscal year. This eliminates the need of managing multiple Fiscal Year EFPs in order for the system to calculate salary encumbrances through a project's end date.

- Project Funding End Dates may not extend beyond 5 future fiscal years. (Current fiscal year plus 5)

What's New and Different

- Account codes now called Combination (Combo) Codes - function remains the same.

- No more future 'fiscal year gap' salary encumbrances posted to departmental PCAs.
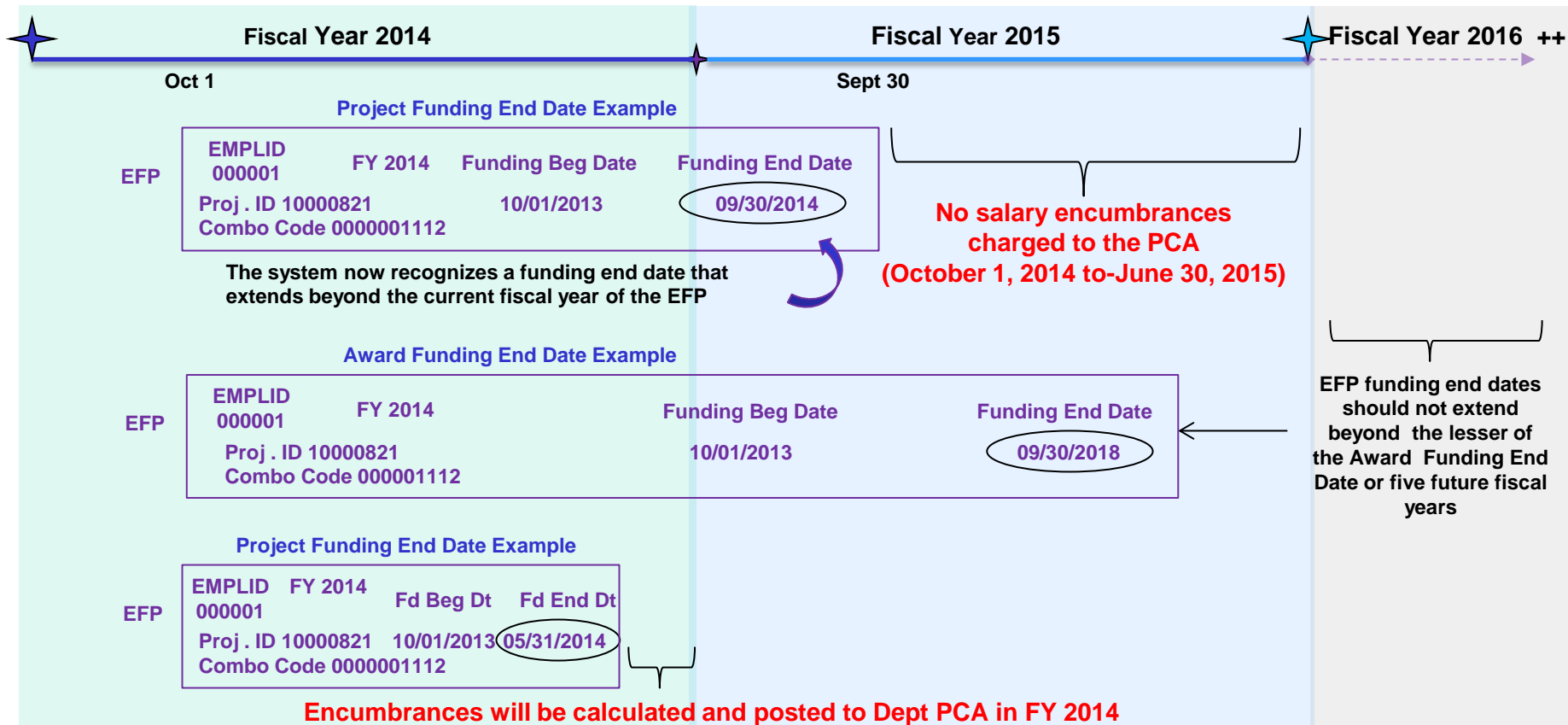
- EFP Override function simplified

What's New and Different

- There is more flexibility in determining how salary encumbrances will be calculated i.e. for a single project period or through multiple project periods. How your project is funded should determine how you want to calc and monitor the project's salary encumbrances.

Project Year-to-Date Salary Encumbrance Model In HCM 9.1
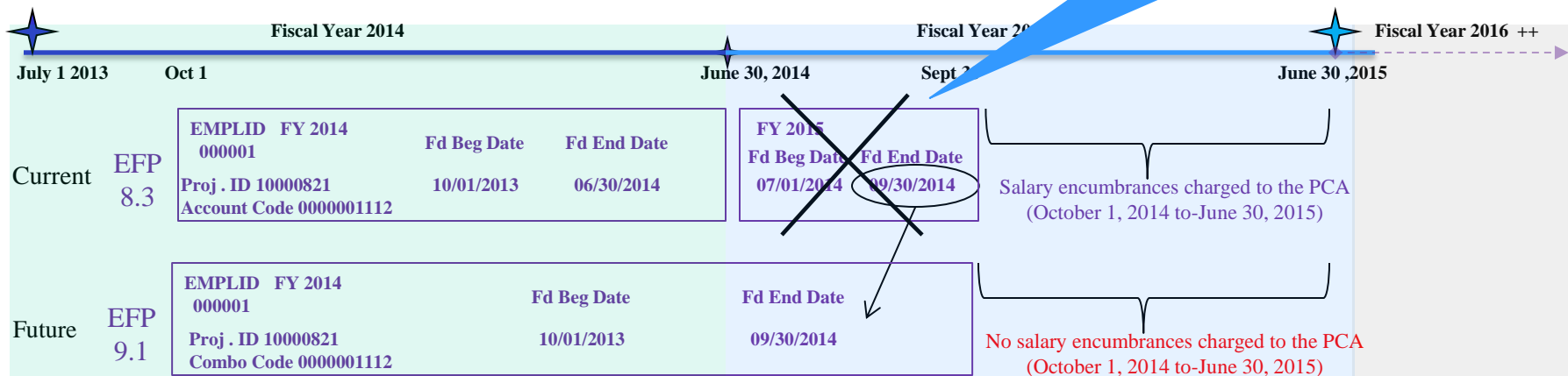
Award Period Oct 1, 2013 to Sept 30, 2018

Project Period - Oct 1, 2013 to Sept 30, 2014

Fiscal Year 2014 **Fiscal Year 2015** **Fiscal Year 2016 ++**

Oct 1 Sept 30

Project Funding End Date Example

EFP

EMPLID 000001	FY 2014	Funding Beg Date	Funding End Date
Proj . ID 10000821		10/01/2013	09/30/2014
Combo Code 0000001112			

The system now recognizes a funding end date that extends beyond the current fiscal year of the EFP

No salary encumbrances charged to the PCA (October 1, 2014 to-June 30, 2015)

Award Funding End Date Example

EFP

EMPLID 000001	FY 2014	Funding Beg Date	Funding End Date
Proj . ID 10000821		10/01/2013	09/30/2018
Combo Code 000001112			

EFP funding end dates should not extend beyond the lesser of the Award Funding End Date or five future fiscal years

Project Funding End Date Example

EFP

EMPLID 000001	FY 2014	Fd Beg Dt	Fd End Dt
Proj . ID 10000821		10/01/2013	05/31/2014
Combo Code 0000001112			

Encumbrances will be calculated and posted to Dept PCA in FY 2014

EFP Transition Task

Goes away on 03/17/2014

Project Period - Oct 1, 2013 to Sept 30, 2014

| | **Fiscal Year 2014** | | | **Fiscal Year 2015** | | **Fiscal Year 2016 ++** |

July 1 2013   Oct 1   June 30, 2014   Sept 2...   June 30 ,2015

Current   EFP 8.3

EMPLID FY 2014		
000001	**Fd Beg Date**	**Fd End Date**
Proj . ID 10000821	10/01/2013	06/30/2014
Account Code 0000001112		

FY 2015	
Fd Beg Date	**Fd End Date**
07/01/2014	**09/30/2014**

Salary encumbrances charged to the PCA
(October 1, 2014 to-June 30, 2015)

Future   EFP 9.1

EMPLID FY 2014		
000001	**Fd Beg Date**	**Fd End Date**
Proj . ID 10000821	10/01/2013	09/30/2014
Combo Code 0000001112		

No salary encumbrances charged to the PCA
(October 1, 2014 to-June 30, 2015)

Highly Recommended - Run the Funding Summary Report by March 11, 2014

Remember to save the report to your local hard drive for future reference!

Important dates to remember ….

March	10	Revised EA form for HIR, REH, TER actions, otherwise use Pre-Print
	11	Approve ETS, EFPs, Travel *e*Form Requests & Expenses
	12-16	System down for upgrade - no access to HRMS, Travel *e*Forms
	15	No access to eUMB Portal, All RAVEN, Financials
	17	HCM 9.1 in production , Travel *e*Form back up
	26	Payroll Rep Meeting for Merit Pay processing instructions

Important dates to remember ….

April	8	Campus access to Merit Pay processing screens (PITP)
	20	Deadline for Departments to COMPLETE Merit Pay
	TBD	ePAF Pilot Group training
May	TBD	ePAF Pilot goes live
	9	Pay date includes Merit Pay retroactive to April 1
June	TBD	EFP rollover for FY 2015
	TBD	Begin campus rollout for ePAF

Any Questions?

Financial Services presents

PAYROLL UPDATES AND REMINDERS

Things to do before March 12ᵗʰ

- Sign up for training

http://cf.umaryland.edu/cits_training/index.cfm

- What's New with the Upgraded eUMB HRMS?
  - 3/6 & 3/12 (last 2 sessions)
- Commitment Accounting for EXISTING CA Users
  - 3/14 – 3/21 (6 sessions)

- New UPKs for the Intro, Dept Payroll Processing and CA to be posted on-line next week- review on your own

Things to do before March 12ᵗʰ

- Payroll calendar has been updated on the FSPR website- review it!

- Remind staff that they can submit timesheets starting Friday, 3/7

  - Supervisors can approve 3/7 through 3/11

  - TL Init should approve after FSPR e-mail on 3/11

- Payroll adjustment forms for PP14-19 are due by Tuesday, March 11ᵗʰ

Things to do before March 12ᵗʰ

- On March 11ᵗʰ after receiving the e-mail from FSPR, run the PP14-18 check register and leave accrual reports ASAP
  - The reports will be deleted during upgrade process- save off-line
  - Check register can be re-created anytime but the Leave Accrual report can only be run through March 24ᵗʰ for PP14-18

Things to do before March 12ᵗʰ

- Review the check register to see if you need any payroll advances
    - FSPR cannot approve advances on 3/12-14
    - Advance paperwork must be delivered to FSPR by 4pm on Tuesday 3/11- pickup advance checks on Friday 3/14
    - If you miss that deadline, advance checks will be processed from 3/17-3/19

Things to on March 17th

- Clear cache (i.e. temporary internet files)

- Log in to new system

- Affiliates can note new ID that replaces the current ID that begins with an "A" (in header area of page)

Things to on March 17ᵗʰ

- Approve payable time!
  - HCM 9.1: Main Menu>Manager Self Service>Time Management>Approve Time and Exceptions>Payable Time

- Approve timesheets so that payable time can be approved the next day before 10AM
  - HCM 9.1: Main Menu>UMB Self Service Manager>UMB Approve Timesheet

Things to do March 18th – 21st

- Review your Payroll Register report carefully!
  - HCM 9.1: Main Menu>Payroll for North America>Payroll Processing USA>Pay Period Reports>Payroll Register
- Run query: UMB_PR_COMP_COMPARE_RG
  - HCM 9.1: Main Menu>Reporting Tools>Query>Query Manager
  - Results list all employees where there is a difference between the current **regular** pay and the base pay from the Job Data page
  - You will not see any overtime, shift or additional pay items
- Recalculate retro pay, if applicable
- Continue this through stabilization period

General Reminders

- Standard hours on Job Data should agree with the T&L schedule (Regular and C2 Staff)
  - If employee is hired for less than 40 hours per week OR the 40 hr/week employee does not work Monday-Friday 8 hours per day a new schedule must be assigned
  - Can cause over/under-payments for Non-exempt staff

General Reminders

- Standard hours on Job Data should agree with the T&L schedule (Regular and C2 Staff)
  - View standard hours from the Job Information tab on the Job Data page (HCM 9.1):

  HCM 9.1: Main Menu>Workforce Administration>Job Information>Job Data

  - Change work schedule (HCM 9.1):

  HCM 9.1: Main Menu>Time and Labor>Enroll Time Reporters>Assign Work Schedule

General Reminders

- W-4 Review
  - New 2014 versions along with instructions posted on FSPR website
  - Changes to form include:
    - Out-of-state residents should enter county where employed (i.e. Baltimore City if working on campus)
  - Employees who don't go through HR on-boarding:
    - PR Reps need to review so they are not sent back
    - Employees have maximum taxes withheld if not done right and no refunds will be made

General Reminders

- Missing e-mail addresses
  - Supervisors need for notices about approving timesheets
    - Query: UMB_ETS_SUPR_TLIN_NO_EMAIL
  - Employees need for notices about recycled timesheets
    - Query: UMB_ETS_USERS_NO_EMAIL
  - Have employees use EE self-service or PR Reps use Manager self-service to update e-mail addresses

General Reminders

- Self-service address changes
  - Please remind employees that they need to update their address through POSC or via CPB forms (and DBM) if they change addresses

    https://hr.umaryland.edu/Current_Employees/Emp_Self_service#addr

  - Also, if an employee moves to a new state or moves to a different county within MD, a new W-4 needs to be completed

Timesheet/payroll audits

- Problems identified by auditor with Payroll Reps who are supervisors and TL initiators (and TL approvers)

- Edit was created to require another TL Init approver if TL Init modifies a timesheet as a supervisor

- We are considering not allowing a person to have both TL Init and TL approver roles

Timesheet/payroll audits

- Departments need to print the PR Register or Cost Center report before gross pay is sent to CPB and have person with fiscal authority approve with signature as evidence

Timesheets

- Before an employee transfers from your dept to another dept make sure all timesheets are completed- the old dept is still responsible for obtaining the timesheet but FSPR will have to reconcile

Next meeting

- Merit processing
  - Wednesday, March 26th
  - 10AM-noon
  - SON Auditorium

Questions or Comments