Payroll Rep Meeting

June 23, 2016
Agenda

• Susan McKechnie
  – Electronic Timesheets (ETS) Notifications
  – Payroll Processing E-mails
  – Leave Accrual Report change

• Emily Runser
  – Merit Eligibility and Specific Guidelines
  – PIT-P Processing Overview
  – Fair Labor Standards Act (FLSA) Overview and Timeline
Electronic Timesheet (ETS) Notifications
ETS Notifications

• The Employee Work and Leave Records (Timesheets) policy and procedures were published in April 2016

• Faculty have been required to do electronic timesheets (ETS) since November 1, 2015

• Delinquent ETS are on the rise so we will attempt to curtail it before it is unmanageable or becomes an audit finding
ETS Notifications

• Beginning next week, automated e-mail reminders will be sent to employees reminding them that they haven’t completed their timesheets

• An e-mail will be sent starting the Thursday morning after the Saturday pay period ends
  – Ex. PP#16-26 ends Sat, 6/25/2016. So if the ETS has not been completed by COB on Weds 6/29, the employee will receive an e-mail on Thurs 6/30
ETS Notifications

• The e-mail will be sent **EVERY** day until the ETS is submitted
• If an ETS Initiator has been set up for an employee, the Initiator will also get an e-mail
• All ETS that have not been completed will be listed in one e-mail
• ETS in open periods will be listed separately from ETS in closed periods
  – Employees will need to look at the most recent e-mail to determine whether the pay period is still open
ETS Notifications

• Announcement will be made in the Elm Weekly to be sent on Monday 6/27/2016

• You may want to remind your employees who they should contact in your department if they have any questions about their timesheets

• If you or your employees have difficulty with ETS, YOU should contact FSPR
ETS Notifications

• For some employees the list of ETS may be long so you need to be prepared to assist with completion!
Payroll processing emails
PR Processing Emails

• FSPR will be updating the language in the emails that are sent on the Tuesday before payday- please read!

• Reminder to run the Cost Center Report (CCR) and compare to the prior week CCR
  – Related to OLA audit
  – No excuse that department didn’t know they are supposed to do this
  – Procedures are being updated to reflect this requirement
Leave Accrual Report
Leave Accrual Report (BEN 007)

• A new option “Benefit Program” will be added to the Leave Accrual Report (BEN007)

• **Background:** The new option is added because of 10-Month Faculty
  – Have a different schedule on Rollover and Allocation than for regular Faculty and staff
  – New option added so that a report can be run to pull all 10-Month faculty on Benefit Program “TMF”- Ten Month Faculty
  – Units can see leave balances for their Ten Month Faculty before the rollover process is run to zero out the leave time
Leave Accrual Report (BEN 007)

• Other than Benefit Program “TMF”- Ten Month Faculty, users can also run reports on each Benefit Program:
  – CII (CII Common Leave Program)
  – EXM (Regular Exempt Program)
  – NEX (Regular Non Exempt Program)
  – NON (None)
  – TMF (Ten Month Faculty)

• The new option will be ready in eUMB next Tuesday, 6/28/16
Leave Accrual Report (BEN007)

- If the “Benefit Program” field is left blank, a full report will be run.
- Select a “Benefit Program” for a specific report.
## Benefit Programs

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Merit

July 1, 2016
Eligibility

• Last Date Hired:  Before or on 1/1/2016
• Must be Active in Payroll:  7/2/2016
• Staff Employee Classes:  20, 22, 33, & 35
• Faculty Employee Classes:  01, 02, 03, & 15
• Post Doc Fellow Employee Class: 19
• Comp Rate Codes:  ANNLEL, ACSPEL, & ADSPEL
• FTE/GFT:  Greater or equal to .50 FTE or GFT Faculty
• Staff PDP:  On file with HRS-Employee Relations (ELR) no later than 6/1/2016
PDP Increases

• Employee must have PDP on File with HRS-ELR no later than 6/1/2016
• Non-exempt Staff will receive 2.5% for PDP of “Meets Standards” or above
• Exempt Staff increases will be determined by the School or Administrative Unit based on PDP rating
• Applicable to eligible Faculty and Staff regardless of funding source
• Departments must administer merit in a fair and equitable distribution across all eligible employees
Merit & PIT-P Key Points

- Employees who are eligible for performance increase and PDP is on file with HRS-ELR by 6/1/2016
  - Received “Meet Standards” or above PDP rating
  - Laterally transferred or promoted before 6/30/2016
  - Reevaluated by 6/30/2016
  - Completed NEX Probation on 6/30/2016
- Terminations with dates after 7/1/2016 must have EA form (HRS-MER) attached and must have PDP on file with HRS-ELR
- Faculty will need to be coded Instructional or Non-Instructional*
  - Instructional = teaching, tutoring, instructing, or lecturing at least 51% of the time
  - Non-Instructional = researching and do not teach at least 51% of the time

*Related to new FLSA guidelines discussed later in presentation*
ePAF and PIT-P Timeline

- Black out period for Job Changes Initiation in ePAF: 6/29/2016 - 7/15/2016 (PPD 16-26 & 17-01)
- Terminations with dates after 7/1/2016 must have EA form for HRS-MER attached
- Merit Paycheck & Retroactive Pay: 7/29/2016 (PPD 17-02)
Merit Specific Guidelines
Nonexempt Over Maximum of Range

• Empl class 20 & 22 (Non-exempt Regular & C2)
  – If merit increase brings employee over the maximum salary range, the employee is ELIGIBLE for a one-time payment of the amount above the maximum
  – HR-Comp will reduce the merit and notify Deans’/VPs’ offices regarding who is above maximum
    • Up to the Deans’/VPs’ offices to communicate with department affected
Nonexempt Over Maximum of Range

• Empl class 20 & 22 (Non-exempt Regular & C2)
  – Completion of Merit One-Time Payment form (on FSPR website) will be processed in PP#17-03 or later
    • Requires Dean or VP approval
    • Earnings code NMP will be used
    • Completed form with pre-print sent to HR-Comp for approval
Exempt Over Maximum of Range

- Empl class 33 & 35 (Exempt Regular & C2)
  - If merit increase brings employee over the maximum salary range, the employee is ELIGIBLE for a one-time payment of the amount above the maximum
  - HR-Comp will reduce the merit and notify Deans’/VPs’ offices regarding who is above maximum

  - Up to the Deans’/VPs’ offices to communicate with departments affected
Exempt Over Maximum of Range

• Empl class 33 & 35 (Exempt Regular & C2)
  – Completion of Merit One-Time Payment form (on FSPR website) will be processed in PP#17-03 or later
    • Requires Dean or VP approval
    • Earnings code EMP will be used
    • Completed form with pre-print sent to HR-Comp for approval
Specific Guidelines: Exempt Regular & C2

• Communication from Deans’ or VPs’ offices for the percentages/pools applicable to departments
• For those units calculating merit based on amount - you must convert the amount to a percentage before entering
  – Percentages can be entered using up to 4 decimals
    • Ex. 2.3456%
• Fair and equitable administration regardless of funding
• School or Central Unit percentage range may not be decreased or increased outside range per Dean’s/VP’s direction
  – 0% merit must have Dean’s/VP’s preapproval
Specific Guidelines: Exempt Regular & C2

- Merit will be entered as percentage based on PDP rating and may vary by School or Central Unit
- The default on the PIT-P is:
  - Percentage = 0%
  - Rating = “Meets Standards”
- Departments will need to change:
  - Percentage for all employees
  - Select rating for those where the PDP is unsatisfactory, below, above, or outstanding
    - No merit for Unsatisfactory or Below Standards
    - Exempt PDPs are required in HRS-ELR by 6/3/2016
Specific Guidelines: Staff

• The FY17 Staff Merit One-Time Payment form must be completed and submitted to HR-Comp for review by the following deadlines:
  – For PP#17-03 payment: Monday, July 25th
  – For PP#17-04 payment: Monday, August 8th
  – For PP#17-05 payment: Monday, August 22th

• Dean/VP’s office will prepare form and attach pre-print
• Dean/VP (or designee) signature required on the form before it is sent to HR-Comp
• Form is on FSPR website:
  – [http://www.umaryland.edu/financialservices/payroll/forms/](http://www.umaryland.edu/financialservices/payroll/forms/)
Specific Guidelines: Faculty, Librarians, and Post Doctoral Fellows

• Empl classes:
  – 01 Tenured
  – 02 Tenure-track
  – 03 Non-tenured
  – 15 Librarians
  – 19 Post Docs (as applicable)

  – Merits will be entered as amounts
  – Amounts may vary by School
Specific Guidelines: Faculty

• Communication from Deans’ or VPs’ offices for the percentages/pools applicable to departments

• For those units calculating merit based on percentage - you must convert the percentage to an amount before entering
  – Amounts can be entered using up to 2 decimals
    • Ex. $1200.00
Specific Guidelines: Faculty & Librarians

• Instructional vs. Non-Instructional – NEW FIELD

• **Instructional Faculty:** primary duty in the activity of imparting knowledge of 51% through
  – Teaching
  – Tutoring
  – Instructing
  – Lecturing

• **Non-Instructional Faculty:** primary duty is
  – Research
  – Teaching less that 51% or extracurricular duties
Terminations: All

• Strongly encouraged to award merit to separating (resignation, retirement, and layoff) employees
• Terminations effective between 7/2/2016 - 7/11/2016 will require ePAF with EA form by 6/29/2016
  – Merit EA form (HRS-MER) effective 7/1/2016
  – ePAF Termination (includes Merit ANNLEL increase) - effective date of termination
Terminations: All

• If EA forms 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 merit pay
  – Merit will then be processed in the pay period after it is entered in the system
PIT-P Reporting: All

- Run the PIT-P Review query-
- UMB_CM_PIT-P_REVIEW
  - after you finish entering
  - on 7/14/2016 after HR-Comp has completed their review
  - Query cannot be run after data has been loaded to job record on 7/15/2016
PDP Rating Report: Staff

- Request for a PDP Rating report with your employees’ PDP ratings that were submitted to HRS may be submitted through the Dean’s Offices or Administrative Office.

- Please include the department numbers needed.
QUESTIONS?
PIT-P Processing

June 30, 2016 - July 15, 2016
PIT-P Timeline

- PIT-P will be open to departments/schools: **6/30/2016–7/11/2016**
- PIT-P will be reviewed by HR-Comp: **7/5/2016-7/14/2016**
- PIT-P loaded to employee record: **7/15/2016**
PIT-P

• 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
PIT-P Access: Campus (exclude SOM)

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

• A person cannot have BOTH roles
• People who have each of these roles must be available to enter or approve between 6/30/2016 - 7/11/2016
PIT-P Access: SOM Only

- Each SOM department should have at least 1 person with UMB_PAYINC_INIT role
- All approvals will be done in the School of Medicine Dean’s office before 7/6/2016
- Department initiators must be available to enter between 6/30/2016 and 7/6/2016
  - All merit entry by departments must be completed by COB on Wednesday, July 6th
  - If you finish entering merit early let Jim Airey know via e-mail so he can approve early- jairey@som.umaryland.edu
- Department initiators must be available on 7/6/2016 – 7/11/2016 to make changes if required by Dean’s office approvers
PIT-P Access: SOM Only

- The UMB_PAYINC_APPROVE role will be removed from SOM department users and the UMB_PAYINC_VIEW role will be assigned to the former approvers.
- Users with the VIEW role can look but not change.
- Contact Jim Airey x6-2880 or Ron Powell x6-2607 with questions.
PIT-P Roles

- **UMB_PAYINC_INIT** (Initiator)
  - Can update Eligibility field and enter reason if changed to ineligible
  - Can enter the merit increase
  - Can update PDP rating field

- **UMB_PAYINC_APPROVE** (Approver)
  - Can update Approve field

- **UMB_PAYINC_VIEWER**
  - Can view PIT-P pages but not update any fields
PIT-P Access

- If you need to 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
# PIT-P Access

## Results:

If you need to change roles in your department you must submit a new eUM HRMS User Authorization form by Friday, 6/24/2016.

[http://www.umaryland.edu/cits/communications_forms/forms/](http://www.umaryland.edu/cits/communications_forms/forms/)
PIT-P Defaults

• Data in the PIT-P will include all employee information entered by HRSC through 6/29/2016

• PIT-P will be loaded on Thursday, 6/30/2016

• All eligible comp rates for all eligible employee classes will appear on the PIT-P and will be defaulted to an approved status = No

• Employees hired/rehired on or after 1/1/2016 will not be loaded to PIT-P
PIT-P Defaults

• Actions for Pay increase initiators:
  – Non-Exempt
    • Meets Standards is defaulted to 2.5% and only approval is required
    • Change PDP ratings for NEX employees with Unsatisfactory, Below Standards, Above Standards, or Outstanding
  – Exempt
    • Enter % for all EX employees based upon PDP ratings and/or as prescribed by Dean or VP
    • Change PDP rating for EX employees with Unsatisfactory, Below Standards, Above Standards, or Outstanding PDP ratings to appropriate rating
  – Faculty
    • Enter $ amount based upon Dean or VP guidelines
    • SOM- FTE adjustment may be changed related to Merit increase only
PIT-P Eligibility Exceptions

• Types of eligibility exceptions that may require action:
  – Post Docs on NRSA grants- no merit permitted
  – Regular & C2 staff and faculty with wrong comp rate codes that require corrections
  – Unprocessed terminations
  – Pre-7/1/2016 employee actions

• Changes to PIT-P require supporting documentation be submitted to HRS-Compensation
Using the PIT-P: Initiator & Approver

• Main Menu> Workforce Administration> Job Information> UMB Pay Increase Transaction

• Data is processed by *Department* and *Employee Classification*
Using the PIT-P- Initiator & Approver

- Leave criteria blank to search for all you have access to
Using the PIT-P: Initiator

- Sample view for Pay Increase Initiator - 33 Exempt Regular & C2 (FY14 version)

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**UMB Performance Rating field is inserted between Current Comp Rate and Change Amount fields on FY17 PIT-P**
Using the PIT-P: Initiator

- All rows will be loaded to page
- Initiator can change *Elig Stat* and *Elig Override Reason*

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<td></td>
<td></td>
<td>Eligible</td>
<td></td>
</tr>
</tbody>
</table>
Using the PIT-P: Initiator

- Initiator can enter or override the *Change Amount* or *Change Percent*
- *Department Approved?* and *Load to Job* columns are grayed out and set to No
Using the PIT-P: Initiator

• Initiator can update the *UMB Performance Rating* field if necessary

• Don’t forget to click the SAVE button when you finish entering!
Using the PIT-P: Initiator Samples

- Faculty with ADSPEL- appears on PIT-P

- Faculty with ADSPIN- not on PIT-P

- Note- the *New FTE* and *Change Amount* fields can be updated for faculty
Specific Guidelines: SOM Faculty

• Clinical Faculty-
  – If the annual salary is less than Total Approved Salary (TAS) then the FTE may need to be changed to reflect the percentage of TAS that is paid by UMB
  – FTE = UMB salary/TAS
  – FTE can be entered using up to 4 decimals, i.e. 0.5643
  – If you are not increasing the UMB salary but have increased the salary in the practice plan, you may need to change the FTE

• Basic Science Faculty-
  – Full-time faculty not fully funded need to be reflected as 1.00 FTE
Specific Guidelines: SOM Faculty

- Fiscal Year FTE changes should be entered on the PIT-P (i.e. increases not related to merit)
- FYC increases or decreases to salaries (i.e. increases not related to merit) effective 7/1/2016 must be done through ePAF with appropriate documentation
Using the PIT-P: Approver

- Sample view for Pay Increase Approver

- **FTE, Elig Stat, Elig Override Reason, UMB Performance Rating, Change Amount or Change Percent** cannot be updated.

- If a change needs to be made, the approver must ask the initiator to make the change BEFORE s/he approves.
Using the PIT-P: Approver

- Approver can only change *Department Approved?* field - defaults to No and grays out when changed to Yes
- Load to job field matches *Department Approved?* field
Using the PIT-P: Approver

• Don’t forget to click the SAVE button after entering approval!

• Once the Approver has changed Department Approved? field to Yes and saved, then further changes cannot be made by the department
  – Contact HRS-Compensation if corrections are needed
Using the PIT-P: Approver

• Approved status should be set by the department/SOM Dean’s office to YES for all employees before Monday, 7/11/2016
  – Status is Eligible with Amount or Percent ≥ 0 and Approved = YES
    Or
  – Status is Ineligible and Approved = YES
Reminder: PIT-P Query

• The data from the PIT-P will be archived as soon as it is loaded to Job Data

• Run the query **UMB_CM_PIT-P_Details** if you want a copy of the data you entered BEFORE Thursday, 7/14/2016
Using the PIT-P: HR Compensation

- HR Comp has final approval and use the Load to Job field
Using the PIT-P: HR Compensation

IMPORTANT!

• HR-Compensation must have documentation to support the reason from Dean’s Office/CASS why a department made an employee ineligible to receive Merit
Job Data Updates

- Only 1 new job data row will be inserted even if there are multiple PIT-P rows (i.e. ANNLEL with ADSPEL)
- Ineligible comp rate codes will be inserted on new job data row with the updated eligible comp rates (i.e. ANNLEL with ADSPIN)
- Departments can view the job data rows on morning of Monday, 7/18/2016
Salary Change Communications

We strongly encourage departments to send out notices to all employees identifying what the new salary is and how much the increase is their % and/or amount
Paycheck Communications

• E-mail template will be sent to PR Reps to customize and send to your employees
• Please distribute by Friday, 7/15/2016
• Employees should be referred to your department payroll rep if they have questions about their paychecks
Paycheck Results

• PP# 17-01- Period 6/26/2016-7/9/2016 - Payday 7/15/2016
  – No changes to annual gross salary

• PP# 17-02- Period 7/10/2016-7/23/2016 - Payday 7/29/2016
  – New gross salary includes merit increase
  – Additional retro pay for period July 1st- July 9th

• PP#17-03- Period 7/24/2016-8/6/2016- Payday 8/12/2016
  – Normal gross salary includes merit increase and will continue until next Employee Action
  – One-time merit payments can start with this pay period
QUESTIONS?
Fair Labor Standards Act (FLSA)

UMB Implementation Date: November 27, 2016

FLSA Compliance: December 1, 2016
FLSA New Threshold: $47,476

Law Effective: December 1, 2016
Exemptions to the new FLSA Exempt Threshold

• Bona Fide Teachers: Instructional with primary duty is teaching (>50%)
• Faculty practicing Medicine (clinical appointment)
• Faculty practicing Law
• Graduate Research Students who are involved in research that is directly related to their studies
• Graduate Teaching Students with primary duty is teaching (>50%)
• Hourly Workers
UMB FLSA Communication

- HRS-Compensation is working with each school and unit to determine most feasible approach and finalize

- Communication will be from Dean’s Office/CASS to managers about affected employees

- Managers will communicate with each affected employee
UMB FLSA Timeline

• 7/1/2016: Finalization of affected jobs
• 7/11/2016: Verify all Faculty through PIT-P as Instructional or Non-Instructional
• 7/15/2016: Request for Employee reclassification to Compensation
• 9/1/2016: FLSA Review Committee completes reclassification reviews
• 9/28/2016: Departments notified of employee reclassification determination
• 9/28/2016: Departments provided communication documents for employees being reclassified to non-exempt status and those being bumped to FLSA threshold
UMB FLSA Timeline (con’t)

- 10/14/2016: Managers complete one-on-one meetings with employees being reclassified and bumped to threshold
- 11/1/2016: Initiate ePAF Job Changes entered
- 11/27/2016: Effective Date of UMB FLSA Job Changes
- 12/1/2016: FLSA changes effective
QUESTIONS?