CSE PAYROLL

Overview of current process, procedures, and responsibilities
INTRODUCTIONS
CLUSTERED PAYROLL PROCESSES
CLUSTERED PROCESSES

Across the board

- New hires
- Visa ID requests
- Appointment entry for faculty, CSBU staff, undergraduates, and fellowships
- Position entry
- Assign affiliate relationships

Situational

- Graduate student entry
- Distribution entry
- Retro distribution adjustments
- Abstract review
- Recruiting
- HRMS data corrections
- Payroll update forms
- Off cycle, stop payment, and over payment corrections
The payroll cluster and units have different responsibilities based on both the clustered payroll model and the individual unit’s preferred arrangements with the cluster.
Unit

- Complete HRTS4 and other supporting documents and upload them to Google Drive as soon as possible
- On-board employees (verify I9*, provide new employee education about time and absence, etc.)
- Respond promptly to questions from cluster staff regarding appointments
- Complete expected job end date form by the next job entry deadline

- Follow correct naming conventions for files uploaded to Drive
- Upload appointments for summer, fall, and spring by each upload deadline
- Biweekly primary* or secondary* abstract review
- Biweekly time and absence reporting*
Cluster

- Work with central payroll, central benefits, and the super user help desk to resolve issues
- Run expected job end date reports*
- Entered expected job end dates after units have reviewed them for accuracy*
- Biweekly primary* or secondary* abstract review
- Biweekly time and absence reporting*
- Enter new hires and visa ID requests within 24 hours of receiving them
- Enter appointment information/updates before the next relevant payroll deadline
- Process HRMS data corrections, payroll update request forms, off-cycle requests, over payment corrections, and stop payments as needed and/or in coordination with unit payroll staff
- *Aid in on-boarding new payroll staff*
RESOURCES
INTERNAL RESOURCES

- Google Drive instructions
- Required documentation list
- HRTS4 required fields
- Grad appointment entry job aid
- Grad appointment spreadsheet
- Grad appointment spreadsheet instructions
- Faculty summer salary spreadsheet
- Faculty summer salary spreadsheet instructions
- Time and absence queries job aid
IMPROVED CSE PAYROLL WEBSITE

Updates made in the last year:

- Updated contact section with more information
- Direct links to central resources
- Permanent home for internal resources

Pending updates:

- Active updates about current payroll news
- Ability to archive messages that are typically sent out as emails
Payroll and accounting support team

About us
The CSE payroll and accounting support team enters payroll appointments, position requests and updates, serves as backup for departments, and prepares EFS documents for select units.

Contact
Beth Rugge - Manager

Payroll and Accounting Support Team staff
- Jan Berg - Supports BME, Chartac, DTC, ECE, IE, ISE, MCEM, Mech, MechE, MSE, MN, MAR, UNITE
- Nancy Cook - Supports CSSE for payroll, EFS documents and purchasing
- Emily Nelson - Supports AEM, CE, CSE, Darnell Office, Math, Math/CMER, and SAF.
- Chas Pullus - Supports CSSE for payroll
- Sue Richter - Supports the MAE, MSA, and Physics
- Andrea Suggett - Supports CBE, CEMS, Chem, CSE-IT, ESCL, HST, IPRI, MRSEC, CSE Shop, and TLU

Payroll resources
- Required fields on HTS documents (download PDF)
- Required documentation (download PDF)
- Google forms job aid (download PDF)
- Graduate appointment entry guide for units with entry access (download PDF)
- New graduate appointment spreadsheet (download XLS)
- New graduate appointment spreadsheet instructions (download PDF)
- Returning graduate appointment spreadsheet (download XLS)
- Department/cluster responsibilities for payroll (download PDF)
- Position request form

Related links
- Budget and Finance Office main page
- Financial chart
- CSE financial practices
- Access to University and College systems

Fiscal Admin Blog
Read the Fiscal Admin Announcements Blog

Subscribe for Fiscal Admin Email Announcements
Enter your email address
*Staff will need to opt-out of these updates through account before subscribing

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CENTRAL RESOURCES

- http://humanresources.umn.edu/
- Payroll administration (http://humanresources.umn.edu/leader-manager-resources/pay-job-class)
  - Forms
  - 9 over 12 information
  - I9 and visa information
  - Payroll calendars
- HRMS training and resources (http://humanresources.umn.edu/supervising-u/hrms-training-resources)
APPOINTMENT CYCLE
• Position management:
  • All appointments must have active and approved position numbers
  • Updates to existing position numbers that already have a position description in the system can be submitted on an HRTS4 through Google Drive
  • Requests for new positions or updates to positions that do not have a position description in the system should be requested using the Position Management Request form (https://goo.gl/forms/Vo8TmGZvD18eDjZk1)

• Recruiting solutions
  • All CSBU, P&A, and faculty positions must be posted
  • Exceptions are made for temporary/no post arrangements
  • Undergraduate positions may be posted if the unit wants to perform a search
APPOINTMENT CYCLE

- Appointment information gets sent to the payroll cluster
  - Reference the required HRTS4 fields document and required documentation guide to determine what information the cluster needs for entry
  - Use the “To be processed” folder in Google Drive to upload the appointment and to document all communication regarding the appointment
  - The appointment will be entered and cycled through a series of payroll folders before being stored in the “Completed appointments folder”

- An appointment is ended when the department uploads another document notifying the cluster of the change, or when the expected job end date is pulled and confirmed in the week before the appointment ends
USING GOOGLE DRIVE FOR CSE PAYROLL
Objectives:

- Provide an easy way to share documents and communicate
- Facilitate smooth transitions when other people need to help
- Provide a clear audit trail of changes and communication
- Allow all users to monitor a documents status through the entry cycle
## Using Google Drive - Folders

<table>
<thead>
<tr>
<th>Name</th>
<th>Owner</th>
<th>Last modified</th>
<th>File size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional payroll docs</td>
<td>me</td>
<td>Dec 14, 2015</td>
<td>—</td>
</tr>
<tr>
<td>Appointments to be audited</td>
<td>me</td>
<td>Mar 10, 2015</td>
<td>—</td>
</tr>
<tr>
<td>Completed appointments</td>
<td>me</td>
<td>Mar 20, 2014</td>
<td>—</td>
</tr>
<tr>
<td>Corrections needed</td>
<td>me</td>
<td>Feb 5, 2015</td>
<td>—</td>
</tr>
<tr>
<td>To be processed</td>
<td>me</td>
<td>Apr 9, 2014</td>
<td>—</td>
</tr>
<tr>
<td>Verified abstracts</td>
<td>me</td>
<td>Jun 10, 2014</td>
<td>—</td>
</tr>
</tbody>
</table>
Documents should follow these naming conventions:

- **Appointments/Data Corrections**: Effective date (mm-dd-yr) Last-name.pdf (e.g. 08-26-13 Smith.pdf)
- **Distribution changes**: Effective date (mm-dd-yr) Last-name DC.pdf (e.g. 08-26-13 Smith DC.pdf)
- **Retro distributions**: Request end date (mm-dd-yr) Last-name retro dist.pdf (e.g. 08-26-13, Smith retro dist.pdf for an HSA request from 08/12/13-08/26-13)
- **New hires**: New hire Effective date (mm-dd-yr) Last-name.pdf (e.g. New Hire 08-26-13 Smith.pdf)
- **Request for ID for J1 visa applications**: Visa ID Date submitted (mm-dd-yr) Last-name ID.pdf (e.g. Visa ID 08-15-13 Smith.pdf)
- **Position management**: PM Effective date (mm-dd-yy) pos# (e.g. PM 08-31-15 218563)
- Effective date should correspond with the date of a change as it affects an appointment
- For new appointments, this is the start date of the appointment
- When changing the date of an existing appointment (e.g. an AY grad RA 08/26/13-01/09/14), please use the date of the change, not the start or end of the appointment (e.g. transfer 10/13/13, use 10/13, not 8/26 or 01/09).
USING GOOGLE DRIVE – FOLDERS
Google Drive should be the primary method of communicating about an appointment.

To access the “comments” feature, you need to convert PDFs to Google Docs.

If a conversation is had over the phone or in email, it must still be documented in the comments on a document.

Objectives
- Provide a clear audit trail of changes or confirmation
- Allow all users to clearly know the status of a document