RRC Managers

December 11, 2013
Agenda

• Appointment Restructuring
• Payroll Accounting
  • Distributions
  • HSAs
• Zdeptid/Entity
• Non Service Fellows (Company UNS)
Appointment Data Restructuring Goals

- Remove non-employees from key employment record
- Simplify appointment structure
- Use more delivered functionality and processes
- Consistency of data input
- Improve data reporting
- Create a clearer definition of our organizational structure
Current Appointment Records (example)
Proposal for 9.2
Single Appointment (e.g. Department Chair)

Compensation (Institutional Based Salary)
- Regent Awards
- Faculty Pay (Base)
- Administrative Aug
- Increment

Additional Pay
- Awards
- Overload
- Lump Sum
# Academic Administrators

<table>
<thead>
<tr>
<th>Title</th>
<th>Administrative</th>
<th>Faculty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Associate Dean</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Assistant Dean</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Department Chair</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Department Head</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Director with Faculty Rank</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
Appointment Data
Multiple Appointments

• Valid multiple appointments
  – Multiple jobs can only add up to 1 FTE
  – UMP (different company)
  – Retiree (when they return to work)
  – 12 month and 9 month appointments
  – Truly distinct jobs

• Discontinued multiple appointments
  – Augments, increments, awards, overloads
# Clear Employee Definitions

## Employee Class

<table>
<thead>
<tr>
<th>Category</th>
<th>Class</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty - Regular</td>
<td>Research Specialist</td>
<td>LR - Clerical</td>
</tr>
<tr>
<td>Faculty - Contract</td>
<td>Phased Retirement</td>
<td>LR - Health Care</td>
</tr>
<tr>
<td>Faculty - Temp/Duluth - Non Reg</td>
<td>Civil Service</td>
<td>LR - Police</td>
</tr>
<tr>
<td>Faculty - Visiting</td>
<td>Graduate Assistants</td>
<td>LR - Trades</td>
</tr>
<tr>
<td>Faculty - Adjunct/Clinical</td>
<td>Residents/Fellows</td>
<td>LR - Service &amp; Maintenance</td>
</tr>
<tr>
<td>Academic Administrative</td>
<td>Professionals in Training</td>
<td>LR - Technical</td>
</tr>
<tr>
<td>Academic Professionals</td>
<td>Student Employee</td>
<td>Temp Casual</td>
</tr>
<tr>
<td>Post Doc</td>
<td>Federal Benefits</td>
<td>Non - Employees</td>
</tr>
</tbody>
</table>
Appointment Data

Tenure

- Using delivered functionality, we can separate tenure from the job record
- Accommodates multiple tenure appointments/associations
- Start by storing status only
- Future examination of tracking functionality
Appointment Data
Contract Pay

• All faculty and P&A employees will be moved to contract pay
• Allows use of delivered-functionality to pay employees and store associated contract details/dates
• Will assist in meeting NOA requirement
Appointment Data: Affiliates

• Move non-employees and unpaid appointments out of the job record
• Track necessary data elements to accurately recognize their service
• Ensure privileges will continue as they do today
• Allows reporting on these individuals without compromising appointment data – opportunity to monitor
Affiliates

These are where instructions for the page will go. They will be in a text catalog entry that can be updated via configuration at any time.

<table>
<thead>
<tr>
<th>Person ID:</th>
<th>1688814</th>
</tr>
</thead>
</table>

Affiliates Relationship Details

- **Effective Date:** 04/17/2013
- **Affiliate Relationship:** 9401 Professor
- **Department:** 619A Academic Health Center
- **Track:** 001 Clinical Scholar
- **Status:** Active
- **Affiliate Title:** Professor
Sneak Peek

http://upgrade.umn.edu/2013/11/now-showing-appointment-structure-sneak.html
Distribution Entry

• Distribution entry will be separate task from appointment entry; can assign the work to two people

• Distributions can be at:
  • Department
  • Position Pool
  • Position
  • Individual appointment

• Both tasks, appointment entry and distribution entry, still occur in HRMS
PeopleSoft has two types of retro distributions:

Budget retro – occurs when making an historical distribution entry change, i.e., the effective date of a distribution change affects pay periods that have already been expensed, and

Direct retro – occurs when crediting a chartstring that was used for an employee's salary or fringe transactions and debiting a different one.
HSAs – 9.2

CCI & Payroll Accounting IDP Recommendation:

Use PS's delivered retro distribution processing, and eliminate the U's custom HSA process.

Add a custom page for the entry of direct retros to both limit the functionality for users (direct retros are very powerful and unwanted errors could occur) and to facilitate and speed up the data entry process. This page will also allow for justification comments.
Add a custom page to integrate with the Approval Workflow Engine (AWE) in PS to capture Effort and Certified Approvals on both types of retros.

Add a custom process to break up budget retros into individual transactions based on the emplid affected if they are subject to any system approval (PS batches all budget retros done in a day into one transaction). Budget retros NOT requiring system approvals will be batched as one transaction.
ROI for 9.2 Retros

Productivity gains in all departments:

• Budget retro eliminates HSA data entry and works well for most University needs.
• Will cut down on the need to do direct retros (which are similar to our HSAs).
Direct Retro-Distribution - Search Page

1. User enters this page by **EMPLID**
2. User can enter filters to find Pay Distribution entries and use the ‘Get Distributions’ button to search
3. Results are summarized across the date range by Empl Rcd, Earnings Code and Chart String

**Direct Retro Distribution**

- **Employee ID:** 9999999
- **Name:** Smith, Zelda
- **Retro Control ID:**
- **Initiator:** XXXXXXXX
- **Status:**

**From Date:** 09/09/2013  
**To Date:** 10/21/2013

**Distribution Details**

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<tr>
<th>Empl Rcd</th>
<th>Transaction Type</th>
<th>Combo Code</th>
<th>Fund</th>
<th>Dept ID</th>
<th>Program</th>
<th>Project</th>
<th>Chart Field 1</th>
<th>Chart Field 2</th>
<th>Fin Empid</th>
<th>Cost Shr</th>
<th>Account</th>
<th>Trans</th>
<th>Amount</th>
<th>Select</th>
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</thead>
<tbody>
<tr>
<td>0</td>
<td>REG Regular Earnings</td>
<td>10001173420000000101</td>
<td>1000</td>
<td>11734</td>
<td>200000</td>
<td>A100</td>
<td>700101</td>
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<td></td>
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<td></td>
</tr>
<tr>
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<td>VAC Vacation</td>
<td>10001173420000000101</td>
<td>1000</td>
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<tr>
<td>0</td>
<td>HOL Holiday</td>
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<td></td>
</tr>
</tbody>
</table>

**No Dates**

Results represent all transactions in the date range.
Syncing Zdeptid and Entity

- HRMS will adopt Zdeptid and replace Entity
- Values will become the same in EFS and HRMS
  - To be worked out between Financial Leads and HR Leads
Company UNS

Graduate Fellow-extrnly funded
Graduate School Fellow
Graduate School Trainee
Intern
NIH-NRSA Med Fellow-GradProg
NIH-NRSA Medical Fellow
NIH-NRSA Medical Resident
Post-Doctoral Fellow
Professional School Fellow
Professional School Trainee
Undergraduate Research Fellow
Questions?