• Welcome – Happy 2016!
• DART passes – Cris Aquino
• ePAR for New Faculty Hires – Richard Huckaba
• OIEC Update – James Dockery
• Benefits
  - ACA 1095 C form; Total Rewards Statement; Retirement Expressway
• Employee Relations/Organizational Development
  - Annual Employee Appraisals due April 7; New Performance Review Period form
• Employment Services
  - Jan 22 deadline; Employment Express Jan 12 & 13th; PA7 updates;
Faculty/Staff DART Passes

- From December 1 through February 12, DART Transit Passes are available for $300.
- Passes are good from January 1 through December 31, 2016 and allow you to ride all DART buses and trains, plus the Trinity Railway Express from Union Station to CentrePort/DFW Airport Station (TRE Zone 1.)
Transportation Changes

- A number of bus stops and holding points will change as service to all Rutford Avenue and Drive A stops will cease.

- VCB bus stop near traffic circle to serve as holding point.

- Route 883 West to halt service to WSTC, ROC and SPN.

- Riders to transfer at VCB to catch Route 883 East to reach WSTC, ROC & SPN.
Thank you
ePAR for New Faculty Hires

January 6, 2016 HR Forum

Presented by Richard Huckaba
Associate Provost
The basics

- Only NEW faculty (F00001 – F00999)
- Submit no earlier than 30 days before actual start date
- Earlier access available through eCAT
- Why such limited access?
  - Duplicate IDs
  - Creation of new EmplIDs
Search Information

- Last Name
- First Name
- (Middle Name)
- (Suffix)
- Date of Birth
- Address1
- Address2
- City
- State/Province
- Postal Code
- Gender
- Other Known Names
Initial Appointment Information

- Position #
- Job Code # (F-----)
- Department #
- FTE
- Salary Basis (9/12)
- Annual Rate @ 100%
- Monthly Rate @ 100%
Initial Appointment Information

- Job Start/End Date
- Funding Begin/End Date
- Explanation (Initial Appointment, NEW hire)
- Cost Center #s
- Distribution %s
- Highest Degree
- Filename of Offer Letter to attach to ePAR
Thanks for your help!
UPDATE - IRS Form 1095-C

- **Form 1095-C** = Employer-Provided Health Insurance Offer and Coverage (Benefits W-2)
  - Statement of coverage offered and provided to employees, retirees, surviving dependents and COBRA participants each month for the entire calendar year
  - Due date extended by the IRS to March 31, 2016
  - UT Dallas is planning to meet the 2/1/16 original deadline
  - The IRS Q&A clarifies that taxpayers do not need to wait until they receive a 1095-C form before they file their taxes. Taxpayers comply with minimum essential coverage filing requirements if they simply check a box on their 1040 that they had coverage for the year — they do not need to file any evidence of coverage with their tax forms.
  - Online access will not be available this year. Forms will be mailed to employees home address by Equifax. Please make sure your address is updated in the system.
**Sample Form 1095-C**

### Employer-Provided Health Insurance Offer and Coverage

#### Part I
- **Employee**
  - Name of employee
  - Social security number (SSN)
  - Name of employer
  - Employer identification number (EIN)
- **Applicable Large Employer Member (Employer)**
  - Employer identification number (EIN)
  - Street address (including apartment no.)
  - City or town
  - State or province
  - Country and Zip or foreign postal code

#### Part II
- **Employee Offer and Coverage**
  - All 12 Months
  - Plan Start Month (Enter 2-digit number):

#### Part III
- **Covered Individuals**
  - If employer provided self-insured coverage, check the box and enter the information for each covered individual.
  - Name of covered individuals
  - SSN
  - DOD (If SSN is not available)
  - Covered 12 months
  - Months of Coverage

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For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.
Total Reward Statements

- UT Reward$ 4U - Total Rewards Statements will be available very soon.
- Total Rewards Statement is a great recruiting and retention tool. It tells employees the total value of their job including benefits.
- Access via My UT Benefits using available access option including Single Sign-on.
- Statements are estimated based on the December 2015 data in PeopleSoft.
- Certain data on the statements (i.e. ORP and TSA combination, salaries for faculty with additional and summer pay) are actuals due to certain limits requirements.
• Lunch and Learn Session: How to Make the Most of Your Social Security Benefits
  – Presenter: Lincoln Financial
  – January 14, 2016 at 12:00 – 1:00 p.m.
  – Student Union – Galaxy Rooms A & B (2.602)
  – Space is limited to 100; please sign-up quickly when the announcement is made
  – Communication will be out shortly
EMPLOYEE RELATIONS/
ORGANIZATIONAL DEVELOPMENT

Division Update
Performance Appraisals

Who must receive an annual appraisal?

- Any employee who worked in 2015
- Current temp assignments of 4.5 months or more
- Hired between Jan 1 – Apr 15
Who does **NOT** need an annual appraisal?

- Student workers
- Graduate Research Assistants
- Current temp assignments who have worked **less** than 4.5 months by April 7, 2016

*Not required but some kind of performance management is recommended as a best practice.*
Deadlines

• April 7, 2016 if hired before January 1

• June 30, 2016 if hired between January 1 – April 15

NOTE: Teaching Assistant’s (TA’s) will follow same review cycle as employees. Reviews will be submitted to Human Resources.
Tips for an Effective Review

• Provide employee self appraisal

• Review employee job duties
  - Job duties discussed?
  - Performance expectations clear?
  - Communicated changes in duties or expectations?
  - Employee doing job?

• Collect and review data
  Notes, statistics, citations or other performance based information
  Special projects, performance during stressful or busy time of year,
Performance Appraisals

• Ambiguous feedback
  “You need to be proactive” vs. “You failed to obtain appropriate documents for the submission of the grant. To be successful, all grants you bring to me for review must be complete and all standard documents must be included.”

• Rate based on conflict avoidance
  Fear of negative employee reaction

• Overly critical
  Never give positive feedback or recognition

• Over promise
  Promise employee an increase or promotion before receiving appropriate approvals
Include the following on the Appraisal Form

- Employee Identification Number (UTD ID)
- Legal Name
- Rating factors
- Highlights
- Goals
- Overall rating/comments
- Employee comments
- Signatures

Scan and email to ellen.ammons@utdallas.edu and marco.mendoza@utdallas.edu.
Mail to MS AD10
Performance Review Period Form
Classified and A&P
30 Day

Appraisal Type (select one below):
- ☐ New Employee/Probationary Period
- ☐ New Position/Transfer

Date:
Employee: [Name]
School/Division: [Department]
Supervisor: [Supervisor Name]
Evaluation Period: [Start Date] to [End Date]

<table>
<thead>
<tr>
<th>PERFORMANCE FACTORS</th>
<th>YES</th>
<th>NO</th>
<th>N/A</th>
<th>COMMENTS (provide examples where met or did not meet criteria)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendance: Does employee report to work when scheduled, on time and work entire</td>
<td></td>
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<tr>
<td>shift?</td>
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<td>Job Knowledge: Does employee demonstrate having the level of knowledge required of</td>
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<td>the position to perform essential tasks and duties?</td>
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<tr>
<td>Initiative: Does employee seek out information from supervisor, peers and other</td>
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<td>available resources to educate self on job duties, policies, procedures, processes,</td>
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<tr>
<td>etc.?</td>
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<tr>
<td>Interpersonal: Does employee interact in a professional, respectful and civil</td>
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<td>manner with all members of the UTD community?</td>
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<tr>
<td>Communication: Does employee express ideas and provide information, both written</td>
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<tr>
<td>and oral, in an effective manner that is thorough, clear, concise, and complete;</td>
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<tr>
<td>convey information to supervisors, peers, and customers in a timely manner; listen</td>
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<tr>
<td>to and accept feedback and suggestions from others?</td>
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</tr>
</tbody>
</table>

| SUPERVISORY PERFORMANCE FACTORS                                                  |     |    |     |                                                               |
| (if applicable)                                                                  |     |    |     |                                                               |
| Management/Leadership: Does employee create an environment of understanding,      |     |    |     |                                                               |
| welcome feedback, give direction and communicate expectations, provide           |     |    |     |                                                               |
| performance feedback, manage performance problems, understand, implement and     |     |    |     |                                                               |
| comply with basic HR regulations and laws, coach/counsel effectively, document   |     |    |     |                                                               |
| critical incidents and is accessible to staff?                                    |     |    |     |                                                               |
| Accountability: Does employee regularly review work and performance of assigned   |     |    |     |                                                               |
| staff and take immediate action to correct problems or substandard work?          |     |    |     |                                                               |
Performance Review Period Form

<table>
<thead>
<tr>
<th>Organization: Does employee plan and implement a realistic work schedule designed to meet deadlines and set expectations of staff that are appropriate for the job?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Management: Does employee set clear objectives and measures, monitor progress and results, and provide feedback, development, training, direction, coaching, and guidance in a supportive environment?</td>
</tr>
<tr>
<td>Judgement/Decision Making: Does employee weigh and evaluate information, prioritize tasks, assess probable consequences and take appropriate action; demonstrate the ability to make sound and timely decisions and include appropriate people in the decision-making process and select alternatives that meet the objectives of the department and institution?</td>
</tr>
</tbody>
</table>

Has employee completed required compliance training for new employees? ☐ Yes ☐ No (if No, contact the Office of Institutional Compliance at: compliance@utdallas.edu – required within the first 30 days of employment)

Has employee completed any of the following training? Check all that apply: ☐ New Employee Orientation; ☐ Job/Department specific (list) ____________________________________________ ; ☐ Received copy and reviewed job description with supervisor? ☐ Other (list) ____________________________________________

COMMENTS: (List key success factors moving forward. Provide specifics required to meet performance expectations as well as timeframe to correct deficiencies, if applicable. Attach additional sheet(s) if needed.)

Supervisor Signature: ___________________________________________ Date: __________________________

Employee Signature: ___________________________________________ Date: __________________________

(My signature above indicates that I have reviewed and discussed this appraisal with my supervisor)
Questions?

Ellen Ammons, Employee Relations Manager
ellen.ammons@utdallas.edu; Ext. 4633

Marco Mendoza, Director of Employee Relations and Organization Development
marco.mendoza@utdallas.edu; Ext. 4412
Division Update

EMPLOYMENT SERVICES
is the deadline for submitting requests to HR for a staff reclassification, promotion, market/equity adjustments or one-time merit with a March 1, 2016 effective date.

The March 1 date is reserved to reward exceptional performance or extraordinary circumstances.

To submit a request, please complete a PRR and include justification for the action.

If requesting a promotion, the Staff Promotion Assessment form and all applicable documents must also be attached.

If requesting a reclassification, please contact Betty Burns (betty.burns@utdallas.edu / 972.883.4632.)

Please refer to our Compensation Standards & Practices for additional information.
Employment Express

- January 12th and 13th
- 9am – noon, and 1 - 4pm
- Founders Atrium, 1st Floor
PA7 Updates

• Search Coordinators are now able to:
  – Create and submit Hiring Proposals
  – Forward them to a Level 1 Manager for approval

• Reference/Recommendation Letters:
  – can be set up during the creation of the posting.
  – can be sent when applicants reach a certain workflow state (i.e. Interview).
  – may be accessed at the bottom of the application.

• Bulk Action: Move in Workflow
  – Applicants must be in the same workflow status before the bulk action functionality will work.
  – Move “Not Interviewed/Not Selected” applicants first.
### References

**Reference Notification**

Request References to submit Recommendations when candidate reaches selected workflow state?

**Recommendation Workflow**

When all Recommendations have been provided, move to selected workflow state?

**Recommendation Document Type**

Allow a document upload when a reference provider submits a Recommendation?
PA7 Updates – Recommendation Letters

Reference Letters

* Required Information

Reference Letters

* Require Applicants to Submit References for This Position? Yes

Minimum Number of References
Minimum number of references an applicant must submit in order to complete their application. If you are not accepting references for this position, please enter zero (0).

Maximum Number of References
The maximum number of references an applicant can submit for this job posting.

Last Day a Reference Provider Can Submit Reference
02/28/2016
Reference Providers can submit a recommendation on an applicant up to the date listed in this field. PeopleAdmin 7 will not allow recommendations after this date. If no references are being requested, you can simply put today's date.
### Required Documents

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<tr>
<th>Document Type</th>
<th>Name</th>
<th>Conversion Status</th>
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<tr>
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<td>PDF complete</td>
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<tr>
<td>Cover Letter</td>
<td>Cover Letter 04-22-15 14:01:21 (31.9 KB)</td>
<td>PDF complete</td>
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### Optional Documents

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<tr>
<td>Unofficial Other Transcripts 1</td>
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<tr>
<td>Unofficial Other Transcripts 2</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Other Document 1</td>
<td>Other Document 1 04-22-15 14:01:31 (24.9 KB)</td>
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<td>Other Document 2</td>
<td>-</td>
<td>-</td>
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<tr>
<td>Unofficial Graduate Transcript 1</td>
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<tr>
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### Recommendation Documents

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<tbody>
<tr>
<td>Reference Letter</td>
<td>Anonymous, 04/27/2015 11:13 AM</td>
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<td>Reference Letter</td>
<td>Anonymous, 05/04/2015 10:22 AM</td>
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### PDF Documents

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<th>Document Type</th>
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<tr>
<td>Application</td>
<td>View</td>
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<tr>
<td>Combined Document</td>
<td>Generate</td>
</tr>
</tbody>
</table>
Q & A

Next Month: February 3, 2016, Clark Center CN1.120
HR Fireside Chat – What would you like to know?
Send your questions to hr@utdallas.edu by January 22, 2016