Semi-Annual Payroll Meeting

04/23/2015
Today’s Agenda

• Welcome
• Time and Labor Update – Jessie Bortz
• ePAR Update – Natalie Cummings
• Summer Payroll – Adam Cantwell
• Payroll Procedures – Sheretha Measells
• Open Questions / Discussion
Payroll Department Staff

- Adam Cantwell – Director of Payroll
  - Alice Ahten – Administrative Assistant

- Sheretha Measells – Payroll Manager
  - Creshona George – Accountant III
  - Amber Gray – Data Processing Analyst
  - Ambra Gray – Payroll Analyst
  - Ashley Lankford – Payroll Analyst
  - Jay Manikandan – Data Processing Analyst

- Natalie Cummings – Sr Business Process Analyst
  - Jessica Bortz – T&L Analyst
  - Amy Tiller – Payroll Data Analyst

- Nancy Barganier – University Tax Accountant

Payroll@utdallas.edu
Extension x2611
Time and Labor Update
Time & Labor Updates

• As of April 1st, all but 2 departments are reporting time online

• Payroll spreadsheets will no longer be accepted

• Phase 2 of PeopleSoft Time & Labor Implementation has begun and completion expected by end of summer
  ➢ Facilities Management & the Callier Center downtown use time collection devices and will transfer their data into PeopleSoft instead of using online timesheets
Time & Labor Knowledge

Terminations & Transfers

• When an employee leaves your dept by termination or transfer, you must complete the timesheet BEFORE they leave
  ➢ All time submitted and all time approved up until the date of termination or transfer
Time & Labor Knowledge

Terminations & Transfers

• When the timesheet is complete, you must REMOVE the employee from your Manager page
  ➢ Why?
    • The old department will get the Sick/Vacation notices
      – If the employee has two manager listed, one for the old and one for the new dept, the original manager will get the S/V emails
    • The old department will get the Student/Casual Labor hours to approve
      – But will not be able to access the timesheet since the dept has changed
      – And the new manager will not be routed the time because its been sent to the original manager
Time & Labor Knowledge

Student Worker/ Casual Labor Record # Changes

• Example: When a student goes from Work/Study to Non Work/Study
  ➢ Enter all time on the 51 record and approve
  ➢ THEN change the record to the 0 or 1 number
  ➢ OR keep both records assigned until you know 51 is complete, then remove
  ➢ Why?
    • Once Record 51 is terminated, you have no way to access the timesheet
  ➢ How do I know that records #s are changing?
    • Be cognizant of the effective dates from the PAF and make a note of that for the employee and manager
    • If you are made aware of the change mid-period, delete the hours from 51 and move them to the new record
Time & Labor Knowledge

• Summary
  ➢ Terminations
    • Complete the timesheet before employee leaves, manager approves
    • Remove from Manager page
  ➢ Transfers
    • Complete the timesheet before employee leaves, manager approves
    • Remove from Manager page
    • New department assigns new manager
  ➢ Record Changes
    • Complete the original record by submitting/approving
    • Change the record #
    • OR add in the new record #, keeping the old and new until the old record is complete
      – Optional Job Title will come in handy here- put in the dates of the change for the employee to know when to switch over
Time & Labor Questions?
What is ePAR and why should we change?

- **Electronic Personnel Action Request**
- Replacing Paper Forms Currently used Today
- Speed ofApprovals
- Electronic Audit Trail
- Electronic Attachments
- No Loss of Paperwork
Current Status

- **Active Forms**: Termination, End of Assignment, Retirement, Leave of Absence, Return from Leave of Absence, Supplemental Pay, Change Funding, Job Attributes, Transfers, New Hire, Rehire, Secondary Appointment

- 2318 Forms Submitted through 04/22/15

- Incorporating Checkout Forms with ePAR

- 53 Active Department IDs on Pilot
ePAR Pilot Groups

- Office of Budget and Finance
- Provost
- Human Resources
- Information Resources
- School of Management
- School of Engineering & Computer Science
- Student Affairs
ePAR Screen

Employee Information
- Emp ID: [Red Highlight]
- Name: [Blank]
- DeptID: 407100 Pos

Action
- Action: Termination
- Status: [Blank]
- Request ID: 10/14/2014

Termination Reason
- Level 1: [Blank]
- Level 2: [Blank]
- Level 3: [Blank]

Termination Information
- EmpRd: [Blank]
- Position: [Blank]
- Job Code: [Blank]
- Job Title: [Blank]
- Dept ID: [Blank]
- Dept Title: [Blank]
- Job Indc: [Blank]

*Last Day of Employment: 11
*Recommend Rehire: Yes
Transfer to State Agency: [Blank]
Donate Sick Leave: [Blank]

W2/Forwarding Address
- Address Line 1: [Blank]
- Address Line 2: [Blank]
- *City: [Blank]
- *State: [Blank]
- *Zip: [Blank]
- Telephone: [Blank]
- Email Address: [Blank]
- Country: [Blank]
ePAR Screen

Employee Information
- Emp ID: 4656
- Name: [Redacted]
- Job: C00019
- Administrative Assistant II
- Dept: 801090
- Pos: 00007598

Action
- *Action: Termination
- Status: Completed
- Request ID: 00000580
- Request Dt: 10/07/2014

Termination Reason
- *Level 1: Voluntary
- *Level 2: Resignation for Employment
- Level 3

Termination Information
- Emp Rd: 1
- Position: C00010
- Job Title: Administrative Assistant II
- Dept ID: 801000
- Dept Title: DEAN OF STUDENTS
- Job Ind: Primary Job

*Last Day of Employment: 10/03/2014
*Recommend Rehire: Yes

Transfer to State Agency: Texas Agency Employer

Other Agency Not in List: Transfer to Job Title
- Donate Sick Leave:

W2/Forwarding Address
- *Address Line 1: 3330 Country Square Dr
- Address Line 2: APT 424
- *City: Carrollton
- *State: TX
- *Zip: 75006
- Telephone: [Redacted]
ePAR Workflow

- Multiple Department Approvers
- After Department Approvers
ePAR Workflow

Department Approvals

REQUEST_ID=00000580: Approved

Department 1

- Approved
  - Gene Fitch
  - Department Approval
  - 10/07/14 - 3:54 PM

- Approved
  - Sue Sherbet
  - Department Approval
  - 10/07/14 - 4:10 PM

After Department

REQUEST_ID=00000580: Approved

TER, LOA, RFL, RET, END

- Approved
  - Jennifer Koerber-Miller
  - Employee Relations
  - 10/07/14 - 4:51 PM

- Approved
  - Christina D Sharpling
  - Leave Administration
  - 10/07/14 - 4:57 PM

- Approved
  - Amber Gray
  - Payroll Office
  - 10/08/14 - 7:52 AM
ePAR Notification

Termination ePAR Request ID 00000620 has been submitted for approvals. To review, please click on the link below.

Go to ePAR

ePAR Action: Termination
Employee Name: Adam Cantwell
Department: 407100/Payroll - Operating
Originator/Requestor: Natalie Cummings

If you are not already logged in please login to Galaxy to review request Go To Galaxy

Thank you,

Contact ePAR Team

Have a Question? askYODA
ePAR Status Types

- Saved
- Submitted
- Approved
- Denied
- Completed
Rollout Schedule

• Two Phase Rollout Approach
  ➢ July 1\textsuperscript{st}
    • 1XXXXX, 2XXXXX, 5XXXXX
      – Approvers Requested May 1\textsuperscript{st} – Due May 13\textsuperscript{th}
      – Training Released June 8\textsuperscript{th}
      – Kick Off Meeting June 18\textsuperscript{th}
      – Forms Turned on July 1\textsuperscript{st}
      – Workshop July 7\textsuperscript{th}
  ➢ October 1\textsuperscript{st}
    • 3XXXXX
      – Approvers Requested July 31\textsuperscript{st} – Due August 12\textsuperscript{th}
      – Training Released September 7\textsuperscript{th} (Will already be available from Jul 1 Group)
      – Kick Off Meeting September 17\textsuperscript{th}
      – Forms Turned on October 1\textsuperscript{st}
      – Workshop October 6\textsuperscript{th}
ePAR Questions ?
Summer Payroll
Summer Payroll

- Spreadsheets for Faculty & TA (no Hourly or RA)
- Instructions Provided in e-mail
- Will be able to terminate from spreadsheet
- Released Starting April 27th to Fiscal Officer
- Spreadsheets Due May 22nd
- Follow Up – Supplements (9 vs. 12) / Cell Phone
- FTE requirements for ACA
- PAF/ePAR – Please note as change to spreadsheet
Summer Questions?
Payroll Process and Procedures
REU Participant Support

• New Job Code – S00921
• Account Code remains 70101
• Moving from HRN to STP Paygroup
  ➢ Paid Monthly vs. Semi-Monthly
  ➢ Will need to submit a normal PAF to start Job Data with a monthly amount to be paid and/or Terminated
• For Research only – not actual employees – forms required
  ➢ PAF
  ➢ PDF – Personnel Data Form
  ➢ W4 – FIT Taxable
  ➢ Direct Deposit Form (if applicable)
  ➢ Copy of SSN Card
  ➢ You must contact Payroll to set this up for payments
Taxable Stipends (Non-Scholarship/Student Financial)

- Job Code remains S00922
- Account Code is 51058
- Stipend Types
  - Peer Advisors
  - Student Government
  - Radio/Newspaper
  - Academic Bridge
Retro Pay

• UTD / State Policy

- According to Article III, Sections 44, 51, and 53 of the Texas Constitution, an increase may be retroactive to the first day of the month in which final approval (from all required approvals) for the pay change is received, provided that the approval was received in the same pay cycle (i.e., an increase requested with all required approvals received anytime in November may be retroactive to November 1, but not prior to November 1).

- In addition, an employee may not begin working before the official start date issued by Human Resources. An administrative error in awarding a salary increase is insufficient, by itself, and may only be corrected if the error resulted in an employee not receiving an increase they are entitled to under the law. Merit increases and market adjustments are not an entitlement under the law.
Term / End of Assignment / Short Work Break

• Similarities
  ➢ They all end payment of salaries based on the effective date

• Differences
  ➢ Term means the employee is leaving UTD
  ➢ End of Assignment means the employee is returning to UTD in the near future
  ➢ Short Work Break (SWB) is similar to EOA. It is automatically applied to Faculty and TA jobs

• Requirements / Non-Requirements
  ➢ PAF/ePAR and/or Spreadsheet is required to Terminate or End the Assignment
  ➢ If termed by an ePAR, do not submit an ePAR cancellation of a cell phone or other supplements – it is automatically done when the ePAR Termination is completed
  ➢ Anyone not returning from an EOA or SWB will require you to submit a Term PAF/Term ePAR
HRN Paygroup – Hourly Employees

• Most hourly employees have an expected end date of 08/31/2015

• Unless you submit hours for the employee, the employee will not be paid – funding is not encumbered

• If the expected end date is prior to 08/31/2015 and the employee is still working, you must submit a new PAF/ePAR for funding

• If the employee will continue in the Fall semester, please do not term or end the assignment during the Summer semester

• Spreadsheets for hourly employees will not be sent out for the Summer semester, but will be sent out for FY16 (fall semester)
Payroll Questions ?
Open Questions & Discussion