

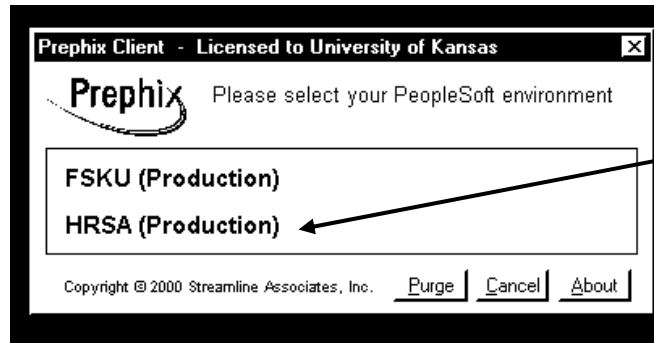
HR/Pay (HRSA) Navigation Training

	Page		Page
Security, Sign on and Access	2	Employee Review	25
Opening Multiple Windows	3	Job/Position Summary	25
Toolbar and Function Keys , Panel Footer, Favorites	3	Leave Accruals	25
Password Policy	3	Names	25
Panels		Prior Work Experience	25
Search/Match	4	Paycheck Data	26
Bio/Demo Data & Relationship with Institution	5	Paycheck/Advice Mailing	26
Personal Data	6	Position Data Summary	26
Job Data	8	Position History	26
Employee Checklist	10	Position, Vacant Budgeted	26
General Comments	11	Visa/Permit Data	26
Administer Workforce Search	12	Honors & Awards	27
External System ID	13	GRA Intent Dates	27
Position Data	14	SHaRP Emplid (State ID)	27
Manage Positions Search	19	Training Attendance	27
Position Pool Table	20	Legacy HRMS Data	27
Position Pool Table Search	20	Emergency Contact	27
Department Budget Table	21	Additional Information	
Department Budget Table Search	23	Web Sites	27
Setup Tables Related to Budget/Encumbrance	24	Fields and Notes Quick Summary	28
Directory (also see Directory Manual)	25	Contact List	29
Pay Rate	25	HRSA Processing	30

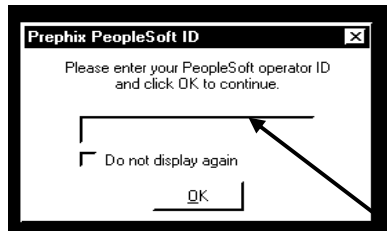
Security, Sign on and Access

- **Compliance with confidentiality of data is essential.**
- HRSA is generally available Sunday Noon through Saturday midnight. Emails are sent for additional planned unavailability.
- Everyone will be required to fill out a HRSA security form before access is assigned. Sign-ons will only be allocated if the person attends all training appropriate to their system access and they have HR/Payroll job duties.
- Most campus user are **timekeepers** and will have two (2) **SIGN-ONS** to allow update to their authorized data and view to other data campus wide. Simultaneous sign-ons are allowed. **The second sign-on with campus wide view access will generally have a 1 at the end of the operator ID.** Operator ID's will be in the format of first initial last name. e.g. msmith for departmental view or msmith1 for campus wide
- For those with 2 sign-ons you will only see your employees if using the departmental access or if using campus wide you will see all employees.
- The security form includes a statement that misuse or inappropriate release of information may result in disciplinary actions, including the possibility of termination.

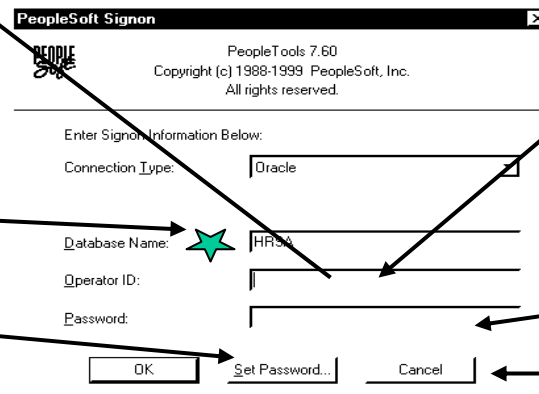
- CW = Campus Wide View; DP = Departmental View
- DS = Departmental sign on Access; VS =View sign on access



Click on this one



For those with access to FSKU and HRSA you are not able to have both systems open and print reports. For viewing and entering you may have both open at the same time.



Enter your Operator ID – remember you may have 2 of them if you are a timekeeper.

Your Password goes here.

Click OK with mouse or use enter key.

If you want to change your password click on this after you have filled out Operator ID and current password.



Select this icon

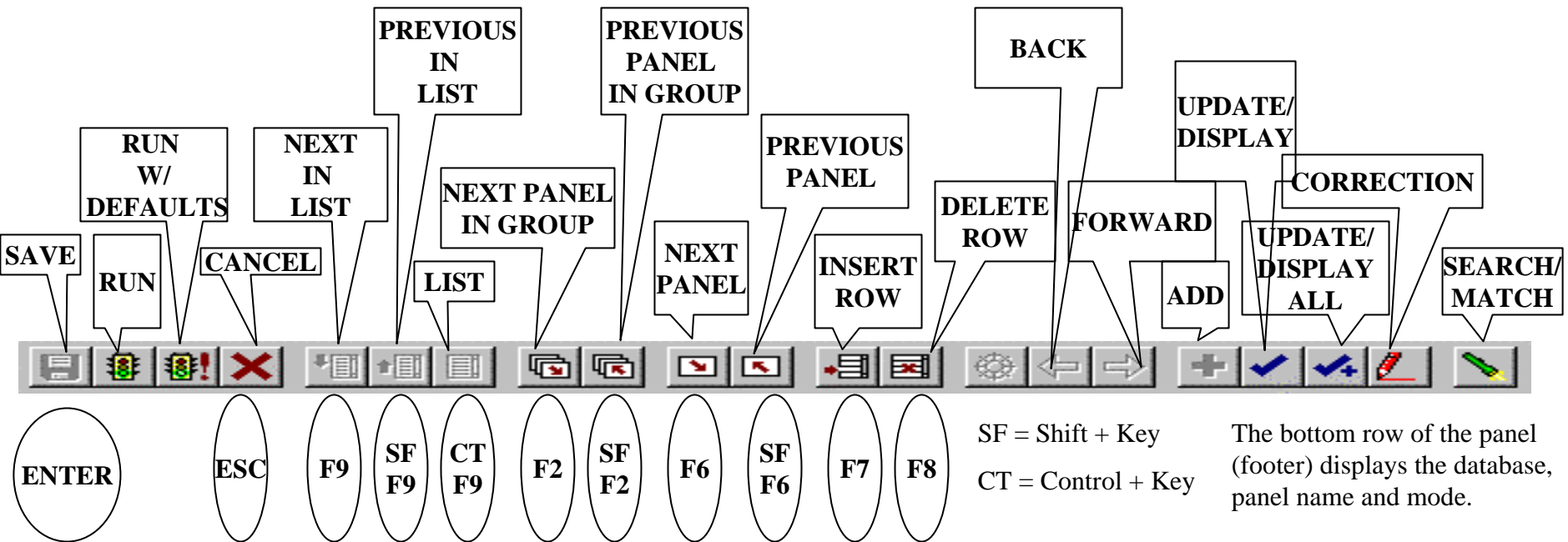
This should default to HRSA if not, check to be sure your are selecting the correct programs.



Opening Multiple Windows

Go, New Window

Toolbar and Function Keys



Favorites - You may also mark Favorites listed on the top menu. Also under **Go** – you have a “recent” feature that you can select from.

Storing/Saving HR/Pay Data – You are not to store any confidential data (includes HR/Pay data) on any unsecured device, this includes but is not limited to USB drives, disk, cds, hard drives, etc. You are not to access HR/Pay data over a wireless connection.

Password Policy - The Password policy is located at https://documents.ku.edu/policies/Information_Services/Password.htm . At the beginning of each semester users should change their signon to HRSA. If you are a timekeeper you will need to do this on both signons. HRSA (PeopleSoft) has unique rules regarding passwords. You must have all 4 items for the password: Must be 7 or 8 characters long and *cannot be longer than 8 characters (but must be 7 to comply with the University policy)*. 2. The leading character must be an upper case alphabetic character (A-Z). *Alphabetic characters keyed are automatically converted to upper case when signing in to HRSA.* 3. Must include one of the following three special characters #, \$, _ . *Only three special characters are allowed, if you use others the new password will not be changed or saved.* (The KU policy allows additional special characters but HRSA PeopleSoft does not so you are only allowed to use the 3 listed above.) 4. Must include at least one digit (0-9). Therefore, users are to create a ‘strong’ password that is 7 or 8 characters long. It must include at least one of the three special characters and at least one digit (0-9) and begin with an upper case alphabetic character.

ID Numbers – Please note that the Campus ID, Student Records ID and possibly the Employee ID may be covered under the Family Educational Privacy Rights Act (FEPR).

Search/Match (CW – DS & VS)

Maintain Organization Data

File Edit View Go Favorites Setup Help

Search/Match

Required before submitting a new appointment for your department.

Option A) Flashlight for Search Match or navigate by Go, Maintain People Data, Inquire, Search/Match . The results from this option display a Search/Match list (see below) and is in alpha order. Clicking on the Search/Match list then takes you into the panel.

Option B) Navigation: Go, Maintain People Data, Use A-K, Use Bio/DemoData, Bio/DemoData, Update Display All. The results from this option display a list in ID order number and then takes you directly into the panel. This option allows you to search on Campus ID “Student ID”.

Note: When a friend or in the past when student prospects were entered into Bio/Demo Data they may or may not have provided their Social Security Number or formal SSN Name so don’t make your search too specific.

TR05

Maintain People Data - Inquire - Search/Match

File Edit View Go Favorites Use A-K Use L-Z Inquire Process Report Help

Search/Match Search/Match Result

Field Name Search/Match Data Option A

Address Line 1 _____

Date of Birth _____

City _____

EmplID _____

First Name _____

Last Name **MERMAN**

Use the scroll bar to display all field options for searching.

Search Order Nbr

100 Name-L+F,DOB

110 Nat-Id

120 Emplid

130 Name-L+F,Full

140 Name-L

Select one of the highlighted “Sparkys” that match your fields to Fetch. Use the scroll bar to find all Sparkys

TR05 Search/Match Update/Display

Maintain People Data - Inquire - Search/Match

File Edit View Go Favorites Use A-K Use L-Z Inquire Process Report Help

Search/Match Search/Match Result

Search/Match Level Executed: 130
Name-L+F,Full

	Carry ID	Details	ID	Name Type	Eff Date	First Name	Last Name	National ID	Bir
1			1399999	Preferred	05/01/2005	Zeus	Merman	125635659	03/
2			1399999	Preferred	03/01/2004	Zeus	Merman	125635659	03/
3			1399999	Primary	03/01/2004	Zeus	Merman	125635659	03/
4			1399999	Primary	05/01/2005	Zeus	Merman Jr	125635659	03/

Option A

Use horizontal scroll bar to see other fields.

TR05 Search/Match Result Update/Display

Maintain People Data - Inquire - Search/Match

File Edit View Go Favorites Use A-K Use L-Z Inquire Process Report Help

Search/Match Search/Match Result

Search/Match Level Executed: 130
Name-L+F,Full

	Carry ID	Details	ID	Birthdate	Gender	L	A	E	F	P	S	I	Campus ID
1			1399999	03/03/1957	Male	-	-	E	-	-	-	-	1234567
2			1399999	03/03/1957	Male	-	-	E	-	-	-	-	1234567
3			1399999	03/03/1957	Male	-	-	E	-	-	-	-	1234567
4			1399999	03/03/1957	Male	-	-	E	-	-	-	-	1234567

Option A

“E” Indicates Employee

TR05 Search/Match Result Update/Display

Bio/Demo Data & Relationship with Institution (CW – DS & VS)

File Edit View Go Favorites Use A-K Use L-Z Inquire Process Report Help

Bio/ Demo Data | Addresses |

Eff Date: 05/01/2005 Name: Merman Jr,Zeus
 ID: 1399999 Prefix: Suffix: Mar Status: Single
 Country: USA NID Type: PR SSN National ID: 125-63-5659
 Gender: Male Citizenship Status: Native Birthdate: 03/03/1957 Ethnic Group: White
 Campus ID: 1234567 Military Status: No Mil Svc
 Email Addresses: Type: Campus Email ID: zmerman@ku.edu
 Names: Name Type: PRF Preferred

	Eff Date	First	Middle	Last
1	05/01/2005	Zeus		Merman

TR05 Bio/ Demo Data Update/Display

Bio/Demo Data-Selected via magnifying glass on Search Match Panel or Navigation found under Search Match (prior page)

- ID: PeopleSoft assigned number-used for employment.
- Suffix: When hiring the suffix is added to the last name (Smith Jr,John).
- National ID: Social Security Number- Payroll will update changes from the SS Card 999-99-9999 are used for Affiliates.
- Campus ID: SAKU student ID# is added here by Payroll when a student is hired. If non-KU student is hired on the student payroll – 888888 is entered on the External System ID panel.
- Email Address Type: “Campus”
- Dept staff may make changes to Preferred name in the *KU Directory* panels. Preferred Name is used by the directories. Same as SSN Name unless another name is requested. Use scroll bar to see other names.

- Addresses are not changed on the second panel - Entry is made on the *KU Directory* Panels (see Directory Training).

Maintain People Data - Use A-K - Bio/Demo Data

File Edit View Go Favorites Use A-K Use L-Z Inquire Help

Bio/ Demo Data | Addresses |

Eff Date: 05/01/2005 Name: Merman Jr,Zeus
 ID: 1399999 Prefix: Suffix: Mar Status: Single
 Country: USA NID Type: PR SSN National ID: 125-63-5659
 Gender: Male Citizenship Status: Native Birthdate: 03/03/1957 Ethnic Group: White
 Campus ID: 1234567 Military Status: No Mil Svc
 Email Addresses: Type: Campus Email ID: zmerman@ku.edu
 Names: Name Type: PRF Preferred

	Eff Date	First	Middle	Last
1	05/01/2005	Zeus		Merman

TR05 Bio/ Demo Data Update/Display

Maintain People Data - Use L-Z - Relations With Institution

File Edit View Go Favorites Use A-K Use L-Z Inquire Help

Relations With Institution |

Merman Jr,Zeus ID: 1399999

	Currently Is A(n)	Manual Maint	Has Been A(n)	Manual Maint
Alumni (L):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stdnt Applicant (A):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee (E):	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial Aid (F):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prospect (P):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student (S):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student Financials (I):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recruiter (RCR):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advisor (AVS):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Instructor (IST):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friend (FND):	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Internet Access Status: No Web Access Force Password Change

TR05 Relations With Institution Update/Display

This panel is updated by a batch process for adding employee, has been a friend or has been an employee. Payroll entry is made to assign “Friend” (early email access and feeds to other system) from HR/EO and Provost offer letters see http://www.hreo.ku.edu/files/documents/friend_process.pdf.

Personal Data

Go, Administer Workforce, Administer Workforce (US), Use, Personal Data (DP-DS)

Administer Workforce (US) - Use - Personal Data [Window Title]

File Edit View Go Favorites Use Setup Process Inquire Report Reports Help

[Icons]

Name/Address | Personal Profile | Eligibility/Identity

ID: 1888888 Status: Employee Original Hire Date: 07/01/2006

Effective Date: 04/01/2004

Name: Burkhead, Madeline A Initials: Prefix: [Dropdown]

Home Address Mailing Address

Country: USA United States USA

Address 1: 123 Dog Lane 456 Fenced Yard

Address 2: [Dropdown]

Address 3: [Dropdown]

City: Baldwin City Lawrence

State: KS Kansas Postal: 66004 KS 66044

County: DG Douglas DG Douglas

[Edit Mailing Address]

[TR05] Name/Address [Update/Display]

Information is obtained and entered from the Appointment Data Sheet, Personal Data Change Form, Directory Panels or indications in Comments on the Payroll Form.

Name/Address Panel:

Effective Date: Please note that name and addresses changes are effective dated. The on-line system will display the current effective dated row. Past and future changes will be visible to the on-line user when using the scroll bar on the Name/Address panel.

Name: Format is unchanged (must be EXACTLY same as on Social Security card without periods): Last Name, First Name Middle (Smith, John D). The suffix (Jr, Sr, II, III, etc.) is added to the end of the last name.

Home Address: Is the W-2 address. Please remember that addresses on the Personal Bio/Demo Data panel are owned by the SA side and may not be the same as the addresses on the HR side, especially if the SA address is an APO address. Once they are an employee the HR side owns the Home Address.

County: Payroll critical; field is required for interface to State of Kansas. Has direct effect on benefits eligibility. Two digit characters are used for Kansas and Kansas City, Missouri metropolitan counties (e.g. DG). ZZ is defaulted in for any other counties and countries.

Edit Mailing Address: Sub-panel address is used when mailing address differs from W-2 address listed on "home address."

Administer Workforce (US) - Use - Personal Data [Window Title]

File Edit View Go Favorites Use Setup Process Inquire Report Reports Help

[Icons]

Name/Address | Personal Profile | Eligibility/Identity

Burkhead, Madeline A ID: 1888888

Highest Education Level: Doctorate Full-Time Student

Referral Source: Unknown Waive Data Protection

Employee Referral ID: [Dropdown]

Specific Referral Source: [Dropdown]

Date Entitled to Medicare: [Dropdown]

Phone Information Gender

Phone: 785/842-9877 Female Male Unknown

Other Phones

Phone Type: Campus Phone: 785/864-7482

Email Addresses

Type: Campus Email ID: maddogburkhead@ku.edu

Effective Date: 04/01/2004 Marital Status: Single Smoker

[TR05] Personal Profile [Update/Display]

Personal Profile Panel:

Education Level: Highest Education Level completed.

Phone Information, Phone: Home phone number. (Changes should only be made in the Directory Panels.)

Other Phones, Phone Type: "Campus" phone types are used for all work phone numbers entered here when hiring. This should be kept in sync with Work Phone under Position Data panel. (Changes should only be made in the Directory Panels.)

Email Addresses: "Campus" email address. (Changes should only be made in the Directory Panels.)

Marital Status: Not used for tax purposes.

Referral Source, Date Entitled to Medicare, Waive Data Protection Full-Time Student, Smoker: are not used.

Administer Workforce (US) - Use - Personal Data _ | □ | ×

File Edit View Go Favorites Use Setup Process Inquire Report Reports Help

Name/Address | Personal Profile | Eligibility/Identity

Burkhead, Madeline A ID: 1888888

Birthdate:	<input type="text" value="07/26/1977"/>	Birth Country:	<input type="text"/>	State:	<input type="text"/>
Date of Death:	<input type="text"/>	Birth Location:	<input type="text"/>		
Language Code:	<input type="text" value="English"/>				
Citizenship Status:	<input type="text" value="Native"/>				
Ethnic Group:	<input type="text" value="Hispanic"/>				
Military Status:	<input type="text" value="No Mil Svc"/>				
<input checked="" type="checkbox"/> Eligible to Work in U.S.		Employment Eligibility Proof 1: <input type="text" value="SS CARD"/> 2: <input type="text" value="DRV LIC"/>			

National ID

Country:	<input type="text" value="USA"/>	NID Type:	<input type="text" value="PR"/>	SSN	National ID:	<input type="text" value="555-66-7777"/>
----------	----------------------------------	-----------	---------------------------------	-----	--------------	--

TR05 | Eligibility/Identity | Update/Display

Eligibility/Identity Panel:

Birthdate: Keyed from Appointment Data Sheet

Birth Information: No longer asked or entered. *subject to change

Language Code: Defaults English – not used at this time.

Citizenship Status: Keyed from Appointment Data Sheet by Payroll

Ethnic Group: Keyed from Appointment Data Sheet by Payroll

Military Status: Keyed from Appointment Data Sheet by Payroll

Eligible to Work in U.S.: Defaults checked on – left as is.

Employment Eligibility Proof: Document names used to verify citizenship, e.g. Drivers License & Social Security Card are options entered here. Refer to the *Employee Checklist* section in this manual for the I-9 signature date and link to the Federal I-9 manual. (*Administer Workforce, Administer Workforce (US) Use, Employee Checklist.*).

National ID: Social Security Number. Affiliates may have (999-99-9999) if their individual number is not available.

Go, Administer Workforce, Administer Workforce (US), Use, Job Data (CW-VS, DP- DS)

Administer Workforce (US) - Use - Job Data

File Edit View Go Favorites Use Setup Process Inquire Report Reports Help

Work Location | Job Information | Payroll | Compensation | Job Earnings Distribution | Benefit Program Participation | Empl

Burkhead,Madelaine A ID: 1888888 Empl Rcd#: 0

Employee Status: Active Position Management Record

Effective Date: 06/29/2006 Effective Sequence: 0 Current

Action / Reason: Hire VAC Vacant Position Action Dt: 07/03/2006

Position Number: 00654321 Entry Date: 06/29/2006 Administrative Professional Sr

Position Data Override Encumbrance Override

Regulatory Region: USA United States

Company: KUL University of Kansas

Business Unit: UKANS University of Kansas

Department: 1520000 06/29/2006 Human Resources & Equal Opp

Location: LAWRENCE KU

TR05 Work Location Update/Display

Initial Information is entered from the Payroll Form. Updates are made from the Payroll Form or by batch process (budget load, step increases etc.).

Work Location Panel:

Job Data: Used when updating job records for existing appointments.

Action/Reason: Codes used to active certain processing, describes transaction and are sent to Topeka's system (SHaRP) for other reporting.

Position Number: All employees must be assigned a position number. Many of the field values default from position when it is entered in order to keep the job and position panels in sync.

Effective Sequence: Usually "0." When multiple rows are added with the same effective date you will have multiple sequences - 0 is the first transaction 1 would be the next and so on.

Administer Workforce (US) - Use - Job Data

File Edit View Go Favorites Use Setup Process Inquire Report Reports Help

Work Location | Job Information | Payroll | Compensation | Job Earnings Distribution | Benefit Program Participation | Empl

Burkhead,Madelaine A ID: 1888888 Empl Rcd#: 0

Effective Date: 06/29/2006 Current Effective Sequence: 0

Action / Reason: Hire Vacant Position

Job Code: KU4120 06/29/2006 Administrative Professional Sr

Regular/Temporary: Regular Full/Part: Full-Time

Empl Class: UnivSupprt Officer Code: None

Regular Shift: N/A Rate / Factor: /

Standard Hours: 40.00 FTE: 1.00 Adds to FTE Actual Count?

Position FLSA Status: N EEO Class: None

Job FLSA Status: Nonexempt Classified Indc: C UnivSupprt

TR05 Job Information Update/Display

Job Information Panel:

Most fields default from position. See Position Data Panels for details.

Job FLSA Status: May only be modified by HR/EO after review of the position description.

Administer Workforce (US) - Use - Job Data



File Edit View Go Favorites Use Setup Process Inquire Report Reports Help



Work Location | Job Information | Payroll | Compensation | Job Earnings Distribution | Benefit Program Participation | Emp. >>>

Burkhead, Madeline A		ID: 1888888	Empl Rcd#: 0
Effective Date:	06/29/2006	Current	Effective Sequence: 0
Action / Reason:	Hire	Vacant Position	
Payroll System:	NA or Payroll Interface		
Pay Group:	CUN	NonexStaff	
Pay Months Per Year:	12.0		
Employee Type:	E	Excep Hrly	
Tax Location Code:	LAWR	LAWR	
GL PayType:		FICA Status: N	Subject
Account Code:			
Holiday Schedule:	SOKS	State of Kansas Holiday Sched	
TR05		Payroll	Update/Display

Payroll Panel:

The fields used default from position. See Position Data Panels for details.

We are not using "GL Pay Type" and "Account Code" fields on this panel.

FICA Status: Entered by Payroll only, Indicates N if subject to FICA withholding, E is exempt. Default is N. Holders of certain types of a visa are exempt (F1, J1 etc.). Verification process is run to check against SAKU(Student Administration System) to check for student employee enrollment eligibility and exemption.

Administer Workforce (US) - Use - Job Data



File Edit View Go Favorites Use Setup Process Inquire Report Reports Help



Work Location | Job Information | Payroll | Compensation | Job Earnings Distribution | Benefit Program Participation | Emp. >>>

Burkhead, Madeline A		ID: 1888888	Empl Rcd#: 0
Effective Date:	06/29/2006	Current	Effective Sequence: 0
Action / Reason:	Hire	Vacant Position	
Sal Plan:	USS	Grade: 100	Entry Date: 06/29/2006
Rating Scale: SOK	Rating:	Matrix:	Model: SOK
Comp Frequency: Hourly	Compa-Ratio: 0.81		
Compensation Rate:	20.000000		
Change Amount:			
Change Percent:			
Annual Benefits Base Rate: \$41,600.000	Hourly Rate:	20.000000	
	Monthly Rate:	\$3,466.667	
	Annual Rate:	\$41,600.000	
TR05		Compensation	Update/Display

Compensation Panel:

Grade: University Support Staff for the Band level. For others - default 001.

Step: Not used at this time

Comp Frequency: Pay critical. We only use one of two options either "Hourly" or "Biweekly." Must match position defaults: See Position Data, Payroll Panel and notes. Non-exempts are paid "Hourly", Exempts are paid "Biweekly".

Compensation Rate: Pay critical. Hourly or biweekly comp rates are entered based upon FLSA/Paygroup.

Annual Benefits Base Rate: Calculated by system biweekly – based on paygroup to determine full year or academic year on regular employees – used with Benefits.

Administer Workforce (US) - Use - Job Data

File Edit View Go Favorites Use Setup Process Inquire Report Reports Help

Job Information | Payroll | Compensation | Job Earnings Distribution | Benefit Program Participation | Employment Data

Burkhead, Madeline A ID: 1888888 Empl Red#: 0

Hire Date: 06/29/2006 Rehire Date: Termination Date:
 Company Seniority Date: 06/29/2006 Last Date Worked:
 LOS Adjustments Yrs / Days: Expected Return Date:
 Service Date / Years / Days: 06/29/2006 / / 222 Next Increase Date:
 Date Last Increase: Probation Date: 12/28/2006
 Benefit Record Number: 0 Home/Host: Home

Business Title: Administrative Professional S Work Phone: 785/864-7482

Reports To Posn: 00000267 Director Major Division/School
 Incumbent Supvr: 1000002 Faucher, Ola D.

TR05 Employment Data Update/Display

Employment Data Panel:

This panel is used for tracking data that is maintained by HR/EO. Defaults are entered for others.

Company Seniority Date: Reflects the last longevity bonus date for university support staff when it is paid. (Defaults as hire date for all until used for longevity.)

Last Date Worked: Upon a save of a termination or rehire this field is populated or unpopulated respectively for all employees.

Date Last Increase and Next Increase Date: Date Last Increase populated from salary loads for USS. Next Increase Date not used.

Probation Date: Reflects the last day of a university support staff (USS) staff member's probationary period.

Service Date/Years/Days: Reflects state service. Used for university support staff for longevity bonus and vacation leave accrual. Date used for service recognition for non students (includes prior state service if applicable.)

Employee Checklist

Go, Administer Workforce, Administer Workforce (US), Use, Employee Checklist (CW-VS; DP-DS)

Administer Workforce (US) - Use - Employee Checklist

File Edit View Go Favorites Use Setup Process Inquire Report Reports Help

Employee Checklist

Burkhead, Madeline A ID: 1888888

Checklist Date: 06/29/2006 Checklist: HIRE Hire
 Responsible ID:
 Comments:

Chklist Seq	Chklist Itm	Briefing Status	Status Date
100	I-9	Completed	06/29/2006
200	VETNS Newly Separated Veterans	Initiated	07/05/2006

TR05 Employee Checklist Update/Display

Employee Checklist Panel:

Checklist Date: Date of hire

Checklist: HIRE.

Responsible ID: ID of person verifying I-9 data (not required)

Chklist Itm: I-9 or Newly Separated Veteran.

Briefing Status: "Completed" when verification is completed. Initiated when not used/required.

Status Date: I-9 date of employer signature. The date is to be within three (3) days of the employee's beginning work in accordance with federal law. VETNS – date separated.

Link to the Employer's Handbook for I-9
<http://www.uscis.gov/files/nativedocuments/m-274.pdf>

General Comments

Go, Administer Workforce, Administer Workforce (US), Use, General Comments (Update allowed -CW-VS, DP- DS)

Administer Workforce (US) - Use - General Comments

File Edit View Go Favorites Use Setup Process Inquire Report Reports Help

General Comments

Burkhead, Madeline A ID: 1888888

Comments By: Pam Burkhead

Comment Date: 07/03/2006

Comments: Comments are campus wide view and "timekeepers" have access to add them as well as central offices.

TR05 General Comments Update/Display

General Comments Panel:

Used for various employee comments. Campus wide view and entry.

Payroll office enters RFA (Retroactive Fund Adjustment) notations here.

Working budget comments are loaded here that apply to salary notices such as administrative supplements, sabbatical leaves etc.

You must put in your full name and the date if entering comments.

(F7 inserts row or use icon from toolbar)

Administer Workforce Search

Update/Display All -- Personal Data

EmplID: **A**

Name: _____ **or** _____

Last Name: **B**

Department SetID: +

Department: +

National ID:

ID	Empl Rcd#	Name

Buttons: OK, Cancel, Search, Detail, Use Query, New Query

Update/Display All -- Job Data

EmplID: **A**

Employment Rcd Nbr:

Name: _____ **or** _____

Last Name: **B**

National ID:

ID	Empl Rcd#	Name

Buttons: OK, Cancel, Search, Detail, Use Query, New Query

Administer Workforce Search Panels:

EmplID: Number assigned to employee begins with 1XXXXXX

Employment Record Nbr: If an employee has more than one job they will have multiple employee records (first one is 0)

Name: Must be in PeopleSoft format, LN, FN MN. The suffix is after the last name with a space in between. You do not have to use the complete name when searching. (ex: Jones II, James R; Smith, Mary Jane)

Last Name: Must only be the last name (may include suffix).

National ID: Social Security Number

Department: True "HR" Department

OK or Search should be selected

OK takes you to the panel if only one option is found, if multiple results displays list box

Search always displays list box.

(You can only see what you sign on allows.)

External System ID

Go, Maintain People Data, Use A-K, External System ID (CW- DS &VS)

ID Numbers – Please note that the Campus ID, Student Records ID and possibly the Employee ID may be covered under the Family Educational Privacy Rights Act (FEPR).

External System ID Panel:

This panel displays various ID's needed for interfacing to other systems or processes. Use the outside scroll bar to view different types.

GTA GRA Eligible DissHrs: 777777 is entered upon Payroll Office receipt of the approved Graduate Teaching Assistant/Graduate Research Assistant Certification of Eligibility to Enroll in Fewer than Six Hours. (available on the Provost web site)

GRA Masters Final Semester: 555555 is entered upon Payroll Office receipt of the approved Master's Level Certification of Eligibility to Enroll in Fewer than Six Hours (available on the Provost web site). One time – one semester

Other Campus ID/Prior Campus ID: Used for noting a current (other campus ID) or past (prior campus ID) hire of a non KU student on student payroll. These students are generally high school or Haskell students that are designated to be hired for a particular project.

You must seek approval in advance from Human Resources & Equal Opportunity (HR/EO) before hiring. Documentation (e.g project requirement) must be provided. Department is responsible for monitoring the non KU student's enrollment at the other institution. *888888 is entered to designate. (Social security and UCI are charged). Please note in comments section of the Payroll Form if terminated employee has this Other Campus ID.

Sharp Emplid: Every employee will have this ID as it is required to interface to the state's payroll system. It may also called the "State" or "SHaRP" ID. For those whose state careers began at KU they will generally begin with a J (Jayhawk). For those who have started at other state agencies we will store their ID here. Once you have an State ID it follows you from agency to agency. It is maintained by the Payroll Office and is critical for a successful interface to the State.

Student Records:This is used to interface all employees to the Student System – may or may not be the same as their employee ID. Entered by a processing batch job.

Position Data

Go, (Develop Workforce), Manage Positions, Use, Position Data (CW-VS; DP-DS)

Manage Positions - Use - Position Data -|□|X|

File Edit View Go Favorites Use Setup Inquire Process Report Help

Position Location | Description | Payroll | Information | KU Data | KU Data 2

Position Number:	00654321	Administrative Professional Sr
Open/Filled:	Open	Current Head Count: 0
Effective Date:	06/18/2006	Status: Active
Action Reason:	NEW	New Position Action Dt: 07/03/2006
Regulatory Region:	USA	USA
Company:	KUL	University of Kansas
Business Unit:	UKANS	University of Kansas
Department:	1520000	Human Resources & Equal Opp
Location Code:	LAWRENCE	University of Kansas
Job Code:	KU4120	Administrative Professional Sr Academic Rank:
Position Pool ID:		
Sal Plan/Grd/Step:	USS 100	Calc Group (Flex Service): Manager Level:

TR05 | Position Location | Add

Manage Positions - Use - Position Data -|□|X|

File Edit View Go Favorites Use Setup Inquire Process Report Help

Position Location | Description | Payroll | Information | KU Data | KU Data 2

Position Number:	00654321	Administrative Professional Sr
Open/Filled:	0	Current Head Count: 0
Position Status:	Approved	Status Date: 06/18/2006 <input type="checkbox"/> Key Position
Title:	Administrative Professional Sr	Short: AdmProfSr
Description:	Administrative Professional Sr	
Dotted-Line Rpt:		Manager Level:
Reports To Posn:	00000267	Director Major Division/School
Work Phone:	785/864-7482	
Mail Drop ID:		

TR05 | Description | Add

Initial information is entered from the Payroll Form and or the Position Description. Updates are made from the Payroll Form or by batch updates (i.e. budget load).

Position Location Panel:

Action Reason: Codes used to active certain processing, describes transaction and are sent to Topeka's system (SHaRP) for other reporting. Action code is always POS - only the Reason code is entered.

Department: This is the designated "true HR" department, not the cost center.

Location Code: These codes represent either a "campus" or a KU site.

Job Code: Assigned by HR/EO for unclassified or university support staff or Provost for faculty/academic staff during search or when hired based on job duties.
http://www.hreo.ku.edu/personnel_related_staff/hr_pay_computer_system/hrsa_tables.shtml

Academic Rank: Not used at this time

Position Pool: Pools must be set up on the Position Pool Table and associated with a "true" department before they can be keyed on this panel. Establishment of a new pool would require a budgetary document to fund.

Description Panel:

Key Position: This field is not currently used.

Title and Short Title: This displays the "official" titles.

Description: This area is used as a comments field or may show a brief description from the Job Code Table.

Reports to Position: Displays the position number of supervisor/manager. We need this to be filled out for all regular positions. If you have changes, please note in comments field on the Payroll Form.

Work Phone: Currently this is the phone number used for loading into the university email directory. This should be kept in sync with the Other Phones, Campus under the Personal Data panel.

Mail Drop ID: Only used when there is a need for campus mailings to be sent to another "HR" department-when the mailing list is created from HR/Pay data.
http://www.hreo.ku.edu/personnel_related_staff/hr_pay_computer_system/hrsa_tables.shtml

Payroll Panel:

Manage Positions - Use - Position Data _ | □ | x |

File Edit View Go Favorites Use Setup Inquire Process Report Help

Position Location | Description | Payroll | Information | KU Data | KU Data 2

Position Number: 00654321 Administrative Professional Sr
Open/Filled: **Current Head Count:** 0

Effective Date: 06/18/2006 **Status:** Active **Action Reason:** NEW
Business Unit: UKANS University of Kansas
Department: 1520000 Human Resources & Equal Opp
Job Code: KU4120 Administrative Professional Sr

Payroll System:

Pay Group: Nonexempt Staff

Employee Type: Exception Hourly **Jobcode FLSA Status:** N

Holiday Schedule: State of Kansas Holiday Sched **Override FLSA Status:**

Union Code:

TR05 Payroll Add

Pay Group: Field is pay critical and must be in synchronization with employee type and FLSA override. (See chart –next page.)

Employee Type: Field is pay critical and must be in synchronization with pay group and FLSA override. If position is “exception hourly,” the “standard days” on the position Information Panel load to the time/leave panels to facilitate keying. Changes to the employee type should be made on a payroll form. (See chart –next page.)

S=Salaried – all exempt employees are coded as salaried.

E=Exception Hourly – non-exempt (hourly) employees whose work hours/schedule is set on an on-going weekly schedule. If this selection is chosen, the department must provide the standard hours schedule. This schedule is entered by the Payroll Office on the *Position Data, Information* panel. These hours are then preloaded into the *Time and Leave* panels and the employee is checked OK to Process. The idea is that the timekeeper will only have to modify when an “exception” is made (e.g. use of vacation etc.). This is also known as a “regular schedule”.

H=Hourly – non-exempt (hourly) employee’s whose schedule is not preset and may vary weekly. Timekeepers will always have to key the hours in the *Time and Leave* panels and will have to check the OK to Process box. This is also known as an “irregular schedule”.

Holiday Schedule: NOH is entered for all faculty, part-time regular university support staff/unclassified and all temporary employees (university support staff/unclassified/students), UNHL Full-time regular unclassified staff, SOKS-Full-time regular university support staff.

Please note that holidays default into the *Time and Leave* panels for all full-time regular position eligible employees. This does not mean that an employee is always eligible based on the default or that if it does not default into the panels they are not eligible. This is a standard load and timekeepers are responsible for verification of individual employee’s holiday eligibility. The employee type also impacts eligibility for holidays. Please refer to the [Guide to Eligibility for and Reporting of Holidays](http://www.hreo.ku.edu) located at www.hreo.ku.edu under Leaves and Holidays. If you have any questions regarding a particular employee, please contact HR/EO, 785/864-4946 hrdept@ku.edu.

Union Code: Appropriate code will be displayed here if this position is eligible to be covered by Memoranda of Agreement regardless if employee is member or not. (GTA, service/maintenance and law enforcement positions).

Override FLSA Status: Field defaults on new positions from Job Code FLSA Status. HR/EO must authorize and enter any values that differ from the Job Code FLSA Status after review of the position description. Exempt has 3 types of codes: administrative, professional and executive. (See chart –next page.)

RELATIONSHIP OF PAYGROUP, FLSA AND EMPLOYEE TYPE and PAY DAYS IN THE BIWEEKLY PERIOD

Pay Group (generally)	Override FLSA Status	Employee Type	Pay Days
AFL - Affiliates (non paid)	X = No FLSA	Hourly	0 (not paid)
CUN - Univ. Support/Unclass. Professional Stf	N = Non Exempt	Hourly or Exception Hourly	10 (actual reported)
CUX - Univ Supt/Uncls Profess. & FY Faculty Academic Staff	E,A,P= Exempt	Salaried	10
LFC - AY Faculty/Academic Staff	P (E) = Exempt	Salaried	14
STN - Student	N = Non Exempt	Hourly or Exception Hourly	10 (actual reported)
STX - Student (generally GTA's)	P (E) = Exempt	Salaried	14
SRX - Student (generally GRA's)	P (E) = Exempt	Salaried	10

Manage Positions - Use - Position Data [Icons]

File Edit View Go Favorites Use Setup Inquire Process Report Help

[Icons]

Position Location | Description | Payroll Information | KU Data | KU Data 2 |

Position Number: 00654321 Administrative Professional Sr
Open/Filled: 0 **Current Head Count:** 0

Current Budget

Earnings:	Deductions:	Tax:	Total:
------------------	--------------------	-------------	---------------

Current Incumbent(s)

EmplID: [Dropdown]

Effective Date: 06/18/2006 **Status:** Active **Action Reason:** NEW

Business Unit: UKANS **FTE:** 1.00 **Adds to FTE Actual Count?**

Department: 1520000 **Classified Indc:** C **Standard Hours:** 40.00

Job Code: KU4120 **Pre-Encumb Indicator:** N

Max Head Count: 1

Regular/Temporary: Regular **Update Incumbents**

Full/Part Time: Full-Time **Budgeted Position**

Regular Shift: N/A **Confidential Position**

Job Sharing Permitted

Standard Days

Mon:	8.00	Sat:	
Tues:	8.00	Sun:	
Wed:	8.00		
Thurs:	8.00		
Fri:	8.00		

[TR05] [Information] [Add]

Information Panel:

Adds to FTE Actual Count: Checked for all regular positions.

Regular/Temporary: Changing a position from regular to temporary or vice versa is not allowed. You would need to have administrative authorization before you may initiate this change for an employee.

Full/Part-Time: Part-time if standard hours (week) are less than 40.

Regular Shift: Defaults N/A, if applicable for shift differential will display. If changes needed indicate in Payroll Form comments.

Classified Indc: U indicates Faculty, Academic Staff, Unclassified Professional or Student. C indicates University Support staff. For regular employees this is used in the accrual process.

Update Incumbents: Should always be checked.

Confidential Position: This should be checked for those who hold positions that have access to confidential employment files as they are not able to belong to a Union. Most departmental payroll staff (PRS) should be checked. Indicate in Payroll Form comments if change is needed.

Standard Hours: Required for all positions; pay critical for salaried positions. Represents the expected work hours in a week (not biweekly). Standard hours drives "FTE" field. Must be divisible by quarter hour increments.

Standard Days: If a position is "exception hourly," the "standard days" will load to the time/leave panels to facilitate keying. Be as accurate as possible for other regular positions. Must be in quarter hour increments. Drives FTE. Standard Days totals to Standard Hours.

Manage Positions - Use - Position Data

File Edit View Go Favorites Use Setup Inquire Process Report Help

Position Location | Description | Payroll | Information | KU Data | **KU Data 2**

Position Number: 00654321 Administrative Professional Sr

Eff Date: 06/18/2006 **Status:** Active **Pay Group:** CUN **Employee Type:** E

Job Code: KU4120 Administrative Professional Sr **Full/Part Time:** Full-Time

Overrides	JobCd Defaults	Posn Location
Empl Class: UnivSupprt	UnivSupprt	Country: USA State: KS
IPEDS Job Cat: Oth Pfsnls	Oth Pfsnls	County: DG Locn: LAWRENCE
EEO-6 Job Cat: Nonfaculty	Nonfaculty	Building: C-0
EEO Job Grp: C	C	Room: 111
Manager Cd: None	None	Designated/CDL: Neither
BBP Risk Cat: Low Risk	Low Risk	Special Cond Dt: <input type="checkbox"/> No Salary Letter? <input type="checkbox"/> Limited Term? - Dt

FSD

Work Title: [] **Pref Dept:** []

TR05 KU Posn Data Add

Manager Code Values - L, S, M, or N (Not Applicable)

L = Lead Worker - an employee in a position that is assigned the ongoing responsibilities of planning and coordinating the work of co-workers and guiding and training them while performing the same kind and level of work a majority of the time. Could be a team leader that does not have supervisory responsibilities.

S = Supervisor - (a) Performs a majority of work that is different from that of the employee's subordinates; and (b) has the responsibility to authorize or recommend in the interest of the employer a majority of the following actions: (1) To hire, transfer, suspend, promote, demote, dismiss, and discipline employees under that individual's supervision and to address employee grievances; and (2) to assign, direct, and conduct performance reviews of the work. The exercise of this authority and responsibility shall not be of a merely routine or clerical nature but shall require the use of independent judgment.

M = Manager - (a) Integrates and coordinates the activities of several organizational functions or programs; (b) Measures and evaluates the effectiveness of those functions or programs; and (c) Initiates changes through subordinate supervisors or through the management of projects or programs to achieve the predetermined goals and objectives.

KU Data Panel:

Many fields on this panel are defaulted and they are not listed on the Payroll Form. If you want to make a change, indicate in the comments section of the Payroll Form or make a note when you submit an updated Position Description

Empl Class: Defaults from Job Code. Override if needed – consult HR/EO if questions. Determined by Job Code (very rare exception).

IPEDS Job Cat, EEO Job Group: EEO job category and subcategory used to monitor hiring goals for KU's affirmative action plan and other reporting needs. Defaults from Job Code Table – overrides only if approved by HR/EO.

Manager Cd: Required. Verification should be made by HR/EO for updates or changes. Information may be obtained from the Position Description. (see under panel print on left)

BBP Risk Cat: Blood borne pathogen exposure risk level based on job duties. Levels: Low, Medium, High Risk or Undetermined if information has not been entered into HRSA. Information may be obtained from the Position Description.

Posn Location Country/State/County: Should correspond with data on the Position Location panel. Information may be obtained from the Position Description. Work location not home address.

Posn Location Building/Room: Select building from list and enter room number (office location). Indicate room if available, building required.

Designated/CDL: Designated/CDL codes are only for law enforcement positions or positions that require a commercial driver's license. Applicants for/or incumbents of these positions may be drug-tested.

Work Title: Working title for the position if differs from official job title. Used in faculty/staff telephone and electronic email address directories. This field will be monitored by HR/EO.

Pref Dept: Preferred name for describing department if differs from department name. Used in faculty/staff telephone directory.

Special Cond DT : Fields that will be or are displaying "special conditions" that relate to the position. Special conditions such as limited term and contingent upon funding and their reasons. Used in offer letters and the annual salary notices.

KU Data 2 Panel:

Manage Positions - Use - Position Data _ | □ | ×

File Edit View Go Favorites Use Setup Inquire Process Report Help

Position Location | Description | Payroll | Information | **KU Data** | KU Data 2

Position Number: 00654321 Administrative Professional Sr

Eff Date: 06/18/2006 **Status:** Active

Job Code: KU4120 Administrative Professional Sr

Sal Plan: USS **Grade:** 100

Hiring Level and Ranges

	As Of Date	Sal Plan	Band	Level	Hourly Rates		Fulltime Annual Rates		Range Eff Date
					Low	High	Low	High	
1	06/18/2006	USS	100	2	19,069.712	20,980.769	39,665.00	43,640.00	04/08/2006

TR05 | KU Data 2 | Update/Display

This new panel (04/06) is used to designate the hiring level and displays the hiring range for university support staff positions only.

When a vacancy occurs the department will know the hiring range for job postings and making offers. If a department wishes to go over the hiring maximum they must receive HR/EO approval in advance.

Only university support staff have hiring ranges designated in the HR/Pay system.

The Grade is also known as the Band.

The hiring Level is designated by HR/EO based on the job duties and responsibilities on the position description.

The hiring range displays the low and high hourly and annual rates per the effective dates of the designation and range chart.

A listing of all the bands and hiring levels are on the HR/EO web site www.hreo.ku.edu under University Support Staff.

Manage Positions Search

Manage Positions Search Panel:

Position Number: Six digit number may be found on budgetary document authorizing funds (if applicable)

Business Unit: UKANS

Department: True "HR" Department

Position Pool ID: Should be used along with the Department - number may be found on budgetary document authorizing funds (if applicable) or may search Position Pool Table/Department Budget Earnings for more information.

Job Code: May be used along with Department to narrow search.

Reports to Position Number: Only valid if data in system is kept accurate.

OK or Search should be selected

OK takes you to the panel if only one option is found, if multiple results displays list box.

Search always displays list box.

Other Position Information that we designated by Position Number

- Personnel Related Staff – for special mailings – one per department
- Administrative Positions
- Deans, Directors and Chairs
- Substantial Interest – those positions with duties required to file the Statement of Substantial Interests Form, annually with the State of Kansas Governmental Ethics Commission
- Serve at the Pleasure - Faculty and unclassified staff may be appointed to positions that are designated as "serve at the pleasure of." The positions generally involve administrative responsibilities of a broad, high level, or critical nature. Such individuals may be terminated from employment without the usual time period requirements for a notice of non-reappointment and without a specific termination reason since they serve at the pleasure of the administrator to whom they report.
- Weather Essential – employee required to report to work during inclement weather declarations.

Position Pool Table

Go, Define Business Rules, Define Budget/Encumbrnce (U.S.), Setup, Position Pool Table (CW-DS & VS)

Define Budget/Encumbrnce(U.S.) - Setup - Position Pool Table

File Edit View Go Favorites Setup Report Help

Position Pool Table

SetID: UKANS
 Department: 1520000 Human Resources
 Position Pool ID: S01

Effective Date: 07/01/2000
 Description: 1520000-003 Student Hourly
 Short Description: S01

TR05 Position Pool Table Update/Display

Initial information and updates are entered from Payroll Forms & Budget Loads.

Position Pool Table Panel:

- Position pools are created for all temporary positions and for some regular positions (lecturers and instructors who are not named in the University Budget).
- The pools must be associated with a department on the setup table.
- Funds must be approved by a Budget Transfer or by a budgetary document such as the University Working Budget or a Budget Summary before a pool can be established. Changes to the Pool ID on Position are made by a Payroll Form.
- Only Budgetary Funding Hubs can set up position pools. A partial list is displayed below to show the format. Consult your budgetary documents for a complete listing.

SXX = Student Hourly
 UXX = Unclassified (Temp)
 #XX = Sponsored projects (0 or 1)
 WXX = Work Study (Always and Only)

RXX = GRAs
 CXX = USS (Temp)
 TXX = GTAs
 LXX – Lecturers

- If any pool has a combination of sponsored project funding and non sponsored project funding then a letter value for the Pool must be used. If all sponsored project generally a 0 or 1 Pool would be used.

Position Pool Table Search

Update/Display All -- Position Pool Table

SetID: UKANS
 Department:
 Position Pool ID: or
 Description:

SetID | DeptID | Pool ID | Descr

OK
 Cancel
 Search
 Detail
 Use Query
 New Query

Position Pool Table Search Panel:

Department: True “HR” Department

Position Pool ID: See above, should use with Department, may search on just the first field of the pool (ex S)

Description: This is only valid if you enter as it is on the description when it was established or modified.

OK or Search should be selected

OK takes you to the panel if only one option is found, if multiple results displays list box

Search always displays list box.

Department Budget Table

Go, Define Business Rules, Define Budget/Encumbrnce (U.S.), Setup, Department Budget Table (CW-VS; DP-DS)

Initial information or Updates are entered from Payroll Forms or batch updates (i.e. budget loads)

Funding is distributed after the confirmation of the payroll calculation when the leave accrual process is completed.

We are not using the encumbrance functionality

Define Budget/Encumbrnce(U.S.) - Setup - Department Budget Table

File Edit View Go Favorites Setup Process Inquire Report Help

Dept Budget Date Dept Budget Earnings Dept Budget Deductions Dept Budget Taxes Dept Budget Actuals

SetID: UKANS Department: 1520000 Human Resources & Equal Opp Fiscal Year: 2007

Budget Begin Date: 06/18/2006 Offset Group: UNIV Budget Cap: Per Budget Level Per Earn/Tax/Ded

Budget End Date: 06/16/2007

Budget Level: Department Position Pool Jobcode Position Appointment

Position Number: 00654321 Administrative Professional Sr

Effective Date: 06/18/2006 Status: Active Budget Level Cap: 0.00

Currency Code: USD Last Action: Add 07/03/2006

Earnings Code: SEQ#: 1 % Effort:

Account Cd: 1520000-003 Human Resources & Equal Opport

Account: Fund: 003 DeptID: 1520000 Program: Class:

Budget Prd: Proj: Affiliate: Scenario:

Budget Amount: 0.00 % of Distribution: 100.000 Funding End Date:

TR05 Dept Budget Earnings Add

Dept Budget Earnings Panel:

Current panels are modified to change funding from one or multiple combination of account codes to another (after approval of budgetary documents) from the Payroll Form.

Budget Level: By "Position Pool" or "Position" only. Multiple effective dates indicate changed to original funding. If mid-pay period change, effective date should be actual date of funding change.

Budget Level Cap: Always 0.00.

Last Action: List the Mode and Date of last entry for this effective date.

Earnings Code, % Effort, Funding End Date: Always blank.

Seq #: Always "1" even when multiple account codes. If multiple sources of funding for the same effective date use inner scroll bar to view.

Account Cd: Values must be on "Account Code" setup table. (See Setup Tables Related to Budget & Encumbrances.)

% of Distribution: All sources of distribution must equal 100.00 on each effective date.

This scroll is for multiple rows of funding which goes with the % of Distribution

This scroll is for multiple effective dates of funding.

Define Budget/Encumbrnce(U.S.) - Setup - Department Budget Table

- | □ | X |

File Edit View Go Favorites Setup Process Inquire Report Help

Dept Budget Date | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes | Dept Budget Actuals

SetID: UKANS Department: 1520000 Human Resources & Equal Opp Fiscal Year: 2007

Budget Begin Date: 06/18/2006 Budget End Date: 06/16/2007 Offset Group: UNIV

Budget Level
 Department Position Pool Jobcode Position Appointment

Position Number: 00654321 Administrative Professional Sr

Effective Date: 06/18/2006 Status: Active

Currency Code: USD

Plan Type: [+] Plan: [+]

Ded Cd: [+] Ded Class: [+] SEQ#: 1

Account Cd: 1520000-003 Human Resources & Equal Opport

Account: Fund: 003 DeptID: 1520000 Program: Class:

Budget Prd: Proj: Affiliate: Scenario:

Budget Amount: 0.00 % of Distribution: 100.000 Funding End Date:

TR05 Dept Budget Deductions Add

Dept Budget Deductions & Dept Budget Taxes Panels:

Duplicate information from “Dept Budget Earnings” panel unless you are setting up a work study pool or in specific pre-approved instances in which you may charge health insurance to a different funding source.

Define Budget/Encumbrnce(U.S.) - Setup - Department Budget Table

- | □ | X |

File Edit View Go Favorites Setup Process Inquire Report Help

Dept Budget Date | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes | Dept Budget Actuals

SetID: UKANS Department: 1520000 Human Resources & Equal Opp Fiscal Year: 2007

Budget Begin Date: 06/18/2006 Budget End Date: 06/16/2007 Offset Group: UNIV

Budget Level
 Department Position Pool Jobcode Position Appointment

Position Number: 00654321 Administrative Professional Sr

Effective Date: 06/18/2006 Status: Active

Currency Code: USD

State: [+] Tax Class: [+] SEQ#: 1

Locality: [+]

Account Cd: 1520000-003 Human Resources & Equal Opport

Account: Fund: 003 DeptID: 1520000 Program: Class:

Budget Prd: Proj: Affiliate: Scenario:

Budget Amount: 0.00 % of Distribution: 100.000 Funding End Date:

TR05 Dept Budget Taxes Add

Department Budget Table Search

Update/Display All -- Department Budget Table

SetID: UKANS

Department:

Fiscal Year:

Budget Level:

Position Pool ID: **A**

Job Code SetID:

Job Code:

Position Number: **B**

EmplID:

Employment Rcd Nbr:

Can not use A and B together may use one or none.

OK

Cancel

Search

Detail

Use Query

New Query

SetID	DeptID	Year	Bdgt Level	Pool ID	Jobcode SetID

Department Budget Table Search Panel:

Department: True "HR" Department

Fiscal Year: 4-digit year (2010)

Budget Level: Position Pool or Position

Position Pool ID: Should use with Department, may search on just the first field of the pool (ex S)

Position Number: Will only display positions that have funding and are not funded by a pool.

OK or Search should be selected

OK takes you to the panel if only one option is found, if multiple results displays list box

Search always displays list box

We do not budget by Job Code SetID, Job Code, EmplID and Employment Rcd Nbr – if you fill in these fields you will not get any results.

Setup Tables Related to Budget/Encumbrance (CW – DS & VS)

Go, Compensate Employees, Administer GL Interface, Setup, Organization or Fund or Project/Grant:

Organization (DeptID, Cost Center): This is an organizational unit, within a department, that will be used for tracking and reporting expenses.

DeptIDs must be identified as payroll or non-payroll -- in other words as organizational units that either have payroll expenses or not. All departments must have at least one DeptID with payroll (because all Departments will have employees). DeptIDs with payroll will be the only organizational units in the financial system by which payroll costs are tracked. Created and approved by Budget Management and Fiscal Services (BMFS). “Descr” field must match Financials naming convention. “BACIS Dept” and “Payroll Expense Indicator” are blank. “Department” is “true HR” department.

Fund: Authorized by Comptroller’s office. Only the top third of the panel is completed. Entry by HR/EO.

Project/Grant: Only created and authorized by Vice Provost for Research/KUCR. Created identical to Financials (FSKU).

PCA/PCS Codes: Only created by the Comptroller’s Office. Created identical to Financials (FSKU).

Go, Define Business Rules, Manage Human Resources (US), Setup, Department Table

Department: True “HR” Department Table. A Department is defined as “the smallest organizational unit of the University recognized by the central administration which has: one or more positions, a budget, and sovereignty (meaning that the Department has its own mission, authority over its own budget, and authority over its own operations).” Generally, Departments will be the lowest level to which budgets are allocated by the University administration. Requests for new Departments must be approved by the HR/EO Director and Comptroller. HR/EO is the steward of this table.

Account Code Table

Go, Define Business Rules, Define Budget/Encumbrance, Setup, Account Code Table

Account Code Table Panel:

Effective Date: If state funding generally fiscal year. Project/Grant and Scenario may be effective date of funding during current fiscal year.

Description/Short Desc: Naming conventions should be consistent with cost centers.

Organization (Cost Center) and Fund Code: Must use valid values established on setup tables in “Administer GL Interface.”

Project/Grant: Must use valid values established on setup tables in “Administer GL Interface.” Projects on the Financial system.

Scenario: Text field. Required field for all reimbursable salary funds:
725 - Endowment Account

8XX - KUMC Account

And used for “PI” on Projects to post to the KEY personnel budget
All other fields are blank.

Directory (DP-DS)

Go, Administer Workforce, Administer Workforce (US), Use, KU Directories (See Directory Training Manual for details.)
Updates to Preferred Names, Campus Phone and Address, Home/W2, Mailing addresses, email address, etc...

Pay Rate (CW-VS; DP-DS)

Go, Administer Workforce, Administer Workforce (US), Use Pay Rate Change)
History of employee profile and job data rows.

Employee Review, Pay Increase, Longevity Bonus (University Support Staff (USS) Only) (DP-DS) **Remember your confidentiality requirements for system use.**

Go, Administer Workforce, Plan Salaries, Use,
Display the review data and longevity period data.

Job/Position Summary (CW-VS; DP-DS)

Go, Administer Workforce, Administer Workforce (US), Inquire, Job/Position Summary
This panel combines all job (by employee record #), position and funding information for an individual on one panel. It includes history from multiple panels so be sure the effective dates of each section (notice the scroll bars) are in sync for the date of interest to you. In the "funding" section, click on the radio button for the type of funding you want to see (generally earns). If you are viewing a person with lots of funding history, the panel may take several seconds to load. If you want to view this data for persons campus-wide, use your campus-wide sign-on.

Leave Accruals (DP-DS)

Go, Compensate Employees, Administer Base Benefits, Use, Leave Accruals
You must use the scroll bar to search for the various leave balances. Military Leave is for tracking maximum usage if approved.
This panel is not easy to use, see the report section that might work better.

Names

Go, Administer Workforce, Administer Workforce (US), Use, Names (DP-DS)
Go, Maintain People Data, Use A-K, BioDemo Data, BioDemo Data (CW-VS & DS)
This panel provides information about former and preferred names.

Prior Work Experience (CW-VS; DP-DS)

Go, Administer Workforce, Administer Workforce (US), Use, Prior Work Experience
Displays prior work experience information at other Regents institutions or State agencies

Paycheck Data * Remember your confidentiality requirements for system use.* (CW-VS & DS)

Go, Compensate Employees, Maintain Payroll Data (US), Inquire, KU Paycheck Data

You may review this information after the first calc which is generally available Tuesday morning following the close of the payroll period. Several calcs are run so if you see inaccurate data, please contact the Payroll Office as soon as possible. If you click on the "Addl Data" button it will allow you to see the Department, Job Code and Position that is connected with the earnings you have selected.

If you are viewing an employee with multiple positions, use your middle scroll bar to view other amounts and by clicking on the "Addl Data" button you can see the Department, Job Code and Position that corresponds with the amount of each row on the scroll bar.

Please note if Advice or Check is printed on the top left hand corner. This will indicate whether their check is a paper "check" or whether it was an "advice" which means it will be deposited by electronic funds transfer (EFT).

Paycheck/Advice Mailing (DP-DS)

Go, Compensate Employees, Maintain Payroll Data (US), Use, Payroll Data,

This panel will display in the bottom portion where the check or advice was or is to be sent. If an employee has multiple active employee records you will need to select the lowest one in which the employee was paid on for the particular check you are searching to see where it was sent. It is encouraged for all employees to have electronic funds transfers (EFT). For employees with multiple active records that do not have EFT they may fill out a personal data change form to have all their check mailing addresses list the same department.

Position Data Summary (CW-VS; DP-DS)

Go, Develop Workforce, Manage Positions, Inquire, Position Data Summary

This displays historical changes made to a position.

Position History (CW-VS; DP-DS)

Go, Develop Workforce, Manage Positions, Inquire, Position History

This displays current incumbent and past incumbents, entry and exit dates and exit reason if applicable, compensation rate, frequency, salary plan and grade/step if applicable. (Please note this panel does not always accurate.)

Position, Vacant Budgeted (on line display) (CW-VS; DP-DS)

Go, Develop Workforce, Manage Positions, Inquire Vacant Budgeted Positions

This has no relationship to the Budget System.

Displays information about vacant positions. Several sort options are available.

Visa/Permit Data (DP-DS)

Go, Administer Workforce, Administer Workforce (US), Use, Identification Data, Visa/Permit Data

Honors and Awards (CW-VS & DS)

Go, Administer Workforce, Administer Workforce (US), Use, Honors and Awards KU

GRA (Graduate Research Assistant Intent Dates) (CW-VS & DS)

Go, Administer Workforce, Administer Workforce (US), Use, GRA Intent Dates (All Emplids)

Displays data entered by hierarchy for Graduate Research Assistant's Intent to Appointment Forms.

SHaRP Emplid (State ID) (CW-VS & DS)

Go, Maintain People Data, Use A-K, External System ID, you will need to use the right scroll bar until you find the one labeled SHaRP Emplid.

Training Attendance (CW-VS & DS)

Go, Develop Workforce, Administer Training (US), Inquire, Student Training Summary

Displays information about faculty/staff attendance at KU professional development activities.

Legacy HRMS Data (CW-VS & DS)

Go, Legacy HRMS Data

Displays appointment and education data from our prior HR/Payroll System (mainframe). Separate search function.

Emergency Contact (DP-DS)

Go, Administer Workforce, Administer Workforce (US), Use, Emergency Contact (Entry Panel)

Departments may fill out emergency contact data for their employees.

Web Sites

Human Resources & Equal Opportunity: www.hreo.ku.edu

Links to Employee [Handbooks](#) & [Affiliate & Volunteer](#) information. [Benefits & Pay](#), [Learning and Development](#), [Health & Safety](#) and [Wellness](#) information. Human Resource & Equal Opportunity and [HRSA/DEMIS Training Materials](#), [Position and Job Title Information](#), [Recruitment & Search \(PeopleAdmin\)](#) information & links to vacancies. [Leaves and Holiday information](#).

[Pay worksheets and charts](#): Academic Year charts, USS Longevity, GTA minimum etc.

Payroll Office (Part of the Comptroller's Office): www.payroll.ku.edu

[Payroll Processing Newsletter](#), [Payroll Forms and Examples](#), [Employee](#) and [Departmental](#) forms, [Pay Calendar](#) and other related information.

Comptroller: www.comptroller.ku.edu

For a listing of account values (types of expenditures/object codes), [Central Accounting & Purchasing Services](#), [KU Accounting System Codes](#)
[Financial Systems Administration](#)

Budget Management and Fiscal Services: www.budget.ku.edu, Appropriations and budgetary structure, forms etc.

Policy Web site: www.policy.ku.edu Listing of KU Policies – Additions weekly

DEMIS Portal Site: <https://demisweb.ku.edu/Portal>

Fields and Notes Quick Summary

ID: Known as the Employee ID, HRSA ID

Empl Rcd#: If this is in the 9XX series this is an *Affiliate* job all others are or were paid employee records

Affiliates of the University of Kansas, Lawrence are (1) employees of the recognized University-affiliated corporations/organizations (KUAA, KUAC, KUEA, Kansas and Burge Unions, Hilltop, and ROTC); (2) individuals who are associated with and providing specific services to the University voluntarily and without compensation for these services; or (3) retired and emeritus members of the University of Kansas, Lawrence, faculty and staff and of the affiliate corporations/organizations. See the Human Resources/Equal Opportunity web site for more details at www.hreo.ku.edu/policies_procedures/category_details/13.

FLSA: Fair Labor Standards Act - Federal determination made by HR/EO based on the position duties and individual qualifications. Determines whether paid hourly or salaried or for affiliates not applicable.

Class: Known as Employee Classification: University Support Staff (USS), Unclassified Professional Staff, Faculty, Academic Staff, Adjuncts, Courtesy etc..

Frequency: Hourly or Biweekly (if paid salaried)

Standard Hours: Hours employee works in a week. 40 is full time and equals 1.00 FTE (full time equivalency)

Position Pool ID: Identifier for positions not funded on an individual position basis – all temporaries and some lecturers and instructors

Pay Group: Field is pay critical and must be in synchronization with employee type and FLSA override. (See chart below.)

Pay Group	Override FLSA Status	Employee Type	Prorated Days Payroll Period
AFL - Affiliates (non paid)	X = No FLSA	<u>H</u> ourly	N/A
CUN – University Support/Unclassified Professional	N = Non Exempt	<u>H</u> ourly or <u>E</u> xception Hourly	10
CUX –Univ. Suprt /Unclas. Professional, Fiscal Yr Faculty	E,A,P= Exempt	<u>S</u> alaried	10
LFC – Academic Year Faculty	P (E) = Exempt	<u>S</u> alaried	14
STN - Student	N = Non Exempt	<u>H</u> ourly or <u>E</u> xception <u>H</u> ourly	10
STX - Student	P (E) = Exempt	<u>S</u> alaried	14
SRX – Student	P (E) = Exempt	<u>S</u> alaried	10

Fiscal Year is generally 26 payroll periods (the dates change each year) 2080 fulltime hours in a calendar year (52 weeks X 40). CY 2004 had 27 payroll periods, FY2006 has 27 payroll periods, based on pay date.

Academic Year is 272 days, 136 days for the fall semester 8/18 – 12/31 and 136 days for the spring semester 1/1-5/16 *leap year 5/15

HRSA Initial Contact List

HUMAN RESOURCES and EQUAL OPPORTUNITY , Room 103 Carruth-O’Leary Hall		
Ola Faucher, Director	4-7411	4-4946 hrdept@ku.edu ofaucher@ku.edu
Pam Burkhead, System Administrator HR/Pay	4-7482	pburkhead@ku.edu
Barb Walker, Leave and Worker’s Compensation	4-7416	bwalker@ku.edu
Main Office, USS Longevity, Evaluations and State Service Dates	4-4946	hrdept@ku.edu
<u>Employment</u>	4-3686	employ@ku.edu
Unclassified Professional Staff and University Support Staff Search Request & Inquiry, Fair Labor Standards Act, Position Descriptions, Position Data, Student Employment approvals (if required)		
<u>Staff Benefits</u>		
Rhonda Mosby, Benefits Manager	4-7421	rmosby@ku.edu
Judy Tomei	4-7425	jtomei@ku.edu
Shelley Langston	4-7420	slangston@ku.edu
Lisa Adams	4-7422	lisaadams@ku.edu
Mary Karten, VTSA and GTA/GRA Student Insurance	4-7346	mkarten@ku.edu
PAYROLL PROCESSING CENTER, Room 147 Carruth-O’Leary Hall		
Karen Banning, Assistant Comptroller and Director of Payroll	4-4386	4-4385 payroll@ku.edu kbanning@ku.edu
<u>Payroll Services Section</u>		
Dawna Groninger, Supervisor	4-5998	codlg@ku.edu
Shelly Lawhorn, Questions specific to Non-Resident Aliens (NRA)	4-4387	slawhorn@ku.edu
Laurie Funk	4-5994	llfunk@ku.edu
Richard Davis (back up NRA)	4-5993	rmdavis@ku.edu
Linda Mann		lkaymann@ku.edu
<u>Adjustments Section</u>		
Penny Kellum, Supervisor	4-5995	pkellum@ku.edu
Rhonda Monthey	4-5992	rmonthey@ku.edu
<u>Funding and Reporting Section</u>		
Wayne Spellman	4-5991	wspellman@ku.edu
INFORMATION TECHNOLOGY/INFORMATION SERVICES		
Printing Problems, System Availability, Response Time	4-8080	itcsc@ku.edu
Forgot your password?	4-0439	acctappl@ku.edu

HRSA Processing – How all this Connects and Creates a Paycheck

Recruitment and Budgeting (STEP 1)

Position and funding are identified and approved through the appropriate budgetary channels. Funding is allocated or established by one of the following: University Working Budget, Sponsored Project Budget Summary (SPBS), Budget Transfer Form (BTF).

Recruitment for Unclassified Professional Staff (UPS), University Support Staff (USS) and Student Hourlies are done via PeopleAdmin, Faculty Recruitment Forms, can be found on the HR/EO web site www.hreo.ku.edu. UPS & USS signed returned offer letters are used as the Payroll Form to appoint, if funding needs to be changed – submit Payroll Form.

It is critical that certain fields are on the position description as they are used to update HRSA data.

Graduate Research Assistants must have an approved GRA Intent to Appoint Request Form prior to beginning to work. (www.ku.edu/~provost)

Graduate Teaching Assistants must have an approved GTA Appointment Form prior to beginning to work (www.ku.edu/~provost). This form is used as the original Payroll Form to appoint. Any modifications to the appointment will need a new GTA Appt Form and a Payroll Form.

Manage Position (STEP 3)

Each employee must be assigned a Position Number (unclassified/university support staff are identified in Step 1). Only one person may be assigned to the same position number unless there is an overlap (employee replacement) and all the values are the same Following are some of the fields on these panels:

Position Number, Department # (“HR Dept”), Location*, Job Code*, Working Title and Description*, Pay Group, Holiday Schedule (see manual guidelines), Standard Hours*, FLSA Status Regular/Temporary*, Pool ID, (if applicable).

* Generally found on the initial hire in Step 1 – some fields may be modified while incumbent is in position by submission of a Payroll Form.

Connects to the Employee by the Position# and connects to the Funding by either the Position or Pool ID #.

Budget/Encumbrances i.e. Funding (STEP 2)

Funding is established for each position either by the Position number or a Pool ID number. Funding must be active and have enough money and be within dates allowed to cover the period you are appointing. Dept Budget Earnings, Deductions and Taxes store the Account Codes (Organization/DeptID-Fund & Project-Scenario-if applicable) which is the link to posting the charges to the Financial Systems FSKU- (UKANS/KURES and NIBS -budget). If modifications are made to initial funding you will need to process a Payroll Form. At all times there should be funding to cover the appointment period and in compliance with any guidelines from the funding source. Attaches to Position Data by the Position or Pool ID.

Administer Workforce – Personal/Job Data (STEP 4)

Information that is employee specific. Connects to Position by the Position #

Job Data – Action/Reason codes determine how it is processed in the database – so comments are needed on the Payroll Form to determine the appropriate codes. Following are some of the fields on these panels: Personal Data - (Employee ID, Demographic Information) Job Data (Position Number, Compensation Rate/Frequency, Employment/Action Dates.)

Payroll Form are not needed for hiring unclassified or university support staff selected from PeopleAdmin, the employee can not be added to HRSA without supporting documents. Forms may be needed for funding.

Time & Leave (STEP 5)

Hours entered for non-exempts worked and leave taken, exempts leave taken. Dept. issues timesheets to all employees and keeps internal records. Time is entered on-line which creates the paycheck by connecting to the Position Number which finds the Job Data and the Funding (Budget & Encumbrance). Connects by the Position # and Employee ID.

How the hours that are entered create the paycheck and are charged to the Financial Systems.

