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HR/Pay only maintains one Core Navigation document. Access to the pages will vary based on job duties and security roles assigned.
Navigation Tips

1. Add to Favorites – add inside HR/Pay by using the Favorites menu or the Add to Favorites from the top right of the page. Favorites are assigned to you and are accessible wherever you may sign on to system.

2. opens to expand all columns instead of viewing in the tab format

3. closes all expanded columns and sets view back to the tab format

4. opens up the selected area in its own view window – zoom; click on the return button to go back to the regular page

5. extracts the data to excel
KU Multi-IDs

Workforce Administration>Personal Information>KU Directory>KU Multi-IDs

KU Multi-IDs

Employee ID (HR/Pay ID)  Name

SOKS ID:

Campus Solutions ID:

Other KU ID:

<table>
<thead>
<tr>
<th>KU Empl Rod</th>
<th>KU Ben Rod</th>
<th>SOKS Emp Rod</th>
<th>SOKS Ben Rod</th>
<th>Central HR and Payroll use for interfaces.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

KU Other-ID Values

Workforce Administration>Personal Information>KU Directory>KU Other-ID Values

<table>
<thead>
<tr>
<th>ID Type</th>
<th>As of Date</th>
<th>Status</th>
<th>ID Value</th>
<th>Last Updated</th>
<th>User Name</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>IDF_EMAILID</td>
<td>04/30/2014 Active</td>
<td></td>
<td>@ku.edu</td>
<td>04/30/2014 12:00:00.000000AM</td>
<td>LOPER</td>
<td>Edit</td>
</tr>
<tr>
<td>IDF_ONLINEID</td>
<td>04/30/2014 Active</td>
<td></td>
<td></td>
<td>04/30/2014 12:00:00.000000AM</td>
<td>LOPER</td>
<td>Edit</td>
</tr>
</tbody>
</table>

SOKS ID: is the State of Kansas ID and is used for access to state sites so is considered confidential.

Campus Solutions ID: aka Enroll and Pay ID is protected under FEPRA –Federal Education Records and Student’s Right to Privacy.

This number is considered very confidential.

Online ID and Email ID are provided to facilitate an employee getting access to systems. They should not be used to provide information to others. There will be values in HR/Pay that are not publicly displayed in Outlook or on KU People Search pages. Use Outlook/KU People Search to provide information to others without a business need for assisting an employee.

IDM_EMAILID: If this value is blank it generally means the employee has not set up a KUL email account. The IDM_ONLINEID must be populated to set up the email account.

IDM_ONLINEID: If this value is blank it generally means that a KUL online ID has not been created for the employee. Without the online ID the employee cannot create their email account. If the online ID is populated but not the IDM_EMAILID then action is needed by the employee.

KUL_BR_APPLID: If a person was sent to HR/Pay via BrassRing Integration (BR –Ready to Hire) the Applicant ID is stored here.

OTHER_HRPAY_ID: Used to track ID that was deleted when duplicate data for an employee is merged. (>5/1/15)
**Person Organizational Summary**

*Workforce Administration > Personal Information > Person Organizational Summary*

---

**Person Organizational Summary**

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

**Employment Instances**

<table>
<thead>
<tr>
<th>ORG Instance</th>
<th>0</th>
<th>Last Hire: 09/10/2012</th>
<th>Termination Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Status</td>
<td>Active</td>
<td>Payroll Status: Active</td>
<td></td>
</tr>
</tbody>
</table>

**Assignments**

<table>
<thead>
<tr>
<th>Empl Record</th>
<th>Home/Host</th>
<th>HR Status</th>
<th>Payroll Status</th>
<th>Date Last Change</th>
<th>Business Unit</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>Active</td>
<td>Active</td>
<td>09/10/2012</td>
<td>UKAN</td>
<td>2133000</td>
</tr>
</tbody>
</table>

**Person Organizational Summary**

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

**Person of Interest Instance**

<table>
<thead>
<tr>
<th>Person of Interest Type</th>
<th>Empl Record</th>
<th>Status</th>
<th>Begin Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affiliate</td>
<td>999</td>
<td>Active</td>
<td>01/01/2013</td>
<td></td>
</tr>
</tbody>
</table>

**Person of Interest Instance**

<table>
<thead>
<tr>
<th>Person of Interest Type</th>
<th>Empl Record</th>
<th>Status</th>
<th>Begin Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff/Faculty Job Accepted</td>
<td>05/10/2015</td>
<td>05/03/2015</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This may be used to find if a person exists and what type of employment instance they may have (employee or affiliate.)

**Active Employee in Department 2133000**

**Active Affiliate**

After a candidate has accepted his/her offer in Brass Ring and the Ready to Hire is submitted, basic demographic data is interfaced into HR/Pay with either a Person of Interest Type of Staff/Faculty Job Accepted or Student Job Accepted. This is to activate the on-line ID process so that email and other services may be provisioned. When the employee is hired they will have 2 sections – Employment Instance and Person of Interest Instance which should be made inactive upon the Job Data hire.

The Begin Date is the date entered.
The End Date is the expected start date.
Job Data

Workforce Administration>Job Information>Job Data

This is where the employee or affiliate is assigned a job data row. When the position number is keyed for an employee in Job, the system populates many of the fields from Position Data.

<table>
<thead>
<tr>
<th>Work Location</th>
<th>Work Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee or Person of Interest (Affiliate)</td>
<td>Employee or Person of Interest (Affiliate)</td>
</tr>
<tr>
<td>Effective Date: First day the new action row takes place. (i.e. first day of employment, first day of new rate, and first day of no longer working/first day not paid for termination.)</td>
<td>Effective Date: First day the new action row takes place. (i.e. first day of employment, first day of new rate, and first day of no longer working/first day not paid for termination.)</td>
</tr>
<tr>
<td>Effective Sequence: Highest value for each day is the latest action. 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.</td>
<td>Effective Sequence: Highest value for each day is the latest action. 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.</td>
</tr>
<tr>
<td>HR Status: Active or Inactive</td>
<td>HR Status: Active or Inactive</td>
</tr>
<tr>
<td>Payroll Status: Active, Leave without Pay, Paid Leave (Sabbaticals), Suspension, Death, Retired, Terminated A, L, P, S codes = HR Status as Active D, R, T codes = HR Status as Inactive</td>
<td>Payroll Status: Active, Leave without Pay, Paid Leave (Sabbaticals), Suspension, Death, Retired, Terminated A, L, P, S codes = HR Status as Active D, R, T codes = HR Status as Inactive</td>
</tr>
<tr>
<td>Action/Reason: Required codes sent to State. We only use KUL values – drop down contains KUMC specific codes as well.</td>
<td>Action/Reason: Required codes sent to State. We only use KUL values – drop down contains KUMC specific codes as well.</td>
</tr>
<tr>
<td>Job Indicator: Needed for processing, for regular employees this will be the 0 record.</td>
<td>Job Indicator: Needed for processing, for regular employees this will be the 0 record.</td>
</tr>
<tr>
<td>Position Number: Key field connects Position Data, other fields are populated from Position Data. (See Position Data)</td>
<td>Position Number: Key field connects Position Data, other fields are populated from Position Data. (See Position Data)</td>
</tr>
</tbody>
</table>
Job Information

Most fields are populated from Position Data

**Empl Class:** Employee Class. This is overridden from the default based on the Job code table for Affiliates.

**Paid Employee Classes:**
A=Unclassified Academic Staff – staff engaged in research, public service and teaching in units that support the academic mission of the institution. They are unclassified employees whose education, degrees and experience are equivalent to those of the academic faculty. (Ex. Titles: Curators, Scientist. Etc.)

F=Faculty – engaged in teaching research and service (Ex. Title – Professor, Lecturer series etc.)

B=University Support Staff- engage in operational activities supporting the mission of the University in functions that include service, maintenance, administrative support, safety and security, research support, instructional support, and student services.

U=Unclassified Professional Staff - engage in operational activities supporting the mission of the University in functions that include service, administrative support, research support, instructional support, and student services.

S=Student – primary association with the University is based on their status and enrollment as either undergraduate or graduate students. They perform operational tasks that support the mission of the University in all campus departments, direct involvement in classroom and laboratory instruction or direct involvement with research activities.

**Affiliate Employee Classes – No compensation**

L= Adjunct Faculty/Researchers-Serve primarily in an instructional or research capacity without compensation. Research must be in collaboration with KU researchers.

J=Courtesy Faculty/Researchers-Employees of KU who perform additional services primarily in an instructional or research capacity without additional compensation. Research must be in collaboration with KU researchers.

Z= Affiliated Corporation - regular employees (non-student) who provide services to KU and receive some administrative service from KU and are employees of official affiliated corporations ( e.g. Kansas Union, KUEA etc.)

M=Emeritus (Retired faculty/staff who have received official designation)

Q=Religious Advisors

Y= Affiliate Corporation Retirees

X=University of Kansas Retirees

V=Visiting Scholars – employee at other institutions of higher education who serve KU
Payroll

Absence System: Assignment to Absence Management if applicable

Pay Group: see below

Holiday Schedule: UNHL and SOKS contain the same holidays now and NOH is used for those not eligible (temporary and AY faculty/staff)

FICA: System process handles coding based on student enrollment and hours worked and visa for deductions for Social Security (OASDHI).

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

<table>
<thead>
<tr>
<th>Pay Group</th>
<th>Override FLSA Status</th>
<th>Employee Type</th>
<th>Pay Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>AFL - Affiliates (not paid)</td>
<td>X = No FLSA</td>
<td></td>
<td>0 (not paid)</td>
</tr>
<tr>
<td>CUN - Univ. Support/Unclass.Professional Stf</td>
<td>N = Non Exempt</td>
<td>Hourly</td>
<td>10 (actual reported)</td>
</tr>
<tr>
<td>CUX - Univ Supt/Uncls Profess. &amp; FY Faculty</td>
<td>E, A, P, C= Exempt</td>
<td>Salaried</td>
<td>10</td>
</tr>
<tr>
<td>Academic Staff</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LCT - AY Faculty/Academic Staff with</td>
<td>P (E) = Exempt</td>
<td>Salaried/Contract</td>
<td>14</td>
</tr>
<tr>
<td>Ongoing commitment-Prepaid Benefits</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LFC - AY Faculty/Academic Staff</td>
<td>P (E) = Exempt</td>
<td>Salaried</td>
<td>14</td>
</tr>
<tr>
<td>LTX -Less than 12 month Staff with</td>
<td>P = Exempt</td>
<td>Salaried/Contract</td>
<td>10</td>
</tr>
<tr>
<td>Ongoing commitment-Prepaid Benefits</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STN - Student</td>
<td>N = Non Exempt</td>
<td>Hourly</td>
<td>10 (actual reported)</td>
</tr>
<tr>
<td>STX – Student (generally GTA’s)</td>
<td>P (E) = Exempt</td>
<td>Salaried</td>
<td>14</td>
</tr>
<tr>
<td>SRX - Student (generally GRA’s)</td>
<td>P (E) = Exempt</td>
<td>Salaried</td>
<td>10</td>
</tr>
</tbody>
</table>
Salary Plan

Maintained by Human Resources
LAFL – KUL Affiliates – N/A not paid
LAFP – KUL Academic Staff/Faculty – Grades are not set up – generic 001
LGRP – KUL Graduate Research Assistants – future use
LGTP – KUL Graduate Teaching Assistants – future use
LSTP – KUL Other Students – future use
LUPP - KUL Unclassified Professional Staff
LUSP – Lawrence University Support Staff

Grades for the LUPP and LUSP are available on the Human Resources Classification and Market Study website.

Compensation
Frequency
B=Biweekly
C=Contract (Less than 12 month faculty/staff eligible for prepaid deductions)
H=Hourly

Rate Codes
CANNLL-Contract Pay (goes with C above)
NABWKY – Biweekly (goes with B above)
NAHRLY – Hourly (goes with H above)
### Employment Data

Accessed by clicking on the hyperlink at the bottom of Job Data

**Company Seniority Date**: State Adjusted Service Date

Used for State Recognition and for University Support

Staff leave accruals and, if eligible, longevity pay.
Workforce Job Summary

Workforce Administration>Job Information>Review Job Information>Workforce Job Summary

Provides current and historical display in row format of the various job rows of the employee. The data fields displayed are described under the Job Data section.

This page is very helpful when looking at historical changes in Job Data.

Prepaid Summer Benefits & Coverage for Faculty and Staff

Academic year faculty/academic staff who hold full academic year or a spring semester regular appointment and who have an ongoing commitment for the upcoming fall semester will be placed in designated pay groups. This eligibility is also for approved salaried staff whose appointments are less than 12 months because of the academic year cycle. Approval for less than 12-month positions is made by the department and Human Resources. Faculties with ongoing commitments, and less than 12-month staff, generally have appointments included in the University budget. These appointment types allow the employee to retain coverage for summer benefits and keep the employee active but unpaid during the summer period.

(More information on the HRM website search on prepaid.)

Eligibility based on an ongoing commitment for these employees should be determined at the point of hire, annual budgetary cycle or reappointments to the Fall and Spring Semesters. Percentage of appointment (FTE) or the employee selection of or eligibility for benefits is not a factor. In order to process timely, eligibility changes should be communicated via Personnel Action Form effective no later than the deadline set for first payroll period in the Spring Semester (Faculty payments for the spring semester begin on 1/1/YYYY.) The contract information has to be finalized (keyed) in HR/Pay by the last work day in January.

Contract pay is a method of paying individuals appointed to salaried, regular positions 1) for a specified time period and specified amount; 2) which allows the summer employer deduction for benefits and facilitates the prepaid employee deductions during the spring; and 3) keeps the employee in an active status but not paid during the summer unless a summer appointment is processed. Contract pay will be used for academic year faculty (including lecturers) and approved salaried staff whose appointments are less than 12 months because of the academic year cycle for whom there is an ongoing commitment.
Update Contract Pay N/A

Contract numbers increase with each new period created by Employee ID and Employee record.

Contract Pay Types:
- Academic Year Contract Pay 8/18-5/16 unless leap year then 5/15 (Pay Group LCT – Faculty and Academic Staff)
- Spring Semester Contract Pay 1/1-5/16 unless leap year then 5/15 (Pay Group LCT – Faculty and Academic Staff)
- Contract Less than 12 Months (dates will vary in a Fiscal Year and are based on each staff member's dates as provided from the annual working budget). (Pay Group LTX)

If active in Job Data and Compensation Frequency is C, check the current contract dates to see if being paid.

The hours per day are needed to compute the proration of pay based on pay group proration.
Contract Payment Details

Payroll for North America>Employee Pay Data USA>Contract Payment Details

Populated by a central process run every on cycle calc process; may be run individually for off cycles. Process breaks out the payroll periods below.

Contract Information
- Contract Begin Date/Payment Begin Date: Start of Contract
- Contract End Date/Payment End Date: Last Day on Contract
- Contract Worth: If employee has not had any adjustments this will reflect the rate on job

View All: (opens up all rows)
Shows what has been paid as well as what is left to be paid if not completed.

This is completed so the payments have all been made.

Displays the amount to be paid if contract is still active, broken down by payroll periods.
Review Self Service Paycheck

*Payroll for North America*→*Payroll Processing USA*→*Produce Payroll*→*Review Self Service Paycheck*

Due to the confidential data, this access is limited to the Shared Service Center Time Reviewer staff only. Those with access are only to use for assisting employees or validation of accuracy of the payments made. Paycheck deduction and tax information is not to be provided to anyone other than the employee.

Position Data

*Organizational Development*→*Position Management*→*Maintain Positions/Budget*→*Add/Update Position Info*

Position number is a key field to linking Recruitment, Job and Funding data together. Also impacts Time & Labor and Absence Management.

Key values: Position number, Business Unit, Company, (HR) Department, Job code, Supervisory code, Reports To, Standard Hours (FTE), Pool ID.

Each paid employee has their own unique position number assigned. There may be cases of “overlap” which generally does not exceed 2 payroll periods. (Must share same key values.)

Affiliates (unpaid) may have a unique position number assigned if they have paid employees reporting to them. This is needed for approval workflow. (E.g. Athletics and KS Union and ROTC)

Maintenance is provided by transactional forms, position descriptions and system loads.

Data is submitted to State of Kansas SHaRP system.

It is important to know if it is an existing position number or if a position number needs to be assigned when processing transactions.

- a. Budget and regular position numbers are tied together. Changing an HR department incorrectly may have a negative effect on the Budget system and on funding.
- b. Reusing position numbers is to be done whenever possible: reuse positions in the hiring department first.
- c. Temporary positions are not included in the Budget as they are funded by Pool IDs.
- d. An existing affiliate position is not to be changed to a “paid” position and a “paid” position is not to be changed to an affiliate.
- e. An existing “paid” position is not to be changed from regular to temporary OR temporary to regular.
- f. Temporary positions may be changed between paid employee classes but cannot be changed to regular.
- g. Regular positions may be changed between paid employee classes but cannot be changed to temporary.
h. Affiliate positions may be reused only for affiliates and are stored in the 1520NOT department. Affiliates only require a position number when they supervise a paid employee.

Following are key procedures when assigning or reusing a position.

1. A position number may not be reassigned when it is filled.
2. A position number may not be reassigned if it is listed in UBUD-DEMIS unless the department and or Budgeteer has authorized.
   UBUD is used to verify if a position number is in the budget. KU Online ID is used to sign on to DEMIS. Refer to DEMIS Manual.
   a. Financials Tab
   b. University Budget Reports, UBUD FY (Current)
   c. On the left side select HR Data Restrictions
   d. Scroll to the Enter Position(s)
   e. Enter the position number, multiple position numbers may be entered if a return is inserted after each number entered
   f. If data is returned, the position may not be used without the Department/Budgeteer approval. If a No Records notice is returned it is not in UBUD and should be available for reuse.

Only one person should generally be appointed in a position at a time unless there is approval for an overlap due to a termination and rehire. Generally the overlap should not exceed 2 weeks. Overlap is defined as 2 persons appointed to the same position.
   a. Employees may not overlap unless all the key position values are the same for the 2 employees AND the funding is identical AND position attributes, if applicable. If the funding or the key fields are not the same, a secondary position must be used.
   b. Key position fields include Department, Job Code, Position Pool ID (if applicable), Title, FLSA Status, Regular/Temporary, Full/Part Time, Regular Shift, Standard Hours/FTE and Reports To.
   c. If the department chooses, fields that may be out of sync for a couple of weeks* but will require updates to be made after the incumbent leaves: Location Code, Work Phone, Mail Drop ID, Supervisor and KU Position Attribute codes, Designated/CDL, Building, Room, Work Title, Pref Dept and possibly KU Position Attributes. These fields will be reported and displayed incorrectly in directories and in requests made for data during this timeframe. (* Pending directory extracts.)
   d. If the position is a supervisory one; both incumbents will be sent the time to approve and one will receive the absence request.

Effective Dates
   a. If changing the status between exempt/non-exempt the change must be made at the beginning of week (Sunday) and preferably beginning of a payroll period.
   b. If the position is filled and the change is for a future employee, the changes should not be keyed until the current incumbent has been terminated. Watch the dates as the entry/change will likely update the job data for the current employee.
## Description

### Position Information

**Effective Date:** First day the action is effective  
**Status:** Active, only use Inactive for rare cases centrally, prior affiliate position or due to legislative action.  
**Reason:** Codes to describe -required by State, Action is POS for all positions.  
**Action Date:** System assigned date keyed  
**Position Status/Status Date:** Approved, other options are rare cases centrally used; Frozen is due to legislative action.  
**Key Position:** N/A

### Job Information

**Business Unit:** UKANS  
**Job Code:** 000300, Project Manager  
**Reg/Temp:** Regular  
**Regular Shift:** 1 and 9  
**Title/Short Title:** Should not be changed, defaults from Job Code  
**Full/Part Time:** Full-Time  
**Union Code:** 066 (Police Officers), 055 (Service/Maint), 099 (GTA), See MOA on HR website for details  
**Detailed Position Description:** Defaults text from Job Code table and also used for brief comments

### Work Location

**Department:** HR Department, critical to funding/not ChartField  
**Location:** Area where position is located  
**Reports To:** Critical to workflow  
**Dot-Line:** N/A  
**Supervisor Level:** See definitions next page  
**Security Clearance:** N/A

### Salary Plan Information

**Salary Admin Plan:** LUPP  
**Grade:** 001  
**Step:**  
**Standard Hours:** 40.00  
**Work Period:** Weekly  
**Location:** USA  
**FLSA Status:** Administrative  
**Bargaining Unit:** 8888  
**Security Clearance:** N/A

---

**Salary Plan Information** – see next page
**Supervisor Lvl - L, S, M, or N**

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.

**Salary Plan Information**

**Salary Plan:** defaults based on Job Code (only override for Affiliates)

- LAFL = KUL Affiliate Non-Pay Plan
- LAFP = KU Academic Staff/Faculty
- LGRP = KUL Graduate Research Assistants
- LGTP = KUL Graduate Teaching Assistants
- LSTP = KUL Other Students
- LUPP = KUL Unclassified Professional Staff
- LUSP = KUL University Support Staff

**Grade:** Defaults from Job Code Table also known as Band.

**Standard Hours/Work Period:** Hours working weekly

**Standard Hours Days:** N/A for us – Just defaults (we use TL work schedule)

**USA Flag**

**FLSA Status:** (Fair Labor Standards Act)
- Administrative, Computer Employee Exception, Executive, Professional – Exempt paid as Salaried
- Nonexempt – paid as Hourly
- No FLSA Required – Used for Affiliates

**Bargaining Unit:** N/A - leave as defaults – Not used
### Specific Information

**Max Head Count**: 1 always

**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.

**Health Certificate/Signature Authority**: N/A

### Incumbents

- **Update Incumbents**: always checked
- **Include Salary Plan/Grade**: checked for all but affiliates
- **Budgeted Position**: checked for all but affiliates
- **Confidential Position**: Checked for those who hold positions that have access to confidential employment files as they are not able to belong to a Union.

**Job Sharing Permitted/Available for Telework**: N/A

### Education and Government

- **Position Pool ID**: Required to be filled out for all Temporary positions used with funding (regular lecturers not named in the budget may also be assigned Pool ID) See Position Pool Table for more information.
- **Pre-Encumbrance Indicator**: None – defaults
- **Calc Group (Flex Service)**: N/A
- **Encumber Salary Options**: Salary Step – defaults N/A
- **Academic Rank**: N/A
- **Classified Indicator**: Classified for all USS (university support staff) all others Unclassified
- **FTE**: Defaults using Standard Hours (modification)
- **Adds to FTE Actual Count**: Checked on for Regular Position (not Affiliate or Temporary)
### Budget and Incumbents

**Current Budget:** Values are not stored in HR/Pay

**Current Incumbents:** If filled as of “today”, you may click on Job Data hyperlink to go to Job Data

### KU Pos Attributes

*Used to track Attributes by 3 types*

- **Special:** Used for coding positions that have an employment condition impact such as Serve at the Pleasure of, Limited Term, Acting, Interim, Funding Sources
- **Designated:** Commercial drivers license, State of KS Substantial Interest, Inclement Weather, Required Trainings etc.
- **Contact:** May be used for PRS mailings and other types of contact listings.
Position Summary

Organizational Development>Position Management>Review Position/Budget Info>Position Summary

Provides current and historical display in row format of the various position rows.

Position History

Organizational Development>Position Management>Review Position/Budget Info>Position History

Provides current and historical incumbent data.

Budget Status

Organizational Development>Position Management>Review Position/Budget Info>Budget Status

As we do not have budgeted data in the system this just displays system current calculated annual amounts * not accurate for those on less than 12 month appointments.

Vacant Budgeted Positions

Organizational Development>Position Management>Review Position/Budget Info>Vacant Budget Positions

Provides a list of positions currently not filled but have had funding established. This has no relationship to the amounts or allocations in the university budget system.
KU Building

Set Up HRMS>Foundation Tables>Organization>KU Building

Provides HR/Pay codes used for buildings, generally it will have street address and KU building code and county – used for state reporting.

Departments

Set Up HRMS>Foundation Tables>Organization>Departments

Known as the true “HR” Department Table. This is the value assigned on the Position and Job Data and links to Funding. 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 Director and Comptroller. HR/Pay is the steward of this table. KU Department Information will display HR and SSC etc. staff assigned to the department number.
Job Code Table

Set Up HRMS>Foundation Tables>Job Attributes>Job Code Table

Job codes are assigned upon review of Position Descriptions. Job Codes have a Title assigned. Some values may be overridden at the Position level.

Source of data that prepopulates values in Position and Job.
HR/Pay Funding Relationship to Financial Postings
Chartfield Values

Set Up HRMS>Common Definitions>ChartField Configuration>Chartfield Values

**Dept ID**: This is an organizational unit, within a department, that will be used for tracking and reporting expenses. Also known as Cost Centers. DeptIDs with payroll will be the only organizational units included in HR/Pay. Created and approved by Budget Office.

“Descr” field must match Financials naming convention.

“Department” is “true HR” department.

If the DEPT ID is active in HR/Pay it is eligible to be used for payroll expenditures.

**Fund Code**: Authorized by the Comptroller’s office. Entry by HR/Pay.

Work-study fund 709 is to only be used on W pools for earnings, department funds must pay all deductions and taxes.

Reimbursable funds are 725 (KUEA) and 8XX (KUMC or KBOR reimbursable).

Funds that are 8XX reimbursable with other state agencies (i.e. KUMC and KBOR) the DEPT ID (Cost Center) must begin with 15103XX and are assigned by the Payroll Office.
Project/Grant: Loaded twice a day from the financial system.

KU E-Verify - If project requires employees on this funding to be processed through the federal E-Verify, this box will be checked.

KU Resp Conduct for Research - If project requires training under particular federal guidelines, this box will be checked.

KU Cost Share - If project is eligible for cost share, this box will be checked. This is also used in the creation of the combination code.

Actual project values are in the Financial system.

GL Account Table:

Also referred to as the object code - a way the university and state classify expenditures. Full listing is available on the Comptroller’s web site under Accounting Codes.
**Chartfield 2:** Use “CS” for Cost Sharing (CF2)

**Chartfield 3:** (CF3)

Used for indicating the value needed for reimbursable (fund) values such as KUEA (725), KUMC (801-849) or KBOR (850).

KUEA value is 5 digit KUEA account with an X and is for KU Endowment Reimbursable funding.

KUMC (KU Medical Center)/KBOR (Kansas Board of Regents) value assigned by the Payroll office or

If PI is used in this field along with the Project ChartField the expenditures will be posted to the project budget category of Key Personnel.

Chartfield 1 is coming when FITC goes live.
Combination Code Table

Set Up HRMS>Product Related>Commitment Accounting>Budget Information>Combination Code Table

Enter any information you have and click Search. Leave fields blank for a list of all associated values.

**Combination Code Table**

**Combination Code:**
Value assigned to a string of unique ChartFields to fund payroll costs. Used on the Department Budget Table to fund a Position or Pool ID.

Search by the individual values and may search off the Dept. Budget Table as well.

Established up by Budget Management or Research for grants or possibly in budgetary loads. The values on the Chartfield cannot be modified.

Funds that are 8XX reimbursable with other state agencies (i.e. KUMC and KBOR) the DEPT ID (Cost Center) must begin with 15103XX and are assigned by the Payroll Office.

**Current Combination Codes:**
Are currently “smart coded”. Not all chartfields are included in the string due to maximum length.

Digits of the Combination Code (current)
1-7 are the Dept ID (or known as the Cost Center)
8-10 are the Fund
The rest of the number varies depending on the possible remaining ChartFields used.

**Future Combination Codes:**
Will be assigned by the system and will not be “smart coded”.

Chartfield 1 will also be introduced for use in HR/Pay with the implementation of FITC (Financials In The Cloud)
## Combination Code Table

<table>
<thead>
<tr>
<th>Set ID:</th>
<th>UKANS</th>
</tr>
</thead>
<tbody>
<tr>
<td>GL Combination Code:</td>
<td>1520000-003</td>
</tr>
</tbody>
</table>

### Combination Code Detail

<table>
<thead>
<tr>
<th>*Effective Date:</th>
<th>06/06/2004</th>
<th>*Status:</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description:</td>
<td>15200000003</td>
<td>Valid Value</td>
<td></td>
</tr>
<tr>
<td>Short Desc:</td>
<td>1520000003</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### ChartField Detail

<table>
<thead>
<tr>
<th>DEPT ID</th>
<th>1520000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund Code:</td>
<td>003</td>
</tr>
<tr>
<td>Account:</td>
<td>9999999</td>
</tr>
</tbody>
</table>
HR/Pay Relationship Position To Funding

An employee is assigned to a Position in Job Data

Regular Positions – One to One DBT (Department Budget Table) as their association is by the HR Department and Position Number

Temporary Positions – May be many Positions to one DBT (Department Budget Table) with the exact same funding as they are associated by a HR Department and a Pool ID.
Position Pool Table

Set up HRMS>Product Related>Commitment Accounting>Budget Information>Position Pool Table

Used for funding multiple positions from the same funding (combination code) values.

Always used for Temporary Positions. Not used for Regular Position funding. May be assigned to Additional Payments. Not used for positions in the working budget.

The HR Department on the Position Pool table matches the HR Department on Position Data.

If a Position is assigned to Pool ID and if position funding is active, the position funding must be inactivated or Pool ID funding will not be used in distribution.

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 is established.

SXX = Student Hourly RXX = GRAs UXX = Unclassified (Temporary)
CXX = USS (Temporary) TXX = GTAs WXX = Work Study (Always and Only)
LXX – Lecturers (Temporary) GXX= Graduate Assistant
#XX = Sponsored projects (0 or 1) (generally)

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.

Work-study fund 709 is to only be used on W pools for earnings; department funds must pay all deductions and taxes.

Budget Office establishes Pools for state funding and Research establishes Pools for grant/project – research monies.

- The Pool Table Description should not be used to validate funding just a label; view the Department Budget Table (DBT) for Funding
**Position Pool Table**

Only used to fund Temporary Positions.

**Set ID:** UKANS

**Department:** HR Department (matches Position)

**Position Pool ID:** See above for coding

**Effective Date:** Date set up or changed

**Status:** Active or Inactive (new in 9.1)

**Description:** Displays on pages – determined by Budget Office and Research – sometimes use combination codes for ease of search.

**Short Description:** Determined by Budget Office and Research

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**Position Pool Table**

<table>
<thead>
<tr>
<th>Set ID:</th>
<th>UKANS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department:</td>
<td>1520000</td>
</tr>
<tr>
<td>Human Resources</td>
<td></td>
</tr>
<tr>
<td>Position Pool ID:</td>
<td>S01</td>
</tr>
</tbody>
</table>

**Effective Date:** 06/05/2016

**Status:** Active

**Description:** 1520000-099 Student Hourly

**Short Description:** 1520-099
Department Budget Table USA (DBT)

Set up HRMS>Product Related>Commitment Accounting>Budget Information>Department Budget Table USA

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

Budget Level: By “Position Pool” as assigned to a Position 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.

Set up by Fiscal Year – central annual process to change to new fiscal year.

Dept Budget Earnings: Funding for Earnings.
Dept Budget Deductions: Funding for all employer Deductions
Dept Budget Taxes: Funding for employer Taxes

Effective Date: Date change or funding starts
Eff Seq: Highest sequence per day is the latest one.
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.
Date Entered: Date row was saved

Combination Code: Value assigned to represent chartfields.
Distribution %: Must always equal 100%

Combination Code Description: Select to see the description of the combination code which contains the chartfields.

Dept Budget Deductions and Dept Budget Taxes are the funding sources to pay the employer’s fringe cost. In most cases the earnings, deductions and taxes will match. An example of a case in which they won’t match is work-study. Work-study monies do not pay for any fringe costs and generally pay for 75% of the earnings. So in a work-study Pool ID (begins with W) you will see a minimum of 2 earnings rows – 1 for the 75% work-study with fund 709 and then the 25% on departmental funds. Fringes will be all department funding and no work-study fund 709.
There are additional hyperlinks built into the Department Budget Table pages when you are adding new rows. Only those with access to entering funding may insert a new row.
Chartfield 1 will be used in HR/Pay upon implementation of FITC.
KUL Actuals and DBT Inquiry

Set up HRMS>Product Related>Commitment Accounting>Budget Information>KUL Actuals and DBT Inquiry

RFA (Retroactive Funding Adjustment) policy: [http://policy.ku.edu/comptroller/retroactive-funding-adjustment](http://policy.ku.edu/comptroller/retroactive-funding-adjustment)

This page is used for extracting data from the KU Accounting Line (instead of the DEMIS Gross and Fringe). This is used for Position RFAs only. At this time, this page cannot be used for Pool ID funding. You will need to have additional detailed training and be authorized to access this page and the location where the reports are stored.

Type in Begin and End Dates, Include Position Number and tab out. The Generate Reports button will become activated. Once data is displayed you can extract by using the graph icon for each section or if needed you can select Reset. A transaction number is assigned once you have completed the page.
KUL EPAF RFA Transaction

Set up HRMS>Product Related>Commitment Accounting>Budget Information>KUL EPAF RFA Transaction

This page is used after the KUL Actuals and DBT Inquiry and is only used for Position RFAs only. Pool ID RFA funding is handled via the Image Now EPAF process. You will need to have additional detailed training and be authorized to access this page and the location where the reports are stored.

This is used to indicate where the past charges/funding should have been posted (Effective Date, Combination Code(s) and Distribution %). The Post RFA is used to indicate after the end date of the RFA what should the funding be (Effective Date, Combination Code(s) and Distribution.

Once the page has been Validated and then Transfer Request to ImageNow a RFA EPAF will be created.

This page also has a hyperlink to the Request a new Combo Code page.

Once the transaction has been submitted the process continues and once completed is sent to Research or Payroll.

If Research or Payroll needs to return the transaction only an SSC Manager may reactive the page for modification.
KUL EPAF RFA Reactivation

Set up HRMS>Product Related>Commitment Accounting>Budget Information>KUL RFA ePAF Reactivation

If Research or Payroll needs to return the RFA transaction only an SSC Manager may reactive the transaction page for modification and resubmission. This should be very minimal.

The SSC Manager will need to have additional detailed training and be authorized to access this page.