PeopleSoft HR/Pay 9.1
Manager Self Service

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Human Resources

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Human Resources

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Agenda

• Supervisors Responsibilities
• Who Uses What (T/L & AM)
• Supervisor System Delegation
• Conversion 7.6 to 9.1
• Key Points of Knowledge Center (UPK)
• Time Frame and Resources
• Questions
• Terminology Appendix
Supervisors Responsibilities
(MSS – Manager Self-Service)

• Approves Time Reporting & Absence Request
  • Reviews and Adds Missed punches
• Work Schedules
• Other MSS activities – KU Review
• No back dates for new hires.
• Keep funding changes current.
• Notify hourly employee of time collection method and position number if needed.
• View Employee’s Compensation History
• Keep terminations up to date.
  • Collect proximity cards upon termination. Return to HR
• Assist employee with signing up for KU Online ID.
  (https://myidentity.ku.edu/setup/login)
Supervisors Responsibilities
(MSS – Manager Self-Service)

• Workflow:
  • Check Worklist daily
  • Employees must always have a filled position to report.
  • If supervisors (reports to) position is vacant, HR will change to one level up.
    • Preference is that department process supervisor change in advance of vacancy in preparation.
  • Email for Workflow will be sent for transactions excluding Time and Labor approvals.
Supervisors Responsibilities
(MSS – Manager Self-Service)

• Time and Labor and Rules
  • If a regular hourly employee has met the FLSA threshold the system will calculate compensatory time.
  • If the department has approval to pay overtime, it may be added by the Supervisor or Time Reviewer to the next payroll calc as a compensatory time payout.
    • Current limits for maximum are still in place.
  • Temporary employees are not eligible to accrue compensatory time so the system will pay the overtime.
• No hours will be defaulted, all hourly employees will need to report time or have approved leave to be paid.
## Who Uses What

<table>
<thead>
<tr>
<th>Type of Employee</th>
<th>Type</th>
<th>Time &amp; Labor</th>
<th>Absence Mgmt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Staff (USS, UPS etc.)</td>
<td>Hourly</td>
<td>Timesheet</td>
<td>Yes</td>
</tr>
<tr>
<td>Regular Staff (USS, UPS) Premium Pay</td>
<td>Hourly</td>
<td>WebClock/TCD</td>
<td>Yes</td>
</tr>
<tr>
<td>Temporary (USS, UPS, Students etc.)</td>
<td>Hourly</td>
<td>WebClock/TCD</td>
<td>No</td>
</tr>
<tr>
<td>Regular Staff (USS, UPS etc.)</td>
<td>Salaried</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Regular Faculty</td>
<td>Salaried</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Temporary Faculty</td>
<td>Salaried</td>
<td>No</td>
<td>Yes (LWOP)</td>
</tr>
<tr>
<td>Temporary Students (GA, GTA, GRA)</td>
<td>Salaried</td>
<td>No</td>
<td>Yes (LWOP)</td>
</tr>
</tbody>
</table>

- Hourly employees report worked hours and leave taken.
- Salaried employees report leave taken or leave without pay.
- USS - University Support Staff
- UPS - Unclassified Professional Staff
- GA – Graduate Assistant
- GTA – Graduate Teaching Assistant
- GRA - Graduate Research Assistant
Supervisor System Delegation

- System is based on Reports to Position
  - Example:
    - Mary is assigned to Position ABC and ABC positions “reports to” Position XYZ held by a Program Manager
    - It is expected for the Program Manager (through MSS – Manager Self Service) to approve transactions such as Time reporting or Absence Requests.
Supervisor System Delegation

Supervisors may delegate transactions in the system but not responsibility.

- Delegate an entire activity – not at an employee level.
- Talent Acquisition Manager (TAM)
- Absence Management (AM)
- Time and Labor (T/L)
  - If T/L or AM is delegated to a employee who “reports to” to the person delegating, the employee cannot approve their own T/L or AM and that will need to be done centrally.
  - If an Absence has been approved via MSS and a change needs to be made - this can only be done centrally.
- Delegation must be made to someone who is knowledgeable regarding the employee’s work.
  - Must have internal method to be sure the employee has worked.
Supervisor System Delegation

Supervisor may set specific date range.

• Downward delegation of authority to a direct report or another person lower down in the reporting hierarchy.
• Upward delegation of authority to a manager or another person higher up in the reporting hierarchy.
• Lateral delegation of authority to a peer either within the same division or in a different division within the reporting hierarchy.
Conversion 7.6 to 9.1

• Last payroll period in current system (7.6)
  • 9/16 to 9/29 paid 10/12
• First payroll period in new system (9.1)
  • 9/30 to 10/13 paid 10/26
    • Split time tracking for hourly. (we need to finish calc in 7.6)
  • Temporary and Premium Pay employees must write down actual clock times in and out beginning 9/30 and until notified the new system is available.
    • Time Reviewers (or Supervisors) will need to enter this data into the 9.1 “punch” timesheet.
  • Timesheet users should make note of total hours worked per day and then enter in 9.1.
Key Points of Knowledge Center (UPK)

You learn how to:
✓ Save Favorites
✓ Find your Worklist
✓ Ask the Expert

• UPK will always be available
• New employees will be enrolled (currently weekly) in the Knowledge Center
• ROC (Recruitment and Onboarding Center) will notify hires.
Time Frame and Resources

Go Live
• 9.1 HR/Pay Projected Availability – 10/8/2012

Where to get Information:
• Project Website: www.hrpay.ku.edu
  • Time Device – Building List
  • Project Team
  • Training Schedule and Methods
• Drop In 10/8/2012-10/19/2012 (M-F)
  • 7:00 am to 6:00 pm – Rooms 31 and 103B Carruth
Time Frame and Resources

Contact Information:

• Help Desk 864-0600 (Functional)
• Help Desk 864-8080 (Technical)
• Project Management Team email: apex-pmo@ku.edu
• Project Email: hrpay@ku.edu
Questions

Thank you for attending.
<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>AM</td>
<td>Absence Management – A module in PeopleSoft where leave requests are entered and are approved. Leave taken, entitlements, and balances are stored in AM.</td>
</tr>
<tr>
<td>Absence</td>
<td>Leave request (vacation, sick, compensatory time usage, etc.)</td>
</tr>
<tr>
<td>Candidate Gateway</td>
<td>Applicant entrance to apply for and manage job searches within the PeopleSoft system.</td>
</tr>
<tr>
<td>Combination Code</td>
<td>A value assigned to a string of chartfields used for funding payroll costs. (Prior name was Account Code)</td>
</tr>
<tr>
<td>Entitlement</td>
<td>Accrual</td>
</tr>
<tr>
<td>ESS</td>
<td>Employee Self Service</td>
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<tr>
<td>MSS</td>
<td>Manager Self Service</td>
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**Key:**
- **AM**: Absence Management
- **ESS**: Employee Self Service
- **MSS**: Manager Self Service
## Terminology Appendix

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<tr>
<td>Takes</td>
<td>Absence usage</td>
</tr>
<tr>
<td>TAM</td>
<td>Talent Acquisition Management – A module in PeopleSoft for Recruitment also known as Recruiting Solutions.</td>
</tr>
<tr>
<td>TCD</td>
<td>Time Collection Device – a physical device outside PeopleSoft used to clock-in/out via proximity cards or biometrics.</td>
</tr>
<tr>
<td>Time Collection Method</td>
<td>Ways to report hours worked or absence via Time Collection Device, timesheet, or web clock.</td>
</tr>
<tr>
<td>Time Reviewer</td>
<td>Departmental, Area or Business Service Center Staff Member with job responsibilities to assist with the completion of worked time and absence approvals.</td>
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<td>T&amp;L or T/L</td>
<td>Time and Labor – A module in PeopleSoft where hours worked are loaded by a time collection method, processed and stored. Absences are also loaded and stored.</td>
</tr>
<tr>
<td>TRC</td>
<td>Time Reporting Code – a code used to determine the type of hours worked or leave taken (e.g., REG, CME, SCK, etc.)</td>
</tr>
<tr>
<td>UPK</td>
<td>User Productivity Kit – Additional Oracle Product for end user training and online reference/tutorial and can do online testing.</td>
</tr>
<tr>
<td>Workflow</td>
<td>System process that routes approval or notifications via electronic system determined by fields or roles and may use email to notify.</td>
</tr>
<tr>
<td>Worklist</td>
<td>Page in the PeopleSoft system of items awaiting action – a To Do list or items sent via workflow. Action items such as approve timesheet or absence are located here.</td>
</tr>
</tbody>
</table>