

PeopleSoft HR/Pay 9.1 Manager Self Service

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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**
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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

| Type of Employee | Type | Time & Labor | Absence Mgmt |
|--------------------------------------|----------|--------------|--------------|
| Regular Staff (USS, UPS etc.) | Hourly | Timesheet | Yes |
| Regular Staff (USS, UPS) Premium Pay | Hourly | WebClock/TCD | Yes |
| Temporary (USS, UPS, Students etc.) | Hourly | WebClock/TCD | No |
| Regular Staff (USS, UPS etc.) | Salaried | No | Yes |
| Regular Faculty | Salaried | No | Yes |
| Temporary Faculty | Salaried | No | Yes (LWOP) |
| Temporary Students (GA, GTA, GRA) | Salaried | No | Yes (LWOP) |

- 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.

aaversion

Terminology Appendix

| Term | Description |
|-------------------|--|
| AM | Absence Management – A module in PeopleSoft where leave requests are entered and are approved. Leave taken, entitlements, and balances are stored in AM. |
| Absence | Leave request (vacation, sick, compensatory time usage, etc.) |
| Balance | $Absence\ Adjustments + Entitlements - Takes = Absence\ Balance.$ |
| Candidate Gateway | Applicant entrance to apply for and manage job searches within the PeopleSoft system. |
| Combination Code | A value assigned to a string of chartfields used for funding payroll costs. (Prior name was Account Code) |
| Entitlement | Accrual |
| ESS | Employee Self Service |
| MSS | Manager Self Service |

Terminology Appendix

| Term | Description |
|------------------------|--|
| Takes | Absence usage |
| TAM | Talent Acquisition Management – A module in PeopleSoft for Recruitment also know as Recruiting Solutions. |
| TCD | Time Collection Device – a physical device outside PeopleSoft used to clock-in/out via proximity cards or biometrics. |
| Time Collection Method | Ways to report hours worked or absence via Time Collection Device, timesheet, or web clock. |
| Time Reviewer | Departmental, Area or Business Service Center Staff Member with job responsibilities to assist with the completion of worked time and absence approvals. |

Terminology Appendix

| Term | Description |
|------------|---|
| T&L or T/L | 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. |
| TRC | Time Reporting Code – a code used to determine the type of hours worked or leave taken (e.g., REG, CME, SCK, etc.) |
| UPK | User Productivity Kit – Additional Oracle Product for end user training and online reference/tutorial and can do online testing. |
| Workflow | System process that routes approval or notifications via electronic system determined by fields or roles and may use email to notify. |
| Worklist | 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. |