

***Empowering******a Community of Excellence***

**HR/Pay - Overview of HRM Partner Tile - Navigation Guide**

Human Resources & Payroll (HR/Pay) system address [hr.ku.edu](https://hr.ku.edu)

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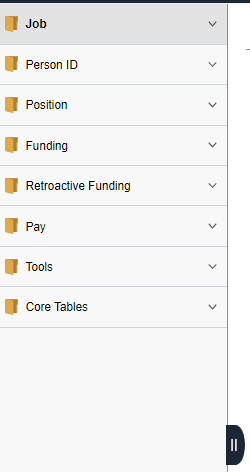
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HR/Pay only maintains one Core Navigation document. Access to the pages will vary based on job duties and security roles assigned.

# Navigation Tips

1. icon
    opens to expand all columns instead of viewing in the tab format
2. icon closes all expanded columns and sets view back to the tab format
3. icon opens up the selected area in its own view window – zoom; click on the return button to go back to the regular page
4. icon extracts the data to excel
5. iconopen up a search
6. Update/Display – current & future rows
7. Include History – past current & future rows
8. Navigation is by the use of tiles on the home page. This guide covers the HRM Partner tile. Left Side Menu:
   1. 

Closes and opens left menu

1. Top right = 3 dots to sign out

menu view

# **Person ID**

## KU Multi-IDs

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

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

Other Fields specific to HR/Pay interface to the State or not used.

## KU Other-ID Values

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 the employee needs to take action.

IDM\_PHONE: Phone number assigned by other IT system and interfaced to HR/Pay.

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)

HR/Pay may track ID types used to communicate with other systems or for system interfaces.

## Person Organizational Summary

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

Employment Instances will show status.

Assignments will show employee records.

Persons of Interest Instance will show Person of Interest Types.

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.

Employee records that begin with 9 are affiliates with Job rows.

The Begin Date is the date entered.

The End Date is the expected start date.

HR/Pay Relationship Beginning to End – Module Overview Chart

# **Job**

**Position**

Department (HR)

Position #

Pool ID (Temporary)

**FITC Ledgers**

Financials in the Cloud

**OAC**

Oracle Analytics Cloud

**PPM (Projects)**

Project Portfolio

Management

**PAAG**

(Payroll at a Glance)

**PBCS**

Planning Budget Cloud Service

**State of Kansas Payroll & Funding**

Converts to SOKS values for Account & ChartFields

**Payroll**

**Distribution**

**ChartFields**

Department (Cost Center)

Fund

Project

Chartfield 1

Chartfield 2

Chartfield 3

Account

**Funding**

Department Budget Table

Department (HR)

Position/Pool ID

**Payroll Calculation**

Employee ID/Record

Pay Group

**Absence Management**

Employee ID/Record

**Payroll**

Employee ID/Record

**Time and Labor**

Employee ID/Record

Time Reporter Data

**Job**

Employee ID

Employee Record

Department (HR)

Position Number

Pay Group

Compensation Rate

**Person ID**

Employee ID

Person Organization Type

**Employee Paid** Funds to Bank &

W-2

## Job Data

Job Data rows are created by the Onboarding system loading to HR/Pay or by HRM entering data from transactional forms, position description reviews and other system loads (which can be the annual budget or university compensation changes).

Job data is what activates other modules such as Benefits, Time and Labor, and Absence Management and is used in many other interfaces to other systems.

Job data is used to obtain the compensation rate and used in the calculation of payroll.

Each person is assigned their own Employee ID and keeps that Employee ID throughout their career with KU. The employee ID is assigned when Personal Data is saved. Some historical persons may have two employee IDs created due to the “marriage and then subsequent divorce” with KUMC data. We will use the one created regardless of if it starts with a letter or number. Personal Data access is very restricted to only key personnel in HRM and Payroll due to the confidential nature of the data

Data is submitted daily to the State of Kansas SHaRP system.

Employee Records are assigned when an employee holds multiple jobs at the same time. The “0” employee is required to be used when the employee holds a regular position.

Employe Records that start with “9” are indication of an affiliate (unpaid).

Display department descriptions and supervisor names are displayed as of the effective date of the row and may not be the current values.

### Work Location

Employee and Person of Interest (POI-Affiliates) who are assigned a job data row. Empl (Employee) ID and Empl (Employee) Record. When the position number is keyed for an employee in Job, the system populates many of the fields from Position Data.

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.)

Graduate Teaching Assistants (GTA) and Academic Year (AY) faculty generally have set appointment dates for the fall/spring semesters. Fall: 8/18-12/31 for fall; Spring 1/1 to 5/16 (leap 5/15; Academic year 8/18-5/16 (leap 5/15). There are 136 calendar days per semester and 272 per academic year.

5/2024 Graduate Research Assistants (GRA) are moving to the 14-day prorate pay group, but this does not change their appointment dates. GRAs are hired and terminated based on their actual dates. This allows consistent pay as many Graduate Students change between GRA and GTAs.

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.

HR Status: Active or Inactive

Payroll Status: **A**ctive, **L**eave without Pay, **P**aid Leaves (Sabbaticals & Faculty Professional (e.g., Fellowships), **S**uspension, **D**eath, **R**etired, **T**erminated

A, L, P, S codes = HR Status as Active

D, R, T codes = HR Status as Inactive

Action/Reason: Required codes sent to State of Kansas System when we interface.

Job Indicator: Needed for processing, for regular employees most 0 empl records will be Primary Job. If multiple jobs and the employee is a supervisor on one job, that must be primary. Handled by HR/Pay Team.

Position Number: Key field connects Position Data

Most other fields are populated from Position Data. (See Position Data)

Required for all paid employees, optional for affiliates.

Last Start Date: System generated using Action Codes Hire/Rehire

Expected Job End Date: Not used

### Job Information

Most fields are populated from Position Data or are displayed from Work Location,

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.)

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.

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

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. (KUMC Admin, Research, or Instructional duties at KU.)

**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, Hilltop, Alumni etc.)

**M**=Emeritus (Retired faculty/staff who have received the designation Emeritus/Emerita.)

**Q**=Religious Advisors and Panhellenic House Directors

**Y**= Affiliate Corporation Retirees

**X**=University of Kansas Retirees

**K**=Visiting Scholars – employee at other institutions of higher education who serve KU without compensation

### Payroll

Absence System: Assignment to Absence Management when applicable, if not Other.

Pay Group: Relationship key fields for the Pay Group

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Pay Group** | **Description** | **FLSA Status** | **Employee Type** | **Pay Days/BW Period** |
| AFL | Affiliates - Not Paid | N =No FLSA | Hourly | 0 |
| CUN | University Support/ Unclassified Professional Staff (Hourly Faculty) | N = Non-Exempt | Hourly | Actual |
| CUX | University Support/ Unclassified Professional Staff, Fiscal Year (FY) Faculty/Academic Year Staff | E- Executive,  A-Administrative, P-Professional,  C-Computer = Exempt | Salaried | 10 |
| LCT | Academic Year (AY) Faculty /Academic Staff with  Ongoing commitment-Prepaid Benefits | E- Executive,  P-Professional = Exempt | Salaried | 14 |
| LFC | Academic Year (AY) Faculty /Academic Staff | E- Executive,  P-Professional = Exempt | Salaried | 14 |
| LTX | Less than 12-month Staff with an  Ongoing commitment-Prepaid Benefits | E- Executive,  A-Administrative,  P-Professional,  C-Computer = Exempt | Salaried | 10 |
| SRX | Student (generally GA-salaried)  [GRAs changed to STX as of 5/26/24 previously SRX.] | P-Professional = Exempt | Salaried | 10 |
| STN | Student Hourly | N = Non-Exempt | Hourly | Actual |
| STX | Student (generally GTA & GRA)  [GRAs changed to STX as of 5/26/24 previously SRX.] | P-Professional = Exempt | Salaried | 14 |

### Prepaid Summer Benefits Eligible 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 group (LCT).

This eligibility is also for approved salaried staff whose appointments are less than 12 months because of the academic year cycle designated by pay group (LTX). Approval for staff positions less than 12 months are made by the department and Human Resource Management.

Faculty with ongoing commitments and less than 12 months 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.)](http://humanresources.ku.edu/)

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 Job information has to be finalized (keyed) in HR/Pay by the last workday in January.

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).

Absence Management System: Designated based on HR/Pay Configuration

### Salary Plan

LAFL – KUL Affiliates – N/A not paid

LAFP – KUL Academic Staff/Faculty –Grades are not set up – generic 001

LGRP – KUL Graduate Research Assistants – Grades are not set up – generic 001

LGTP – KUL Graduate Teaching Assistants – Grades are not set up – generic 001  
LSTP – KUL Other Students – Grades are not set up – generic 001

LUPP - KUL Unclassified Professional Staff

LUSP – Lawrence University Support Staff

Grades for the LUPP and LUSP are available on the Human Resources [Job Title Pages](http://humanresources.ku.edu/job-title-table-key) or Core Tables.

More data about the pay structure and compensation can be found at:

**humanresources.ku.edu> Time, Pay & Leave>Compensation**

### Compensation

Frequency

**B**=Biweekly

**H**=Hourly

\***C**~~=Contract (Less than 12-month faculty/staff eligible for prepaid deductions)~~ **Discontinued Fall 2018**

Rate Code

NABWKY – Biweekly (goes with B above)

NAHRLY – Hourly (goes with H above)

**\*** CANNLL-Contract Pay (goes with C above) **Discontinued Fall 2018**

**Compensation rate** will be hourly or biweekly based on the rate code and compensation frequency.

**Pay Rates:**

Daily, Weekly, Monthly and Annual rates are calculated as 12-month annual and 5-day work week. This is not accurate for academic year, less than 12- month or student hourlies.

Use the OAC Employment dashboard.

**Formulas:**

14-day salaried prorate (pay group) – Biweekly rate /14 = daily rate.

10-day salaried prorate (pay group) – Biweekly rate /10 = daily rate.

Academic Year is 272 calendar dates or 136 days each for fall and spring semesters.

8/18-12/31; 1/1 to 5/16 (leap year 5/15)

### Employment Data

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

Company Seniority Date: State Adjusted Service Date

Adjusted for display to accurately represents the years months and days of service if breaks in State of Kansas regular service. Used for State Recognition and for University Support Staff Non-Union if eligible, longevity pay.

If the date is adjusted by Human Resources. The modified data value may not be the date the employee started but rather the rehire/hire date plus adding in the prior qualify years of service.

e.g.

Hired by KU 2/1/2024 and previously worked 5 years and 3 weeks at a regular other state agency position. The company seniority date is the KU hire date backdated to include the + 5 years and 3 weeks for the calculation to reflect the accurate years of state qualifying service.

Dates will also be adjusted if working a KU temporary job and then accepting a regular position. The date would be changed to the start date of the regular position.

Certain extended leaves without pay will cause a service date to have dates adjustment to exclude this without pay period.

This date reflects regular service at a state agency and cannot include affiliate service. Rules are provided by the State.

## 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 helpful when looking at historical changes in Job Data.

# **Position**

## 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 Lvl, 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 two payroll periods. (Must share same key values.)

Affiliates (unpaid) may have a unique position number assigned if they have paid employees reporting to them or for interfacing to KU’s performance and learning system (mytalent). 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 (onboarding and budget).

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.

1. Use of the OAC>Human Resources>Employment>Position Management which will show current and future data entered into HR/Pay as of the day before to assist with assignment.
2. 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.
3. Reusing position numbers is to be done whenever possible: reuse positions in the hiring department first.
4. Temporary positions are not included in the Budget as they are funded by Pool IDs.
5. 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.
6. An existing “paid” position is not to be changed from regular to temporary OR temporary to regular.
7. Temporary positions may be changed between paid employee classes but cannot be changed to regular.
8. Regular positions may be changed between paid employee classes but cannot be changed to temporary.
9. Affiliate positions may be reused only for affiliates and are stored in the 1520NOT department. Affiliates only require a position number when they supervisor a paid employee or are included in the Success Factors interface.

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 two weeks. Overlap is defined as 2 persons appointed to the same position.

1. Employees may not overlap unless all the key position values are the same for the 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.
2. Key position fields include
   1. Department,
   2. Job Code (Title),
   3. Position Pool ID (if applicable),
   4. FLSA Status,
   5. Regular/Temporary,
   6. Full/Part Time,
   7. Regular Shift,
   8. Standard Hours/FTE and
   9. Reports To.

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. These fields will be reported and interfaced incorrectly during this period.

* 1. Location Code,
  2. Mail Drop ID,
  3. Supervisor

1. If the position is a supervisory one, both incumbents will be sent the time to approve, and both must approve. With absence both supervisors will receive the email but only one is needed to approve, the 2nd person will get an error message if they click on email notification.

Effective Dates

1. If changing the status between exempt (overtime ineligible)/non-exempt (overtime eligible) the change must be made at the beginning of week (Sunday) and preferably beginning of a payroll period.
2. 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: Table Driven – Official State Title

Reg/Temp: Regular or Temporary Position (is not to be changed once established)

Regular Shift: 0, 1, 2, 9, or Not Applicable (only used on eligible hourly positions

Title/Short Title: Should not be changed, defaults from Job Code

Full/Part Time: Full Time if 40 Standard hours, else Part-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 used for brief comments

**Work Location**

Department: HR Department, critical to funding/not ChartField

Location: Area where position is located

|  |  |
| --- | --- |
| CAPITL CTR | State of KS Capitol Complex |
| EDWARD | Univ of Kansas Edwards Campus |
| JUNIPER GN | Juniper Gardens Area |
| KGS WICH | KS Geologic Sample Repository |
| KLETC | Kansas Law Enforcement Trn Ctr |
| KS CITY KS | Kansas City, Kansas |
| KS CITY MO | Kansas City, Missouri |
| KU MED CTR | University of Ks Medical Ctr |
| KUMC WICH | Univ of KS – Wichita Kansas |
| LAWRENCE | Univ of Kansas Lawrence Campus |
| OUTKSMO | Outside KS/MO not listed |
| PARSONS | University of Kansas, Parsons |
| TALENT SRC | Educational Talent Search Proj |

Reports To: Position reports to. This is critical to workflow

Dot-Line: N/A

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 most 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.

Security Clearance: N/A

**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 (no grade)

LGRP=KUL Graduate Research Assistants ( no grade)

LGTP=KUL Graduate Teaching Assistants ( no grade)

LSTP=KUL Other Students (no grade)

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. Very rarely used as printed campus mailings have been greatly reduced

Health Certificate/Signature Authority: N/A

**Incumbents**

Update Incumbents: always checked

Include Salary Plan/Grade: checked for all but affiliates

Force Update for Title Changes (new 9.2)

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 for all (only) Temporary positions used with funding (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: N/A defaults 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 Update Position Attributes

Displays data from other pages.

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, Contingent upon funding and Review Date (Chairs, etc.)

Designated: Commercial driver’s license, State of KS Substantial Interest, Inclement Weather, Required Trainings etc.)

These are conditions that can be used for termination and the Notice of Non-Reappointment policy does not apply. These conditions do not override the tenure portion of a faculty appointment.

Contact: Not used - May be used for personnel-related mailings and other types of contact listings.

## Position History

Provides current and historical incumbent data.

## Position Summary

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

## Vacant Budgeted 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.

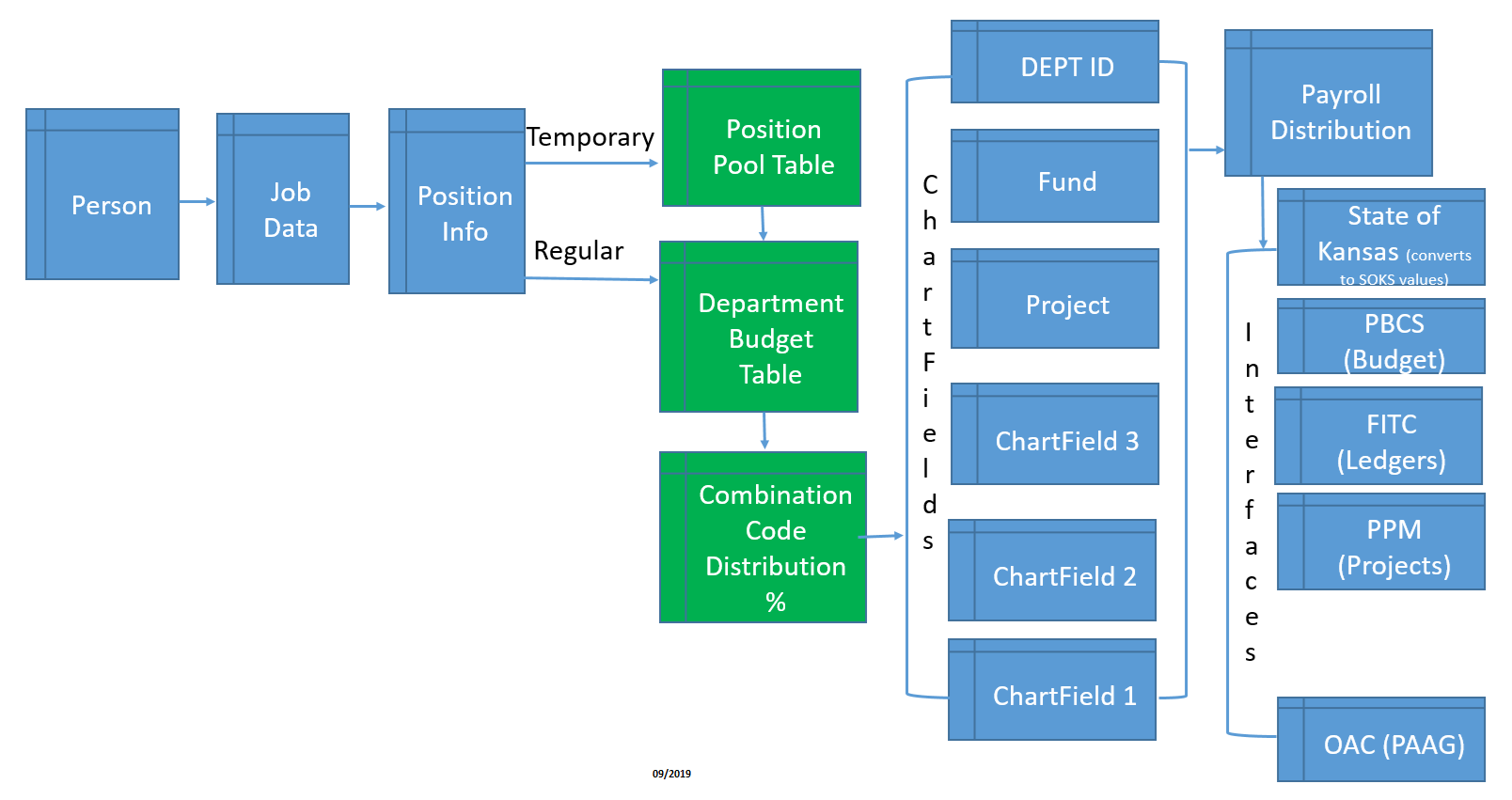
Recommendation: Use the OAC>Human Resources>Employment>Position Management dashboard which will show current and future data entered into HR/Pay as of the day before to assist with assignment.

## 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.

# **Funding**

## Funding Review Chart

 KU Department CF

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.

## KU Fund Code CF

Authorized by Finance Services and Budget 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). Marked KU 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.

If marked KU Project Fund must have a Project included on the Combination Code.

If KU Cost Share marked can be used for [cost share](https://policy.ku.edu/research/costsharing).

## KU Project/Grant CF

Original source is the PPM (Project Portfolio Management) system via Financials; interfaced twice a day from OAC (Oracle Analytics Cloud).

Includes Start and End Date and the Principal Investigator.

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

KU Resp Conduct for Research -If project requires training under 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.

KU Proj Attribute 1 -is the Cost Center assigned to the Project

## Chartfield1

Budget Officer are the ones who use this ChartField. CF 1 request starts on the Financials side and interfaces twice a day via OAC (Oracle Analytics Cloud).

1. CF1 starts within the Financials Systems by being entered into FITC (Financials in the Cloud) and Concur by a manual process. HR/Pay receives the data via interface from OAC.
   1. Financial team members indicate that after the request for a new value is received, it could take up to 2 days for FITC & Concur to be updated and up to 3 days for the CF1’s to be in OAC (Oracle Analytics Cloud service). They do hope to improve processing time, but we wanted to make you aware for planning purposes.
   2. Once the value is in OAC then it should be available in HR/Pay the following day. The date for all CF1 values in HR/Pay will be effective 5/20/18.
2. CF1 is not collected in PBCS (Planning and Budgeting Cloud System) Planning (BCP) budget collection process or PPM (Projects Planning Module-Grants & Sponsored Projects) or in eCRT (effort reporting) or in Allocation of F & A (Facilities and Administration).

## Chartfield2

Use “CS” for [Cost Sharing](http://www.policy.ku.edu/research/costshareandmatching) (CF2)

## Chartfield3

Used for indicating the value needed for reimbursable (fund) values such as KUEA (725), KUMC (801-849) or KBOR (850, 851) (Contact-Payroll Office for KUMC & KBOR values.)

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 O**r**

PI is used in this field along with the Project ChartField to have payroll expenditures posted to the Project budget category of Key Personnel.

## GL Account Table

Also referred to as the object code - a way the university and state classify expenditures. Full listing is available from Financial Services. All expenditures are posted with a value that begins with 5.

Short description is used for the State of Kansas (SOKS) account value.

KU assigns account values during payroll distribution and does not create individual combination codes using these values.

## Combination Code Table

Value assigned to a string of unique ChartFields to fund payroll costs. As of 11/5/17 new Combination Code assignments are system generated numbers that begin with 3. Previously created codes started with the Cost Center/Dept ID. Existing ones were not converted.

Used on the Department Budget Table (DBT) to fund a Position or Pool ID.

Search by the individual ChartField values and may search from a funding row in the Dept. Budget Table (DBT) as well.

Established up by the Budget Office or Research Office for grants or possibly in budgetary loads via HR/Pay Team. The values assigned to a Combination Code cannot be modified. [Funding SetUp Request Form](https://inowformsprivate.ku.edu/fs?form=Funding%20Set%20Up%20Request%20Form)

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.

Combination Codes are requested via the Funding Set Up Request Form Process.

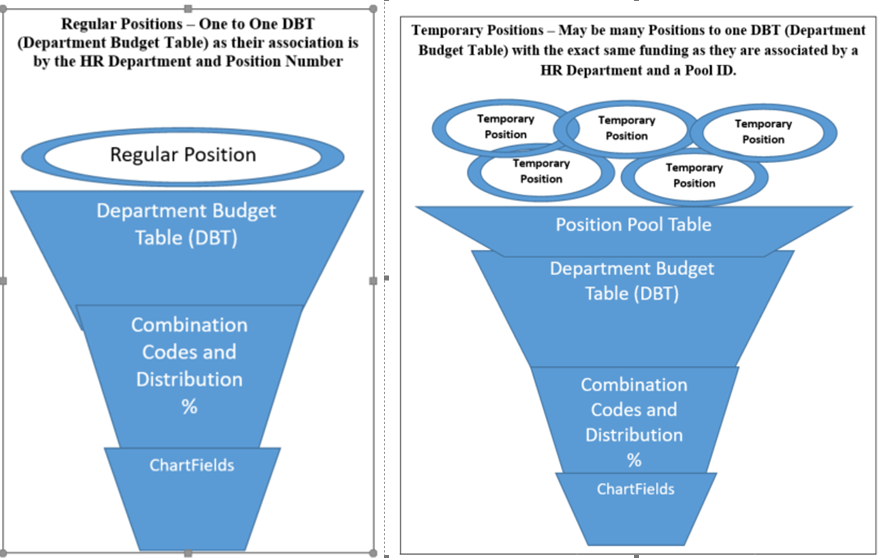
See individual chart fields for information on required field combinations.

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.

# 

## HR/Pay Relationship To Position or Pool ID Funding Chart



## Position Pool Table

Required and only used for Temporary Positions. Not used for Regular Position funding. May be assigned to Additional Payments.

Not used for positions in the working budget. Used for funding multiple positions from the same funding (combination code and distribution %) values.

The HR Department on the Position Pool table must match 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 the Pool ID funding will not be used in distribution. This should no longer be an issue as of January 2017 as all regular positions are not allowed to be Pool funded.)

The Pools must be associated with a HR Department on the setup table.

Pools are established during the Working Budget or by the Funding Set Up Request Form.

|  |  |
| --- | --- |
| SXX | Student Hourly |
| RXX | Graduate Research Assistants( GRA) |
| UXX | Unclassified (Temporary) |
| CXX | University Support Staff (Temporary) Eliminating |
| TXX | Graduate Teaching Assistants (GTA) |
| GXX | Graduate Assistants |
| WXX | Work Study (Always and Only) |
| LXX | Lecturers (Temporary) |
| #XX | If all Research Funding (0,1,2.3, 4) |

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 funded generally a leading number Pool would be used unless it is work-study as that must be a pool beginning with W.

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. [Funding SetUp Request Form](https://inowformsprivate.ku.edu/fs?form=Funding%20Set%20Up%20Request%20Form)

The Pool Table Description or Displays should not be used to validate funding just a label, view the

Department Budget Table (DBT) for chartfields.

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 2012)

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

Short Description: Determined by Budget Office and Research or may be suggested by Budget Officer.

## Department Budget Table USA (DBT)

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

Budget Level: Either by “Position Pool” as assigned to a Position or “Position” only. 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. To validate correct Combination Code do not rely on description use hyperlink under ChartField Details or validate using the Combination Code Table.

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 will not match is work-study. Work-study monies do not pay for any fringe costs and pay for 75% of the earnings. Work-study Pool IDs (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 will not have 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.

Forms Related to Funding

1. **Link to the form for requesting CF1 values**:

<https://kansas.sharepoint.com/teams/fsrc/_layouts/download.aspx?SourceUrl=https://kansas.sharepoint.com/teams/fsrc/Forms/Add%20Remove%20CF1.xlsm>

1. **Funding Set Up Request form for HR/Pay**

(Requesting: Combination Codes, Pool ID, and Payroll acceptable DeptID/Cost Centers)

Link to the Funding Set Up Request form: [https://inowformsprivate.ku.edu/fs?form=Funding%20Set%20Up%20Request%20Form](https://inowformsprivate.ku.edu/fs?form=Funding%20Set%20Up%20Request%20Form%20)

1. **HR/Pay PAF (Personnel Action Form)**

Link to the PAF: <https://humanresources.ku.edu/personnel-action-form-paf>

1. **Funding Change Request Form**

Future

Retroactive Funding (RFA) – *The HR/Pay RFA pages* will be removed in June 2024 as a new RFA form was released in April 2024. Link to the new form: <https://inowformsprivate.ku.edu/fs?form=HR%20RFA%20Form>.

## *KUL Actuals and DBT Inquiry*

*RFA (Retroactive Funding Adjustment) policy:* [*https://policy.ku.edu/financial-services/retroactive-funding-adjustment*](https://policy.ku.edu/financial-services/retroactive-funding-adjustment)

*This page is used for extracting data from the KU Accounting Line for Position RFAs only. OAC Payroll at a Glance (PAAG) is used for Pool ID RFAs. You will need to have additional detailed training that will cover this page. Access will be authorized to this page and the location where the reports are stored upon completion of training.*

*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 the data 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*

*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. There is additional detailed training, and a user must 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 and what should the funding be (Effective Date, Combination Code(s), and Distribution.*

*Once the page has been Validated and 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.*

## *KUL EPAF RFA Reactivation*

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

*The SSC /Research Manager will need to have additional detailed training and be authorized to access.*

# **Pay**

## Review Self Service Paycheck or Review Paycheck Summary

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.

# Faculty

## Review Rank/Status History

View History Page based on the data entered on the Tenure Data Page

## Create Tenure Data

### Tenure Data

Data is maintained by Faculty Development (or future from Onboarding)

Tenure Status: Current Status

Home Rank: Current Academic Rank

Track Start Date: May be a modified date to Original

Change Date: Last effective dated change to Status

Change Reason: (Optional)

Original Track Date

Tenure Home: HR Department

Mandatory Review Dt

Granted Dt

**Other Tenure Departments List**: This area may be used to track other departmental relationships

## Prior Experience/Credit

May be used to track prior credits that are considered to count toward tenure status. Will also be used to track HLC tested experience (future onboarding)

Tools

## Process Monitor

Check status of Jobs being processed (commonly used for the Heads-Up Report – time and absence).

Core Tables

## Job Code Table

Job codes are assigned upon review of Position Descriptions. Job Codes have a Title assigned (official state title). Values populate Position Data and update Job Data for employees. Affiliates may have a position assigned based on supervisory or need for mytalent functionality, else their job codes are only in Job Data. Standard Hours may be overridden at the Position level.

Regular/Temporary default may be overridden at the Position Level for Faculty and Academic Staff, and Affiliates only

Under the USA flag are reporting codes assigned by HRM Employment & Compensation.

FLSA status may be overridden at the Position level. (Fair Labor Standards Act

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

Academic Rank will display for Faculty Departments

Grade/Step = Band for KU. Only designed for LUPP and LUSP.

Hourly, Daily, Monthly, Annual values are displayed based on the Band based on 12-month rates

LAFL – KUL Affiliates – N/A not paid, no plan

LAFP – KUL Academic Staff/Faculty –Grades are not set up – generic 001

LGRP – KUL Graduate Research Assistants-Grades are not set up – generic 001

LGTP – KUL Graduate Teaching Assistants-Grades are not set up – generic 001

LSTP – KUL Other Students – Grades are not set up – generic 001

LUPP - KUL Unclassified Professional Staff

Empl Class: Academic Staff, Faculty, Unclassified Professional Staff, University Support Staff and Students for paid types. Affiliates: Adjunct & Courtesy Research and Faculty & KUMC, Affiliated Corporation Employees and their Retirees/Emeritus, KU Retirees/Emeritus, Visiting Scholars, Religious Advisors/House Directors, Specialized Support. [humanresources.ku.edu/affiliates](https://humanresources.ku.edu/affiliates)

KU JobCd Attribute 1 used for specific HR/Pay needs for Brass Ring Search Committee interface.

KU JobCd Attribute 3 used for used for specific HR/Pay needs for the IP system interface for the Office of Research.

## Department

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 at the lowest level to which budgets are allocated by the University administration. Requests for new Departments must be approved by the HR/Pay Director and Budget Director. HR/Pay is the steward of this table.

KU Department Information will display specialists as needed by the HR/Pay team and are assigned to the department number as of the effective date

## KU Building

Provides HR/Pay codes used for buildings and room numbers.

Only values on this table can be used in the Directory Page (Personal Details/My Team). Pages will have street address and KU building code and county. Values used for state remittances and reporting. To request room numbers to be added, email [hrpay@ku.edu](mailto:hrpay@ku.edu?subject=Room%20Needed) and after approval from the Space Management office, the HR/Pay team will add. Data must match values in MAXIMO for University reporting.

This will also have states for remote workers and for Kansas remote sites we are required to track by county codes. To find other states the code starts with OTH-MISSOU as an example.