

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

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

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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 Tile/Menu



[< Homepage](#)

- Job
- Person Contact
- Person ID
- Person Tracking
- Faculty
- Position
- Funding
- Retroactive Funding
- Pay
- Tools
- Labor/Health/Plan
- Core Tables

# Job

## Job Data

### 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.)

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: Active, Leave without Pay, Paid Leaves (Sabbaticals & Faculty Professional (e.g., Fellowships), Suspension, Death, Retired, Terminated

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.

Position Number: Key field connects Position Data  
Most other fields are populated from Position Data. (See Position Data)

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.

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 GRA's)	P-Professional = Exempt	Salaried	10
STN	Student Hourly	N = Non-Exempt	Hourly	Actual
STX	Student (generally GTA's)	P-Professional = Exempt	Salaried	14

### 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 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 less than 12-month staff positions is made by the department and Human Resources. Faculty 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. 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 must 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 – 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 [Job Title Pages](#) or Core Tables

## 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**

## 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.

## 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.

# Person ID

## KU Multi-IDs

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 FEPPRA –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 action is needed by the employee.

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 employment 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.

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

## **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 or academic staff 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)

## **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 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 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 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, 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 (overtime ineligible)/non-exempt (overtime eligible) 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: 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

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

### **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, Funding Sources

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

Contact: 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**

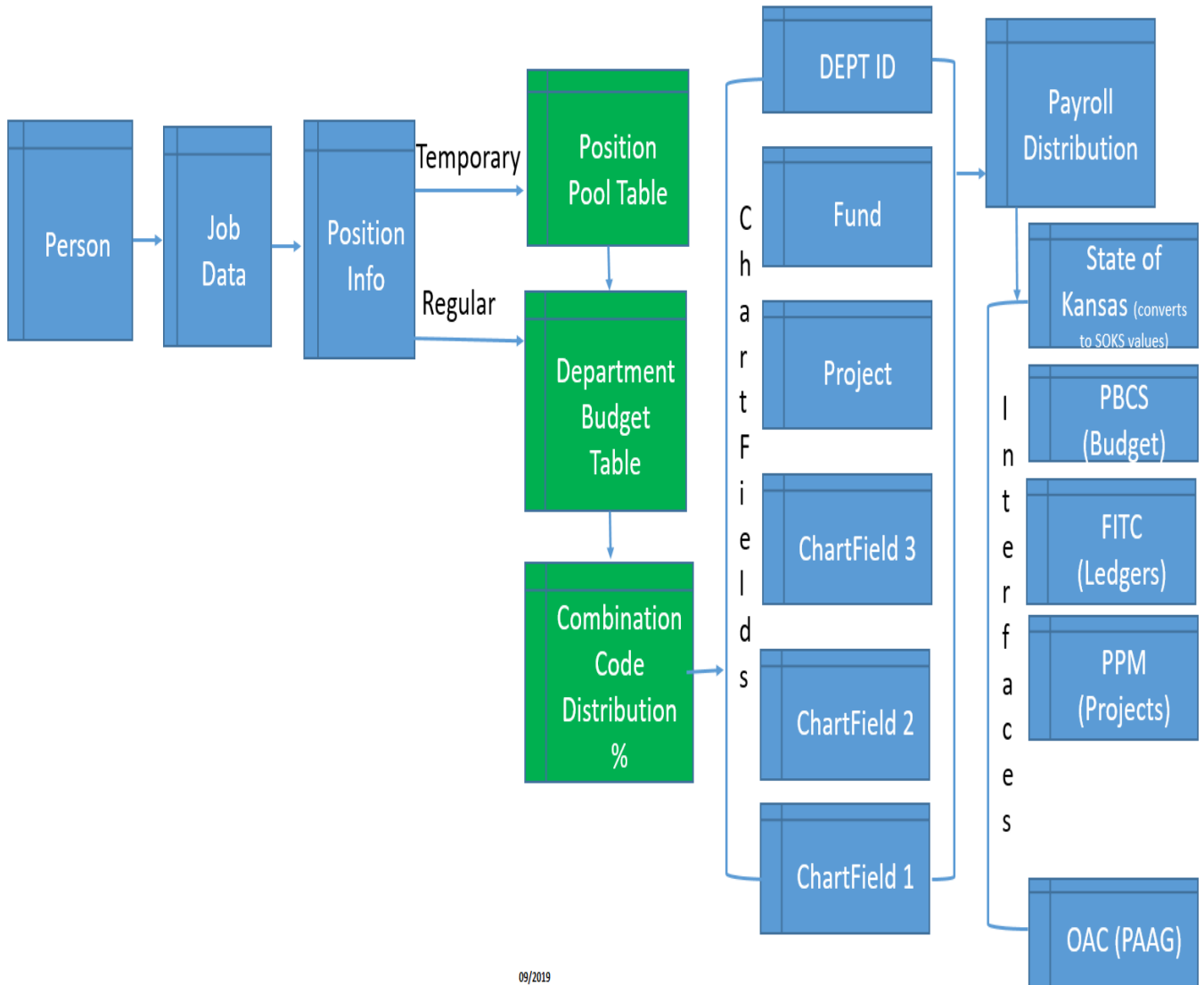
Provides a list of positions currently not filled but have had funding established. This has no relationship to the amounts or allocations in the university budget system.

### **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.

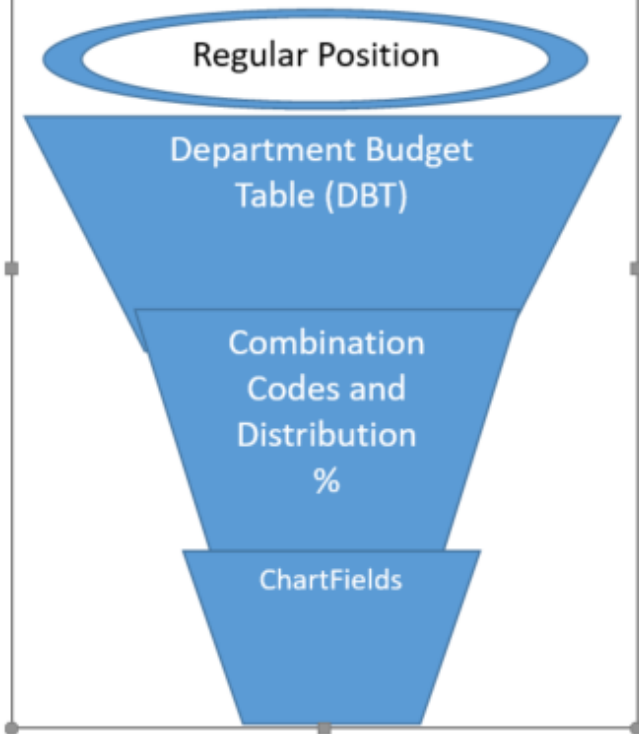
# Funding

## HR/Pay Funding Relationship to Financial Postings

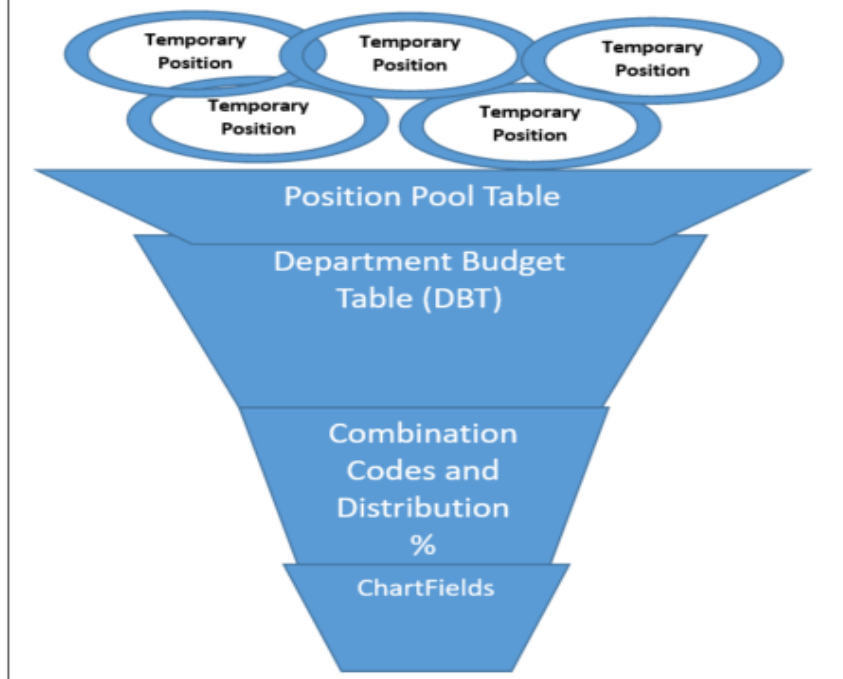


09/2019

**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.**



## 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](https://kansas.sharepoint.com/teams/fsrc/_layouts/download.aspx?SourceUrl=https://kansas.sharepoint.com/teams/fsrc/Forms/Add%20Remove%20CF1.xlsm)

2. **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>

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

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

4. **Funding Change Request Form**

Future

## 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. 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. 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 won't match is work-study. Work-study monies do not pay for any fringe costs and generally 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 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.

## 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 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 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)

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 leading number 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

Research establishes Pools for grant/project – research monies.

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

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.

Short Description: Determined by Budget Office and Research

## **Combination Code Table**

Value assigned to a string of unique ChartFields to fund payroll costs. As of 11/5/17 new Combination Code assignment 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.

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.

## **KU Department CF**

This may be 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.

## **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).

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.

## **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 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 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**

Budgeteer/Budget Officer use 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.
  - a) 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.
  - b) 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).
  - a) PBCS Planning and Projects do not consume the CF1 in any of their accounting or allocations.

## **Chartfield2**

Use "CS" for [Cost Sharing](#) (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

Or

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

## **Account**

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

## **Retroactive Funding**

### **KUL Actuals and DBT Inquiry**

RFA (Retroactive Funding Adjustment) policy: <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 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 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 reactive 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**

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.

## **Tools**

### **Process Monitor**

Check status of Jobs being processed (commonly - The Heads Up Report).

## **Core Tables**

### **Job Code Table**

Job codes are assigned upon review of Position Descriptions. Job Codes have a Title assigned. Values populate Position Data and for Affiliates Job Data. Assignment of FLSA, Employee Class, Salary Plan etc.

### **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/Pay Director and Budget Director. . HR/Pay is the steward of this table. KU Department Information will display HR and SSC etc. staff assigned to the department number as of the effective date.

## **KU Building**

HR/Pay codes used for building in the KU HR/Pay Directory, generally it will have street address and KU building code and county – used for state reporting. This will also have states for remote workers and with Kansas will have county codes.