

Vice President for
Finance
Administration
Team

HR Liaison/Wellness Breakfast August 2012

HR Liaison of the Quarter
Kaylee Olney
2nd Quarter – 2012





Blue & Gold Management Essentials Certificate

Giving UD managers the skills to manage their teams to prominence

Learn

proven management skills to become a more effective manager

Increase

your UD unit's performance and added value

Build

your professional credentials to improve your work and further your career



Course dates...

- September 27
- October 4, 11, 18, 25
- November 1, 8, 15, 29



Finance & Administration
HUMAN RESOURCES – EMPLOYEE EDUCATION & DEVELOPMENT

Blue & Gold Workplace Effectiveness Certificate

Gives UD employees the skills needed to improve organizational effectiveness

Learn

process improvement, communication, team-building and change management skills.

Improve

your unit's processes and procedures to save time and money.

Build

your professional credentials to improve your work and further your career.



New course title!

- October 9, 16, 23, 30
- November 13, 27
- December 4, 6, 11, 13



New to our course line-up!!


- Survival skills for new managers and supervisors
- Best Practices: Financials Training
- Critical Conversations
- Managing from the Middle
- Speak with Confidence II
- Event Planning

For current classes, visit www.udel.edu/eed

Blue & Gold Workplace Effectiveness - Capstone Projects

New to the website

Human Resources - Employee Education & Development
Valuing People




UD Home Human Resources About Us FAQs LearnIT Calendar

Blue & Gold Cohort 5

Participant	College/Department	Project Information	Contact Information
Tracey Bauernschmidt		Budget	On-line Form
Carol Bedgar	Health Sciences Deans Office	Scheduling Calendar for Dean	
Sharmayne Burre	Arts & Sciences	Manual for Duties of Receptionist	

[EE&D Home](#)
[Classes & Registration](#)
[Blue & Gold Certificate Programs](#)
[New Employee Resources](#)
[Summary of Courses](#)
[Customized Training](#)
[eLearning](#)
[Other Resources](#)
[Contact Us](#)



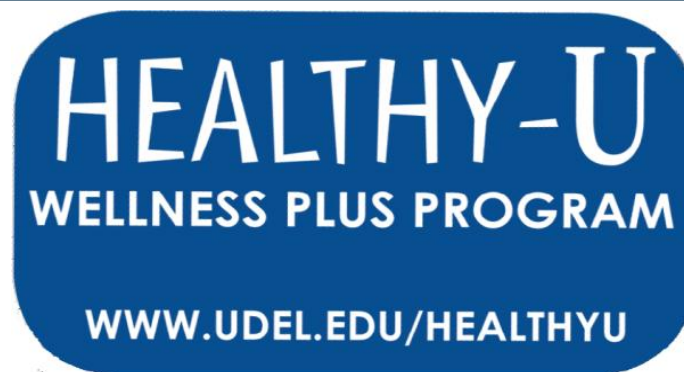




Sept. 24 – Nov. 18
30 Wellness Dollars

Includes

- Performance t-shirt
- 5K Fun Run/Walk on Sept. 20
- Activity log & weekly newsletter
- Group fitness activities
- Friendly team competition between UD faculty/staff and students



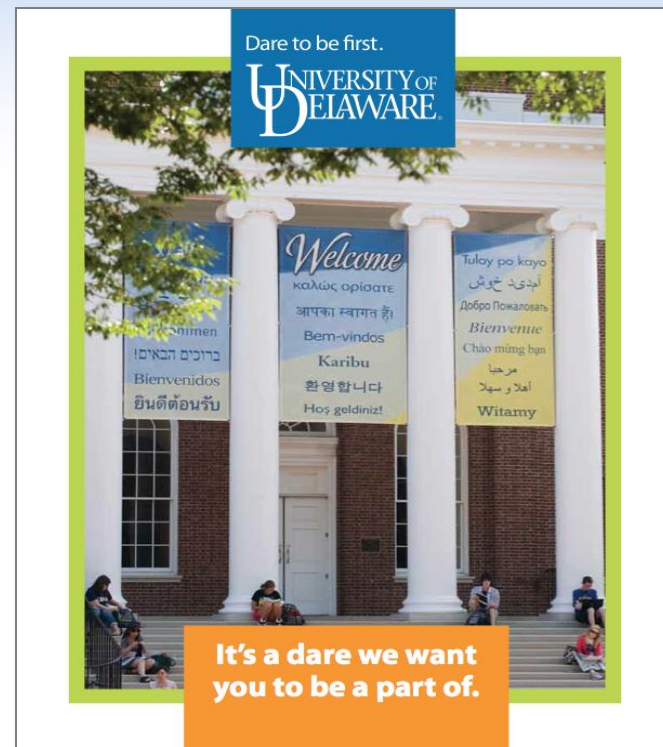
Register Aug. 1 - Sept. 14
75 Wellness Dollars

Package includes

- Fall & spring campaigns
- Personal fitness package
 - Fitness assessment
 - Biometric screening
 - 1 personal training session
- \$100 Value

UDJobs

- Recruitment Brochure
- SharePoint
 - Tentatively implementing beginning of academic year
 - Training sessions & documentation
 - Communication



Classification & Compensation Update

- Positions and Job Specifications
- Compensation Guidelines




COMPENSATION SYSTEM HANDBOOK



New Employee Orientation

Valuing People



Visit www.udel.edu/hr

Home

HR Departments ▶

Employment Opportunities

Policies ▶

Programs ▶

Resources ▶


Feedback for HR

HR Community Outreach

HR Staff Directory

Learn UD: A Guide to Policies, Programs and Resources for Faculty and Staff

Please email us if you have questions or comments.



University Overview

Learn about UD's organizational structure, leadership, policies and strategic plan – The Path to Prominence™.

You will also find a comprehensive list of acronyms used at UD.

Summer On-boarding Dates

On-boarding Group	Location	Date	Time
ELI/ITA Group On-boarding (Completed)	New ELI Building	7/18/12	8:30-1:00
Faculty Group On-boarding	The Rodney Room in Perkins Student Center	8/23/12	8:30-4:00
All other New Graduate Students on Contract Group On-boarding	The Rodney Room in Perkins Student Center	8/24/12	8:30-4:00

Your Role for Summer Group On-boarding

For NEW Graduate Students on Contract:

- Complete a GSCRF
- Complete a SFAF
- Complete the on-board department data form
- Encourage your new graduate students on contract to attend the group on-boarding session

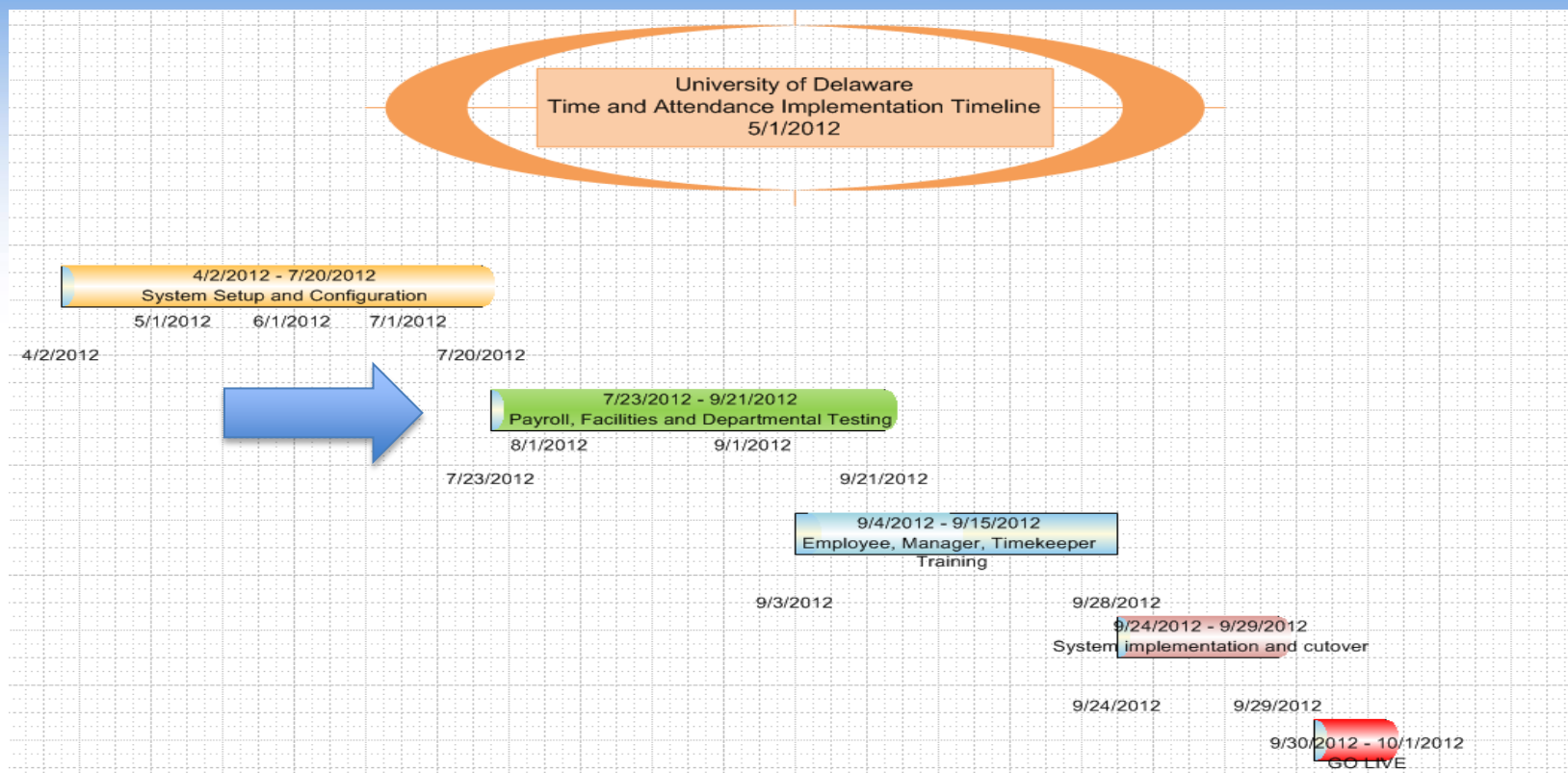
For NEW Faculty Members:

- Complete the on-board department data form
- Encourage your Faculty members to attend their group on-boarding session
- Please try not to schedule department orientation

For All New Employees:

- Please try not to schedule department orientations on group on-boarding days
- Encourage employees to respond to emails requesting completion of CBC information

UD PAY



Go Live September 30, 2012

New & Revised Web Forms

- Additional Assignments
 - For students/misc wage employees working in multiple departments
- Comp Time
 - To record comp time earned
- Leave Request
 - Will need to be used by all benefited employees including fiscal faculty
- HR Supervisor Update
 - Will be used to update Supervisor Codes
- JED Modifications

Additional Assignments Web Form



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Additional Assignments

Req ID: 1000xxx

Use this form to manage job assignments for student and miscellaneous wage employees who may be working for multiple departments, or working multiple jobs within a department. If you have any questions, contact Records Management at (302) 831-8677 or email hrrsystemsadmin@udel.edu.

Symbol key: * Required information, ! Error

Form originator

Originated by: Ann Example (0000000)
General Accounting (04710)
302-831-3772

Lookup employee

Employee: * 🔍

- Can be started by anyone who has HR Access
- Originator may lookup any employee in Peoplesoft



Additional Assignments

Menu Help Logout

Req ID: 1000xxx

If you have any questions, contact Records Management at (302) 831-8677 or email hrsystemsadmin@udel.edu.

Symbol key: * Required information, ! Error

Employee

Employee: Ed Zample (0000000)
Primary job: Records Analyst/Coordinator (434505)
 General Accounting (04710)

Misc Wage Records/Finance (710300) | General Accounting (04710)

Effective date: Start date: 05/01/2011 End date:

Supervisor code: 129

Hourly rate: \$22.50

Work study award type: Federal

Earnings code: Regular Pay (REG)

Chart of accounts:

SpeedType: CTED212111	Account: 120200	Class: 001	UserField:
Fund: OPSS	Program: PUBSV	Dept: PCS-Prof & Noncredit Programs (07420)	
Purpose: R/E LLL-WILM OPERATIONS (CTED212111)			
Project ID/Grant:		Source:	
Resource type:	Resource category:	Resource subcategory:	
HR account code: CTED2121111202000001A39687			

Misc Wage Technical (710500) | General Accounting (04710)

Effective date: Start date: 07/01/2012 End date:

Supervisor code: 235

Hourly rate: \$10.00

Work study award type:

Earnings code: Regular Pay (REG)

Chart of accounts:

SpeedType: CTED212111	Account: 120200	Class: 001	UserField:
Fund: OPSS	Program: PUBSV	Dept: PCS-Prof & Noncredit Programs (07420)	
Purpose: R/E LLL-WILM OPERATIONS (CTED212111)			
Project ID/Grant:		Source:	
Resource type:	Resource category:	Resource subcategory:	
HR account code: CTED2121111202000001A39687			

- Will display each assignment that applies to the employee
- If the originator has access to a department listed then the fields for that assignment will be editable
- Job code and department are not editable because they are considered a new assignment
- Will need to complete a new form when an assignment ends

Routing


Role	Email address
Originator	Example, Ann
<input type="text" value="Choose one"/>	<input type="text"/>
<input type="text" value="Choose one"/>	<input type="text"/>
<input type="text" value="Choose one"/>	<input type="text"/>
Approver	<input type="text" value="Choose one"/>
Purpose Code Approver	<input type="text" value="Choose one"/>
Approver	<input type="text" value="Choose one"/>
Purpose Code Approver	<input type="text" value="Choose one"/>
Final approver	RMTA
Copy	Example, Ann
Copy	Supervisor
Copy	Purpose Code Approver
Copy	Supervisor
Copy	Purpose Code Approver
Copy	RMTA
Copy	Timekeeper

[Previous step](#)
[Save & exit](#)
[Exit without saving](#)

[✓ Finish & submit](#)

- When an assignment is edited or added then the assignment supervisor will need to approve the form as well as the Purpose Code Approver
- Final Approver will be RMTA (Records Management)
- When form is approved it will update Peoplesoft which will in turn update UD Pay

Comp Time Earned


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Comp Time Earned

Req ID: 1000xxx

Use this form to add compensatory (comp) time to an employee's bank balance.

If you have any questions about this form, contact Records Management at (302) 831-8677 or hrrsystemsadmin@udel.edu.

Originator

Originated by: Cynthia Doucette (700099999)
IT - Web Development
cindi@udel.edu

Employee

UD ID: * Provide the UD ID of the employee on whose behalf you are submitting this form.

Dates

Submit one form for each contiguous block of days. For example, submit one form covering June 1 through June 8; submit two forms for June 1 and June 8.

Start date: *

End date: *

[Exit without saving](#)
[Next step](#)

- Form can be started for employees in the SRG and BAF pay groups eligible to earn comp time
- Form can be started by employee, HR Liaison or Timekeeper

Dates

Date entered: *

Add day before

Date	Type	Number of hours	Reason for comp time
Mon 7/2/2012	Choose one ▼ +		
Tue 7/3/2012	Choose one ▼ +		
Wed 7/4/2012	Choose one ▼ +		

Add day after

Previous step

Exit without Saving

Next step

- After date range entered on step one this section will appear
- The type, number of hours and reason for comp time need to be completed



Comp Time Earned

Req ID: 1000xxx

Use this form to add compensatory (comp) time to an employee's bank balance.

If you have any questions about this form, contact Records Management at (302) 831-8677 or hssystemadmin@udel.edu.

Originator

Originated by: Cynthia Doucette (700099999)
IT - Web Development
cindi@udel.edu

Employee

Employee: Christopher Petrilla (700099999)
IT - Web Development (04375)
petrilla@udel.edu

Pay group: Bi-weekly AFSCME (BAF)

Job code: Description (41004)

Standard hours per week: 40

Dates

Date entered: 7/2/2012

Date	Type	Number of hours	Calculated comp time (hours)	Reason for comp time
Mon 7/2/2012	Straight time (1.0)	1	3.75	Reason
	Overtime (1.5)	2.5		
Tue 7/3/2012	Straight time (1.0)	4	4	Reason
Wed 7/4/2012	Double time (2.0)	2	4	Reason

Bank balance

The balances below reflect currently approved comp time off Leave Requests.

Balance before this request (hours)	Balance before this request (days)	Comp time total (hours)	Comp time total (days)	New balance (hours)	New balance (days)
22.5 hours	3.00 days	11.5 hours	1.53 days	34 hours	4.53 days

- Time submitted will be summarized and comp time balances for the employee will display



Routing and authorization

Role	Holder	Completed on
Originator	Cynthia Doucette	
Supervisor	Choose one... ▾	
Choose one ▾	<input type="text"/> (lookup)	
Choose one ▾	<input type="text"/> (lookup)	
Choose one ▾	<input type="text"/> (lookup)	
Final approver	RM-TA	
Copy	Maria Mullin (supervisor)	
Copy	Cynthia Doucette (originator)	
Copy	Christopher Petrilla (employee)	
Copy	Cynthia Doucette (timekeeper)	

[Previous step](#)
[Exit without Saving](#)
[Finish and submit](#)

- The employee's supervisor will need to approve the form
- The final approver is RM-TA (Records Management)
- If the employee is not the originator then the employee will receive a copy of the form
- The form will update the bank balances in UD Pay

Leave Request



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Leave Request

If you have any questions about this form, contact Records Management at (302) 831-8677 or hrrsystemsadmin@udel.edu.

- [Start a new request](#)
- [Modify or view my existing requests and bank balances](#)
- [Modify or view existing requests and bank balances for someone else](#)

- The originator can start or modify an existing request
- HR Liaisons and Timekeepers will have the ability to start a request on behalf of another employee



Leave Request

[Menu](#) [Help](#) [Logout](#)

Req ID: 1000xxx

If you have any questions about this form, contact Records Management at (302) 831-8677 or hrrsystemsadmin@udel.edu.

Symbol key: * Required information, ! Error

Originated by: Cynthia Doucette (700099999)
IT - Web Development
cindi@udel.edu

Submitted on behalf of: If this request is for you, leave this field blank.

Submit one request for each contiguous block of days. For example, submit one request covering June 1 through June 8; submit two requests for June 1 and June 8.

Type: *

Start date: *

End date: *

Number of hours you work per day: *

- Requests must be for a continuous period of time (Ex. 8/1/xx to 8/5/xx)
- If you need to request leave for 8/1/xx and 8/3/xx then a form will need to be completed for each day



Leave Request

[Menu](#) [Help](#) [Logout](#)

Req ID: 1000xxx

If you have any questions about this form, contact Records Management at (302) 831-8677 or hrsystemsadmin@udel.edu.

Symbol key: * Required information, ! Error

Originator

Originated by: Cynthia Doucette (700099999)
IT - Web Development
cindi@udel.edu

Submitted on behalf of: Christopher Petrilla (70000000)
IT - Web Development
petrilla@udel.edu

Request details

[Add day before](#)

Date	Type	Hours requested	All day	Hours
Mon 7/2/2012	Vacation +	7.5	<input type="checkbox"/>	<input type="text"/> to <input type="text"/>
Tue 7/3/2012	Vacation +	7.5	<input checked="" type="checkbox"/>	
Wed 7/4/2012	Holiday +	0.0	<input checked="" type="checkbox"/>	
Thur 7/5/2012	Vacation +	7.5	<input checked="" type="checkbox"/>	
Fri 7/6/2012	Vacation +	7.5	<input checked="" type="checkbox"/>	
Sat 7/7/2012	Vacation +	0.0	<input checked="" type="checkbox"/>	
Sun 7/8/2012	Vacation +	0.0	<input checked="" type="checkbox"/>	
Mon 7/9/2012	Vacation +	7.5	<input checked="" type="checkbox"/>	

[Add day after](#)
[Previous step](#)
[Exit without Saving](#)
[Next step](#)

- Based on the date range entered on step one the number of days for the request will appear
- The type of leave will need to be selected and if an employee is using two types of leave such as vacation and sick on the same day then the plus sign will need to be selected
- The number of hours will default to the standard hours for the employee and the all day checkbox will default to yes
- If the leave is not for all day then the employee must provide the time for the leave request (Ex. 1:00 PM to 3:00 PM)



Leave Request

[Menu](#) [Help](#) [Logout](#)

Req ID: 1000xxx

If you have any questions about this form, contact Records Management at (302) 831-8677 or hrsystemsadmin@udel.edu.

Symbol key: * Required information, ! Error

Originator

Originated by: Cynthia Doucette (700099999)
IT - Web Development
cindi@udel.edu

Submitted on behalf of: Christopher Petrilla (700000000)
IT - Web Development
petrilla@udel.edu

Request details

Date	Type	Hours requested	Time range
Mon 7/2/2012	Vacation	4	1:00 PM–5:30 PM
Tue 7/3/2012	Vacation	7.5	All day
Wed 7/4/2012	Holiday	0.0	
Thur 7/5/2012	Vacation	7.5	All day
Fri 7/6/2012	Vacation	7.5	All day
Sat 7/7/2012	N/A	0.0	
Sun 7/8/2012	N/A	0.0	
Mon 7/9/2012	Vacation	4	9:00 AM–1:00 PM

Are you requesting special benefits?

Choose one ▾

Comments:

Emergency contact information:

Provide a phone number or email address where you can be reached in case of an emergency. Or provide contact information for your backup.

Bank balances

Your initial balance reflects the amount of leave time you will have accrued by the start date of this request. Your ending balance includes your time off from this request.

Bank	Initial balance (hours)	Initial balance (days)	Ending balance (hours)	Ending balance (days)
Vacation	135 hours	18.00 days	93.75 hours	12.5 days

- The last page summarizes the request and provides the bank balance for the leave types made on the form
- The request for special benefits only applies to faculty and will only appear on the form for faculty




Routing and authorization

Role	Holder	Completed on
Originator	Cynthia Doucette	
Supervisor	Choose one... ▾	
Choose one ▾	<input type="text"/> (lookup)	
Choose one ▾	<input type="text"/> (lookup)	
Choose one ▾	<input type="text"/> (lookup)	
Timekeeper	Cynthia Doucette	
Copy	Maria Mullin	
Copy	Christopher Petrilla	

[Previous step](#)
[Exit without Saving](#)
[Request time off](#)

- A supervisor will be required to approve the leave request form
- The timekeeper will receive a copy of the leave request form
- When approved the form will update the bank balances in UD Pay

HR Supervisor Update


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HR Supervisor Update
Menu Help Logout

Req ID: 1000xxx

Use this form to create, change, or remove supervisors.

If you have any questions about this form, contact Records Management at (302) 831-8677 or hrrsystemsadmin@udel.edu.

Symbol Key: * Required Information ! Error

Requested by: Christopher Petrilla (700099999)
IT-Web Development (04375)
petrilla@udel.edu

Request details

Request type: * Choose one... ▼

Effective date: *

Supervisor table

You may provide a maximum of two alternates for each category.

	Name/UD ID	Employee status	Department	Signature authority
Supervisor:	<input type="text"/>			<input type="checkbox"/>
Supervisor (1st alternate):	<input type="text"/>			<input checked="" type="checkbox"/>
Supervisor (2nd alternate):	<input type="text"/>			<input checked="" type="checkbox"/>
Final approver:	<input type="text"/>			<input type="checkbox"/>
Final approver (1st alternate):	<input type="text"/>			<input checked="" type="checkbox"/>
Final approver (2nd alternate):	<input type="text"/>			<input checked="" type="checkbox"/>
Chair	<input type="text"/>			<input type="checkbox"/>
Chair (1st alternate):	<input type="text"/>			<input checked="" type="checkbox"/>
Chair (2nd alternate):	<input type="text"/>			<input checked="" type="checkbox"/>
Dean/VP:	<input type="text"/>			<input type="checkbox"/>
Dean/VP (1st alternate):	<input type="text"/>			<input checked="" type="checkbox"/>
Dean/VP (2nd alternate):	<input type="text"/>			<input checked="" type="checkbox"/>
Timekeeper:	<input type="text"/>			<input type="checkbox"/>
Timekeeper (1st alternate):	<input type="text"/>			<input type="checkbox"/>
Timekeeper (2nd alternate):	<input type="text"/>			<input type="checkbox"/>

- This form will allow you to request a new supervisor code, to update an existing code or to inactivate a supervisor code

Routing and authorization

Role	Holder	Completed on
Final approver:	HR-IT	
Copy:	HR-ITC	
Copy:	Christopher Petrilla	

Finish and submit

- The form will be reviewed and approved by HR-IT.
- The form will update Peoplesoft

JED Changes

- There will be minor changes made to the JED
 - Adding a new field to indicate for the employee if they have work study and what type of work study award
 - For misc wage and student workers, we will now collect the default hourly rate for the employee's primary job assignment
 - The LAM Distribution section will also need to be completed for misc wage and student workers in order to provide their default funding

Collecting Data

- We are trying to have the additional assignments web form completed before go live so you can use this form to provide us with your additional assignment data
- We will send out a spreadsheet to collect leave balance information
- We will also send out a spreadsheet to collect a default funding source for all misc wage and student workers
- We are also in the process of reviewing all supervisor code information that you provided and updating Peoplesoft with your timekeeper information and any other changes

UD Pay Training

- We will be providing Just-In Time Training in September
- We are working on the logistics and will notify everyone when registration for the training will begin
- We would like to train by Dept/College/Admin Unit
- We will contact each area in the next week or two

UD Pay Website & E-Mail

- We are working on developing a website for UD Pay. When the website is up we will send out an e-mail notification.
- If you have any questions, please feel free to send an e-mail to Time-Attend-users@udel.edu.

- Questions?