

Jennifer McMillin, Director, HRIS Applications

PeopleSoft HR Upgrade

➤ Implementation Dates

- Starting at 6 PM on Thursday, January 7, 2016, the HR System will be unavailable to users while the upgrade is in progress.
- The upgraded database (9.2) is expected to be available on Monday, January 11, 2016 at around 8 AM. An email will be sent notifying users when the HR System is available.
- Web clocks will not be available during the upgrade for bi-weekly employees to clock in and out but punch card devices will be available.
- HR will notify employees the first week in January of procedures to follow during and after the upgrade.

➤ How we define a manager – “Reports To”

- The “Reports To” Manager, which is currently used for ePerformance, will also be the time approver (for bi-weekly employees) and absence request approver (bi-weekly and monthly employees) after the upgrade.
- In November, HR distributed a list of Reports To Managers to the CDAs so that changes could be submitted by spreadsheet to HR.
- Currently, about 500 positions do not have a Report To Manager assigned to them.
- Compensation may reach out to departments with missing Reports To Managers before the upgrade to see if they will update the spreadsheet or departments can submit a ePRF to change/add the Reports To Manager if they like.
- Jennifer can also provide queries to interested departments to show current Report To Managers and any positions with missing Managers.
- HR will assign a Reports To Manager prior to the upgrade if one is not assigned by the department.

➤ TRAM

- Following the HR System upgrade, the Reports To Manager will be the only approver of time and absence requests. Reported Time will automatically be approved, and each night Payable Time will be generated for employees. The Reports To Manager must approve the Payable Time by the payroll deadlines. Business administrators will be able to view time but cannot approve it.
- If the Reports To Manager will be out of the office temporarily, he/she can select a delegate approver to approve on his/her behalf. Though not intended for long-term use, approval delegations can be made indefinitely, if needed.
- After the upgrade, the Reports To Manager’s approval will replace the need for Time Approvers and Payroll Approvers. Therefore, there will no longer be a need for TA or PA training or to complete a HR Security Access Form for TAs or PAs. Reports To Managers will be setup through an overnight process after submitting an ePRF.
- If a Reports To Manager changes during the middle of a pay period, all bi-weekly time for that pay period must be approved by the new Reports To Manager.
- If a Reports To Manager’s position is vacant, the next higher Reports To Manager (i.e., the vacant position’s Reports To Manager) will be responsible for approving time and absences.

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- All high exceptions (missed and out of order punches) must be approved before the upgrade.
- All time must be approved before the upgrade. Any unapproved time will be approved by HR.
- HR is creating a TRAM Workcenter to put all TRAM-related pages and reports in one location for easier access.
- ePerformance
 - The deadline for completing 2015 ePerformance evaluations has been extended to March 31, 2016 due to the upgrade.
 - In April 2016, HR will introduce a new template for 2016 ePerformance. Some of the new features include:
 - 360 reviews – Option for supervisor, customers, and peers to evaluate an employee for a more well-rounded evaluation. It can also be used for employees who have multiple Report To Managers, though one Manager will have ownership of the ePerformance process and will need to incorporate suggested scores and comments from the other Manager.
 - Weights will be simplified by eliminating them within a section (Goals, Responsibilities, etc.) though there may still be weights for each section.
 - Checkpoint feature that reminds Managers to review the goals of their employees half way through the year to make sure they are still relevant.
 - HR will provide training on the new template for ePerformance.
- W-2's and Affordable Care Act Reporting
 - Payroll sent an email reminder to all employees to review and update their personal information in PASS so that W-2's are issued correctly in January.
 - In January, Payroll will also issue Affordable Care Act (ACA) forms 1095C for the first time.
 - Employees who worked an average of 30 or more hours per week in 2015 will receive a Form 1095C from both UH System and the State of Texas Employment Retirement System (ERS). The UHS 1095C will indicate when insurance was offered to the employee and the ERS 1095C will indicate the type of insurance provided. Employees will need both forms when completing their 2015 tax return.
 - Employees can opt-in for electronic receipt of W-2's and the UHS 1095C, which allows employees to print them on demand, if needed. Once they opt-in, they will no longer receive a paper W-2 or 1095C from UHS until they opt-out.

Joan Nelson, Associate Vice Chancellor/Associate Vice President, Human Resources

Corestaff Contract

- The Corestaff temporary staffing services contract ends December 31, 2015. However, Joan is working to extend the contract until June 30, 2016 in order to create sufficient time to contract with another staffing service.
- Human Resources conducted a RFP for staffing services and is in the final stage of selecting the vendor. However, Corestaff chose not to submit a proposal for the RFP so another vendor will receive the new contract.

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Business Partner Implementation

- For the past several years, about 85% of HR's activity has focused on transactions (hiring and paying employees, etc.) and about 15% has focused on strategic planning (succession planning, etc.). HR wants to place more emphasis on strategic planning – perhaps 60% transactional and 40% strategic.
- HR is piloting the Business Partner program in Student Affairs and Facilities, Planning, and Construction (within Administration & Finance) in which an HR employee will be stationed in the department to help support the department's strategic HR goals.
- The HR Business Partner will work with the various units in HR (Compensation, Staffing, Training & Development, Benefits, etc.) to help the department accomplish its goals in the most expeditious way possible.
- Clausezette Davis will be the HR Business Partner for Student Affairs and FP&C during this pilot program, which is expected to last six months or less. An HR Generalist will be hired soon to take over Clausezette's current responsibilities in HR.
- See the HR PowerPoint presentation for more information.

Mike Glisson, Assistant Vice President for Finance and Controller

Concur Update and Reminders

- The Employee Self-Registration page for Concur has been updated based on feedback received from college/division administrators (CDAs).
- A Non-Employee Registration page, which will be completed by an employee, is being developed. When implemented, this page will replace the need to send a Concur Access form to Finance to create a profile for a non-employee. However, an Access form will still be required to make changes to the non-employee's profile in Concur after it is setup.
- CDAs should verify with Travel Card cardholders, custodians, and delegates in their college/division that they are submitting Expense Reports in Concur to account for all Travel Card transactions in the time required.
- Unless otherwise announced by Accounts Payable, Travel Card transactions with a transaction date in the prior month should be accounted for on a Concur Expense Report and submitted to Accounts Payable in Concur workflow by the 25th of the following month.
- Below is a summary of the activity and due dates related to Travel Cards over the past couple of months for departments who began using Concur on November 2:
 - October billing cycle (T-Card transactions posted September 4 to October 3) – Print and sign the GCMS Expense Report and upload with backup to PeopleSoft.
 - October TC transactions in Concur (only T-Card transactions posted after October 3 appear in Concur) – An Expense Report for T-Card transactions appearing in Concur with an October date should have been submitted to AP by November 25.
 - November T-Card transactions in Concur – Create and submit an Expense Report through Concur workflow to AP by December 23.
- On November 20, Samantha Yurus sent an email to the CDAs with a list of T-Card transactions posted through November 18 (transactions take two days to post normally) that were not submitted to AP on a Concur Expense Report. Transactions dated October 31 and earlier were highlighted because an Expense Report should be submitted by November 25.

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- On December 22, Samantha will send another email to the CDAs with a list of T-Card transactions posted through December 20 that have not been submitted to AP on an Expense Report. Transactions dated November 30 and earlier will be highlighted because an Expense Report should be submitted by December 23.
- CDAs should use the lists provided by Samantha to follow-up with their T-Card cardholders, custodians, and delegates who create Concur Expense Reports to ensure they submit Expense Reports for these transactions in a timely manner. The longer T-Card transactions remain unprocessed, the more likely receipts will be lost for those transactions.
- Mike Glisson is working on obtaining an additional service from Concur that will provide more frequent reporting of various types.

Cost Center Manager Dashboard

- Mike demonstrated (with help from Grace Rosanes in the Division of Research) the Cost Center Manager Dashboard, which is also known as the Cost Center Summary page in the Finance System.
- The Cost Center Manager Dashboard was designed initially by the Division of Research to give faculty members with grants easier and faster access to financial information about their cost centers. It shows the Cost Center Manager a one line summary of each of his/her cost centers with Budget, Expense, Commitments (Open and Soft Commitments combined), and Balance. By clicking on the cost center, the Cost Center Manager can view a breakdown by expense category (Salaries, Fringe Benefits, M&O, etc.). From there, additional detail can be obtained by clicking the Subtotal in the Budget, Current Month Expense, Cumulative Expense, Commitments, or Remaining Balance columns.
- Within the next couple of weeks, all UH faculty will be given access to a new icon for the Cost Center Manager Dashboard in AccessUH. When they click on the icon, they will see cost center information for cost centers where they are listed as the Cost Center Manager. If they are not a Cost Center Manager, nothing will appear when they click on the icon.
- Additional information will be available to faculty through this icon in the future, including non-financial information, which is why it is being made available to all faculty members to start with.
- Certifying signatories will also be given access to the Cost Center Summary page in the Finance System, which is the same financial information that faculty will be able access through the new icon. However, certifying signatories will be able to pull up any cost center, not just their own. Access is limited to certifying signatories and faculty members who are Cost Center Managers at this point because the drill down capability includes payroll detail.
- Instructions on using the page will be provided after the new icon becomes available to faculty and certifying signatories have been given access in the Finance System. This is the first phase of a page that will be improved over time. Also, changes will be made to the page to make it easier to view non-project cost centers, since it was originally designed for grants.

Combining Certifying Signature, Contract Delegation, and Endowment Delegation Forms

- The CDAs suggested combining the forms to record certifying signatories, contract delegations, and endowment delegations. Mike will check with Contracts Administration and University Advancement to see if they are okay with this change.