College/Division Administrator Meeting Minutes
March 10, 2011

Vivian Do, Financial Analyst
Sabrina Hassumani, Executive Director, Academic Budgets and Administration

Monthly Checklist Demonstration
Sabrina discussed improvements made by Vivian to the Monthly Checklist used by Academic Affairs to document the completion of various administrative tasks that are required by policy or performed as a good business practice. Improvements include:

- Department checklists are linked to and automatically update the college checklists, eliminating the need for double data entry. Centralized colleges also enter data in the department checklist, which updates their college checklist.
- Department checklists contain the due date at the top of the spreadsheet and clarifying information, when needed, about the task to be completed in the Notes column.

Academic Affairs will save a copy of the college checklists on the 16th of each month, so they know which colleges did or did not complete their tasks on time, however, departments may continue to update their department checklist as needed.

David Johnson, Executive Director, Technology Services and Support

Initial Goals and Objectives
David, who has been at UH for about 60 days, explained his vision for Technology Services and Support (TSS), which involve three tiers of support.

- Departments should be able to contact the TSS Help Desk (Tier 1) at x31411 with any question, problem, or suggestion related to information technology.
- If the Help Desk cannot resolve the problem themselves, they will escalate the problem to a Tier 2 person who has more expertise in that area but also has a broad understanding of how information technology works at UH. The Tier 2 person will communicate directly with the customer.
- If the Tier 2 person cannot resolve the problem, the Tier 2 person will discuss with a Tier 3 person, who is a subject matter expert in the problem area, and the Tier 2 person will report back to the customer with the answer or solution.

David is working with TSS staff to improve customer service by utilizing the above approach. While the tiers are already in place, TSS procedures will need to be modified to implement this approach to problem solving and customer service.

Chief Malcolm Davis, Assistant Vice President for Public Safety and Security
Officer Aaron O'Donley, Training Coordinator

"Shots Fired" Presentation
Officer O'Donley and Chief Davis showed a 20 minute video presentation that explains what to do if you see someone with a gun enter the workplace or hear gun shots. The "Shots Fired" and other videos are available on the UHDPS website: http://www.uh.edu/police/active_shooter.html

All UH employees are encouraged to view this video in order to be better prepared in the event of an active shooter situation. UHDPS can also show this video to departments and discuss it with them, if they wish. Contact Ginger Walker at x30583 to make arrangements for a department presentation.

In the event of a life threatening emergency, UH employees should call 911, rather than x33333. When you tell the 911 dispatcher that you need the police, the 911 dispatcher will immediately connect you with UHDPS through a special line that alerts UHDPS it is a 911 call. This will ensure that your call is handled immediately by someone at UHDPS, whereas calls to x33333 could be delayed if the UHDPS dispatcher is already busy with another x33333 caller.

Joan Nelson, Executive Director, Human Resources

ePerformance Update
Currently, 833 employees do not have criteria established in ePerformance by their supervisor. HR is working with those departments and supervisors to complete the criteria before the March 31 HR/SA upgrade.

While supervisors establish the performance criteria for most employees, Executive Directors and above will establish their own criteria in ePerformance, which will be approved by their supervisor. HR will provide instructions for doing this.

Susan Nester, Interim Director, HRMS

HR System 9.0 Upgrade Update
The HR System will go down for the upgrade at about 5 PM on March 31 (Thursday) and is expected to come back up the morning of April 5 (Tuesday). PASS will also be down during the upgrade. HR will send a notice to all employees and post a notice on the portal sign-in page.

During the upgrade, the HR Reporting Database will be available. Though you will not be able to run reports in Reporting, you will be able to run queries that were migrated to Reporting on March 15 and view data that is a copy of HR Production from just before the upgrade.

While pending Time & Labor, eForm, and PASS transactions prior to the upgrade are expected to be available after the upgrade, departments and employees are encouraged to clear as many pending transactions as possible prior to the upgrade so that there are fewer transactions to migrate during the upgrade.

Users should not notice many changes from the upgrade, but HR will provide instructions for the changes that occur. The upgrade is needed so that we can implement future enhancements to the HR System that require we operate from the 9.0 platform. In addition, the upgrade is needed to ensure continued software support from Oracle, which owns PeopleSoft.

Carla Ponzio, Interim Executive Director, Payroll/HRMS

FMLA Processing Update
HR created time reporting and earnings codes, so that employees can properly record family medical leave (FML) on their timesheet. These codes should be used starting March 1, 2011 for

extended absences from work due to approved FML. Intermittent FML (periodic time off from work) is not recorded with these codes. HR will look at creating codes for intermittent FML as well.

FML procedures include:

- The FML form is completed and signed by the employee and physician, signed by the employee's supervisor and college/division administrator, and sent to HR for review and approval. The supervisor and administrator signatures do not imply approval. Their signatures just indicate that they are aware of the FML application. It is the employee's right to apply for FML and HR's responsibility to review and approve it.
- If the FML form is approved, the HR Benefits Office will verify with the department the vacation and sick leave available to the employee.
- Benefits will then create an ePAR for paid and/or unpaid leave and enter the leave on the employee's timesheet.
- All return to work releases from physicians should be sent to HR directly for approval. Releases with restrictions (e.g., can only work four hours a day, etc.) must be approved by Affirmative Action as well.
- Once approved, the department will prepare the ePAR to return the employee to work from leave status.

Note: Departments should not maintain in their files or upload documents in the HR System with employee health information, such as completed FML forms or doctor releases, due to privacy concerns. These documents should be sent to HR directly by fax, interoffice mail, or US mail.

HR will offer FML training for supervisors and managers beginning March 23. Contact Cristina Sanchez at x35743 to schedule training.

<u>Time & Labor Approved Time</u>
Carla asked that departments run the queries in the HR System prior to the March 31 upgrade so that pending reported and payable time can be approved:

- HRMS_TL_PAYTIME_NA_BY_DEPT Payable time needing approval.
- HRMS_TL_RPTTIME_NA_BY_DEPT Reported time needing approval.

<u>Paycheck Questions</u>
As indicated in Carla's January 13 email to all employees, federal income tax and FICA tax withholding were different for the January 1, February 1, and March 1 paychecks due to tax rate changes passed by Congress in late December, after the January 1 payroll had run.

- The January 1 check used the 2010 Tax Table for income tax withholding and the higher FICA tax rate.
- The February 1 check used the 2011 Tax Table, the 2011 FICA tax rate, and included a refund of the excessive FICA withholding (2%) on January 1.
- The March 1 check used the 2011 Tax Table and the 2011 FICA tax rate.

Payroll Processing

Due to the HR System upgrade and American Recovery and Reinvestment Act (ARRA) reporting requirements, the schedule for B032911 (bi-weekly pay period ending 3/29/11) has changed as follows:

- Off-cycle moved to Monday, March 28.
- On-cycle timesheet due in Payroll office at 5 PM on Tuesday, March 29.
- No Trial Verification Report. Payroll will confirm the pay cycle once all timesheets are entered on Wednesday, March 30 (about noon) and notify departments to run the Final Verification Report.
- Any corrections to the Final need to be submitted by 3 PM on Thursday, March 31.

Mike Glisson, Controller

Revised Cost Center Verification Procedures

Cost center verification procedures were revised to streamline the process of monthly verification and reduce the time required the Cost Center Manager or designee to review. Changes include:

- Not requiring verifiers to enter a “x” in the Verified column next to verified transactions on the Verification Worksheet. He or she will acknowledge that all transactions were verified or the Cost Center Verification Log or by email.
- Allowing monthly verifications to be performed at the department level instead of the Cost Center Manager level. Since there are much fewer departments than Cost Center Managers, there will be fewer reports to run, verify, and review. Departments can still do the verification at the cost center manager level, if they choose, or at the college/division level for centralized units.
- Allowing reviewers of verifications to perform their review twice a year, instead of monthly.
- Development of a one-page Cost Center Verification Log for verifiers and reviewers to initial to document their verification and review, instead of signing a Verification Worksheet for each cost center. Mike will add an option for email notice of verification and review to the procedures, which can be used in place of the Log, if desired.

Internal Audit and Academic Affairs reviewed and approved these procedures, which can be implemented immediately and used retroactively, if desired, back to September 2010.

The revised Cost Center Verification Procedures, the Cost Center Verification Log, and an updated Cost Center Manager Delegation Memo are located on the Finance References page under Cost Center Verification Toolkit: http://www.uh.edu/finance/pages/References.htm