

# FMP Payroll Reports

Revised 3/2/06, 10/12/06, 3/27/07, 1/4/08

## Visas Expiring in 30 days: Responsible Person; Payroll Coordinator

Purpose: to identify employees with visas that are going to expire in 30 days. Employees must be contacted to submit renewal visas.

Find Criteria:

Employee Information Form

U.S. Residency  Yes  No

Visa Status:  Visa Type:  Visa Begin Date:  Visa End Date:

\* Required Fields  
Push **Assignment** button to go to the next screen

Employee Type:  Education Level:  Ethnic:  Status:

Visa End Date = Last date of the upcoming month.

Status = Active

## H1B Visas Expiring in 6 months: Responsible Person; Payroll Coordinator

Purpose: to identify employees with H1B visas that are going to expire in 6 months. Employees must be contacted to submit renewal visas if required.

Find Criteria:

Employee Information Form

U.S. Residency  Yes  No

Visa Status:  Visa Type:  Visa Begin Date:  Visa End Date:

\* Required Fields  
Push **Assignment** button to go to the next screen

Employee Type:  Education Level:  Ethnic:  Status:

Visa Type: H1B

Visa End Date = 1<sup>st</sup> of current month through last of day of 6<sup>th</sup> month.

Status = Active

## Employees Terminating in the next 30 days: Responsible Person; Payroll Coordinator

Purpose: to identify employees who have a termination date in the upcoming 30-day period. Notify supervisor of pending termination date and verify whether the assignment is actually going to end or should be re-appointed.

Find Criteria:

Current Assignment

Name:  Employee ID:  Social Security:

End Date = Date range covering next 30-day period.

End Date:

Fields: \* Salary, \* Distri., \* Payroll Type, \* Begin Date, \* End Date, Total, \* FTE, \* Pay Rate

### Employees Terminating in the Current Month: Responsible Person; Payroll Coordinator

Purpose: to identify employees who are terminating in the current month and verify that the PAR and Employee Termination Clearance have been processed/initiated.

Find Criteria:

Same as above, except date range is beginning to end of the current month.

### Employees Hired within last 3 months or last 6 months: Responsible Person; Payroll Coordinator

Purpose: to identify **benefits-eligible** employees who were hired in the last 3 months and last 6 months. An initial performance review must be recommended to the supervisor for those hired in last 3 months. A initial performance review must be also be recommended to supervisors for employees hired in last 6 months.

Find Criteria:

The screenshot shows the 'Employee Information Form' interface. A red circle highlights the 'Date of Birth' field containing '10/01/05..04/30/2006'. Another red circle highlights the 'Status' field containing 'ACTIVE'. A text box on the right explains the date range: 'Hire Date = Date range covering prior 6-month or prior 3-month period. Example: 10/01/05..04/30/06'. Below the text box, it says 'Status = Active'. The form also includes fields for Date of Birth, Gender, Marital Status, Separation Date, Service Date, U.S. Residency, Visa Status, Visa Type, Visa Begin Date, and Visa End Date. Navigation buttons (First, Prev, Next, Last) and a 'Push Assignment button' are also visible.

### Employees Hired within last 2.5 months

Purpose: to identify newly hired, benefits-eligible staff and take the following actions

- notify employee that his/her 90-day health insurance wait is about to end.
- Find out if they signed the insurance waiver or elected to take the health insurance coverage. If coverage elected, what plan did they select (employee only, family, etc).
- Complete the Fringe Benefit calculator based on the health insurance options selected. Add a statement "I understand that my cost center will be charged for the fringe benefits shown." Add a line for PI Signature and Date.
- Give to PI for signature. File.
- Verify that the FMP Assignment and Ledger are encumbered for the health insurance option chosen.

Find Criteria:

Same as above, but date range will cover the 2.5 month period.

### Un-expended Payroll by Month: To be run upon request of DBA; Reconcilers Will Verify Un-expended payroll during their monthly reconciliations. This report is a checkpoint for overall un-expended payroll.

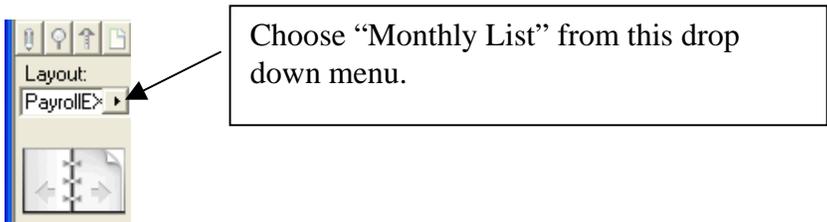
Purpose: to identify any payroll assignments that did not post to the cost center as expected. Investigate the reason and resolve.

Find Criteria:

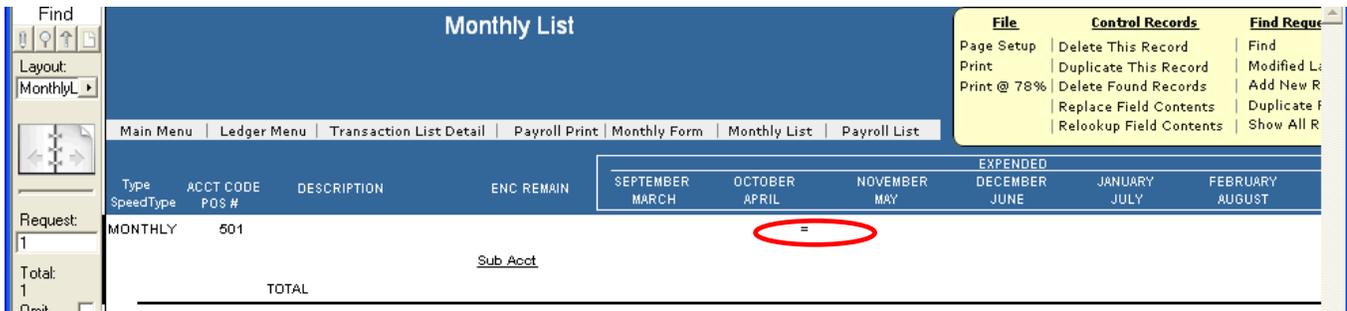
From the **PayrollEXP/ENC List** layout, enter the following search criteria:



Then, use the Layout menu (on the left menu) to navigate to the Monthly List Layout:



Enter an = (equal sign) in the field of the month you are running the report for. Example, if you want to find unexpended payroll for the month of October, enter = in the October field.



Press the enter key.

Find Results:

Monthly List									
Type	ACCT CODE	DESCRIPTION	ENC REMAIN	EXPENDED					
				SEPTEMBER MARCH	OCTOBER APRIL	NOVEMBER MAY	DECEMBER JUNE	JANUARY JULY	FEBRUARY AUGUST
Monthly	50107	FY06 [REDACTED]	\$0.00						
36782	0100046	6/1/05 - 8/12/2005 Salary: 20\hour	Sub Acct				1,600.00	1,600.00	2,080.00
		TOTAL	\$5,280.00						
Monthly	50105	FY06 [REDACTED]	\$0.00						
36725	0010552	6/1/2005 - 8/31/2005 Salary: 1460\month + Ins. Stip	Sub Acct				1,600.00	1,600.00	1,600.00
		TOTAL	\$4,800.00						
Monthly	50102	FY06 [REDACTED]	\$41,592.60						
19518	0010848	9/1/2005 - 8/31/2006 [REDACTED]	Sub Acct						

Review the dates of each record to determine whether salary was expected in the given month.

### Welch Support Eligibility: 5-year PhD Limit

Purpose: to identify research staff employees who will exceed the 5-year PhD limit within the current fiscal year.

#### Navigation

- FileMaker Pro
- HR Payroll
- Current Assignment (“Employee Information” screen should appear)
- Find:
  - “Employee Type” – Select ‘Staff-Research’ from this drop down menu.
  - “Date PhD Awarded” - Type less than sign and date in this field.(Example: < 09/01/2002). To calculate the date, take your current fiscal year, 2007, subtract 5. You get 2002. Do a find for all degrees awarded prior to 2002 and you will get all employees who will have exceeded the five-year limit during the current fiscal year.
  - “Status Box” – Select “Active” from the drop down menu.
  - Enter
  -
- Review the results and make sure that:
  - a) None of the employees listed are currently supported on a Welch grant.
  - b) None of the employees listed will be supported on a Welch grant once they reach the 5-year anniversary of their PhD date. If their assignment extends beyond their PhD anniversary date, notify the PI. Support on the Welch must end on their anniversary date and the funding source must be changed or the assignment ended.

## Welch Support Eligibility: 3-year Employment Limit

Purpose: to identify research staff employees who exceed the 3-year employment limit.

### Navigation

- FileMaker Pro
- HR Payroll
- Current Assignment (“Employee Information” screen should appear)
- Find:
  - **“No. of Year Supported on Welch”** - Type **greater than sign and number of months equal to 36** (3 years) in this field. (Example: >36)

### Note:

The number of records in the found set will appear in the gray status area on the left on the screen.

You may scroll through or print each record. Anyone supported for more than 3 years is out of compliance with Welch guidelines. Appropriate action must be taken to become compliant (request an exception; reallocate charges to a non-grant).