Human Resources Processes
2016-2017
Taking this course allows you to be granted access to the HR module in PeopleSoft. This is essential in accessing employment and position records to be able to process job related transactions.
Topics Covered

- Position Process
- New CBC Process
- Immigration
- Employment Record Process
- Department Budget Table
- Leave Requests (ABM)

- Affiliates
- Benefits
- Employee Relations
- Separations
- Talent & Development
A position comprises the attributes of a specific job (Classification, FLSA Status, Title/Job Code, Division, Reports To) and is referenced by a randomly generated 8 digit number usually beginning with the number 1. A position represents a component of a department or division’s organizational structure.
Position Request/Modification

IAP

Position Navigation

Main Menu
- Organizational Development
- Position Management
- Maintain Positions/Budgets
- Add/Update Position Info

Tips
- Please use the position number (100#), not the EMPL ID (600#) for the “Reports to Position” Field.
- Positions are generated under the department of initiator. If you are creating a position that is not under your purview, please note which department the requested position should belong to.
- Department changes on a position will only be processed once a month. A helpdesk ticket is required for this.
Criminal Background Check

CBC Required for:
- Any applicant under final consideration
- Affiliates / Persons of Interest (POI)

Current employees:
- Considered for promotion
- No previous background check on file
- At President’s discretion

Automated process required effective November 1, 2016

New CBC Process
- Department completes CBC form via electronic venue:
  - UTEP CBC Electronic Form
- HR receives CBC from; link to Kelmar (New Vendor) is sent to candidate via email. Candidate must complete questionnaire within three business days of receiving link.
- HR clears candidate for hire (if applicable) and notifies department via email with Employee ID provided.

A CBC must clear before a candidate starts employment.
Immigration Services

- Provides an array of consultative immigration services around the H-1B, Lawful Permanent Residence, and other relative visa services by trained employees specializing in the field as well as direct contact with immigration attorneys.

- The timeliness and efficiency of our services assist faculty and staff by initiating your immigration process through the Departments of Homeland Security and Department of Labor to ensure employees obtain work authorization documents.
An electronic record within PeopleSoft generated in accordance with relevant position and appointment information as submitted by departments. A job record represents an employee’s actual work assignment and is the source for payroll processing.
Hiring Process

PRE-EMPLOYMENT Paperwork

Candidates must visit Human Resources with the following required documents:

- New Employee Information sheet with CBC DTN completed by the hiring department (Student Employees or any employees not receiving an offer letter)
- Signed Offer letter provided by the Hiring Department (Faculty)
- Staff will sign their offer letters while meeting with their Business Advisor in Human Resources
- Acceptable I-9 identification documents

Forms and the Hiring Process information can be found at: http://hrtc.at.utep.edu/

Appointment Actions Request IAP:
For instructions on how to complete the Appointment Actions Request IAP:

- [http://hrtc.at.utep.edu](http://hrtc.at.utep.edu) > IAP Links and Supporting Documents > Appointment Actions Request Form Instructions

Job Record Navigation

Main Menu
- Workforce Administration
- Job Information
- Current Job
Student Hourly Employees


- If you would like to offer a rate above mid-point, a Request for Salary Increase is required. This is located [here](http://admin.utep.edu/Default.aspx?tabid=74241).

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<table>
<thead>
<tr>
<th>Undergraduate Titles</th>
<th>Job Title</th>
<th>Job Code</th>
<th>Job Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Study Student Employee</td>
<td>10066 Work Study Student</td>
<td></td>
<td>Students working who are under the Financial Aid Work Study Program.</td>
</tr>
<tr>
<td>OCSEO Program Student Assistant</td>
<td>10077 OCSEO Program Student</td>
<td></td>
<td>Students working who are under the On Campus Student Employment Program.</td>
</tr>
<tr>
<td>Undergraduate Assistant I</td>
<td>10070 Undergraduate Assistant I</td>
<td></td>
<td>Undergraduate student with a classification of freshman or sophomore and not associated with teaching or research project.</td>
</tr>
<tr>
<td>Undergraduate Assistant II</td>
<td>10072 Undergraduate Assistant II</td>
<td></td>
<td>Undergraduate student with a classification of junior or senior and not associated with teaching or research project.</td>
</tr>
</tbody>
</table>
Student Salaried Employees

- 9 month academic and 12 month annualized salary employees can expect to be paid on the 1st working day of each month.
- If you would like to offer a rate above mid-point, a Request for Salary Increase is required. This is located here.

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Job Code</th>
<th>Job Description</th>
<th>Appointment Basis</th>
<th>Type of Pay</th>
<th>Rate of Pay</th>
<th>Max. Hours Per Week</th>
<th>Percent Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate Teaching Assistant</td>
<td>10061</td>
<td>Student enrolled in a baccalaureate program appointed to assist in an instructional capacity. Cannot be instructors of record.</td>
<td>9-month</td>
<td>Salary</td>
<td>$13,900</td>
<td>$16,950</td>
<td>$20,000</td>
</tr>
<tr>
<td>Undergraduate Research Assistant</td>
<td>10095</td>
<td>Student enrolled in a baccalaureate program appointed to perform duties associated with a research project.</td>
<td>9-month</td>
<td>Salary</td>
<td>$12,100</td>
<td>$27,300</td>
<td>$42,500</td>
</tr>
<tr>
<td>Masters Assistant</td>
<td>10071</td>
<td>Student enrolled in a master's program and not associated with teaching or research project.</td>
<td>12-month</td>
<td>Hourly</td>
<td>$7.70</td>
<td>$9.45</td>
<td>$11.20</td>
</tr>
<tr>
<td>Masters Teaching Assistant</td>
<td>10063</td>
<td>Student enrolled in a master's program, appointed to assist in an instructional capacity, and are not instructors of record.</td>
<td>9-month</td>
<td>Salary</td>
<td>$16,000</td>
<td>$28,000</td>
<td>$40,000</td>
</tr>
<tr>
<td>Masters Assistant Instructor</td>
<td>10065</td>
<td>Students enrolled in master's program who have completed at least 18 hours in the area of concentration and are listed as instructor of record.</td>
<td>9-month</td>
<td>Salary</td>
<td>$16,000</td>
<td>$30,500</td>
<td>$45,000</td>
</tr>
<tr>
<td>Masters Research Assistant</td>
<td>10090</td>
<td>Student enrolled in a master's program appointed to perform duties associated with a research project.</td>
<td>9-month</td>
<td>Salary</td>
<td>$17,800</td>
<td>$35,925</td>
<td>$58,250</td>
</tr>
<tr>
<td>Ph D Teaching Assistant</td>
<td>10064</td>
<td>Student enrolled in a Ph D program, appointed to assist in an instructional capacity, and are not instructors of record.</td>
<td>9-month</td>
<td>Salary</td>
<td>$35,000</td>
<td>$40,000</td>
<td>$45,000</td>
</tr>
<tr>
<td>Ph D Assistant Instructor</td>
<td>10062</td>
<td>Student enrolled in a doctoral program, teaching in an instructional capacity and are listed as instructor of record.</td>
<td>9-month</td>
<td>Salary</td>
<td>$22,000</td>
<td>$35,500</td>
<td>$49,000</td>
</tr>
<tr>
<td>Ph D Research Associate</td>
<td>10091</td>
<td>Student enrolled in a doctoral program appointed to perform duties associated with a research project.</td>
<td>9-month</td>
<td>Salary</td>
<td>$22,000</td>
<td>$45,390</td>
<td>$68,780</td>
</tr>
</tbody>
</table>
Faculty Employees

- 9 month academic and 12 month annualized salary employees can expect to be paid on the 1st of every month.

- Faculty will be set up 1 of 2 ways:
  - (Academic/9)*12
  - Contract 9 month/4.5 month allocation (Benefit Eligible).

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**Faculty Job Code Table**

<table>
<thead>
<tr>
<th>Position</th>
<th>Code</th>
<th>Description</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professor</td>
<td>10010</td>
<td>Research Professor</td>
<td>10028</td>
</tr>
<tr>
<td>Aerospace/Military Professor</td>
<td>10011</td>
<td>Assistant Professor</td>
<td>10030</td>
</tr>
<tr>
<td>Visiting Professor</td>
<td>10012</td>
<td>Aerospace/Military Assistant Professor</td>
<td>10031</td>
</tr>
<tr>
<td>Clinical Professor</td>
<td>10013</td>
<td>Visiting Assistant Professor</td>
<td>10032</td>
</tr>
<tr>
<td>Adjunct Professor</td>
<td>10015</td>
<td>Clinical Assistant Professor</td>
<td>10034</td>
</tr>
<tr>
<td>Associate Professor Emeritus</td>
<td>10018</td>
<td>Adjunct Assistant Professor</td>
<td>10035</td>
</tr>
<tr>
<td>Associate Professor</td>
<td>10020</td>
<td>Instructor</td>
<td>10040</td>
</tr>
<tr>
<td>Aerospace/Military Associate Professor</td>
<td>10021</td>
<td>Instructor in Clinical Nursing</td>
<td>10041</td>
</tr>
<tr>
<td>Visiting Associate Professor</td>
<td>10022</td>
<td>Aerospace/Military Instructor</td>
<td>10042</td>
</tr>
<tr>
<td>Clinical Associate Professor</td>
<td>10024</td>
<td>Senior Lecturer</td>
<td>10049</td>
</tr>
<tr>
<td>Adjunct Associate Professor</td>
<td>10025</td>
<td>Lecturer</td>
<td>10050</td>
</tr>
<tr>
<td>Research Assistant Professor</td>
<td>10026</td>
<td>Specialist- Faculty</td>
<td>10056</td>
</tr>
<tr>
<td>Research Associate Professor</td>
<td>10027</td>
<td>Non Utep Student Restricted</td>
<td>10060</td>
</tr>
</tbody>
</table>

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The Contract Pay module is used to administer the payment schedule terms associated with the proper processing of 9/9 and 9/12 faculty.

The academic salary and allocation are housed within the job record but the contract determines how that salary and allocation are distributed across a faculty member’s expected work dates.
Compensation Rates (9 MONTH/ACADEMIC)
Compensation Rates (CONTRACT 4.5 Months)
Compensation Rates (CONTRACT 9 MONTH)
All staff related inquiries should be forwarded to your respective HR business advisor.

Departments have authorization to initiate extensions on grant funded appointments.

- **The HRAC’s Objective** – is to support cost containment initiatives, regardless of the source of funds, related to Administrative and Professional (A&P) and Classified employment actions.

- **HRAC Business Rules** – Request to fill vacant budgeted staff positions and request new staff positions.

- **University Pay Plan** – Extend above approved amount, direct hire, supplements, out of cycle merits.

<table>
<thead>
<tr>
<th>A&amp;P JOB CODES:</th>
<th>10100-10999</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLASSIFIED JOB CODES:</td>
<td>11000-19999</td>
</tr>
</tbody>
</table>
Recruitment, Interviews, and Onboarding

Staff

- Recruitment plan
- Job posting
- Prescreens applications
- Coordinates interviews
- Participates in interviews

- Makes contingent offer
- Process criminal background check
- CBC Clears
- Business Advisor makes official offer
- New hire paperwork is completed
- Appointment Actions Request submitted by Business Advisor with signed offer letter.
- Schedules candidate for NEO
Department Budget Table (DBT)

UT x SHARE

P E O P L E S O F T
THE UNIVERSITY OF TEXAS AT EL PASO
What is a DBT used for?

- DBT used when there are changes to:
  - Appointments - New Positions
  - Appointments - Rehires
  - Position Funding Changes (Current Year Corrections Only)
  - Distribution % Changes
  - Department Changes
Who enters DBT’s?

• Typically employees who currently process IAP’s regarding Position Funding/Position Changes will also be responsible for entering DBT changes into Peoplesoft.

• Supervisors select who will enter DBT’s on their behalf. If selected, you will receive an email to accept this delegation.

• You will have the ability to make departmental changes. If someone other than yourself needs to be assigned this role, please get Supervisor’s approval and submit Helpdesk ticket requesting a change.
DBT Delegation & Entry

• Question: Who will enter DBT’s?
  – Typically employees who currently process IAP’s regarding Position Funding/Position Changes.

• How and who will receive DBT access?
  – DBT access will be delegated by the department “Reports To”. An email will be sent to the individuals who has been delegated DBT access by their respective “Reports To”.

• What will I be able to do?
  – After accepting the Delegation request you will be able to make DBT funding changes for all employees that are under the “Reports To”

• Where are DBT changes made?
  – DBT changes are directly entered in PeopleSoft by the DBT proxy.

• You will have the ability to make departmental changes. If someone other than yourself needs to be assigned this role, please get Supervisor’s approval and submit Helpdesk ticket requesting a change.
Accept **Delegation** email request. *(This will be done only once for each Reports To).*

1) **Create IAP** - Initiators to create and submit IAP forms for Position/Funding changes (Budget Office to approve Position Changes. HRTC to approve New Hires and Rehires).

2) **Enter DBT into Peoplesoft** - Once approved, Initiators to enter information from IAP into **DBT** (Peoplesoft).

*Please note: If information on DBT does NOT match information on IAP, it will be Returned/Denied.*
How to Accept Delegation for DBT

1. You will receive an email to accept a delegation request.
2. Click on the link.
3. Sign in to PeopleSoft with your credentials.
5. Click check box next to **DBT Change — Initiate**
6. Click **Accept**
7. Click **OK**
8. You will receive another email confirming you have accepted delegation for DBT
Creating Department Budget Table (DBT) Changes in PeopleSoft
Navigate to Department Budget Table

Main Menu> UTZ Customization> Manager Self Service > Position Manager Center

1. Navigate to Position Management Center
2. Click on Initiate DBT Change Request

PeopleSoft Tip
• DBT is for Current Fiscal Year corrections only. System will allow corrections for prior fiscal years but will not trigger any changes.
## Select Employee in DBT

**PeopleSoft Tip**
- Employee Reporting as of will always populate to current date, date does not need to be changed.

### DBT Change Request

<table>
<thead>
<tr>
<th>Employee Selection Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Reporting as of</strong> 02/22/2016</td>
</tr>
<tr>
<td><strong>Proxy For</strong> Iris Niestas (Director - Managerial)</td>
</tr>
<tr>
<td>Refresh Employees</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Iris Niestas's employees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select</strong></td>
</tr>
<tr>
<td>Select</td>
</tr>
<tr>
<td>Select</td>
</tr>
<tr>
<td>Select</td>
</tr>
<tr>
<td>Select</td>
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<tr>
<td>Select</td>
</tr>
<tr>
<td>Select</td>
</tr>
<tr>
<td>Select</td>
</tr>
</tbody>
</table>

3. Under **Proxy For** select manager you will be entering position funding for.
4. Click the **Refresh Employees** button to pull all employees under Manager.
5. Select Employee you are looking for.
6. Enter Required Fields:
   a) Effective Dt: Appointment start date
   b) Fiscal Year: Current fiscal year
   c) Seq: Must always enter 1
   d) Fund Type: select Grant or Non-Grant
   e) Combo Code: Select Magnifying glass and go to step 8
   f) Distrb %: Must always equal 100%

7. For split distribution, select (+) and repeat step 6 and 8

PeopleSoft Tip

- DBT is for Current Fiscal Year corrections only. System will allow corrections for prior fiscal years but will not trigger any changes.
- All lines with specified earnings codes should be copied over. Example: CDA Earnings Code.
- If funding is the same from previous appointment, select Copy Current Funding.
Looking-up Combo Codes

8. Look for the Combo Code using any of the options provided. We recommend searching by Cost Center or Project.
   - Click Look Up button

PeopleSoft Tips
- Combination Code will be provided on the left side column.
- Since all active combo codes will populate, review the chartfields and select the right one.
PeopleSoft Tips
- For Split distributions, combo codes must be different.

10. Go to the Transaction and Workflow tab.
Submitting DBT

11. Enter brief description under Related Transaction Information.
12. Enter Comments, (see example below). Comments should include corresponding DTN #.
13. Click Save.
14. Click OK.

PeopleSoft Tip
You must SAVE before submitting.
Submitting DBT

15. **Trans ID** will populate.
16. Click **Submit** to send to workflow.

**Department Budget Table Changes**

**Instructions**

Complete the DBT Details tab and return to the Workflow Details tab. Click Save and then Submit when all changes have been made.

<table>
<thead>
<tr>
<th>Set ID</th>
<th>UTEP1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trans ID</strong></td>
<td>000046297</td>
</tr>
</tbody>
</table>

**Transaction Details**

**Related Transaction Information:**

- New Hire

**Comments**

- Please Appoint from 03/01/2016 - 08/31/2016 as follows:
  - 50% cost center 14021600
  - 50% cost center 19010080
17. The Pending Approvers will populate.
18. Click OK

PeopleSoft Tip
Note, the document will route to the UTEP Budget Office for review and approval.
How to check DBT status

Main Menu> UTZ Customizations> Commitment Accounting> Process> View DBT Change Request

1. Navigate to Position Management Center (see navigation above)
2. Click on View DBT Change Request
How to check DBT status

3. Select a Transaction ID to View additional information for the position.

PeopleSoft Tips:
- Only one retro change can be picked up by the system at a time. If multiple changes, only one per payroll can take effect.
- Click the specific Transaction ID to view or approve/deny a DBT change request.
How to check DBT status

4. Click the Transaction and Workflow tab to see the status of the DBT document.

PeopleSoft Tips: By clicking the tab you can see if the changes were Approved or Denied.
Are the balances real-time?
No. Balances are updated every two weeks.

What is the lop-off process?
Employees earn vacation hours each month based on total years of state employment. Vacation leave may be used after six months of continuous state service. An employee’s vacation balance over the maximum carryover converts to Sick Leave from one fiscal year to the next (September-August). Any hours over the maximum carryover must be used and submitted before August 31st.

If my absence request cascades into unpaid leave, will my paycheck automatically be deducted those hours?
Yes, those hours will be automatically deducted from your following paycheck.

Under the leave types that I can choose from I see Educational Activities, what is it?
Educational Activities are 8 hours that you can take for school related activities. If you have children in school between the grades of Pre-K through 12th grade you can select to use this leave in order to attend their events. The time taken for Educational Activities is derived from your Sick Leave balance. It is granted every fiscal year, without a carry forward
**Department:**
- Affiliate Credential Request Electronic Form
- Initiator will be the Admin/CAO of the department
- Valid photo ID
- Approver will be the requesting Professor/Director
  - ✔ Criminal Background Check
*Note: Additional documentation may be required for international requests.*

**HR:**
- Run CBC
- Process in PeopleSoft as POI
- Provide Department with credentials

**Navigation:**
*Website: UTEP > HR Transactions Center > Affiliate Designation Guidelines*  
(http://hrtc.at.utep.edu/?page_id=223)
Benefits - ACA

Meeting And Tracking Eligibility Criteria for Employees
- Equifax Tracking Tool (Notices to Department)
- W-2
- 1095 Employee (Pending Updates)
- IRS Reporting

Steep Penalties
September 1, 2015
- $3,000 penalty per each full-time employee (30 hours).
- $2,000 penalty per each full-time employee if UTEP failed to offer medical coverage to 95% of eligible employees.
- Penalty is accessed if 1 employee enrolls in coverage through Market place and qualifies and receives subsidy.

HOW THIS PERTAINS TO DEPARTMENTS
- Assessing all new and current hires who are assigned less than 40 hours.
- Instituting internal controls for Part-time positions to limit the number of hours for employees work.
- Set aside funding for fringe benefits.
- Notifications from Benefits team on risk groups/employees.
Graduate Student Health Insurance

Cost of Student Health Insurance will vary for FY 2016/2017 depending on students status and coverage dates.

- International Students (Spring 01/01/2017)
- US Students (Spring 01/01/2017)

New International Student Waiver Process

Academic Health Plan will review

PROCESS:

- Notification on eligibility is issued to all New Hires and Reassignments prior to Census Date.
- Communication on “how to apply” for Student health Insurance is distributed.
- Enrollment for those who elect medical insurance before Census Date.
- Our Goal - Minimize delays to student health insurance process by submitting assignments on timely basis.
Employee Relations

- Provides strategic direction on management of staff employment matters to all employees.

- Advises and counsels faculty and staff on performance, disciplinary issues, employee grievances, workplace misconduct, unemployment claims and other issues affecting the workplace.

- Provides proactive assistance to employees on the interpretations and implementation of policies and procedures as stated on the Handbook of Operating Procedures (HOP) and employment laws.
Separations

- Notify abm@utep.edu of the upcoming Separation/Retirement.
- Department completes the Electronic Separation or Retirement form.

Helpful Tips
- If an employee will be transferring from a department, please select “Transfer within UTEP” option on the “Appointment Actions Request” IAP.
- Verify all leave and/or timesheets has been entered into the system.
- If money is owed to the university, the “Authorization to Deduct” form will route to the employee for approval to have money owed deducted from their last paycheck.
- Keys still need to be obtained by the key shop.
- Effective date is always the day after the actual date worked even if it is a weekend or holiday.
- ALL benefit eligible employees still need to contact their benefit representative to schedule an appointment to clear.
Auto Terminations

- Process used within PeopleSoft to systematically end all appointments with a designated end date that falls within the Auto Termination processing period.
  - Process is run on a monthly basis between the 18th and 25th of the current month.
  - Process terminates employees and sets their HR Status to “Inactive”

- Email notification is sent out to CAO’s and/or individual department processors to notify them of the upcoming termination so that they take action.
Training & Development

- Provide development and informative trainings for all faculty, staff and student employees.

- There are over 45 courses available to enhance your talents and improve skills, working towards your professional development.

- Customized trainings for your department area available upon consultation.
THANK YOU