Cutover Forum

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UTSHARE

PEOPLESOFT
THE UNIVERSITY OF TEXAS AT EL PASO
Overview

• What is Cutover?

• Processing Deadlines
  – HR
  – Finance
  – Grants
  – Purchasing

• How Can You Help?
What is Cutover?

- Cutover activities are processing deadlines for HR and Finance transactions similar to *fiscal-year end processing deadlines*.
- Transactions need to be halted by a certain date in Define/HRMS/Miner Mall to prepare data from transfer into PeopleSoft.
- Departments will receive a list of cutover deadlines for Finance, HR, Grants, & Purchasing.

**Impact**

- After a deadline passes, departments will not have access to process transactions in Define/HRMS/Miner Mall. Processing will resume in PeopleSoft after May 5.
HR Deadlines
HRMS Recruit and Fill Documents: Staff Positions

- The last day to initiate and approve a Recruit and Fill document in HRMS is **April 16 by 5:00 PM**.
  - This will satisfy the minimum five day external posting requirement.
  - Departments are asked to work closely with their Recruitment Consultant to plan interviews accordingly to identify a candidate and meet the deadline.
  - Assess staffing needs and submit requests to fill a vacancy via HRAC process by April 11.
  - Any approved request to recruit via HRAC after April 11 will be processed in PeopleSoft, starting May 5.
HRMS Future Dated Appointments

• The last day to create and final approve future dated appointments in HRMS is **April 17 by 5:00 PM.**
HRMS Employment Web Pages:
Closing Staff Job Postings

- The last day for a candidate to apply for a staff position is **April 23 by 5:00 PM**.
  - All job postings will be closed after the deadline.
  - Applicants will have until April 30 to access their current application documents.
HRMS Recruiting Summary: Staff Positions

• The last day to approve and route a Recruiting Summary to assign an individual with an April date of hire, is **April 25 by 5:00 PM**. These new hires will receive their first paycheck in May.
  – Candidates selected for hire after the deadline will be hired with an effective date of May 1.
  – Hires will get access to UTEP systems (email, Miner gold card, etc.) after their assignment has been processed in PeopleSoft, starting May 5.
HRMS Assign Documents

- The last day to initiate a Direct Hire document (i.e., faculty and student) in HRMS is **April 25 by 5:00 PM.**
  - Candidates selected for hire after the deadline will be hired with an effective date of May 1.
  - Hires will get access to UTEP systems (email, Miner gold card, etc.) after their assignment has been processed in PeopleSoft, starting May 5.
HRMS Modify/Reclassify Documents

• The last day to initiate modify/reclassify documents (i.e. leave without pays, funding changes, reclassifications of filled positions, supplement payments) in HRMS is **April 25 by 5:00 PM.**
  
  – Employee/position changes requested after the deadline will be processed in PeopleSoft, starting May 5.
Leave Request Submissions

• All paper or electronic leave requests must be submitted and approved, and entered in Define (paper) by the leave administrator by **4:00 PM on April 28**.
  – Departments can make updates to leave requests in PeopleSoft, starting May 5.
Classified Timesheets

• All paper or electronic timesheets for classified employees must be submitted to the department by **4:00 PM on April 28**. Electronic timesheets must be final approved in UT Direct by **4:00 PM on April 30**. The ET3 screen in Define must be updated for paper timesheets by **4:00 PM on April 30**.
Finance Deadlines
Emergency Checks

• The last day to request an emergency check from the Payroll & Budget Office is April 15 by 4:00 PM.
Capital Project Accounts

• The last day to request a capital project account (creation, funding, etc.) is **April 18 by 4:00 PM**.
  
  – Creation of capital projects will resume in PeopleSoft, starting May 5.
Account Setup or Changes

- The last day to request a new budget group/subaccount or change to an account (unit code, NACUBO, fund, etc.) in Define is April 18 by 4:00 PM.
  - Creation of new budget groups (cost centers) will resume in PeopleSoft, starting May 5.
Electronic & Paper Payments

- All paper and electronic payment vouchers, along with supporting documentation (VP2, VP3, VT5, VT7 Define documents) must be submitted to the Accounts Payable Office by **4:00 PM on April 22**, to be included in April's business.
  - Documents not approved by the deadline will be returned to the creator for deletion.
  - Payment processing can resume on May 5 starting PeopleSoft.
Travel & Expense Report Submissions

• The last day to submit a travel & expense vouchers with supporting documentation (VP5 document) in Define is **April 22 by 4:00 PM**.
  – Vouchers not approved by the deadline will be returned to the department for deletion.
  – Travel & Expense voucher processing can resume in PeopleSoft, starting May 5.
VT1 & VT2 Define Access

- The last day to access and process VT1 & VT2 documents in Define (intra fund group) is April 24 by 4:00 PM.
  - The process for internal approvals for transactions will continue after Go-Live.
Travel Authorizations

• All travel authorizations must be final approved in Define by **4:00 PM on April 25.**
  – Authorizations not approved by the deadline need to be deleted by the department.
  – Authorization processing can resume in PeopleSoft, starting May 5.
Direct Deposit

• The last day to update UT Direct/Define direct deposit information is **April 25 by 4:00 PM**.
  – Access to update direct deposit through Employee Self-Service (ESS) PeopleSoft will be available on May 5.
March Pro Card Transactions Approvals

- All Pro Card activity related to March transactions must be final approved by **4:00 PM on April 25**.
  - Current policy will be followed with regard to outstanding transactions after the deadline. See the Pro Card Manual for more information.
Budget Adjustments

• Budget adjustments must be final approved in Define by **4:00 PM on April 28.**
Cash Receipts & Petty Cash

- Cash receipts and petty cash documents (Define VC1 & VC3) must be final approved by 4:00 PM on April 30.
The last day to process an APS payment (OV7 document) in Define is **April 30 by 4:00 PM**.

- APS paper forms must be submitted to Payroll by April 18.
- APS forms processed after April 30 will be processed for payment on May 22 for semi-monthly employees and June 2 for monthly employees.
Hourly Timesheets & Other Payment Documents

- Hourly timesheets & other payment documents (OV1, OV2, OV5, and OV7 documents) must be submitted by **11:00 AM on May 1** and final approved in Define by **2:00 PM on May 1**.
Grants Deadlines
VT3 Access

• The last day to request and approve a grant budget transfer (Define VT3) is April 16 by 4:00 PM.
Grant Account Setup Request

• The last day to request the setup of a grant account in Define is **April 18 by 4:00 PM**.
  – Creation of new accounts/project setup will resume in PeopleSoft starting May 19.
Grants Miner Mall Purchases

• The last day to make a purchase in Miner Mall using an existing grant account is **April 28 by 5:00 PM.**
  – The first day to make a purchase in Miner Mall using a grant account is **May 19.**
Grant Account HR Processing

• HR cutover deadlines also apply to any activity that uses a grant account (e.g., HRMS documents).
  – The first day to process any HR transaction using a grant account is **May 19**.
Grant Account Finance Processing

• Finance cutover deadlines also apply to any activity that uses a grant account (e.g., VP2s, VP3s, VT5s, VT7s, VP5s and VE5s).
  – The first day to process any Finance transaction using a grant account is **May 19**.
Purchasing Deadlines
Miner Mall Access Removal

• The last day that shoppers and creators will have access to Miner Mall is **April 28 by 5:00 PM.**
  
  – Carts created after the deadline will be returned.
  
  – A notification will be sent to departments as to when they can resume processing in Miner Mall.
Miner Mall Approvals

- The last day for final approvals in Miner Mall is April 29 by 5:00 PM.
  - Final approvals must include commodity and form approvals.
  - Documents not approved will be returned to the creator.
  - A notification will be sent to departments as to when they can resume processing in Miner Mall.
How Can You Help?

• Monitor important cutover deadlines.
• Process documents with enough time to get final approvals before the established deadlines.
• Inform managers/directors ahead of time of any transactions that require final approval in Define/HRMS.
Cutover Resources

• Cutover deadlines posted at www.peoplesoft.utep.edu.
Questions?

• **HR Deadlines**—call ext. 5202
• **Finance Deadlines**—ext. 5171
  – **Budget Deadlines**—call ext. 5109
• **Grants Deadlines**—call ext. 5197
• **Purchasing Deadlines**—call ext. 5558
Questions?