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The Foundation for The Gator Nation



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Welcome!

HR FORUM



December 2, 2009, Human Resource Services

Agenda

- Financial Upgrade to 9.0
- Finance & Accounting/HR Error Report
- Online W-2's
- December Leave Cash out
- December Personal Leave Days
- Vacation Leave Rollover
- 2010 Holidays
- FMLA Update – Military Leave
- Benefit Deduction & Early Deadlines
- Gator Perks
- Tenure & Promotion
- SPP Deadline



Agenda continued...

- Tenure & Promotion
- SPP Deadline
- Faculty Recruitment Waiver Procedure
- Genetic Information Nondiscrimination Act (GINA)
- Payroll/Appointment Deadlines
- E-verify
- Service Center Hours
- HR Forum Membership
- Important Dates



myUFL Financial Systems Upgrade



Today's Discussion

- Why upgrade the financial systems?
- What will be included in the upgrade?
- What can you expect?
 - Project time line
 - Phases of change management effort
 - Available resources



Why Upgrade the Financial Systems?

- Keeping current = Good business
- The upgrade is designed to make sure the myUFL Financial Systems work for you—now and in the future
- Implementation date of March 2011



Why Upgrade the Financial Systems?

- Think of this as an oil change for the myUFL system
 - You can drive a car for a long time without changing the oil, but sooner or later ...



Why Upgrade the Financial Systems?

- Regular upgrades are required to stay current and meet the university's business demands
 - As is the case with all software
- Upgrade will ensure online business processes remain current/compliant for future financial process and reporting needs
 - Also will help us control costs

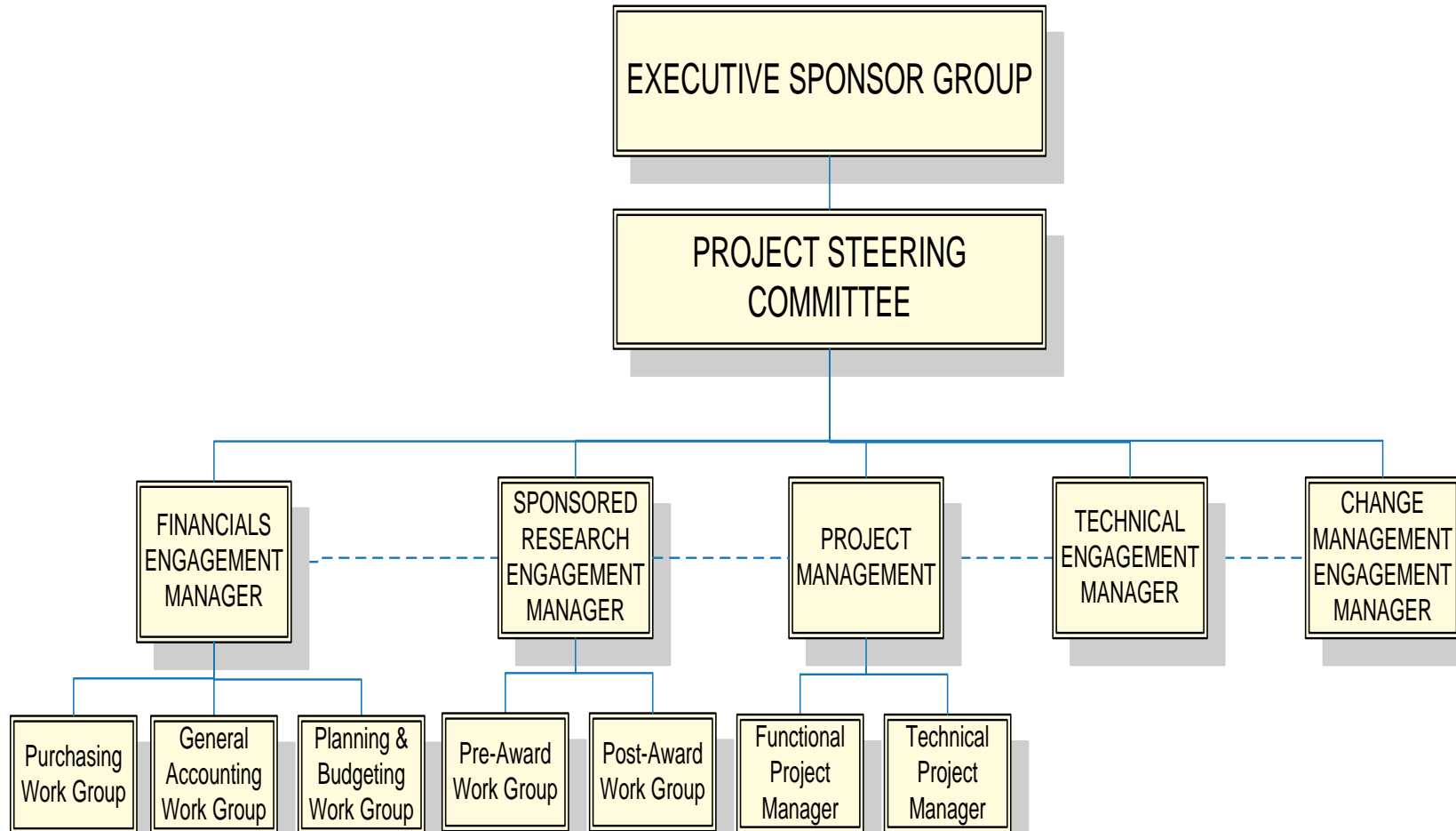


What's Included?

- Accounts Payable
- Accounts Receivable
- Asset Management
- Billing
- Commitment Control
- Contracts
- General Ledger
- Grants Management
- Purchasing
- Project Costing
- Security
- Travel & Expense
- PeopleSoft Financial Data Warehouse
- Enterprise Reporting



myUFL Financials System Upgrade – Organizational Structure



What Can You Expect?



September to December 2009

Functional/technical

<p><u>Current State</u> Focused on documenting current myUFL processes</p>	<p><u>Analyze Impact of Upgrade</u> On current system and processes</p>	<p><u>Determine and Approve Changes</u> Working with stakeholders, evaluate options and decide on best choices for UF based on cost/benefit and other factors</p>	<p><u>Develop and Test Environment</u> Technical staff members implement decisions into a test environment</p>
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Change management

<p><u>Phase 1—To Inform</u></p>	<p>Lay foundation for core offices' involvement</p>	<p>Inform campus that upgrade is moving forward, with target implementation date of March 2011</p>	<p>Put infrastructure in place for communication, outreach, training (web site, etc.)</p>
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January to August 2010

Functional/technical

Test

New system expected to be at 80 to 90 percent functionality in March/April for testing

System Updates/ Changes

Based on testing, implement any needed changes

Test Again!

Iterative process occurs until system is ready for training and deployment

Beta Delivery

Once testing is completed, Beta environment will be launched

Change management

Phase 2—To Engage

Provide outreach opportunities for campus to engage in and learn more about the upgrade

Review sessions, testing by campus, hands-on “look” at system

Continue to increase awareness via communication efforts



September 2010 to March 2011

Functional/technical

Security

Security updates and related infrastructure expected to be at 90 to 100 percent completion
 What roles will be changing?
 Will DSAs need to request new ones?

Prepare for Launch

Move upgrade from Beta to Production



Deployment
March 2011

Change management

Phase 3—To Prepare

Once Beta environment is ready, prepare campus to use upgraded system successfully

Complete instructional design

Launch formal training plan: Overviews/demonstrations, job aids (toolkits, instruction guides, online simulations), online learning, instructor-led training

Available Resources

- Web site: <http://upgrade.my.ufl.edu/>
 - Frequently asked questions
 - Submit your questions!
 - Project progress
 - Change/communication info, including information about our plans
 - Technical resources
 - For those who want to “dive deep”
 - Related links/resources/contact info



Any Questions?



Finance & Accounting Error Correction Scorecard



Finance and Accounting Error Correction Scorecard

Payroll Services:

- Correct Overpayment in Payroll System
- Collection by Payroll Dept
- Payroll Emergency Check

Human Resources:

- Back Pay (per pay period over 1)
- Pay Distribution - No Budget Exists

Treasury Management:

- Deposit Corrections

Purchasing and Disbursement Services:

- Late Approval of P-Card Charges (>30 days)
- Confirming Purchase Orders
- Correction of Voucher Input Errors
- Emergency Checks
- Alternate Delivery Form

- Q&A will be posted on F&A Website (in development now)
- Scorecards will start being sent in January
- F&A will monitor and visit departments



W-2 and you

electronic IRS forms



Communications Update

- Posters
- InfoGator
- Portal Secondary Splash Pages
- Marquees
- Alligator



Prizes!

- “Employee Drawings” Committee
 - 63 individual drawings
 - 9 drawings/week
 - Drawings started 11/12/09
 - Announced on T&L Listserv and InfoGator
 - Great prizes include Gator gear, iPod shuffles, and GPS
 - 2 drawings for departments with 100% participation



The count...

**12,476 and
growing**



W-2 Consent, Veterans
Status Survey, Ethnicity
and Race...I don't
remember...



W-2/W-2c Consent Form

Orfield, Linda W

Online W-2 Consent

Employee's Withdrawal of Consent to Receive IRS Form W-2 Electronically

Please click the box and submit button below if you subsequently decide to revoke or withdraw your consent to receive an electronic W-2 and W-2c form. An e-mail will be sent to your e-mail address on record in MyUFL confirming your withdrawal of consent as well as the effective date. The University will notify the employee if there is any change with the University's contact information.

~~If you do not consent to receive your W-2 electronically or you withdraw your consent, a paper copy of your W-2~~

Your Current Status: Consent received.



- Thank you for promoting this new feature and encouraging employees to sign up.
- We appreciate your continued efforts.
- Remember...

My Self Service > W-2/W-2c
Consent



December Leave Benefits



December Leave Cashout

- TEAMS Employees - 16 Hours
- 40 Hour Balance remaining
- December 4 Payday



December Personal Leave Days

- Available for 12-month Faculty and TEAMS employees
- Used during the period December 28-31 unless employees designated as “essential personnel”
- Additional information available via instruction guide:

<http://www.hr.ufl.edu/training/myUFL/instructionguides/Personal%20Leave%20Days%202009.pdf>



Vacation Leave Rollover



Vacation Leave Rollover

- Vacation over max will convert to sick after January 7, 2010
 - TEAMS & Academic Personnel – 480 hrs
 - USPS – 240 hrs
- Vacation used by January 7, 2010 must be entered and approved in system by that date to avoid conversion



2010 Holidays



2010 Holidays

- New Year's Day 2010, Friday, January 1st
- Martin Luther King, Jr.'s Birthday Monday, January 18th
- Memorial Day, Monday, May 31st
- Independence Day, Monday, July 5th (observed)
- Labor Day, Monday, September 6th
- UF Homecoming, Friday, October 15th
- Veterans Day, Thursday, November 11th
- Thanksgiving, Thursday, November 25th & Friday, November 26th
- Christmas, Friday, December 24th (observed)
- New Year's Day 2011, Friday, December 31st (observed)



FMLA Update – Military Leave

Expands exigency and caregiver leave provisions for military families



Exigency Leave

- In 2008 – up to 12 weeks of leave for urgent needs to eligible family members of service members in National Guard and Reserves called to active service
- October 2009, includes family members of active duty service members



Caregiver Leave

- In 2008, 26 weeks to care for family member injured while serving on active military duty
- October 2009, includes veterans undergoing medical treatment, recuperation or therapy for serious injury or illness that occurred any time during the five years preceding the date of treatment



Questions?



Benefit Deductions & Deadlines



Look for Open Enrollment Plan Deductions

- **December 4th and 18th paychecks**
 - **State Sponsored plans** (i.e. health, basic & optional life, dental, cancer, hospital, vision, short term disability)

- **January 15th and 29th Paychecks**
 - **FSA's** (i.e. medical, dependent care, limited purpose medical reimbursement, HSA's)
 - **UF sponsored plans** (i.e. domestic partner, LTD, Lincoln Financial/UF Term Life)



Early Deduction Deadlines for New Hires

- Due to the holidays and early payroll closing, new hire insurance deductions must be requested by the following deadline:

Payday	Pre-Pays for Coverage for	Benefits deadline to capture deductions for the affected payday
12/18/09	January 2010	12/08/09

- Missed deadline?---New hires must pay by personal check.
- Checks collected between 12/9 -12/24/09, will be processed however, employees will have some delay with January coverage.



Gator Perks



Gator Perks

- UF is pleased to offer a discount program designed for faculty and staff
- Special discounts up to 10% or more for products and services will be available
- Employees can access information on available discounts via a dedicated section of the HR website
- Gator Perks will be officially launched in mid-January 2010



Tenure and Promotion 2009-2010



Tenure and Promotion 2009-2010

Tenure and promotion cases are due to the Academic Personnel Office on January 8, 2010.

Academic Personnel Board will begin the review process in late January through late March and early April.

President approves promotions and will recommend tenure nominations to Board of Trustees for the June meeting.

Announcements will be made in May and June.

Questions about tenure and promotion should be directed to Janet Malphurs, Academic Personnel Office.



Salary Pay Plan for Senior Faculty



Salary Pay Plan for Senior Faculty

Guideline and eligible list will be sent out in mid December to College Dean's Office.

Packets are due to Academic Personnel Office on February 19, 2010.

APB will begin the review process after the Tenure and Promotion Process is completed (normally in late March or early April)

Increases for faculty who will receive the SPP award will be in the 2010-2011 year.

Questions about the eligible list should be directed to Janet Malphurs, Academic Personnel Office.

Recruitment Waiver Procedures & Form



Recruitment Waiver Procedures & Form

- **FEDERAL COMPLIANCE**

- ✧ The University of Florida is a major recipient (\$500,000,000+) of federal contracts and grants.
- ✧ As a federal contractor, the University is required to comply with all federal equal employment opportunity laws which require fair, open and competitive searches, and consistent treatment of applicants.
- ✧ Non-compliance with federal EEO laws could result in cancellation, termination or suspension of all University federal contracts in whole or in part. Additionally, UF may be declared ineligible for further federal contracts.

- **RECENT HISTORY**

- ✧ **41** Faculty Waiver Hires in 2008-09
 - ◆ 149 Total Waivers
- ✧ **245** New Faculty Hires in 2008-09
- ✧ Ratio Waivers to Competitive Searches (**1:6**)

Recruitment Waiver Procedures & Form

- **COMPLIANCE SOLUTION**

- ✧ The Human Resource Services, in cooperation with the Office of the Provost, researched AAUs and developed procedures to improve compliance with federal EEO laws.
- ✧ Limited and clarified exceptions to open and competitive faculty searches.
- ✧ Established a multi-layer process for review and determination.
- ✧ Created a tracking process to monitor trends and patterns.

- **EFFECTIVE DATE**

- ✧ November 23, 2009

Waivers

- ✧ **Critical Hire**
 - ◆ For a position deemed critical to the overall advancement of the University.
- ✧ **Degree Waiver**
 - ◆ An appointment without the usual required academic degree to non-tenure accruing position.
- ✧ **Instructional Necessity**
 - ◆ A time limited appointment during an emergency situation.
- ✧ **Internal Search Only**
 - ◆ For UF applicants only.
- ✧ **Named in Contract / Award (100%)**
 - ◆ An appointment of person(s) named in and paid 100% from the contract or grant.
- ✧ **Special Professional Distinction**
 - ◆ An individual with truly outstanding achievements and significant contributions.
- ✧ **Spouse or Domestic Partner Hire**
 - ◆ An appointment in a dual career family or domestic partnership to enhance the hire/retention.
- ✧ **Underrepresentation (Ethnicity/Gender)**
 - ◆ An appointment of a member of a historically underrepresented group.

◆◆◆

For more detailed description on the waivers, please go to the Provost's website at:

<http://www.aa.ufl.edu/aa/facdev/recruit/index.shtml>

Genetic Information Nondiscrimination Act (GINA)



Genetic Information Nondiscrimination Act of 2008

- **EFFECTIVE DATE**

- ✧ November 21, 2009

- **OVERVIEW**

- ✧ GINA protects applicants and employees from discrimination based on their genetic information in hiring, promotion, discharge, pay, fringe benefits, job training, classification, referral and other aspects of employment
- ✧ GINA prohibits improper use of genetic information in health insurance and employment.
- ✧ GINA prohibits group health plans and health insurers from denying coverage to a healthy individual or charging that person higher premiums based solely on a genetic predisposition to developing a disease in the future.

Genetic Information Nondiscrimination Act of 2008

- **ACTION FOR EMPLOYERS**

- ① Ensure that all equal employment opportunity statements and related policies include “genetic information” as a protected class.
*“The University is committed to non-discrimination with respect to race, creed, color, religion, age, disability, sex, sexual orientation, marital status, national origin, **genetic information**, and veteran status”*
- ② Train HR professionals and managers on employee rights concerning genetic information.
- ③ Implement policies to maintain the confidentiality of employee genetic information in separate confidential medical files.
- ④ Post the mandatory “Equal Employment Opportunity is The Law” poster in all employment offices. (\$17,000 fine)

Payroll/Appointment Deadlines



Payroll/Appointment Deadlines

- Please remember to adhere to payroll deadlines for timely processing of appointments.
- HR payroll deadlines for 2010-2011 will be changing to 5 p.m. Friday before payroll closing.
- 2009-2010 Payroll deadline schedule and critical dates can be found at:
<http://fa.ufl.edu/payroll/paydays-2009-2010.asp>



Payroll - Schedule of Paydays and Critical Dates for Fiscal Year 2009-2010 - Windows Internet Explorer

http://fa.ufl.edu/payroll/paydays-2009-2010.asp

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Links Customize Links

GatorJobs Payroll - Schedule of P...

Schedule of Paydays and Critical Dates for Fiscal Year 2009-2010

Pay Period I.D.	Pay Period Begins	Pay Period Ends	Time & Labor Closes (4)	Payday	Human Resource Deadline 12 Noon *
B062509	06/12/09	06/25/09	06/25/09	07/02/09	06/22/09
B070909	06/26/09	07/09/09	07/09/09	07/17/09	07/06/09
B072309	07/10/09	07/23/09	07/23/09	07/31/09 (3)	07/20/09
B080609	07/24/09	08/06/09	08/06/09	08/14/09	08/03/09
B082009	08/07/09	08/20/09	08/20/09	08/28/09 (7)	08/17/09
B090309	08/21/09	09/03/09	09/03/09	09/11/09 (1)	08/31/09
B091709	09/04/09	09/17/09	09/17/09	09/25/09	09/14/09
B100109	09/18/09	10/01/09	10/01/09	10/09/09	09/28/09
B101509	10/02/09	10/15/09	10/14/09	10/23/09	10/09/09
B102909	10/16/09	10/29/09	10/29/09	11/06/09	10/26/09
B111209	10/30/09	11/12/09	11/12/09	11/20/09	11/06/09
B112609	11/13/09	11/26/09	11/24/09	12/04/09	11/19/09
B121009	11/27/09	12/10/09	12/10/09	12/18/09	12/07/09
B122409	12/11/09	12/24/09	12/17/09	12/31/09 (3)	12/14/09
B010710	12/25/09	01/07/10	01/07/10	01/15/10 (8)	01/04/10
B012110	01/08/10	01/21/10	01/21/10	01/29/10	01/15/10
B020410	01/22/10	02/04/10	02/04/10	02/12/10 (5)	02/01/10
B021810	02/05/10	02/18/10	02/18/10	02/26/10	02/15/10
B030410	02/19/10	03/04/10	03/04/10	03/12/10	03/01/10
B031810	03/05/10	03/18/10	03/18/10	03/26/10	03/15/10
B040110	03/19/10	04/01/10	04/01/10	04/09/10	03/29/10
B041510	04/02/10	04/15/10	04/15/10	04/23/10	04/12/10
B042910	04/16/10	04/29/10	04/29/10	05/07/10 (2)	04/26/10
B051310	04/30/10	05/13/10	05/13/10	05/21/10 (6)	05/10/10
B052710	05/14/10	05/27/10	05/27/10	06/04/10	05/24/10
B061010	05/28/10	06/10/10	06/10/10	06/18/10	06/07/10
B062410	06/11/10	06/24/10	06/24/10	07/02/10	06/21/10
B070810	06/25/10	07/08/10	07/08/10	07/16/10	07/02/10

Bold type indicates accelerated payroll schedule due to holiday observances.

(1) Begin 16 bi-weekly fringe benefit deductions.

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E-Verify



E-Verify

- E Verify training will begin on January 7, 2010.
- Both classroom and online training will be available.
- Training is required for departmental administrators with the roles *UF_EPAF Depart Admin* and *UF_EPAF Level 1 Approver*.
- Roles will be removed if training is not completed by January 31, 2010.



E-Verify

- E-Verify is an internet based employment verification system.
- Mandatory for federal contractors.
- Strict deadlines for I-9 completion and E-Verify submission.
- Penalties for not complying with E-Verify within 3 days of the hire include fines and loss of federal funding.
- Bridges and HR developed a technical solution within ePAF to make changes as seamless as possible.



HR ePAF Home Page - Windows Internet Explorer
 https://mybeta.ufl.edu/ps/ps/EMPLOYEE/HRMS/c/G_FORMS.G_FORM_HREPAF_HOME.GBL?FolderPath=PORTAL_ROOT_OBJECT.HC_WORKFORCE_ADMINI

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 HR ePAF Home Page

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Hire an Employee
Step 2 of 8: Contact Information

*Hire Effective Date

Personal Info

EmpID: 01533301

*First Name: Brad Middle:
 *Last Name: Pitt Suffix:

Email Address:

Home Address and Phone

Home address is the employee's permanent physical address.

*Country: USA United States
 *Address 1:
 Address 2:
 *City: *State: *Postal:
 *County:

Phone:

Business Address and Phone

Business address is a UF address. This is typically a PO Box.

*Country: USA United States

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HR ePAF Home Page - Windows Internet Explorer
https://mybeta.ufl.edu/ps/ps/EMPLOYEE/HRMS/c/G_FORMS.G_FORM_HREPAF_HOME.GBL?FolderPath=PORTAL_ROOT_OBJECT.HC_WORKFORCE_ADMINI

myUFL BETA

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- Accounts Payable
- Asset Management
- Benefits
- Bridges Transition
- Commitment Control
- Compensation
- EProcurement
- Enterprise Reporting
- General Ledger
- Grants
- Identity Access Management
- Manager Self Service
- North American Payroll
- Organizational Development
- Set Up Financials/Supply Chain
- Set Up HRMS
- Time and Labor
- Travel and Expenses
- UF Departmental Administration
- Workforce Administration
 - Increase Workforce
 - Personal Information
 - Job Information
 - Workforce Reports
 - UF HR Approve Job
- HR ePAF Home Page**
- Retirement ePAF Home Page
- Workforce Development
- Workforce Monitoring
- UF Financial Custom Apps
- PeopleSoft
- Worklist
- Tree Manager
- PeopleTools

*City: [] *State: [] *Postal: []

*County: []

Phone: []

Business Address and Phone

Business address is a UF address. This is typically a PO Box.

*Country: USA United States

*Address 1: []

Address 2: []

*City: GAINESVILLE *State: FL *Postal: 32611

*County: ALACHUA

Phone: []

Mailing Address and Phone

Mailing address is the employee's local address, and must be a US address.

Country: USA United States

*Address 1: []

Address 2: []

*City: [] *State: [] *Postal: []

*County: []

Cell Phone: []

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ePAF Home Page - Windows Internet Explorer

http://hrdev.erp.ufl.edu/psp/ps/EMPLOYEE/HRMS/c/G_FORMS.G_FORM_EPAF_HOME.GBL?FolderPath=PORTAL_ROOT_OBJECT.UF_DEPARTMENTAL_ADMINISTRATION.G_FOR... Yahoo! Search

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Links Home - UF Bridges Intranet HRDEV HRTST QAT Quality Center Welcome to myUFL AppMan - TST AppMan - QAT AppMan - PRD

ePAF Home Page

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- Applicant Home
- Change My Password
- My Personalizations
- My System Profile
- My Dictionary

EmplID: 38106143 E-Verify

E-Verify Request Data

*Citizenship:

*SSN:

*First Name: Middle Initial:

*Last Name: Maiden Name:

*Birth Date:

*Hire Date (I9):

*Document ID:

Main Content

Done Trusted sites 100%



E-Verify

- Results will typically be immediate.
- 90% to 95% should be Employment Authorized and hire will continue as normal.
- Tentative Non-Confirmations will be managed by HRS.
- ***Accurate data entry is imperative to minimize non-confirmations.***
- Remember to register and attend training!



HRS Service Center Hours



HRS Service Center Hours

- Due to low customer traffic patterns after 5 p.m., the HRS Service Center will close 30 minutes earlier.
- Effective January 4, 2010, the HRS Service Center Hours will change to 7:30 a.m. to **5:00 p.m.**
- A secure drop box is being installed for after hour deliveries.



HR Forum Membership



Important Dates

- **December 7th** – Registration Opens for Spring Training Courses
- **December 28th – 31st** – Holiday Closing Period
- **January 13th** – Next HR Forum





Thank you for attending!

