July 1, 2009, Human Resource Services

Welcome!

HR Forum
Agenda

• Introductions
• Training Updates
• Leadership Development
• Employment Updates
• Academic Personnel Updates
• Fringe Benefit Pool Update
• Retirement Manager
• Survey Updates – Veteran Status & Race/Ethnicity
• Regulation Update
• Important Dates
Training Updates
Fall Training

- Registration opens August 3
- Supervisory Challenge, myUFL/PeopleSoft, Pro3, Business Communication, etc.
- Computer application also will be provided
  - Microsoft and Adobe applications
  - New: $75 per day fee
- Details still being worked out
  - Current plan: Bill once per month to college/division level
    - Your decision whether to pass along to departments or cover as a college expense
Fall Training

• Will be able to provide more training since cost is being shared by participants
• Will have minimum number of seats that must be filled in order for the class to “make”
• Charge will be assessed for short-notice cancellations and “no shows”
Leadership Development
Leadership Development

• UF Academy for 2009-2010
• Entering its seventh year, Academy focuses on immersion in the university culture and exposure to its organizational structure
• Designed for emerging leaders
  – Applications to participate are being accepted from July 20 through close of business on August 28
  – This year's program kicks off September 23
  – Participation will run from October through June 2010
Leadership Development

• Participants are selected via a competitive application process
• Up to 15 recognized star achievers will be selected
• Employee must be exempt with at least two years of supervisory or decision-making responsibility at UF – Additional criteria described on UF Academy webpage
• Employees at the assistant director level and above as well as interested faculty members with fewer than two years at UF also may apply to participate
• www.hr.ufl.edu/training/leadership/academy.asp
Leadership Development

- Next Level Leadership
- For existing leaders—assistant directors and above as well as faculty members in leadership positions
- Designed to provide UF leaders with skills and tools to more effectively lead, manage, and mentor others
- Call for applications will occur this fall
- Program will begin in January 2010
- Partnering with the Provost’s Office and Faculty Senate
- www.hr.ufl.edu/training/leadership/default.asp
Employment Updates
Employment Updates

• E-Verify delayed until September 8, 2009 as requested by the Department of Justice. New legislation has been introduced in the House.

• Implementation of The Work Number is anticipated for August 1, 2009.

• Section 1 of the I-9 must be completed ON or BEFORE the employees first day of work.
Employment Updates

• New I-9 forms are not published yet so please continue to use the version that expired 6/30/09.

• Be sure to accurately record applicant statuses in GatorJobs. This is the electronic recruitment file which is used for summaries, EEOC reporting, and recruitment challenges.
Academic Personnel Updates
Faculty Promotions & Salary Pay Plan Increases

Promotional increases and Salary Pay Plan increases will be effective:
7/1/09 for 12 month faculty
8/10/09 for 10 month faculty
8/16/09 for 9 month faculty

Tenure and Permanent status dates will be effective:
7/1/09 for 12 month faculty
8/10/09 for 10 month faculty
8/16/09 for 9 month faculty

No need to do anything in job data, Academic Personnel will enter salary increases into job data and update tenure status
Faculty and Graduate Assistant
Summer Job Terminations

• Please make sure that summer jobs that have been entered through ePAF are terminated on a timely basis:

• Term A ends June 30, 2009
• Term B ends August 15, 2009
• Term C ends August 15, 2009
Short Work Break Process

- 9 and 10 month employees will be returned from short work break during the weekend of July 17.
Fringe Benefits Pool Update
Fringe Benefits Pool

- Written approval received from DHHS

- Effective pay period ending 7/9/09

- [http://www.hr.ufl.edu/benefits/fringepool](http://www.hr.ufl.edu/benefits/fringepool)
Fringe Benefits Pool

<table>
<thead>
<tr>
<th>DHHS</th>
<th>UF Salary Plan</th>
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<tbody>
<tr>
<td>Clinical Faculty</td>
<td>COM Clinical Faculty</td>
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<tr>
<td>Faculty</td>
<td>Faculty (3-, 9-, 10-, and 12-month)</td>
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<td>TEAMS Exempt</td>
<td>Exempt TEAMS/USPS</td>
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<tr>
<td>TEAMS Hourly</td>
<td>Non-Exempt TEAMS/USPS</td>
</tr>
<tr>
<td>House Stf/Post Docs</td>
<td>Housestaff/Post Doc Associates</td>
</tr>
<tr>
<td>Graduate Asst</td>
<td>Graduate Assistants</td>
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<tr>
<td>OPS/Temp Faculty</td>
<td>Other OPS/ Temporary Faculty</td>
</tr>
<tr>
<td>Student OPS/FWSP</td>
<td>Student OPS/Federal Work Study</td>
</tr>
</tbody>
</table>
Fringe Benefits Pool

**ePAF Leave Cashouts**

- **Vacation/Sick Leave Cashouts paid by Dept**
  - Last Day Worked = 6/30/2009
  - Job Data Termination = 7/01/2009
  - Add earning account code in Comments of ePAF

- **Vacation/Sick Leave Cashouts paid by FBP**
  - Last Day Worked = 7/01/2009
  - Job Data Termination = 7/02/2009

- **Overtime/Special Comp**
  - Add earning account code in Comments of ePAF
Fringe Benefits Pool

• Simulation exercises

Additional Pay
http://www.hr.ufl.edu/training/myUFL/toolkits/HiringAddPay.asp

Cashouts
http://www.hr.ufl.edu/training/myUFL/toolkits/TimeLabor.asp
403(b) Plan
Retirement Manager
Retirement Manager

• Final 403(b) regulations governing loans and hardship withdrawals place greater burden on plan sponsors, effective 1/1/09

• VRSCO (VALIC Retirement Services Company) is providing administrative and compliance monitoring services
Retirement Manager

VRSC0

- will receive monthly data feed from UF 403(b) vendors
- will store information, and use it to pre-certify loan and hardship withdrawal eligibility
Retirement Manager

• Distribution Eligibility Certificate issued by VRSCCO at:
  – [https://www.aigretco.com/Retireman/](https://www.aigretco.com/Retireman/)

• Providers will require copy of certificate before sending employees applications for loans and hardship withdrawals
Retirement Manager

• Loan limitations
  • Cannot exceed the lesser of $50,000
    – Prior and current loan balances may impact this amount
  • Or 1/2 of present account value across vendors
Retirement Manager

• Hardship eligibility - 6 reasons
  • Medical expenses  (employee or dependents)
  • Purchase of principal residence  (employee)
  • Tuition expenses  (employee or dependents)
  • Payments to prevent eviction/foreclosure  (employee)
  • Funeral expenses  (parents or dependents)
  • Repair damage to principal residence (IRS casualty deduction)

• Documentation required for expenses
Retirement Manager

• Hardship withdrawal allowed only:
  – to meet immediate and heavy financial need
  – when no other sources of funds are available

• Elective deferral ceases for 6 months
Retirement Manager

• Distribution Eligibility Certificate Employee Guide available on Retirement website
  http://www.hr.ufl.edu/retirement/voluntary/annuities.asp

• Certificate of Eligibility does not guarantee approval

• All documents must be submitted to Retirement Services for final review and plan sponsor authorization
Retirement Manager

QUESTIONS?

retirement@ufl.edu

392-2477
Survey Updates:
Veteran Status & Race/Ethnicity
Veterans Status Survey

**WHY**
- As a federal contractor, the University of Florida is required to collect and report veteran status data to the United States Department of Labor each year.
- However, because of changes in the veteran status codes, the data we have collected and stored for employees in the myUFL system is not aligned with these federal reporting requirements.
- Our existing data includes 14 legacy fields, compared to the 6 new fields for which reporting is required.

**WHAT**
- Human Resource Services has worked with UF Bridges to develop a one-time survey process for all regular full-time and part-time employees through a Self Service application in myUFL.

**WHERE**
- To access the survey, go to myUFL > My Self Service> UF Veterans Status Survey

**WHEN**
- July 1, 2009 through September 1, 2009
**Veteran Status Resurvey via MySelf Service**

- **NON-VETERAN**
  A person who never served with the U.S. military, ground, naval or air service.
  A person who is currently active duty in U.S. military, ground, naval or air service and has not been discharged as of today’s date.

- **DISABLED VETERAN**
  A veteran of the U.S. military, ground, naval or air service who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered by the Secretary of Veterans Affairs, or (2) a person who was discharged or released from active duty because of a service-connected disability.

- **SPECIAL DISABLED VETERAN**
  A veteran of the U.S. military, ground, naval or air service who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered under laws administrated by the Department of Veterans’ Affairs for a disability (A) rated at 30 percent or more, or (B) rated at 10 or 20 percent in the case of a veteran who has been determined under Section 38 U.S.C. 3106 to have a serious employment handicap or (ii) a person who was discharged or released from active duty because of a service-connected disability.

- **OTHER PROTECTED VETERAN**
  A veteran who served on active duty in the U.S. military, ground, naval or air service during a war or in a campaign or expedition for which a campaign badge has been authorized.

- **ARMED FORCES SERVICE MEDAL VETERAN**
  A veteran who, while serving on active duty in the U.S. military, ground, naval or air service, participated in a United States military operation for which an Armed Forces service medal was awarded pursuant to Executive Order 12985 (61 Fed. Reg. 1209).

- **VETERAN OF THE VIETNAM ERA**
  A person who: (i) served on active duty in the U.S. military, ground, naval or air service for a period of more than 180 days, and who was discharged or released there from with other than an dishonorable discharge, if any part of such active duty was performed: (A) in the Republic of Vietnam between February 28, 1961, and May 7, 1975; or (B) between August 5, 1964, and May 7, 1975, in all other cases; or (A) in the Republic of Vietnam between February 28, 1961, and May 7, 1975; or (B) between August 5, 1964, and May 7, 1975, in any other location.

- **RECENTLY SEPARATED VETERAN**
  Any veteran during the three-year period beginning on the date of such veteran’s discharge or release from active duty in the U.S. military, ground, naval or air service.
Race & Ethnicity Survey

**WHY**
- The U.S. Department of Education requires all educational institutions and other recipients of DOE contracts and grants to collect and report race and ethnic data utilizing new standards and aggregation categories (Public Law 94-311).

**WHAT**
- VPHR assembled a Policy Team and an Implementation Team to develop a report containing recommendations for implementing the new federal Race & Ethnicity Codes campus-wide.
- The report is scheduled to be shared with the Executive Sponsor on July 8th.

**WHERE**
- Possible navigation: myUFL > My Self Service> UF Race & Ethnicity Survey

**WHEN**
- Fall 2009 (collection)
- Winter 2010 (reporting)
Race & Ethnicity Resurvey via MySelf Service

1. Are you Hispanic or Latino?
   - [ ] No, not Hispanic or Latino
   - [x] Yes, Hispanic or Latino

   A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.

   The above part of the question is about ethnicity, not race.

No matter what you selected above, please continue to answer the following, if applicable, by marking one or more boxes as appropriate.

2. How would you describe yourself?
   (Choose one or more from the following racial groups)

   - [ ] American Indian or Alaska Native
     A person having origins in any of the original peoples of North and South America (including Central America), and who maintains a tribal affiliation or community attachment.

   - [ ] Asian
     A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

   - [ ] Black or African American
     A person having origins in any of the Black racial groups of Africa.

   - [ ] Native Hawaiian or Other Pacific Islander
     A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

   - [ ] White
     A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.
Questions?
Regulation Update
6C1-1.017 Separations from Employment and Layoff
Layoff

• Unit Definition
• Ranking System
  – Flexibility with Layoff Order
  – Bumping Rights Eliminated
  – USPS Maintain Recall Rights
• Police Officers
6C1-3.056 Resignation and Non-Reappointment of Technical, Executive, Administrative and Managerial Support Staff
Non Reappointments

- NRAs No Longer Tied to End of Appointment Period
- Clarifies Buy Out Language
- Ties in With Regulation 6C1-3.054 Revised in March
Important Dates

• August 12\textsuperscript{th} - Next HR Forum
Thank you for attending!