HR Forums

AUGUST 8 & 10, 2017
Agenda

- HR Welcome and Staff Updates
- HR Division Updates
- ERB Exception Report
- UNMJobs ATS and Performance
- UNM Staffing Services Model
- HR Reports
- August Financial Wellness Seminars
- New Guidelines on In-Range Adjustments
- Mandatory Training Reports
- ULead – Fall Session Registration Extended
HR Staff Updates

MIKE BROWN
DIRECTOR, HR CLIENT SERVICES
Staffing Updates

- Farewell, Aida Hernandez, Client Services
  - Last Day: June 30, 2017

- Congratulations, Tiffany Cordova!
  - From HR Service Center to Client Services as HR Consultant
  - Effective August 21, 2017
Division Updates
Division Updates – Amber Bailey

FLSA Pay Change Reminder!
- Paid 9/8 for BIWEEKLY period 8/19-8/31
- Paid 9/29 for MONTHLY period 9/1-9/30

• Communications:
  - August 9-11: Report to HR Agents and Division Leadership
  - August 14: Reminder Notice to Employees
  - Payroll notifying time keepers regarding early payroll due to Labor Day (9/4)

• Resources:
  - Time and Leave Reporting Job Aid
  - Payroll Calculator (to be available at hr.unm.edu/flsa-update-overtime)
Presentation Items
ERB Exception Report

MIKE BROWN

HR CLIENT SERVICES
ERB Exception Report

As a reminder, effective July 1, 2016:

- ERB will require UNM to evaluate time worked for employees on a quarterly basis
- ERB will require UNM to report on all employees and their FTE (excludes students)
- Employees working .26 FTE or more per quarter will require ERB contributions from the employee and UNM
  - Equates to 131 or more hours worked in the quarter
- Does not apply to retirees
ERB Exception Report

- Location: HR Reports
  - Select ‘Employee Application’ from dashboard
  - Select ‘ERB Exception’ from menu
- Search by entering dates per Quarter

Use the table below to run the report based on the quarter you are interested in.

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Begin Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>01-Jan-YY</td>
<td>31-Mar-YY</td>
</tr>
<tr>
<td>Q2</td>
<td>01-Apr-YY</td>
<td>30-Jun-YY</td>
</tr>
<tr>
<td>Q3</td>
<td>01-Jul-YY</td>
<td>30-Sep-YY</td>
</tr>
<tr>
<td>Q4</td>
<td>01-Oct-YY</td>
<td>31-Dec-YY</td>
</tr>
</tbody>
</table>
ERB Exception Report

• Report tracks hours PAID in the quarter

• Three Reports available
  • Over Hours Report
  • Approaching Hour Overage Report
  • Under Hours Report
Quarter 1 | Jan. 1 to March 31, 2017

- 33 on-call employees worked over their reported FTE
  - Should have paid into ERB, but did not

- 29 on-call employees worked under their reported FTE
  - Paid into ERB and should not
Quarter 2 | April 1 to June 30, 2017

- 17 on-call employees worked over their reported FTE
  - Should have paid into ERB, but did not

- 29 on-call employees worked under their reported FTE
  - Paid into ERB and should not
Quarter 1 and 2 Overage Trends

• 9 employees were on both Quarter 1 and Quarter 2 reports

• These employees worked more than their stated FTE in both quarters
Next Steps – HR/Payroll

- HR will be changing the FTE on employees in Quarter 3 report to reflect correct FTE
- Payroll will be notified of the employees over their stated FTE and these employees will have to pay ERB contributions for the previous 2 quarters
  - Client Services will notify supervisors and employees that contributions in arrears will be taken. The specific timing is determined by many factors per Payroll.
- HR will monitor report to see if any employees are approaching their stated FTE for Quarter 3
Next Steps – Department

• Monitor all 3 ERB Exception Reports
  • Increase employee FTE if working more than .25
    • Ensures ERB contributions are made
    • Eliminates the need to collect ERB contributions from employees after the fact

• Decrease FTE if working less than .26
  • Ensures employees are not paying into ERB if not needed
  • ERB will not incorrectly count these quarters as time worked for retirement calculations
Questions?

Contact your HR Consultant.

Or

Mike Brown
Director, Client Services
505-277-2854
mikebrown@unm.edu
UNMJobs: Applicant Tracking and Performance

KEVIN STEVENSON / INTERIM DIRECTOR, BUSINESS SERVICES
MATT ORMITA / MANAGER, UNM STAFFING SERVICES
Transition: Project Mode to Operational Mode

- Finalizing ongoing support for regular system maintenance
- EAs and HRIT creating Reports and additional Security Roles as needed
- Seeking solutions to address areas requiring improvement
  - Working with vendor on fixing bugs, making tweaks, generally making things work
  - Login confusion for internal and external sites
  - Automated email messages
  - Electronic signature issues due to different logins
  - Smoothing out applicant onboarding paperwork now that EOS is live
- Determining long-term maintenance needs and the roles to support them
Transition: Project Mode to Operational Mode

• UNMJobs Quarterly Release occurred 8/4/17
  • Notification of system down time sent to users 8/2/17
  • User Interface Changes to Requisitions and Applicant Experience
    ▪ Look and feel of menus, tabs, and buttons
    ▪ Header styling
New Project: Performance

• Implementing TMS Performance Module
  ▪ Transitioning current PEP process online in TMS for the 2017 review cycle
  ▪ Goal is to maintain process in its current form, but replace the paper form with a completely electronic process

• In parallel, creating a planning team to guide the TMS Performance “Program”
  ▪ Longer-term effort that will evaluate other components of the Performance Module for possible implementation
Feedback!
(don’t be shy 😊)

Kevin Stevenson
kevings@unm.edu
505-277-5804
UNM Staffing Services
Shared Service Center (SSC) Model

KEVIN STEVENSON
ON BEHALF OF STAFFING SERVICES
(Formerly UNM Temps & Recruitment Services)
Shared Service Center (SSC) Model
Shared Service Model

• UNM Staffing Services will be launching a Shared Service Center (SSC) model fall 2017

• Will offer tailored services to meet departments’ unique staffing needs
  - Full-service staffing model
  - A la carte services
  - Step by step guidance and collaboration between department, applicant, & staffing team

• The SSC model is:
  - Ideal for departments who don’t have dedicated resources focused on hiring needs
  - Cost effective and efficient
  - Flexible and focused on the department’s needs
Shared Service Model

• UNM Staffing Services website to be updated with pertinent information regarding SSC Model. To include:
  ▪ List of services & fees
  ▪ Shared Service Request Form
  ▪ Other useful information

• Upcoming communications
  ▪ HR Forums
  ▪ HR Newsletter
  ▪ Department specific meetings (as requested)

We’re excited to serve you!
Questions

Matt Ormita
UNM Temps & Recruitment Services Manager
505-277-5805
mormita@unm.edu
HR Reports Upgrade

HUMAN RESOURCES IT AND BUSINESS SERVICES

ELIZABETH GARCIA
What is HR Reports?

HR Reports provides departments access to their HR data. HR Reports is different from My Reports and is accessible via my.unm.edu or hrreports.unm.edu.

- Active Employees
- Leave Balances
- HR Consultant Information
- Position Management
- Position Vacancy
- Much more!

All you need is the Banner Authorization Request (BAR) role named HR Reports Viewer for Departments to access.
HR Reports Upgrade

The HR Reports Upgrade is scheduled for Saturday, August 5, 2017. The upgrade is bundled with several other planned IT upgrades and outage estimations could be longer than anticipated. HR Reports unavailability is estimated approximately from 6:00 – 8:00 am.

- No noticeable changes immediately on August 5, 2017
  - Upgrade work will consist of stabilizing the new environment and verify current reports and applications are functional

- Expect enhancements in mid August or early September
  - Communication will be sent as changes are made

- Training and SOPs will be updated to correspond to the new interface
- Enhanced User Experience
- Modernized User Interface
- Ease of Use
- Introduction to the Interactive Grid
Current HR Reports

Welcome to HR Reports. Please make a selection below to begin.

- **APEX Applications**
  This application shows all current APEX applications developed to date. All security roles assigned to each application are displayed as well as left sidebar access and column security.

- **Affiliate Benefit Management Application**
  This application is used by the Affiliate Benefit Managers. This application shows affiliate employees who have UNM Medical, Dental and Vision plans.

- **Application Usage Dashboard**
  This application shows the usage of all APEX applications along with top users and the users accessing each application.

- **Benefits Application**
  This application is intended for the HR Benefits office. This application contains information on Enrolled Employees, COBRA reports, Tuition Remission, Mismatch and Audit Errors, Dependent Ed Info, Health Deduction History, Overdue Benefit Payments, Deceased Retirees, Retiree Employee Earnings, Widow Reports and ARP Eligibility and Switches.

- **Employee Application**
  The Employee Application allows the user to view all current active employees by entering a UNM ID or selecting by Level 3 Org(s). You can also view current active employees by entering a position class. The user can view an employee that was active during a date range specified. Depending on security, this application shows Terminated Employees, Ineligible for Rehire, Employee Name Changes, HRS Employee History and HRS Purged employees.

- **Employee Relations Application**
  The Employee Relations Application is restricted to HR Sensitive users only. This application includes the Layoff, Disciplinary and Administrative Leave Cases Reports.
Preview of Future HR Reports*

*This is not a finalized design and will change.
Interactive Grid

Interactive Grids (IG) are very similar to current state Interactive Reports (IR). The IG presents users a set of data in a searchable, customizable report. IG includes numerous capabilities for changing how the data is displayed.

- Familiar look and feel as IR’s
- Rearrange report only using your mouse
- Simplified Sorting
- Simplified Searching
- Quick Reset Function
- Quick Refresh Function
- New Charts
- Pivot Functionality Lost
  - The Oracle APEX team will not deprecate pivot functionality from IR’s until replicated in IG’s
- All reports will **NOT** be converted immediately
  - Currently analyzing most used reports
  - Conversion will occur based on results of analysis
Quick Demo

HR Reports - Log In
Questions

Elizabeth Garcia
Manager, IT Services
Human Resources IT and Business Services
hrit@unm.edu
August Financial Wellness Seminars

CHERIE KNIGHT
UNM BENEFITS, FINANCIAL WELLNESS AND RETIREMENT SERVICES
August Financial Wellness Seminars

- Main Campus – Wednesday, August 23
  - 12:00 – 1:00 pm
  - EOD 1018 or click here to Join Skype Meeting

- North Campus – Thursday, August 24
  - 12:00 – 1:00 pm
  - HSLIC Room 428 or click here to Join Webinar *

Topic: Saving for College Education

Speaker: Mikaela Roos, Representative for The Education Plan, which is the 529 Education Savings Plan that UNM employees can contribute to via payroll.

RSVP to Mikaela@esparza.com for a free bite of lunch!

* Access webcasts via Internet Explorer
Questions

Cherie Knight
HR Projects Specialist
cheriejean56@unm.edu
505-277-2373
In-Range Adjustments for Re-Evaluated Positions

HR COMPENSATION

STACIE JACKSON / CARLOS ABEYTA
New Guidelines

- In response to feedback at President’s Town Halls
- Redistribution of duties following the permanent elimination of a position or reclassification to a lower-level position
- In-range salary adjustment(s) may be requested for employee(s) assuming the most critical or key job responsibilities of a position, as identified in the position description, generally at a minimum of 50% time-effort

- Difference from other compensation guidelines:
  - Due to eliminated/re-evaluated position(s)
  - May have multiple recipients
  - Commit funds to EVP/President
  - May be for lower level duties, if significant
Request Forms

- Forms will be accessible via hr.unm.edu
- Departments will submit request form with:
  - Current org chart
  - Proposed org chart
  - PRQ, if applicable
- The HR Compensation Department will:
  - Oversee the process and approve once the respective EVP/President has approved
  - Give guidance to departments on next steps
  - Answer questions regarding guidelines and policies
Process Flow

- Identify vacancy & cost savings opportunity
- Signed off by Department Head
- Reviewed & approved by Dean/VP & EVP
- Reviewed & approved by HR Comp
- Reviewed & approved by HRP, if applicable
Examples – Multiple Recipients

Department A has a recent vacancy for an Accountant 2 and chooses to permanently eliminate the position. Duties are redistributed to a Sr. Fiscal Services Tech and a Fiscal Services Tech, who each receive a 5% in-range salary adjustment due to the re-evaluation of position.

Accountant 2’s Salary = $60,000
Sr. Fiscal Services Tech increase = $2,400
Fiscal Services Tech increase = $1,900
Salary Savings = $55,700
50% committed to EVP = $27,850
50% department retains = $27,850
Examples – Eliminated Positions

Department B decides to eliminate the accounting functions within their department and move to a Shared Services model with their EVP area. Some of the duties of the eliminated Accountant 2, Sr. Fiscal Services Tech, and Fiscal Services Tech will be allocated to the Operations Manager, who will receive a 5% in-range salary adjustment due to the re-evaluation of position.

Accounting Unit Salaries = $120,000
Operations Manager increase = $3,050
Salary Savings = $116,950
50% committed to EVP = $58,475
50% department retains = $58,475
FAQs

• Can we use this process to address employees who have already taken on additional duties due to an eliminated position?
• Can this process be used for duties assigned temporarily to employees?
• How many request forms do you submit if the department is eliminating multiple positions or delegating duties to multiple employees?
• How much of the cost savings must be committed to my respective EVP/President’s area?
Next Steps

This process is in the final stages of approval. Once approval is received, we will proceed with publishing the guidelines, forms, and FAQs on hr.unm.edu/compensation.

In the meantime, if you have questions, feel free to contact us at comp@unm.edu. Thank you!
Mandatory Training Reports

JILLIAN GONZALES
EMPLOYEE & ORGANIZATIONAL DEVELOPMENT
Reminders

• HR Agents and others with the Security Role (HR Reports Viewer) have access to view their organization’s Mandatory Report at any time.

• HR Reports provides the most accurate information.

• Individual completion can also be accessed by direct supervisors.

• For troubleshooting please see your department’s desktop support or appropriate HELP Desk. (Main, HSC or UH)
Reminders

In 2017, all regular faculty and staff; temporary faculty and staff; on-call staff; and student employees (including Grad Students) are required to complete the designated University-Wide mandatory training. The three University-Wide mandatory trainings are:

- SRS 0117 Basic Annual Safety Training – 2017
- EOD 1017 Intersections: Preventing Discrimination and Harassment – 2017
- EOD 481-17 Active Shooter on Campus: Run, Hide, Fight – 2017

The new deadline for completing Mandatory Training is December 1, 2017.
ULead – Fall Session

JILLIAN GONZALES
EMPLOYEE & ORGANIZATIONAL DEVELOPMENT
ULead Registration Extended

• hr.unm.edu/ulead
Next HRPI Forums

North Campus – RHFH Room 303
Tuesday, October 10, 2017
10:30 – 11:30 am

Main Campus – SUB Acoma A&B
Thursday, October 12, 2017
10:30 – 11:30 am