OVERVIEW – HR/Payroll Employee & Position Actions

ACTION	PAPER FORM	ELECTRONIC FORM

I.   Initiating a New Position Request:
  ➢ The Department completes and submits a Position Description   **X**
     Questionnaire (PDQ) – HR evaluates the title/grade and
     forwards the PDQ review results to the originating Department.
  ➢ The Department creates a new position or changes an existing position
     in IRIS using form ZPPOSITION000 (insert the PDQ).

II.   Position Create/Change Request*   **ZPPOSITION000**
  ➢ Create/Change the *organizational un*it (base department E-account)
  ➢ Create/Change the *position title*
  ➢ Create/Change the *job title*
  ➢ Create/Change the *personnel area* – HSC is always 1070
  ➢ Create/Change the *personnel sub-area* – varies by location (use match code)
  ➢ Create/Change the *employee group/sub-group* – various (use match code)
  ➢ Create/Change the *work schedule* – usually Hour-Day (hourly) or Sal-Day (monthly)
  ➢ Create/Change the *allocated FTE%* - only change if position is vacant
  ➢ Create/Change the *cost distribution* - only change if position is vacant
  ➢ Insert PDQ after clicking PDQ button – use for new positions or title changes
  ➢ Insert funding or other pertinent information on the Workflow Notes tab

  Approval Levels: Human Resources →Distribution Department(s) → Finance & Operations

III.   **Creating a Position Requisition in ORACLE:**   <u>**ORACLE**</u>
          STEPS TO CREATING A NEW REQUISITION IN ORACLE
          1. Enter (Y) for *new position* or (N) for *replace existing position*
              (if existing position enter previous employee's personnel number)
          2. Enter 8-digit *position number* (position or job title must match requisition)
          3. Click on *job class number* (click on *edit, display list* to find job class number)
          4. Tab down to *responsible cost center*, enter responsible cost center
          5. Click on *job class number* (click on *edit, display list* to find work location)
          6. Click on *work room*
          7. Enter proposed start date i.e. 31-dec-2007
          8. Enter *employee group cod*e (T) for *temporary* (F) for *full-time*
          9. Enter *appointment service base* (Y) *12 month*, (A) *Academic Year* ,
              (S) *6 month* or (F) *Flex Year*
          10. Enter *Payroll Type* (B) *Biweekly*, (M) *Monthly*, (S) *Special Pay/Extra*,
          11. Enter *total weekly hours, work days and work schedule*
          12. If position is a term or temporary position, enter ending date of position
               i.e. 31-dec-2008
          13. If position is part-time enter *percent time* i.e. 50 %
          14. Enter whether or not this position will supervise (Y) *yes* or (N) no
          15. Enter whether there are any special physical or mental
              requirements (Y) *yes* or (N) *no*
          16. Enter OSHA Blood-born Pathogens - *O.B.P. Exposure Category* (1) *Exposure*,
              (2) *Possible Exposure*, (3) *No Exposure*
          17. Enter dept. contact person name, his/her work number and the
              direct supervisor's personnel #
          18. Save information and write down the five digit pin #
          19. On the next page, enter the account number (funding source) for
              this position
          20. Enter FTE percentage i.e. 100%

ACTION	PAPER FORM	ELECTRONIC FORM
		ORACLE

STEPS TO CREATING A NEW REQUISITION IN ORACLE (CONTINUED)

21. Enter position funding start date and end date
22. On the next page, enter the PDQ into departmental comments
23. Page down two times and save information

Approval Level: Department →Dean/Vice Chancellor → Finance & Operations →
*   Human Resources/Equity & Diversity (as required)*

IV. Employment Authorization Process	**X**	**ORACLE**

➢ **STEPS TO EXTEND AN OFFER OF EMPLOYMENT**

1. The hiring department contacts the HR recruiter to report interview times and dates – the recruiter updates ORACLE with the interview schedule and notifies the department of the update
2. The department completes the "authorization to hire" in ORACLE indicating reasons for selection and non-selection
3. The HR compensation analyst evaluates the requested salary
4. Upon approval of a salary rate, the recruiter will extend a verbal offer
5. If the offer is accepted the applicant is mailed a letter detailing the process for completing new hire paperwork and orientation

Approval Level: Department →Dean/Vice Chancellor → Human Resources

V.   Initial Hire/Rehire Employee:
                                                             X

- ➢ The HR Department (or the department for students)
  uses the Initial Hire/Rehire of Employee form when a person is to
  be recorded as an employee of UTHSC as follows:
  HIRE AN EMPLOYEE – the person has <u>not</u> been associated with
  the University since the implementation of IRIS – this person will
  not have an existing personnel number.
  REHIRE AN EMPLOYEE – this person has been associated with
  the University since the implementation of IRIS, but has withdrawn –
  this person will have an IRIS personnel number that must be used.

VI.   Personal Data Form – This form must be completed for all new hires,   **X**
rehires, friends transferring to employees and also for any changes to
the following data: Name, Address, Emergency Contact, Education,
Residence/Immigration Status, and additional personal data.

VII.   Personnel Change Request   **X**

- ➢ **POSITION CHANGE/TRANSFER** – Reasons for action are:
  - (1) transferring to another position on his/her current campus
  - (2) adding or removing a position assignment of the employee
  - (3) changing between 9 and 12 month appointments
  - (4) changing *Employee Groups*
  - (5) changing *Payroll Areas*
  - (6) receiving a job reclassification in his/her current position
  - (7) changing between scheduled pay and special pay
- ➢ **TRANSFER FRIEND TO EMPLOYEE**
- ➢ **TRANSFER OUT OF POSITION** – transfer to another UT campus
- ➢ **TENURE CHANGE**

VIII. **Personnel Change Request**   **ZPPAY000**

➢ **LEAVE OF ABSENCE(LOA) WITHOUT PAY /RETURN FROM LOA**
  Reasons for action are:
  (1) Requests for time off for medical conditions such as maternity, surgery, injury or care for a family member
  (2) Military leave
  (3) Time off for educational, administrative or personal leave
  (4) Returns from any approved leave of absence

➢ **PAY/FUNDING CHANGE –** Reasons for action are:
  (1) Pay increase/decreases due to merit increases, state mandated increases, CPS increases, change in responsibilities, etc.
  (2) Funding changes involving changes in cost center(s), and/or WBS element(s) which are charged for an employee's pay and/or changes in the amounts that each account is charged.
  (3) A combination of pay and funding changes

➢ **PERCENT FULL-TIME**

➢ **CHANGE WORK SCHEDULE**

IX. **Additional Payment –** The *Additional Payment* form is used to   **ZPADDPAY000**
request extra service payments.

X. **Recurring Payment –** The *Recurring Payment* form is used to   **ZPRECPAY000**
to request recurring payments i.e. stipends, mobile phones, etc.

XI. **Termination –** The *Termination* form is used for permanent separation   **ZPTERM000**
from employment i.e. terminations, retirements, etc.

XII. **Record Friend, Pending Employee, Guest Traveler –** A *friend* is a person who devotes a portion of his/her effort to the University as a volunteer without monetary compensation or benefits. A friend employed by another institution that has a formal UTHSC association is considered an *affiliated* friend/volunteer. A *guest traveler* is a person who does not have previous or current association with UTHSC but who is to be reimbursed for travel associated with the University. Examples of possible guest travelers include applicants interviewing for a position, a guest speaker/lecturer, a student (non-employee) traveling on behalf of the University, etc. **ZPHRRECORD000**

XIII. **Time Sheets** – There are separate forms for bi-weekly and monthly paid employees. For bi-weekly employees, ALL hours (both worked and absent) are recorded in IRIS. For monthly paid employees, only deviations form their normal work schedule are entered such as annual and sick leave, holiday pay, jury duty, etc. hours/leave from the paper timesheets are entered to IRIS via ZCAT. **X**   **ZCAT**

XIV. **Salary Advance Request -** Certain circumstances may cause situations where employees are not paid on their scheduled pay date for <u>work that has been performed.</u> Salary advances will not be routinely processed due to failure on the part of the employee, their immediate supervisor, departmental timekeeper, or departmental approver to process time entry in IRIS (ZCAP) on a timely basis. <u>Salary advances may be approved only in extenuating circumstances</u> following UTHSC fiscal procedure/form # F475. **X**

XV.   **Exit Clearance Form –** The exit clearance form is a computerized (non-IRIS)   **X**   **WEB**
              form/process on the HR website under "Records". Employees (faculty and staff)
              who are terminating from the University for any reason (Resignation, Retirement,
              Layoff, etc.) must notify his/her supervisor or business manager immediately of
              pending termination in writing giving appropriate notice (two weeks for non-exempt
              and one month for exempt employees). On or before the last day of employment,
              the employee must return all UTHSC issued items including, but not limited to
              laptops, palm pilots, cameras, pagers, keys, ID's, and American Express Corporate
              Cards. The departmental business manager executes the beginning of the clearance
              process which is automatically routed for additional approvals. The electronic form
              is not available for resident terminations which require the paper EC form. The
              electronic form is not to be used for leave of absences (use ZPPAY000).

***NOTE – When a position and the employee in it are both changing – the position
changes must be made in IRIS first, a paper PIF to change the employee's data
may then be completed and submitted for approval.**

APPROVALS REQUIRED FOR PAPER PIF'S

Faculty New Hire PIF's

Department/College (College of Medicine Only)
Vice Chancellor for Faculty, Academic, Student Affairs
Human Resources
CBO

Faculty Other Action PIF's

Department/College
Vice Chancellor for Faculty, Academic, Student Affairs
CBO

Post Doc PIF's

Department/College
Vice Chancellor for Faculty, Academic, Student Affairs
CBO

Staff New Hire PIF's (exempt and non-exempt)

Human Resources
CBO

APPROVALS REQUIRED FOR PAPER PIF'S (Continued)

<u>Staff Other Action PIF's (exempt and non-exempt)</u>

Department/College or Vice Chancellor
Human Resources
CBO

(Please note, staff changes that resulted from a recruiting process require the Oracle PIN number to be written in the "Explanation of Action" box on the PIF form.)

<u>Medical Resident PIF's</u>

Office of Graduate Medical Education
CBO