



## Engagement Summary Report: HR Assignment Contracts Training & Consulting

**Engagement Summary:** 1027787

**Client:** M97 - Charles S. Mott Community College

**Consultant:** Peggy Burns

**Dates of service:** 05/20/08 - 05/20/08

**Delivery method:** On-Site

**Client Participants:**

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**Service Objectives:** Complete Faculty Assignment Contracts training and setup in Test. Test processes and discuss next steps.

**Summary:**

<b>Agenda Topic</b>	<b>Outcome</b>
Complete Faculty Assignment Contracts (ACO) training:	<p>Training completed per the learning guide and handouts. Discussions included:</p> <ul style="list-style-type: none"> <li>- Mott CC is already using the non-instructional assignment options (FMBS) to track non-instructional assignments, so adding the ACO links will be easy.</li> <li>- Semesters are Fall, Winter, Spring, &amp; Summer, and the academic year technically starts with Summer.</li> <li>- Will test and probably use the SDA contract for many FT faculty that have multiple positions to split the funding for their assignments.</li> <li>- Added the rule to limit position selection in ST to the ACPS screen.</li> </ul>
PT, adjunct, overload and FT faculty summer pay calculation subroutines:	<p>Modifications to the delivered shell subroutine discussed included:</p> <ul style="list-style-type: none"> <li>- PT/Adjunct faculty pay grid - PT get one rate on the grid. Adjunct rate depends on degree and step (semesters taught). Discussed determining and entering each faculty member's rate at the person level (WAGS), where the grade and step are currently entered, and having the subroutine get that rate from PERPOSWG. This might eliminate the need for this custom screen.</li> <li>- Overload and over overload use the same calculation as adjunct and PT, so again discussed putting the faculty member's rate of pay in the overload position and having the subroutine get the rate from PERPOSWG.</li> <li>- FT Faculty summer pay - Section instructor load is doubled up to load and paid at 18% of annual salary - Discussed adjusting the load at the section level. The subroutine could get the pay information from PERPOSWG and does the calculation.</li> <li>- English, Journalism, Human Relations, Counseling, etc. have sections that are paid at a different/differential rate and that rate depends on the section. Discussed having the subroutine determine by course section what differential calculation to perform for the correct rate.</li> </ul>
Process discussion and testing topics:	<ul style="list-style-type: none"> <li>- Process mapped the ACO processes.</li> <li>- Faculty assignments will be linked to assignment contracts information on the ST side (FASC and FMBS).</li> <li>- Many people without access to the HR module will need access to RFAL, the Faculty Load Report, including the people making these assignments.</li> <li>- It is highly recommended that only Payroll be able to run CLPS in update mode to make contracts payable.</li> </ul>

- Discussed options for the process of linking assignments for faculty that do not yet have the correct position - notifying HR to add the position so that the assignment can be linked to that contract.
- Discussed being more proactive with the process of promoting PT faculty to adjunct faculty, so that the correct position can be assigned in HR before the assignments are linked to the assignment contract each semester. And/or developing a procedure that if notification of these changes is not received in time to change the position and link the assignments to the correct position, that the new rate will be effective with the next semester. Consider a report to find these faculty nearing then end of their 6th semester to start the process in time to be effective for the 7th semester. This will eliminate the manual checks currently run for late notification of changes such as these. Seniority Plans, a feature in delivered Colleague HR might be helpful in tracking these semesters
- Adjunct, PT faculty and overload positions need to be created as appropriate with expense information, and assigned to employees. Consider few activity codes to reduce the number of salary GL numbers, which in turn will simplify the setup and maintenance of positions and moving employees around in positions.
- Consider adding additional 'generic' Instructional Methods like Lec1 and Lab1 to use when assigning one faculty member (usually FT faculty) to a single course section with 2 different contract types, like FT and overload.
- Test the subroutine(s)
- Test your processes for late notification of faculty assignment and changed to payable contracts.
- Test the ACO process with positions with ended wage records, both when the wage record is ended at the time of linking and if the wage record is ended after linking. What does CLPS do?
- Test what happens if the position used to link the section to the contract is ended before or after CLPS. What happens? Do you need a process to address these situations?
- FT faculty - Discussed using the SDA method for many, if not all, which will require you to use CLPS to make them payable to create the new wage records with the update expense information. Using the SDA method will require you to make those contracts payable to add the new wage records, and should be done when that change needs to be made, which is after the start of the Winter semester.

<p>Other HR and payroll discussions:</p>	<ul style="list-style-type: none"> <li>- Talked about the level of detail being tracked in the GL, the number of journal entries they are doing and how a combination of merging some GL numbers (activities) and adjusting HR module setup, specifically position and stipend setup, might better automate the tracking of expenses. Manually created stipends are being expensed to a GL number and then reallocated with journal entries, when the stipends could be set up with the correct GL and expense correctly every pay cycle, eliminating the need for all the journal entries.</li> <li>- Talked with Renee about implementing Deferred Pay, to expense faculty pay over the working months, but pay them out over the entire 12 months. See Using Human Resources for more information about this feature. Provided a handout to assist with this. Test this with the SDA faculty assignment contracts.</li> <li>- Recommend they implement Remittance processing to get the detailed report of employees deduction amounts by benefit or vendor, and to automate the creation of the AP voucher for those vendor payments. Provided Renee with a handout and referred her to Using Human Resources.</li> <li>- Discussed Group Term and Rapid Rehire with Brenda. Suggested using Group Term and Rapid Rehire instead of ending wage records to indicate inactive employees.</li> <li>- Showed the HR group the EMPS - Employment Summary screen - from which most daily operating screens can be accessed (STAS, DATE, BNDS, STPS, LEVS, ETAX, EDDP, EPOV, etc.) Everyone in HR and payroll should have access to EMPS.</li> <li>- Briefly discussed the new Withholding Cycles field on BACT to make it easier for institutions that pay bi-weekly to calculate the fixed amount and Insurance benefits, by overwriting the pay class calculation of deduction amount.</li> <li>- Discussed the OTHER.DATES val code to be used to track any date the institution wants to track</li> <li>- Provided handout for Retro Pay, and suggested they look at Seniority Plans for both the union seniority tracking and tracking adjunct faculty semesters.</li> </ul>
<p>Payroll and Web Time questions:</p>	<ul style="list-style-type: none"> <li>- They use a position for shift diff, because an employee can hours subject to multiple shift differentials. They have tried setting it up as a differential (EDIF), but that doesn't store the hours the way they need them, and doesn't support 'stacked' earnings differentials. We discussed the differential setup options as they move toward Web Time, and they might leave it the way it is for now. Provided Brenda with a Cheat Sheet for Web Time Entry and Approval.</li> <li>- Discussed about function of the supervisor and alternate supervisor (currently on PPOS, and soon to be added to POSD), and the software update that will allow for non-employee supervisors. Added the status of Non Employee Supervisor to the val code table</li> </ul>

HR.STATUSSES in Test. You will need to transfer this val code to Production.  
- Added codes to the REHIRE.ELIGIBILITY val code table  
(Yes and No) to be used when TERMing employees, either on TERM or using the group  
term feature.

**Next Steps:**

Next Step	Criticality	Assigned To	Project Finish Date	Followup Action	Completion Date
<p>NEXT STEPS:</p> <ul style="list-style-type: none"> <li>- Test and try the setup in test and try any ideas you have for changes in load periods and contract types.</li> <li>- Develop and test the subroutine(s)</li> <li>- Create a detailed test plan and test the processes, especially assignments after the semester starts and the communication necessary when changes are made to payable assignment contracts.</li> <li>- Test the CLPS process to make contracts payable, being sure you don't make any contracts payable before they are ready.</li> <li>- Test the reports and using the additional selection criteria to get the faculty you want to see on your reports.</li> <li>- Move the tested setup to Production as you are ready to use it - for example one load period and a few assignment contract types at a time.</li> <li>- Setup a sample group of PT and adjunct faculty for the Summer session.</li> <li>- Continue to test, train users, and implement with faculty across campus.</li> <li>- Schedule addition consulting as needed.</li> </ul>	High	Team	06/15/08		
<p>The College has been live for 10 years and doing well, but there have been many changes and improvements to the HR module. It is recommended that Mott CC consider scheduling an HR audit. This service provides the college with a detailed audit of the setup and use of Colleague Human Resources system and identifies improvements that can be made for more efficient use, and properly position the college to adopt future functionality. Contact Tammie Hunt (tdh@datatel.com) for information about this service.</p>	High	Team	08/31/08		

