HR Round Table
Procrastinator Theatre

April 5, 2017
Agenda

- MSU accreditation and processing hires for Fall 2017
- Choices Re-enrollment 2017
- Summer Session 2017
- Covering HR vacancies
- Recent common questions/issues in
  - Benefits
  - Compensation-classification
MSU Accreditation and Processing Hires for Fall 2017

April, 2017
MSU Accreditation & Processing Hires for Fall 2017:

- HR partnering with the Provost’s Office over faculty employment data required in August in preparation for MSU’s accreditation site visit
  - Also assists with President’s Office and **other new hire** information
- Please process Fall letters of appointment (LOA) and EPAFs as early as possible
- Data pull slated for August 1 – July payroll deadline
- Report of EPAFs pending

HR is working towards an enhancement in ATS for direct hires. More information to come
Summer Session

April, 2017
Summer Session:

HR PROCESS OUTLINE FOR DEPARTMENTAL ADMIN
SUMMER SESSION APPOINTMENTS | ACADEMIC YEAR FACULTY

<table>
<thead>
<tr>
<th>DEADLINES</th>
<th>Provost Deadline</th>
<th>Payroll Deadline</th>
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<tbody>
<tr>
<td>First Session</td>
<td>May 15 to June 23</td>
<td>Monday, May 1</td>
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<td>Full Session</td>
<td>May 15 to August 4</td>
<td>Monday, May 1</td>
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<td>Inter Session</td>
<td>June 12 to August 4</td>
<td>Thursday, June 1</td>
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<td>Second Session</td>
<td>June 26 to August 4</td>
<td>Friday, June 9</td>
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<tr>
<td>First Session</td>
<td>Friday, May 19 for June 9</td>
<td>Friday, May 19 for June 9 paycheck</td>
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<tr>
<td>Full Session</td>
<td>Friday, May 19 for June 9</td>
<td>Friday, May 19 for June 9 paycheck</td>
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<tr>
<td>Inter Session</td>
<td>Tuesday, June 20</td>
<td>Tuesday, June 20 for July 11 paycheck</td>
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<tr>
<td>Second Session</td>
<td>Thursday, July 20</td>
<td>Thursday, July 20 for August 11 paycheck</td>
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PROCESS OUTLINE

<table>
<thead>
<tr>
<th>PLAN</th>
<th>PREPARE FORM</th>
<th>OBTAIN APPROVALS</th>
<th>FINALIZE CONTRACT</th>
<th>SET UP NEW HIRE</th>
<th>PAYROLL PROCESSING</th>
<th>PAYROLL REVIEW</th>
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<td>Dept</td>
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STEP 1: Planning

- Find out from your department head about instructional and administrative assignments for summer.
- Find out from research-active faculty about research appointments for summer.
- Payroll will post a Summer Session Data File the first week of April on Box.
- The file contains relevant information for each individual faculty member who might receive a Summer Session appointment.
- Summer Session appointments are not always the correct vehicle for summer employment. Please consult the Summer Session guidelines on Box or contact comp-class@montana.edu if unsure.

STEP 2: Payroll Review

- Summer Session appointments should be planned in advance across all sessions, and one appointment form completed per individual representing the entire summer when possible.

ELIGIBILITY AND OVERVIEW

- Academic Year (AY) Faculty (Tenure/Tenure-Track/Non-Tenure Track) are eligible for Summer Session appointments as approved by the Department Head, Dean and Provost’s office.
- Paper-based process. Summer Session form is completed by Departments and processed by Payroll.
- No EAPF required.
- No FTE is assigned in Banner for Summer Session.
- AY Faculty are eligible for 1/3rd to 3/3ths of annual salary, depending on details of appointment.
- No Faculty member may commence teaching summer session course(s) prior to completing Step 4 above (fully executed Summer Session contract).
- For further information on summer session appointment process, please attend HR Fundamentals, Thursday, April 20, 2:30pm, Byer Auditorium or refer to posted presentation.
### Summer Session cntd.:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Timing &amp; Notes</th>
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<tbody>
<tr>
<td><strong>STEP 2</strong></td>
<td>Prepare Form</td>
<td>Form must be approved BEFORE being presented to employee for signature</td>
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<tr>
<td></td>
<td>- Summer Session appointment forms can be found on Box and HR website</td>
<td>Provost’s office requires at least five days prior to payroll deadline to review and approve</td>
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<td>- Instructions for completing the form can be found on Box and HR website</td>
<td>Forms are submitted to Provost’s Office via hard copy not e-mail/scanned</td>
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<td><strong>STEP 3</strong></td>
<td>Obtain Approvals</td>
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<td>- Department Head and Dean signatures required before moving the Summer Session form forward for Provost approval.</td>
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<td>- Is the appointment partially or fully grant funded? If yes, must be approved FIRST by OSP prior to submission to Provost’s office.</td>
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<td>- OSP will then forward to Provost office.</td>
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<td>- Provost’s office must approve all summer session appointments that include a teaching or service element. Please submit these forms directly to the Provost’s office.</td>
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<td>- The Provost’s Office will return approved hard-copy forms to Department</td>
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<td><strong>STEP 4</strong></td>
<td>Finalize Contract</td>
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<td>- Obtain employee signature on fully executed Summer Session form</td>
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<td>- Provide copy of form to employee</td>
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<td>- Forward original form to Payroll. Optional approach to upload signed form to Box can be arranged through your Payroll Tech.</td>
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<td>- Retain copy of form in departmental personnel file</td>
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<td><strong>STEP 5</strong></td>
<td>Set up New Hire (if required)</td>
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<td>- Is this a new hire? If so, please complete a New Hire Form</td>
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<td>- New Hire process instructions can be found [link]</td>
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<td>- Record GID generated from New Hire process on contract prior to sending to Payroll.</td>
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<td><strong>Step 6</strong></td>
<td>Payroll processing</td>
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<td>- Payroll will process employee payments for summer session work per the instructions provided on the form</td>
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<td>- State-funded teaching expenses (Section 4) will be charged to FY18.</td>
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<td><strong>Step 7</strong></td>
<td>Payroll review</td>
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<td></td>
<td>- Please check regular payroll report to confirm correct summer session payments</td>
<td>If Payroll receives a form with no GID, it could delay payroll processing.</td>
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<td>- Further information on “what to check” for summer session payrolls will be provided at HR Fundamentals, Thursday, April 20, 2:30pm, Byker Auditorium April 20</td>
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Summer Session cntd.:

What’s in “The Box”?  

- Blank Summer Session Forms and Contracts (TT and NTT)
- Mail merge templates
- Mail merge instructions
- Summer Session Data spreadsheet
- Summer Session Guidelines
- Summer Session process outline
- Intro to Summer Session Power point
Choices Re-enrollment

April, 2017
Choices Re-enrollment:

For further information and instructions for re-enrollment please visit HR’s web site www.montana.edu/hr
HR's Vacancies

April, 2017
Vacancy Coverage:

- **Benefits**
  - Please direct questions to msubenefits@montana.edu
  - M – Margaux
  - S – Sydney
  - U – distributed by Amy

- **Front Desk**
  - Temporary help, and HR staff on rotation

- **Comp-Class**
  - Please direct questions to comp-classification@montana.edu

- **Reporting**
  - Assistance distributed by Ian

- **Payroll**
  - M – Ashley during recruitment of Susan’s replacement
Recent Common Questions/Issues: Benefits

- How does terminating positions in Banner help departments and employees?
  - Payout of leave balances in accordance with Montana Code
  - Appropriate triggers e.g. qualifying events for benefit plan changes
  - End to employer contributions on benefits-eligible jobs
    - Budget and legal implications of LWOP

[Active and non-active employees are identifiable at timesheet approval each month]
Recent Common Questions/Issues: Benefits contd..

- Why is a new hire’s prompt submission of healthcare selections helpful?
  - Avoids employee dealing with retro premiums and claim reimbursement
  - Standardizes departmental fringe benefit expense budgeting (non-State funds)

[Employees have 30 days to submit selections after which coverage defaults to EE only for the remainder of the plan year]
Recent Common Questions/Issues: Benefits cntd.

- If an employee appears to require a medical leave of absence please refer questions to the Benefits Team. Departments shouldn’t attempt to address the following kinds of issues without advice:
  - FMLA
  - Workers Comp
  - Donated sick leave
  - Long term disability
  - Collective bargaining agreement provisions
  - Employer obligations after leave balances expire

Please direct all benefits and retirement queries to the Benefits Team msubenefits@montana.edu
Recent Common Questions and Issues: Compensation Classification

April, 2017
Recent Common Questions/Issues: Compensation Classification

- On which topics does the Compensation-Classification Team assist and advise?
  - Determining the appropriate hiring instrument
    - MUS contract, LOA
    - Summer Session Appointment
    - MUS Staff Compensation Plan (MUS SCP)
    - Short Term or Fixed Term worker
    - Post Retirement Contract
On which topics does the Compensation-Classification Team assist and advise?

- Appropriate payment method for work outside normal job description, e.g.
  - Additional Compensation
  - Over time, comp time, flex time
  - When to use the ONEPAY EPAF
Recent Common Questions/Issues: Compensation Classification contd.

- On which topics does the Compensation-Classification Team assist and advise?
  - Compensation guidance
    - For recruitment (MUS contract, LOA, MUS SCP)
    - Salary adjustment requests
    - Flexible pay options
    - Raise eligibility

Please direct compensation and classification questions to comp-classification@montana.edu
Questions