Additional Pay Workflow

HRMS UL Meeting, 8/19/11

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# Design Team

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- **Design Team Members**

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  | Kris Crawford, UHR | Kim Andrus, Ross School of Business |
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  | Karen Moran-Woloszyn, Payroll | Julie Smigielski, School of Music |
  | Jean Mayes, Payroll | Janet Finfrock, School of Public Health |
  | Carolyn Wisniewski, UMHS HR | Ann Marie Carder, Student Residences |
  | Kathy Hayford, Dearborn HR | Martine Carl, Student Residences |
  | Dee Dee Hurley, Flint HR | Karyn Procter-Wicks, Internal Medicine |
What is Additional Pay Workflow?

- New tool that allows transactions that use the Additional Pay Table to be directly data entered by units for regular and temporary faculty and staff
- Electronic workflow which enables transactions to be approved by the proper individuals before the transaction is posted to an employee’s record
- Replacement of most of the Additional Pay Changes Submittal Form and Special Payment Form
- Expansion of the functionality that was developed during the DBE Workflow project – important to keep both types of workflow in sync with revisions, updates, etc.
Current Process

Unit:

• Completes a submittal form in M-Pathways or a Special Payment form
• Manually routes the form for approval signatures
• Sends the form to HRRIS, HSHR or University Payroll for data entry into M-Pathways
Improvements with Additional Pay Workflow

• Eliminates duplicate data entry and increases accuracy with online edits
• Eliminates paper forms
• Reduces the time it takes for a change to be posted to an employee’s record
• Allows units an organized way to track and data enter transactions
• Confirms when a transaction is posted to an employee’s record via e-mail
Demo of a transaction using Additional Pay Workflow

- Add’l Pay posted to employee’s record
- Create Add’l Pay Transaction
- Approve Add’l Pay Transaction
- Create Add’l Pay Transaction
Earnings Codes & Special Handling

• Most Earnings Code that were available for use on Additional Pay Submittal Forms will be available in workflow. Exceptions are:
  – FEL and RES – must continue to use Additional Pay Submittal Forms
  – TEA and NTA – access will be permitted in workflow on 11/21/11. Until then, continue to use “Special Payment Form”

• In workflow, some transactions will have routing rules for approval
Pilot member experiences

• Additional Pay Workflow has been in pilot mode since June 15, 2011.

• Pilot members are from the following areas:
  – Dearborn Campus Business Affairs
  – Flint Campus HR
  – UM Hospital
  – Medical School
  – College of Engineering
  – Ross School of Business
  – School of Music Theatre and Dance
  – School of Public Health
  – Student Residences
  – ITS
Next Steps

Fall 2011
• Use Unit Implementation Plan to prepare your unit. This includes:
  • Determining if business process redesign is needed
  • Gathering/changing any impacted documentation/forms

Fall 2011
• Interchanges take place across campus
• Request appropriate roles via OARS

Fall 2011
• Take online training (self-study HRS220 in My LINC)
• Access granted as training is completed

November
• All units are using the Additional Pay Workflow module
• HRRIS and University Payroll will accept paper forms submitted on or before November 18, 2011
Interchanges

• September 15\textsuperscript{th}
  – Room G18 Wolverine Tower, 3:00 – 4:30 PM

• October 17\textsuperscript{th}
  – Rackham Amphitheater, 4\textsuperscript{th} floor Rackham, Central Campus, 3:00 – 4:30 PM

• October 21\textsuperscript{st}
  – Johnson Rooms, 3\textsuperscript{rd} floor Lurie Engineering Center, North Campus, 3:00 – 4:30 PM

• November 10\textsuperscript{th}
  – Room G18 Wolverine Tower, 3:00 – 4:30 PM
Unit Work Plan Review

• Informational spreadsheet available on HRMS UL web site
  – Suggested Implementation Steps
  – Security access roles and descriptions
  – Security access spreadsheet for a large number of access requests

• Email templates that can be used to inform individuals about the roll-out and training are also available on the HRMS UL web site
MY LINC Training Resources

• Links for training resources available for Additional Pay Transactions are in MY LINC document “HR Workflow Transactions”.
  – Create an Additional Pay Workflow Transaction – Step-by-Step Procedure
  – Find an Additional Pay Workflow Transaction – Step-by-Step Procedure
  – HR Workflow Data Selection - Step-by-Step Procedure
  – Create an Additional Pay Workflow Transaction - Guided Simulation
  – Reassign Approver(s) – Support Material

• HRS220 (self-study course) must be taken before security access is granted
Security Access Request

• Effective 8/19/2011, security access should be requested via the OARS process by the HRMS Unit Liaison.

• The security roles are:

  – HR ADL PAY WRKFLOW APPROVER
    • This role provides view access for Additional Pay data and approval or denial of Additional Pay Workflow transactions for which the individual is listed as an approver.

  – HR ADL PAY WRKFLOW UPDATER
    • This role permits an individual to initiate an Additional Pay Workflow transaction, modify an Additional Pay Workflow transaction that the individual initiated and view Additional Pay data.

  – HR ADL PAY WRKFLOW VIEWER
    • This role permits an individual to view Additional Pay data.
Questions?

For unit consulting requests please contact:
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