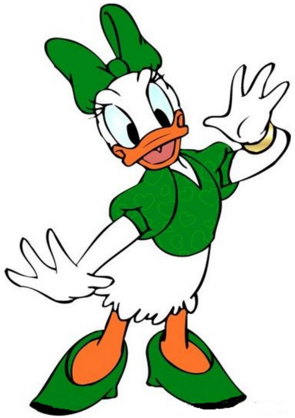
Hiring Daisy at the UO



HRCP Professional Development Session
Thursday, December 2, 11AM-12PM

Thank You!

Tracy Bars, Special Asst. to the VP/HR Partner, Division of Equity & Inclusion

Taylor Fowler, Mgr., Employee Development and Engagement, University Advancement

Brittany Jayne, Employee & Labor Relations Specialist, University Human Resources

Sheila Keen, Department Manager, Psychology, College of Arts and Sciences

Agenda

- **MyTrack Permissions on Requisitions**
  Jenna Rakes, Sr. Associate Director, Talent Acquisition

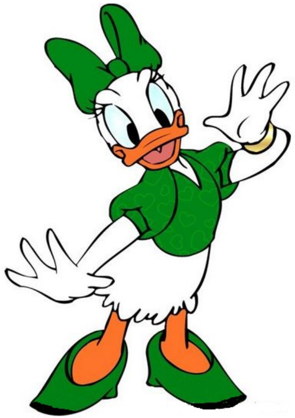
- **Benefits Eligibility & Enrollment and the Payroll Process**
  Cindi Peterson, Associate Director of Benefits

- **What is needed in an ERF, Overload, & Stipend request?**
  Cory Hartman, Classification & Compensation Analyst

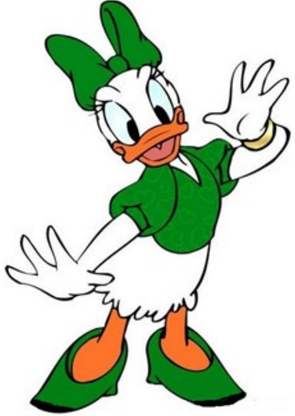
- **When do Units submit paperwork to Payroll vs. HR Operations? What form do I use to submit actions?**
  Catherine Bonomini-Smith, Associate Director, HR Operations

- **Classified Supervisory File**
  Brittany Jayne, Employee & Labor Relations Specialist

MyTrack Permissions on Requisitions



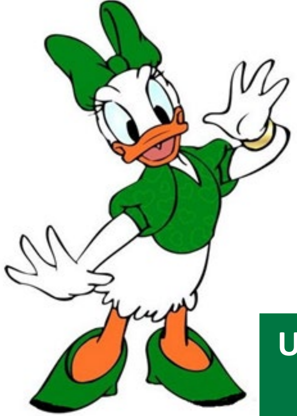
Jenna Rakes, Sr. Associate Director, Talent Acquisition



MyTrack Permissions on Requisitions

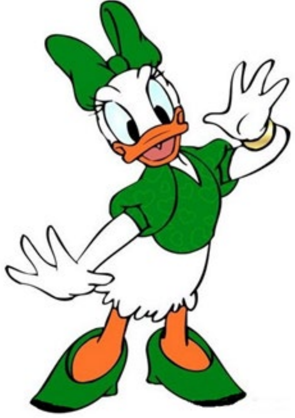
MyTrack Access Overview

- Position Descriptions
    - Based on System Permission Level
    - Based on Team (Level 3 org)
- Requisitions (including applications)
    - Based on assignment to user roles
    - Some aspects tied to System Permission Level
- Why are these different?



MyTrack Permissions on Requisitions

User Role on Requisition	Can see Requisition?	Can see Applicants?	Can adjust Applicant Statuses?	Can see Search Committee Feedback?
Hiring Manager	Yes	Yes	Yes	No
HR Admin	Yes	No	No	No
Hiring Manager Proxy – No Selection Outcomes	No	Yes	No	No
Hiring Manager Proxy- With Selection Outcomes	No	Yes	Yes	No
Search Administrator	No	No	No	Yes

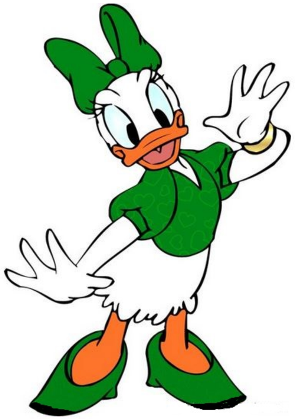


MyTrack Permissions on Requisitions

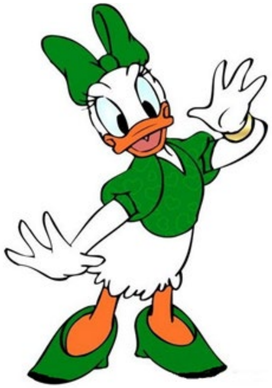
Search Committees:

- Can see applicants ONLY in certain statuses
  - Qualifications Review/Initial Committee Review is 1st
- Do not get access to requisition or candidates in other statuses
- Search Committee User Guides (including video)
- Statuses that allow Search Committee Access (bottom of page)

Benefits Eligibility & Enrollment and the Payroll Process



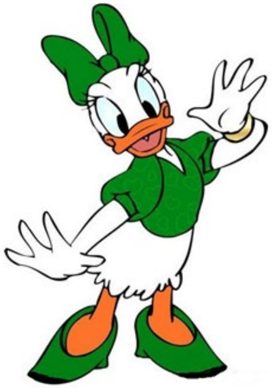
Cindi Peterson, Associate Director of Benefits



Benefits Eligibility and the Payroll Process

Benefits eligibility

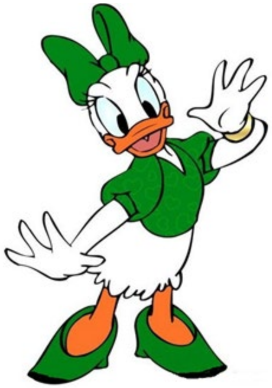
- .50FTE or more for at least 90 days
- Enroll within 30 days of hire date
- Coverage effective first of the month following hire date **AND** enrollment
- Coverage delayed by one month if enroll after the last day of hire month
- Enroll online or via paper forms



Benefits Eligibility and the Payroll Process

Hiring or rehiring

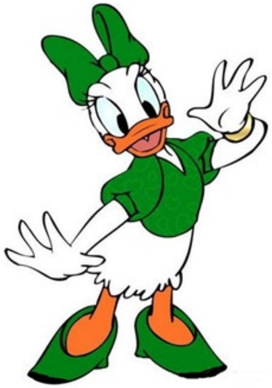
- Complete the process as soon as possible
- Creation of Banner Employee Record (PEAEMPL) – employee enroll online or benefit staff to manually enter enrollments
- Creation of Banner Job Record (NBAJOBS) – payroll set up deductions and collect premiums



Benefits Eligibility and the Payroll Process

Employment changes that may impact benefits

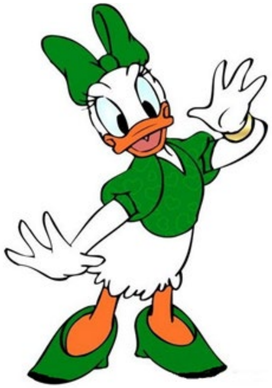
- Hourly employees reporting less than 80 hours
- FTE increase (over .50) or decrease (less than .50)
- Leave without pay
- Termination/Retirement
- Reappointments/rehires



Benefits Eligibility and the Payroll Process

Monthly payroll time entry (Unit Level)

- Review employee roster to ensure accurate employment status in Banner
- Review PHAHOUR Roster to ensure accurate pay
  - Did all active employees report hours (worked, leave usage, etc.)?
  - Did an hourly employee report less than 80 hours? Do they want to use accrued leave?

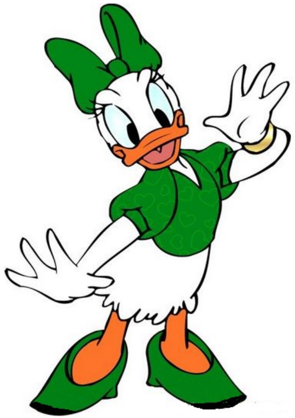


Benefits Eligibility and the Payroll Process

Monthly Time Entry Closes (Benefits Office)

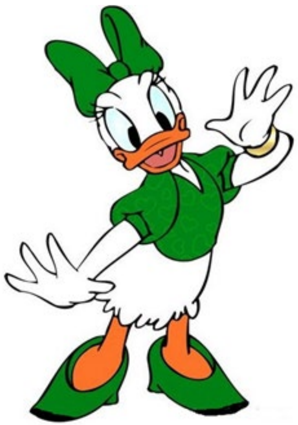
- Review payroll audit report
  - No hours/pay or less than 80 hours reflected in Banner
- Terminate benefits in PEBB system, if determined not eligible

What is needed in an ERF, Overload, & Stipend request?



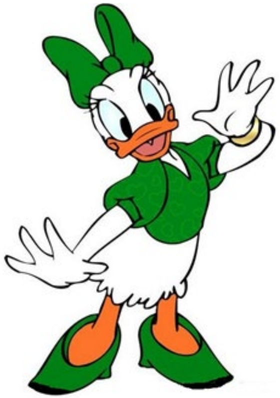
Cory Hartman, Classification & Compensation Analyst

What is needed in an ERF, Overload, & Stipend request?



- All 3 Actions:
  - Current UO employee/appointment
- ERF:
  - $500 or less
  - ERF form
  - Explanation of work performed
- Overload:
  - Overload form
    Overload calculator
  - Explanation of overload
- Stipend:
  - PRF form
  - Off cycle pay actions form and Justification memo if needed (who, what, when, where, why)

Important Note Not all employee groups are eligible for these pay actions



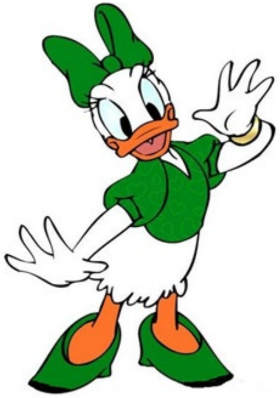
When do units submit paperwork vs. HR Operations? What form do I use to submit actions?

Catherine Bonomini-Smith, Associate Director

HR Operations

Who does the paperwork?

A good place to start is to ask yourself a few questions about the action you want to take for Daisy



- What type of action is it?
  - Positive
  - Negative
  - Correction
  - Adjustment
  - Bargained change
- What type of employee is Daisy?
- How did you request the change?
- Who had to approve it?
- Which unit in HR did you work with?

Who does the paperwork for Daisy?

HUMAN RESOURCES

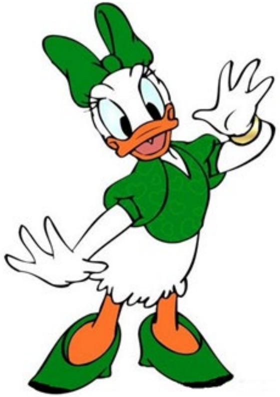
- HR or Provost Approved Action
  - Faculty Promotion (career and TTF) or Post Tenure Review increase
  - Layoff
  - University wide salary increase- including minimum wage changes or negotiated step increases (including monthly classified or Postdoc steps).
  - Requests or Actions Approved by University HR or OICRC unless instructed to submit the PRF
  - Sabbatical FTE change
  - Ongoing Career FTE annual update
  - Special Merit and IT performance merit increase
- Pay Action submitted in MyTrack through a Position Description Update
- HR Operations will occasionally create PRFs for corrections rather than reaching out to the unit to create them.

UNIT

- Pay or personnel action initiated by unit, regardless of additional approvals needed (job title updates, stipend requests, retention requests, faculty appointment renewals (RTOs), FTE changes, FTE re-allocation for ongoing career, corrections to employment start date)
- Non- Bargaining unit salary increases like EC Cares monthly merit increases or other COLA.
- Pay Actions approved by University HR or OICRC where they instruct the unit to submit the PRF
- Payroll specific forms like Manual Check Requests

How do I submit the job change request for Daisy?

Ask yourself a few things:

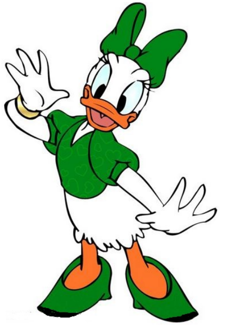


- What am I doing and is there a specific form dedicated to this type of action?
- What type of employee is this?
- Who needs to approve the change?
- Is this an accounting or strictly payroll action?

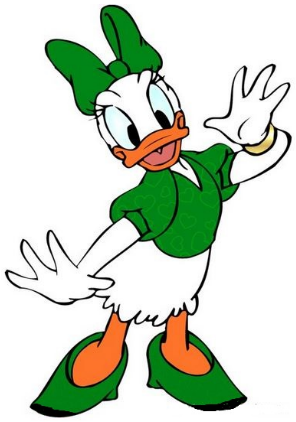
How do I submit the unit paperwork for the job change for Daisy?

- Where do I start? Use the Guide!
  - https://hr.uoregon.edu/hr-operations/personnel-actions/hr-document-submission-forms
  - You'll find links to the forms and instruction guides – including how to find submissions
  - New forms are being developed on a regular basis-and will be linked on this page
- What form to pick?
  - Does the action have its own unique form?
    - Appointment Percent Changes and Employee/Job Separations have their own form and HR Operations is constantly working to develop new forms
  - Paperwork is generally submitted based on type of employee if they have different workflow approvals
    - Note that faculty like Pro Tems and Retirees and OAs, even in fixed term positions with end dates, use the OA and Faculty upload form, not temporary. Their job may be temporary or fixed, but their employee type is not temporary.

- New electronic forms planned for development in 2022:
  - Supervisor Update Form (Will allow for mass updates)
    - Have one you need to do now where there are more than 5 employees with a new supervisor? Email hrops and we will work with you to submit a spreadsheet list to payroll.
  - Earnings Request Form
  - Moving Expense Form
  - And maybe more!
- Used the resources and still don't know how to get Daisy's job updated?
  - Email HROPS@uoregon.edu or send one of our tea[m] members a Teams message



Classified Supervisory Files



Brittany Jayne, Employee & Labor Relations Specialist

What’s the difference between a supervisory file and a Human Resources file?

Supervisory file

- Records and/ or anecdotal notes on subordinate employees (CBA)
- Doesn't matter where it is, whether it's in a specific file, in an email, or on a piece of paper/in a notebook, in a general office file

Personnel file

- Kept in Central HR and includes:
  - Pay actions
  - Performance evaluations
  - Material reflecting caution, consultation, warning, admonishment, reprimand or other disciplinary action, Section 1 shall be retained for a maximum of three (3) years. If requested by the employee in writing, such material however shall be removed after two (2) years, provided there has been no recurrence of the problem or a related problem in that time.

Classified Supervisory File -what should be included?

- Orientation checklists/ documentation
- Rewards/ letters/ notes of commendation
- Notes/emails or praise from customers
- Letters of clarification, letters reflecting disciplinary action
- Notes of conversations, actions and incidents of exemplary behavior
- Notes of conversations, actions, and incidents of problematic behavior
- Leave slips
- Position description
- Performance appraisals
- Letters indicating changes in pay/ classification
- Training information

What should not be included:

- Doctors' notes (OAR 839-006-0242(6)(a), ORS 659A.136(3))
- Workers' Compensation documents (accident/incident

  reports, 801 Forms) (OAR 839-006-0242(6)(a), ORS 659A.136(3))
- Leave slips with medical information (OAR 839-006-0242(6)(a), ORS 659A.136(3))
- Time sheets
- Grievances, or grievance documentation
- Any information with medical information or history (OAR 839-006-0242(6)(a), ORS 659A.136(3))

Supervisory obligations

- Classified employees have a right to see their supervisory files upon reasonable notice to the supervisor (CBA, ORS 652.750(2))
- Classified employees have a right to a copy of the supervisory file (CBA, ORS 652.750(2))
- Once an employee separates from the UO, the supervisory file should be confidentially disposed. In the case of Classified employees who promote, transfer or demote within the university, the file should be retained for up to one year from the effective date of the action (CBA)

Tips for maintaining a supervisory file

- Review and clean out/up supervisory files annually at the time of the performance evaluation. This ensures the information contained within is current and appropriate for the file.

- Find a system that works for you whether that's electronic files, Outlook notes, hard copy files, a combination of different systems. Whatever system you use, make sure you can easily access and compile information.

- When making notes, keep to the facts and don't write anything you wouldn't want seen in public or said to the employee. Describe the facts and avoid assigning intent, motivation or placing judgment.

Q & A

Please use the chat to add your questions or email me at mirabile@uoregon.edu and I will follow-up with you.

HR Resources

HR Partner Trainings

HR Community of Practice members may need access and training on the following systems to successfully manage their HR responsibilities:

- HR Orientation for New HR Partners
  This training offers a high-level look at the organizational structure of University Human Resources. Information about the five different HR Departments, including their specific responsibilities, is reviewed. New HR Partners should register for this quarterly offering on the MyTrack Learning module.

- Human Resource Information System (HRIS) -Banner Training -Business Affairs
  Banner HRIS is a tool for human resource management and the administration of payroll.
  https://ba.uoregon.edu/training

- University of Oregon Forms
  Online form submission and processing of position and pay forms to Human Resources and Payroll Office with electronic signature approvals (UO login required).
  https://forms.uoregon.edu/

https://hr.uoregon.edu/hr-operations/personnel-actions/hr-document-submission-forms

HR Partner Trainings

HR Community of Practice members may need access and training on the following systems to successfully manage their HR responsibilities:

- **MyTrack Recruitment Module**
  MyTrack is the applicant tracking system for employee recruitment. Review the MyTrack User Guides & Tools and contact your Recruitment Consultant or talent@uoregon.edu with questions.

  https://hr.uoregon.edu/recruitment/mytrack-recruitment-module

- **Cognos Integrative Data Reporting (IDR)**
  Cognos is the enterprise-wide data warehouse, business intelligence and data visualization service providing reports, dashboards and data integration.

  https://is.uoregon.edu/applications-middleware/application-services/idr

HR Partner Trainings

HR Community of Practice members may want to register for human resource trainings offered by University HR and campus partners and also explore outside opportunities.

- MyTrack Learning module
  MyTrack Offers UO specific trainings and elearning. Login and check out the monthly calendar of trainings https://uomytrack.pageuppeople.com/learning/

- LinkedIn Learning
  UO is a LinkedIn Learning campus with offerings in 13 business topic areas including human resources https://hr.uoregon.edu/learning-development/linkedin-learning

- Other HR professional organizations offering human resource trainings include: CUPA-HR, SHRM, NACUBO, NACUA, BOLI, PHRMA, LCHRA and Cascade Centers, Inc., the university's employee assistance program.

Recruitment Resources

Recruitment and Hiring at the UO
https://hr.uoregon.edu/recruitment/recruitment-and-hiring

COVID-19 Recruitment Guidance
https://hr.uoregon.edu/programs-services/covid-19-resources/resources-supervisors-hr-partners/covid-19-recruitment-guidance

Recruiting in Today's Labor Market

Talent Acquisition presented this training at our November HR Community of Practice meeting. The presentation and notes can be found on the HRCP November Highlights.

Employment trends and why we need to adjust
What are we seeing in the labor market?
Strategies you can use to improve your applicant pools
Discuss your needs with your Recruitment Consultant

Candidate Tours

Student Orientation Programs can help with candidate tours. Departments can request an abbreviated tour or the prospective student experience (with a short presentation and the 90-minute tour). The best way to connect is to call
541-346-1274 or email visit@uoregon.edu.

Position Description Resources

General Tips for Writing an Effective Position Description

https://hr.uoregon.edu/cc/position-description-forms

MyTrack Position Description Guidelines

https://hr.uoregon.edu/recruitment/mytrack-recruitment-module/mytrack-user-guides-tools/position-descriptions/position-1

SEIU Classification Specifications

https://fa.oregonstate.edu/classification-specifications

LinkedIn Learning Videos

Fundamentals of a Job Description

Creating a Compelling Job Description

Using the MyTrack Recruitment Module

MyTrack is the applicant tracking system for employee recruitment. Reference materials and FAQs are provided to assist users with navigating MyTrack and completing common tasks. These tools and resources provide help and support as you use MyTrack to manage recruitment in your department or unit.

- MyTrack User Guides & Tools
  There are 7 user guides which include position descriptions, job requisitions, approvals, search committees, applications and applicants, offers and onboarding.
- FAQ-UO Users
  Review the FAQs for questions HR Partners have already asked and received answers.
- User Roles & Permissions
  A user's ability to access areas of MyTrack hinges upon two key concepts: your permission level and what user role you are in on a particular item.
- Applicant Support
  Review these FAQs to help your applicants with their questions.

Contact your Recruitment Consultant or talent@uoregon.edu with questions.

Managing the MyTrack Onboarding Task List

The Employee Onboarding Portal can be accessed by the onboarding delegate, supervisor, and new hire when the new hire is in "Offer Accepted" status. New hires arrive in this status after accepting an informal or contingent offer and passing their background check.

HR Partners can update the "Task List" for new employees from their MyTrack Recruitment dashboard. Review the link below to learn about managing onboarding tasks for your new employee

https://hr.uoregon.edu/recruitment/mytrack-recruitment-module/mytrack-user-guides-tools/onboarding/mytrack-user-guide

Onboarding Best Practices for HR Partners
PowerPoint presentation available November 2019
Training highlights and onboarding templates available on HRCP Highlights webpage

Onboarding Best Practices for HR Partners – Part 2
PowerPoint presentation available – February 2020
(tips for using MyTrack Onboarding Task List included)

Identity Management, Affiliation Type & Access Rules

- Position affiliation types, description, and determination by employee codes:

  https://service.uoregon.edu/TDClient/2030/Portal/KB/ArticleDet?ID=32974

- Identity Management Affiliation and Resource Access Rules:

  https://service.uoregon.edu/TDClient/2030/Portal/KB/ArticleDet?ID=32955

Earn Codes, Account Codes for PRFs/PAWS

- Payroll Account Codes: https://ba.uoregon.edu/payroll/payroll-administration/payroll-codes
- Account Codes: https://fpm.uoregon.edu/accountcodesearch
- PRF instructions: https://ba.uoregon.edu/payroll/payroll-administration/payroll-request-form-instructions
- Job Change Reasons for PRFs: file:///C:/Users/tbars/Downloads/all_jcrs_4.pdf
- Employee Classes (Eclass): https://ba.uoregon.edu/payroll/employee-classes

PRF = Payroll Request Form

The PRF is used to update/revise or terminate classified, Faculty, OA, and temporary appointments already in the system, correct leave balances and labor distribution. It is also used to establish temporary appointments in the payroll system. PRFs are routed through the forms.uoregon.edu application for approval and payroll action.

In PWIVERI there is a PDF option which will auto populate job information for already established positions.

To generate a PRF go to the Banner PWIVERI Form:

- Select Tools (top right corner)
- Scroll down and select Payroll Request Form
- Make your changes in appropriate tabs: Identification, Job Detail, Labor Distrib. Codes, Signatures, Dept. Contact
- Select Tools (top right corner)
- Scroll down and select Run Report
- Download the generated PDF (review for correctness)
  Upload completed PDF into the forms.uoregon.edu application to route to authorizers and Payroll, when appropriate

PAW = Payroll Accounting Webpage

The Payroll Accounting Webpage is an easy way to enter multiple dates and information for ledger line items for an employee appointment. Enter employee name, ID, annual salary, annual basis, position and suffix along with financial information ledger line items, budget amount OR actual FTE and start and end dates. A PAW report can be generated and saved as supporting documentation for your employee appointment which would be used to send to Payroll for further clarification of dates, FTE and funding.

Classification and Compensation Resources

Classification and Compensation works in partnership with campus constituents to provide strategies and solutions so that they may achieve their classification and compensation objectives in an effective, efficient, consistent, and equitable manner. We provide advisement and consultation along with other University HR areas on reorganizations and compensation considerations. Application of processes are in accordance with, applicable laws, collective bargaining agreements, policies, and procedures.

Important compensation laws and policies to consider:

- Fair Labor Standards Act (FLSA)
- Oregon Equal Pay Act
- SEIU Classification Specifications
- OA Compensation Structure
- Career & Fixed Term Faculty Pay Actions

Questions? Contact the Classification and Compensation Dept

Classified Recall List

- Eligible classified employees whose positions were laid off due to budget constraints or changing operational needs are able to elect to be on the recall list for their previously held classification.
- When a position becomes vacant that is one of the classifications on the recall list, the supervisor may be contacted to have a placement meeting if a candidate feels position qualified.
- If the recall list candidate is position qualified during the placement meeting, the recall candidate is placed in the position. This process takes place before a position is posted on the HR Careers website.

https://hr.uoregon.edu/recruitment/hiring-faculty-and-staff/hiring-classified-staff/classified-position-start-search

SEIU CBA Article 44 Section 9(A) – University Layoff Recall lists

OA Reemployment Pool

- OAs whose positions were eliminated due to budget constraints or changing operational needs are eligible to participate in the pool.
- Hiring authorities who are launching requisitions from previously approved position descriptions will be asked when completing the requisition if they wish to utilize the Re-employment Pool.
- Hiring authorities may utilize the re-employment pool at any time up to the point a contingent offer has been made on an approved recruitment (fully approved position description and requisition).

https://hr.uoregon.edu/recruitment/hiring-faculty-and-staff/hiring-officers-administration/oa-re-employment-pool

Re-employment FAQ's

https://hr.uoregon.edu/employee-labor-relations/employment-policies/oa-policies/oa-policies-frequently-asked-questions#OA_Re-employment_Pool

Questions? Contact Talent Acquisition at talent@uoregon.edu for assistance.

United Academics Exclusion List

All faculty (TTF/NTTF/emeritus/library/research/pro-tem/post doc, etc.) are represented by United Academics (UA), the faculty union, per article 1 of the collective bargaining agreement (CBA), with only a few categories that convey exclusion from the UA bargaining unit.

- **Title exclusions:**
  If a faculty member holds one of the following exact titles they are excluded from the bargaining unit: *President, Provost, Vice President, Vice Provost, Associate Vice Provost, Assistant Vice Provost, Dean, Associate Dean, Assistant Dean, or Department Head*
- **Law school exclusions:**
  All Law School faculty are excluded and not represented by UA
- **EC Cares exclusions:**
  All EC Cares faculty are excluded and not represented by UA
- **Supervisory exclusions:** If a faculty member has *robust supervisory responsibility (more detail next slide)* for two or more other members of the UA bargaining unit, the supervising faculty member is excluded and not represented by UA

United Academics Exclusion List

Common misconceptions:

- Non-excluded faculty are still members of the bargaining unit and covered by the UA CBA, even if they don't pay dues to UA.
- Membership in the UA bargaining unit and coverage by the UA CBA is based on objective criteria and is not discretionary. Our unit partners are best positioned to identify positions that could qualify for exclusion UO use objective criteria, applied equally.
    - *Robust supervision* is more than day-to-day oversight or assignment of tasks, it must be high-level supervision including such tasks as preparing and delivering annual reviews, or developing and implementing a performance improvement plan.

Please reach out to Shannon Rose (roses@uoregon.edu) if you have any questions!

Tenure Reduction Program for Tenured Faculty

The Tenure Reduction Program (TRP) is a retirement incentive program for tenured faculty. A one-time salary increase amounting to six percent of the faculty member's salary will be effective at the start of the term following their application. On the designated retirement date, the faculty member retires and begins work on their TRP assignments.

APPLY	RETIRE	TRP APPOINTMENT ENDS
Faculty apply to participate in TRP 1. Eligible faculty apply to the TRP Program within 3 years of their planned retirement date 2. Faculty continue to work in current tenured position until retirement	**Faculty retires and enters the TRP Program** 1. TRP faculty are offered 5 TRP appointments within a 5 year timeline 2. One TRP appointment is equal to: 2 courses and 1.0 FTE or 1 course and .50 FTE for two terms 3. With approval of their Dean, faculty can accelerate their TRP timeline	1. TRP appointment ends when: Faculty member's 5 year timeline expires OR 5 TRP appointments are completed 2. Faculty member may continue to work in other post retirement appointment
UP TO 3 YEARS	UP TO 5 YEARS	

Questions? Contact Jen Mirabile, Sr. HR Programs Coordinator

Separation/Transfer Resources

The supervisor, HR Partner and employee coordinate effort to facilitate separation/termination from the department/university when employment comes to an end. There are different types of separation as well as helpful guides for both the supervisor and employee:

- Supervisor/Department Action Resources
- Employee Action and Resources

Unintended consequences of NOT processing separation paperwork:

- Employee may receive pay which will need to be collected by Payroll
- Retroactive merit applied to position.
- Employee may receive insurance and retirement benefits when not eligible
- Employee may not have timely access to retirement account
- Incorrect department roster for reporting purposes
- Employee remains on the UO online directory

Job Change Reason Code: https://hr.uoregon.edu/hr-operations/reference-guides/job-and-separation-reason-code-guide