



College of Agriculture,
Food and Environment
Business Center

Subject Matter Expert Series: Personnel Actions Resources & Tips

August 6, 2020



Administrative items:

- **Remember to mute your mic.**
- **Melissa will be monitoring the chat box for questions, and we will also have time for questions at the end.**

Trivia Question

**How many personnel actions were processed
in CAFE during FY'20?**

Trivia Question Answer:

2545

And the winner is.....

Congratulations, a UK blanket with carrying case is headed your way!



The largest volume of personnel actions occur in August.

So, that is why we chose to do this session at the beginning of August, and we are going to start off with the following 13 Tips to a Busy Hiring Month.



13 Tips to a busy hiring month

Hiring Pause: The University is currently under a hiring pause, with the exception of, hourly students, anyone who an offer was made prior to March 23, 2020, or who has been approved during the exception process.

Posting the job: [IES QRG's](#) are linked to the [CAFE Business Center](#) website. Student, department temporary, Post Doc, etc. positions can be posted through [IES Student/Other](#).

Determine I9 Requirement: Determine in advance if the potential employee will need to complete an I9 and/or background check and make appropriate arrangements.

Student Hires: Please ensure student employees are enrolled for courses at UK.

Student Wage Scale: When hiring students, please reference the [CAFE Student Wage Scale](#). If a department would like to request an exception to the scale, the [Student Wage Scale Exception Form](#) should be completed and submitted online in advance.

Selecting the Position Number: Always choose a position number with the correct reporting relationship, to maintain MSS access/accuracy. Always review the reporting relationship in **PP01**, **prior** to entering the PA40 action. If you need a new, non-regular position created, please complete/submit the [Position Request Form](#).

13 Tips to a busy hiring month continued...

Collecting paperwork: Collect all applicable new hire paperwork (I-9, W-4, direct deposit, etc.), and provide employees with the [MyUK Employee Self Service](#) and [MyUK app instructions](#).

Note: For most hires, the **K-4** form is no longer applicable, and should not be included in the packet. With the KY 5% Flat Tax, there are only **two** reasons a new employee would want to submit a K-4 form:

Reason #1 - If the employee would like to claim exempt for one of the four following reasons:

| | |
|--|--|
| <input type="checkbox"/> | 1. Kentucky income tax liability is not expected this year (see instructions) |
| <input type="checkbox"/> | 2. You qualify for the Fort Campbell Exemption Certificate. I am a resident of _____ State |
| <input type="checkbox"/> | 3. You qualify for the nonresident military spouse exemption |
| <input type="checkbox"/> | 4. You work in Kentucky and reside in a reciprocal state |
| Additional withholding per pay period under agreement with employer \$ _____ | |

Reason #2 - If the employee would like an additional amount withheld (above the 5% standard).

Selecting the Personnel Action: When determining which personnel action to use, the [Personnel Actions Cheat Sheet \(PA40 QRGs\)](#) may be helpful.

Note: HR asks that we use the [Reactivate Additional Assignment](#) action whenever possible. This action can be used to avoid creating an unnecessary additional personnel number for an employee. If an employee already has multiple personnel numbers, and at least one is inactive (ended, not separated), you can use this action.

Note: Avoid entering additional hourly assignments mid-pay period. Time may not run through the evaluation process automatically and the employee's pay will be incorrect, and you will need to ask Payroll to run a split time evaluation,

Review Documents: Check all ZPAR/WF supporting documents (tax forms, direct deposit, etc.) to make sure the forms are filled out completely with signatures prior to sending the paperwork to the CAFE Business Center. Due to COVID-19, all forms are to be emailed to Christine.Fensin@uky.edu.

STEPS Exemption Code: Include the **STEPS exemption number** in the **comments** section of the ZPAR/WF when applicable.

13 Tips to a busy hiring month continued...

Local City Tax/Royster: Remember Payroll requires a new [Local City Tax Form](#) each semester for RA, TA, GA's who are exempt under the [Royster Memo](#) For the fall 2020 semester, **8/17/20** is the earliest available effective date for the form.

9027 Benefits Cost Dist Screen for RA/GA/TAs: [Screen 9027](#) is the benefits cost distributions screen for RA/GA/TAs and Fellowship assignments. The screen should be utilized when benefits need to charge to a different cost center than payroll. This distribution is separate and distinct from the payroll distribution.

ZPAR/WF Deadline: The original ZPAR **plus one copy**, with attached backup documentation, should be sent to the CAFE Business Center, keeping in mind the **ZPAR deadlines**. The Business Center deadline is 10:00 AM on the date in the first column of the Payroll Schedule. Due to COVID-19, all forms are to be emailed to Christine.fensin@uky.edu

| | | | | | | | | |
|---|---|--|---|----------------------|-------|-----------|------|--|
| ZPARS/WFs are due by 10:00 am to the CAFE Business Center | | | | | | | | |
| SAP Biweekly Payroll Schedule for July - Dec 2019 | | | | | | | | |
| Time Load, Time Transfer, and Time Evaluation MUST be run EACH day | | | | | | | | |
| Documents MUST be received in Compensation by Monday 5:00 PM | Data and Time Input MUST be entered by Thursday 5:00 pm Payroll Run (Prelim) | Corrections and Other Data MUST be entered by Sunday 5:00 pm Payroll Correction Run (Trial) | Departments have until Monday 5:00 pm for biweekly payroll corrections Payroll Correction Final Run | Payroll Period Dates | | | | **Earliest Retro Date Set After BW Payroll |
| Bi-Weekly Date | Bi-Weekly Date | Bi-Weekly Date | Bi-Weekly Date | Begin | End | Date Paid | PR # | |
| 07/01/2019 | 07/03/2019 Wednesday | 07/07/2019 | 07/08/2019 | 06/23 | 07/06 | 07/12 | 14 | |
| 07/15/2019 | 07/18/2019 | 07/21/2019 | 07/22/2019 | 07/07 | 07/20 | 07/26 | 15 | |
| 07/29/2019 | 08/01/2019 | 08/04/2019 | 08/05/2019 | 07/21 | 08/03 | 08/09 | 16 | |
| 08/12/2019 | 08/15/2019 | 08/18/2019 | 08/19/2019 | 08/04 | 08/17 | 08/23 | 17 | 06/23/2019 |
| 08/26/2019 | 08/29/2019 | 09/01/2019 | Tuesday, NOON 09/03/2019 | 08/18 | 08/31 | 09/06 | 18 | |

13 Tips to a busy hiring month continued...

-Review SAP to make sure ZPARS are approved/processed (infotype 9022, 9012, infotype 3), and all payments/deductions are going through correctly (PC00_M10_CEDT) prior to the payroll deadline (review [payroll schedule](#) for dates).

Note: Utilize the [/SPIN/ER – IT 0008 Locked Report](#) to ensure all workflows are processed.

-After the payroll preliminary run, the /SPIN/ER Payroll Preliminary Posting Report is available to preview the posting information.

-Review the BW Labor Distribution Reports (usually available 3 days after the payroll final) to ensure the funding is accurate.

Resources

Visit the [HR Administrator Resources](#) section of the [CAFE Business Center](#) site for additional resources.

Tip - ZPAR Routing During Telework

- The *ZPARS* and Workflows remain on the same deadlines.
- All forms need to be sent via email to Chris Fensin prior to the applicable deadline.
- Digital Signatures are acceptable.
- For all positions other than hourly students, notes related to the hiring pause should be included in the comments.

Example 1: per the attached offer letter the offer was accepted prior to the March 23, 2020 hiring pause.

Example 2: per the attached approval an exception was granted to the hiring pause on June 23, 2020.

Tip - I-9s During Telework

Step 1: Advise the new hire of which documents will be needed, and, for individuals that will complete an I-9 on campus, ask him/her **to set up an appointment** to go to Scovell Hall to complete the I-9.

Appointments can be scheduled at:

<https://cafebusinesscenter.ca.uky.edu/www.uky.edu/hr/i9>

Step 2: HR Employment will complete the I-9 with the new hire and email an encrypted digital copy to the hiring department contact (you). **For this reason it is important to provide the employee with your name and email address to give to Employment.**

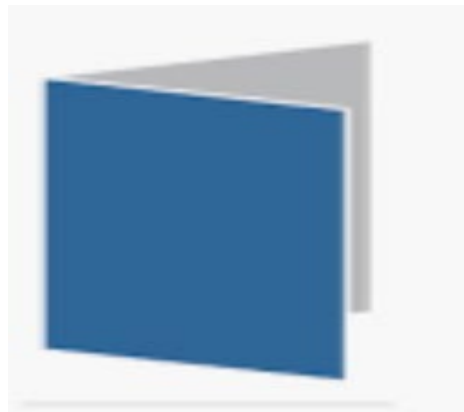
Step 3: Attach the I-9 copy to the ZPAR and scan/email it to Chris Fensin prior to the applicable deadline.

Tip - Personnel Action Booklet

We tried to take the guess work out with the Personnel Action Manual:

https://cafebusinesscenter.ca.uky.edu/files/qrg_-_personnel_actions_-_pa40_-_022120.pdf

Make sure to check out the **Personnel Action Manual** and many other additional resources on the CAFE HR Administrators page.



Tip - Understanding the Payroll Calendar

ZPARS & WFs
due to CAFE by
10:00 am

Time Entry
Due/Begin Payroll
Review Tomorrow

Final Payroll
Review

SAP Biweekly Payroll Schedule for July - Dec 2018

Time Load, Time Transfer, and Time Evaluation **MUST** be run **EACH** day

| Documents MUST be received in Compensation by 5:00 PM | Data and Time Input MUST be entered by Thursday 5:00 pm Payroll Run (Prelim) | Corrections and Other Data MUST be entered by Sunday 5:00 pm Payroll Correction Run (Trial) | Departments have until Monday 5:00 pm for biweekly payroll corrections Payroll Correction Final Run | Payroll Period Dates | | | | **Earliest Retro Date Set After BW Payroll |
|--|---|--|---|----------------------|-------|-----------|------|--|
| Bi-Weekly Date | Bi-Weekly Date | Bi-Weekly Date | Bi-Weekly Date | Begin | End | Date Paid | PR # | |
| 07/03/2018 | 07/05/2018 | 07/08/2018 | 07/09/2018 | 06/24 | 07/07 | 07/13 | 14 | |
| 07/18/2018 | 07/19/2018 | 07/22/2018 | 07/23/2018 | 07/08 | 07/21 | 07/27 | 15 | |
| 08/01/2018 | 08/02/2018 | 08/05/2018 | 08/06/2018 | 07/22 | 08/04 | 08/10 | 16 | |
| 08/15/2018 | 08/16/2018 | 08/19/2018 | 08/20/2018 | 08/05 | 08/18 | 08/24 | 17 | 06/24/2018 |
| 08/29/2018 | 08/30/2018 | 09/02/2018 | Tuesday NOON 09/04/2018 | 08/19 | 09/01 | 09/07 | 18 | |
| 09/12/2018 | 09/13/2018 | 09/16/2018 | 09/17/2018 | 09/02 | 09/15 | 09/21 | 19 | |
| 09/26/2018 | 09/27/2018 | 09/30/2018 | 10/01/2018 | 09/16 | 09/29 | 10/05 | 20 | |
| 10/10/2018 | 10/11/2018 | 10/14/2018 | 10/15/2018 | 09/30 | 10/13 | 10/19 | 21 | |
| 10/24/2018 | 10/25/2018 | 10/28/2018 | 10/29/2018 | 10/14 | 10/27 | 11/02 | 22 | |
| 11/07/2018 | 11/08/2018 | 11/11/2018 | 11/12/2018 | 10/28 | 11/10 | 11/16 | 23 | |
| 11/20/2018 | 11/21/2018 Wednesday | 11/25/2018 | 11/26/2018 | 11/11 | 11/24 | 11/30 | 24 | 09/30/2018 |
| 12/05/2018 | 12/06/2018 | 12/09/2018 | 12/10/2018 | 11/25 | 12/08 | 12/14 | 25 | |
| 12/19/2018 | 12/20/2018 | 12/23/2018 | 12/24/2018 | 12/09 | 12/22 | 12/28 | 26 | |

Tip - Navigating the Hiring Pause


HIRING PAUSE SUMMARY

Note: Offers that were in place on March 23 are not impacted by the pause.

| Positions impacted by hiring pause | Notes |
|---|------------------|
| Visiting Scholars/Visiting Students | |
| Regular staff | |
| Faculty | |
| Temporary department staff | |
| Post-Doctoral Scholars | New appointments |
| TA/GA/RAs | New appointments |
| PTIs | New appointments |
| Post Retirements | New appointments |
| STEPS | |
| Fellowships | |
| | |
| Positions not impacted by hiring pause | |
| Hourly Student Workers | |
| Post Doc Scholar Renewals | |
| Post Retirement Renewals | |



Tip - Personnel Details Icon

Person ID Pers.Assgn 

Start



One powerful little icon:
Personnel Assignment Details

This icon should be used to determine
which personnel action type is appropriate

Tip - Open Folders Under the Personnel Details Icon

- ▶ Actions
- ▶ Dates
- ▶ Payroll
- ▶ Time Management
- ▶ Benefits Administration
- ▶ Personnel Administration

| | | | |
|-------------------|------------------------|------------------------------|------------|
| Name | John Smith | Person ID | |
| Original hire | | Key date | 07/14/2020 |
| | 99999999 (Withdrawn) | 99999999 (Withdrawn) | |
| • Cost Ctr | DEPT BUDGET CLEARING , | EDSRC | |
| • Empl. % | 25.00 | 1.00 | |
| ▼ Actions | | | |
| • Start | 12/23/2007 | 05/24/2006 | |
| • End Date | 12/31/9999 | 12/31/9999 | |
| • Action | Separation | End of Additional Assignment | |
| • Act.Reason | Assignment Ended | End of Additional Assignment | |
| • Employment | Withdrawn | Withdrawn | |
| ▼ Dates | | | |
| • Date type | Original Hire Date | Original Hire Date | |
| • Date | 06/21/2002 | 05/08/2006 | |
| • Date type | Current Hire Date | Current Hire Date | |
| • Date | 11/25/2004 | 05/08/2006 | |
| ▼ Payroll | | | |
| • Payr.area | Bi-weekly | Bi-weekly | |
| • P.no.lock | | | |
| • PS type | Hourly | Hourly | |
| ▼ Time Management | | | |
| • WS rule | 24X7 flex | 24X7 flex | |

Open the folders in the Personnel Details Icon to ensure you have all available information to determine the correct personnel action to enter.

Tip - Looking Up Information

| | | |
|-----------|--|---|
| Person ID | <input type="text" value="=Bengal.Kitty"/> | P |
| Start | <input type="text"/> | |

= can help you locate employee information

Tip - Know Which Actions Kick Off Workflow



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Reactivate Additional Assignment

Position Update

Position Change

LOA with Pay*

LOA without Pay*

Return from leave with pay*

Return from Leave without pay*

Change in Base Pay

Additional Assignment

Change in Status



FTE Change

***Only if screen 8 is being updated.**


Workflow Personnel Actions

Tip - Know Who the Approvers are

FI Workflow Approver Maintain

Selection Criteria

| | | |
|-----------------|----------------------|---|
| Department | 81111 |  |
| Approver Type | <input type="text"/> | |
| Position | <input type="text"/> | |
| Approver Status | <input type="text"/> | |

ZFI_WF_APPROVER

Allows you to view workflow approvers for your unit(s) via SAP transaction

Tip - Know how to check the status of a workflow



The *Services for Object* icon in **PA20**. allows you to check the status of a workflow

Scroll down and click the “Information” link to view the current status.

| | | | |
|-----------|--------------------------|--------------------------|-----------------------|
| Mail sent | 02/23/2018 - 09:38:46 | 02/23/2018 - 09:38:47 | <u>Batch User</u> |
| | 02/23/2018 - 09:38:47 | | <u>Information...</u> |

Tip - Know the ZPAR Processors

Compensation ZPAR Processors

| | | |
|-----|-------------------|--------|
| A-D | Tara Smith | 7-8955 |
| E-K | Beverly Taulbee | 7-0584 |
| L-R | Mary Hay | 7-8952 |
| S-Z | Stephanie Francis | 7-8918 |

Resources

Find all of these resources and many more on the [CAFE HR Administrator page](#)

- Workflow FAQs
- Personnel Actions Manual
- Overload & OT Assignments
- Separation Sheet FAQs
- PTI SAP Entry
- Personnel Actions QRCs
- Workflow Requests
- Workflow Approvals



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<https://cafebusinesscenter.ca.uky.edu/content/hr-administrator-resources>

Additional Resources

- One-on-One HR Administrator Orientation Training (Phase I & II)
- Annual One-on-One HR/Payroll Review Meetings
- Quarterly Users Group Meetings
- Periodic Subject Matter Expert Training Sessions
- Virtual Tutorials - New!
- Feel free to reach out to us anytime you have a question



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Questions

?

Thanks for attending!

