



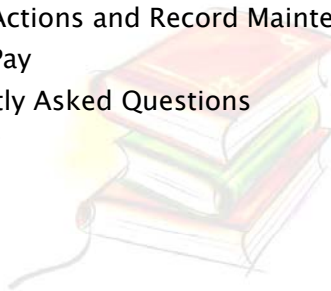
Faculty Actions HR_PA_340



Faculty Actions



- Overview of Process
- Unit 1 – Policies and Procedures
- Unit 2 – Faculty Positions
- Unit 3 – Faculty Actions and Record Maintenance
- Unit 4 – Faculty Pay
- Unit 5 – Frequently Asked Questions
- Course Summary



Learning Objectives



- Review terms and concepts associated with Personnel Administration and Faculty as it relates to UK
- Review the IRIS Faculty hiring process
- At the end of this course you should be able to:
 - ♦ Identify the faculty pay policies and procedures
 - ♦ Create and maintain faculty positions, if applicable
 - ♦ Create and maintain faculty master data



Prerequisites and Roles



- Prerequisites
 - ♦ UK_100 IRIS Awareness and Navigation
 - ♦ HR_200 Human Resources Overview
 - ♦ HR_OM_320 Position Creation, if applicable
 - ♦ HR_PA_300 Personnel Administration
 - ♦ HR_PA_310 Personnel Administration Actions
- Roles
 - ♦ Business Officers
 - ♦ Personnel Administrators



Unit 1



Policies and Procedures

Unit 1 – Policies and Procedures



- Faculty Payments Policy Changes
 - ♦ Issues
 - ♦ Recommendations
 - ♦ Faculty Payment Examples

Faculty Payments Policy Changes



ISSUE

The University of Kentucky needs to be in compliance with the consistency principle contained in A-21

Consistency in the determination of faculty base salaries to be included in the institutional costs is required by the federal government

Faculty Payments Policy Changes



- 1) The University of Kentucky's definition for faculty institutional base salary:

An individual faculty member's institutional base salary is the annual compensation that the University of Kentucky pays for the individual's appointment as reflected in the distribution of effort agreement, whether that individual's time is spent on instruction, organized research, department research, patient care, graduate medical education, administration, service or other activities. All institutional base salary will be eligible for benefits.

Faculty Payments Policy Changes



- 2) The University of Kentucky has created a listing of payment codes available to the end user.
- 3) Agreements with faculty that have already been negotiated may be “grandfathered” at the discretion of the department.
- 4) If the faculty payment is outside of the base salary, the question of whether to include benefits would not be a compliance issue for A-21. This decision will be left to the official making the final decision about the faculty contract and payment.

Faculty Payments Policy Changes



- 5) Funding needed to provide for the additional benefit costs on those state-funded payments currently made outside of base (but with the new definition applied would become part of the base salary) will be provided from central funding sources.
- 6) Funding for benefits associated with payments paid from restricted endowment sources or any other revenue sources will be funded by the respective endowments and other revenues.



Faculty Payments Policy Changes



- 7) Departments and colleges will make the determination of whether chair and professorship payments are “awards” that will not require benefit payments or a part of base salary that will require benefit payments. The primary basis for this determination will be whether or not the payment is associated with work effort performed within the scope of the base salary (DOE).

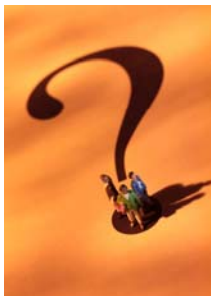
Faculty Payment Examples



- Base Salary
 - ◆ Professor (any rank)
 - ◆ Dean/assistant dean/associate/dean
 - ◆ Department chair/division chief/vice chair
 - ◆ Director of an academic center/graduate studies/institute
 - ◆ Director of a research center/institute
- Non-Base Payments
 - ◆ Summer salary stipend
 - ◆ Awards (inc. Wethington)
 - ◆ Honorariums
 - ◆ Monthly overload
 - ◆ Practice Plan salary supplements



Policies and Procedures



Questions and Answers

Frequently Asked Questions (FAQs)



- Must part-time instructors have a faculty appointment? Will they have to have a dossier prepared?
 - ♦ Yes, all part-time instructors (hired as the primary instructor) teaching credit courses must have a faculty appointment
 - ♦ Effective Spring 2006, all part-time instructors are required to have a complete dossier on file with the University; this requirement enables the institution to comply with SACS guidelines
 - ♦ UK staff members who teach UK101 or Discovery Seminars only are exceptions to the policy and may serve as instructors for these courses without faculty appointments (See Policy Announcement #5 - Academic Appointment for Staff Teaching Credit-Bearing Courses - December 6, 2005)
 - ♦ Individuals who teach a short lecture as part of a whole course or who assists the faculty of record with a lab are exceptions to the above information

Unit 1 Summary



- Faculty Payments Policy Changes
 - ♦ Issues
 - ♦ Recommendations
 - ♦ Faculty Payment Examples



Unit 2



Faculty Positions

Unit 2– Faculty Positions



- Creating Faculty Positions
- Faculty Positions – Additional Payments
- New Positions
- Employee Subgroup
- Cost Distribution
- VA Appointments

Faculty Positions – ZPOS



- Faculty positions should be created with Cost Center funding–not WBS Elements, except for Land Grants
- The University has a policy that requires even staff members who teach credit bearing courses, with the exception of UK101 and Discovery Seminar classes, to have a faculty appointment in a unit appropriate to the staff member's teaching assignment
 - ♦ Individuals who teach a short lecture as part of a whole course or who assists the faculty of record with a lab are exceptions to the policy

Faculty Positions – ZPOS



- Positions created for part-time faculty will have a relationship with a job with a title series of “Part-Time Faculty” and an object name (long text) that reflects their rank
- Use the *Quick Reference Card (QRC) Faculty Title Series and Rank* to create faculty positions:
http://myhelp.uky.edu/rwd/HTML/HR/QRC_Title_Rank.pdf

Faculty Positions – ZPOS



- When entering the **Long Text**, use the Rank
- When entering the **Job Key**, use the Title Series

Create Position

Position Info							
Short text	test						
Long text	Assistant Professor						
Position begin date	09/27/2007						
Position end date	12/31/9999						
Copy position	<input type="checkbox"/>						
Number to create	1						
Pooled position	<input type="checkbox"/>						
Relationship Objects							
Organizational unit	30000504 08100 Architecture						
Job key	40501713 F8501M0 Regular Faculty						
Employee group	C Personnel area 1000						
Employee subgroup	03 Personnel subarea 0001						
Cost Distribution							
C/A	Cost Center	Order	WBS	Pct	Fund	Funct Area	Grant
UK00	1012078510			100.00			

Faculty Positions – ZPOS



- For teaching overloads, create a position with the **Long Text** of “Teaching Overload” and a relationship with a **Job Key** that has the description of “Teaching Overload”

Position Info							
Short text	test						
Long text	Teaching Overload						
Position begin date	09/27/2007	Position end date	12/31/9999				
Copy position	<input type="checkbox"/>	Number to create	1				
Pooled position	<input type="checkbox"/>						
Relationship Objects							
Organizational unit	30000504-08100-architecturs						
Job key	40501757 F900280 Teaching Overload						
Employee group	C	Personnel area	1000				
Employee subgroup	03	Personnel subarea	0001				
Cost Distribution							
CtrA	Cost Center	Order	WBS	Pct	Fund	FunctArea	Grant
UK00	1012078510			100.00			

Faculty Positions – ZPOS



- For 9/10/11-month faculty employees that perform summer teaching, summer administration, or summer research, a position will be created with the **Long Text** of “Summer Supplement” and it will have a relationship with a **Job Key** that has a description of “Summer Supplement”

Position Info							
Short text	test						
Long text	Summer Supplement						
Position begin date	09/27/2007	Position end date	12/31/9999				
Copy position	<input type="checkbox"/>	Number to create	1				
Pooled position	<input type="checkbox"/>						
Relationship Objects							
Organizational unit	30000504-08100-architecturs						
Job key	40501756 F900180 Faculty Summer Supplement						
Employee group	C	Personnel area	1000				
Employee subgroup	03	Personnel subarea	0001				
Cost Distribution							
CtrA	Cost Center	Order	WBS	Pct	Fund	FunctArea	Grant
UK00	1012078510			100.00			

Faculty Positions – ZPOS



- For non-teaching overloads, create a position with the **Long Text** of “Non-teaching faculty overload” and a relationship with a **Job Key** that has the description of “Non-teaching faculty overload”
 - ♦ This position would be used for other faculty activities, such as Continuing Education (CE) courses and consulting outside prime academic department

Position Info						
Short text	test					
Long text	Non-Teaching Faculty Overload					
Position begin date	09/27/2007	Position end date	12/31/9999			
Copy position	<input type="checkbox"/>	Number to create	1			
Pooled position	<input type="checkbox"/>					
Relationship Objects						
Organizational unit	30000570 8H350 Mining Engineering					
Job key	41001600 F9003M0 Non-Teaching Faculty Overload					
Employee group	C	Personnel area	1000			
Employee subgroup	03	Personnel subarea	0002			
Cost Distribution						
CbA	Cost Center	Order	WBS	Pct	Fund	Funct Area
UK00	1012004870			100.00		

Faculty Positions – Additional Payments



- A position should not be created to make an additional payment that is internal to the faculty's college
- In IRIS, these payments are made through the regular faculty assignment through either Recurring Payments (0014) or Additional Payments (0015)
- Some types of positions are no longer required:
 - ♦ Positions named “Temporary” or “P/T Faculty” or “Faculty Group”
 - ♦ Positions with the name “KMSF Faculty P/T”, “KMSF Faculty-Regular F/T”, “KMSF Faculty-Temp”, or KMSF Life Insurance Pos”
 - ♦ Positions with the name of “Joint VA Faculty” or “Joint VA Fee Basis Faculty”

Faculty Positions – New Positions



- A new position must be created or used for the following situations:
 - ♦ Faculty changes from 9- or 10-month contract to a 11- or 12-month contract and vice versa
 - ♦ Faculty changes from 9-month to a 10-month contract and vice versa
 - ♦ Faculty employee's appointment changes with a different rank or title series

Faculty Positions – Employee Subgroup



- Employee Subgroups should be set as follows:
 - ♦ If 9-month faculty, then choose **Employee Subgroup 9-month Deferred Pay** (code 19)
 - ♦ If 10-month faculty, then choose **Employee Subgroup 10-month Deferred Pay** (code 20)
 - ♦ If 11- or 12-month faculty and not Civil Service Retirement System (CSRS) or Federal Employee Retirement System (FERS), choose Exempt Monthly
- Existing positions can be checked using **PP01** and viewing the **Employee Group/Subgroup** infotype

Faculty Positions – Cost Distribution



- For Faculty positions with the following characteristics, Infotype 0027 Cost Distribution will be created by IRIS FES:
 - ♦ Personnel Areas of Main Campus or Extension
 - ♦ Personnel Subarea of Regular Full-Time or Temporary Full-Time
 - ♦ Employee Group of Faculty, Working Faculty Retiree > 15, or Working Faculty Retiree < 15

Faculty Positions – VA Appointments



- If the position is being filled by a faculty member with a VA Appointment, then a relationship to the position needs to be created indicating what method of compensation the VA is using:
 - ♦ Amounts based on the faculty's FTE spent at the VA
 - Referred to as the "VA 8ths"
 - VA 8ths correspond to 8/8, 7/8, 6/8, 5/8, 4/8, 3/8, 2/8, and 1/8
 - 8/8 implies that the VA is paying all of the faculty's salary
 - ♦ Fees based on a time unit spent at the VA, such as a day (Fee basis)

Faculty Positions – VA Appointments

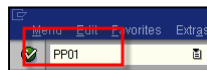


- Faculty may switch between the methods of payment throughout the year or their association with the VA may end
- If this happens:
 - ♦ Create a new relationship with a start date for when the change occurred
 - ♦ The old relationship will be delimited when the new relationship is created

Faculty Positions – Changing Rank – PP01



- To change rank on a faculty position, use the transaction **PP01** (PP zero one)



- Select **Position** in the **Object Type** field

Object type	S Position
-------------	------------

- Enter the position number in the **Object ID** field

Object ID	50103324
-----------	----------

- Press **Enter** to pull up the master data for the position

Faculty Positions – Changing Rank – PP01 IRIS Integrated Resource Information System

- Click on the **Selection** icon to the left of the **Object** infotype

Infotype Name	
Object	▼
- Click on the **Copy** icon

Maintain object	
- Enter the effective date in the first **Validity** date field

Position	F8570M0	Assistant Professor
Planning Status	Active	
Validity	01/01/2008	to 12/31/9999

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HR_PA_340 Faculty Actions
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Faculty Positions – Changing Rank – PP01 IRIS Integrated Resource Information System

- Enter the new rank in the **Object Name** field

Position	F8570M0	Assistant Professor
Planning Status	Active	
Validity	01/01/2008	to 12/31/9999
Object		
Object addr.	F8570M0	
Object name	Associate Professor	
Language Key	EN English	
- Press **Enter**
- Click on the **Save** icon

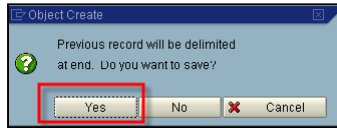
Infotype	Edit	Goto	View	System	H

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Faculty Positions – Changing Rank – PP01



- When the **Object Create** box appears, click on the **Yes** button

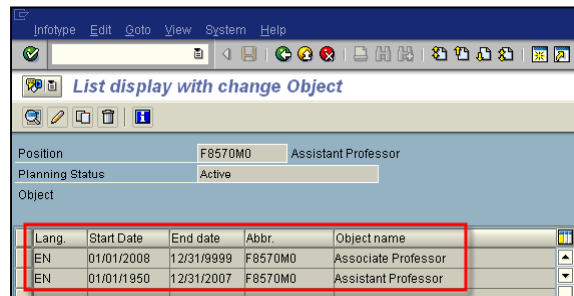
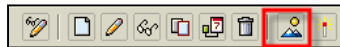


- A system message will appear stating that the record has been changed

Faculty Positions – Changing Rank – PP01



- You can check the changes by selecting the **Object** infotype and clicking on the **Overview** icon



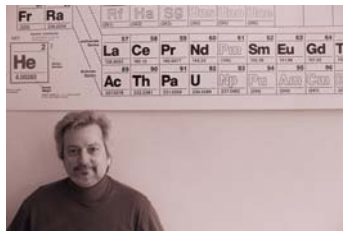
Unit 2 Summary



- Creating Faculty Positions
- Faculty Positions – Additional Payments
- New Positions
- Employee Subgroup
- Cost Distribution
- VA Appointments



Unit 3



Faculty Actions and Record Maintenance

Unit 3– Faculty Actions & Record Maintenance



- Displaying Faculty HR Master Data
- Hiring New Faculty
- Recurring Payments and Deductions
- Additional Payments
- Leave of Absences
- Position Changes
- Concurrent Employment
- Separation
- Phased Retirement

Display Faculty HR Master Data – PA20



- Faculty master data includes additional infotypes which are found under the UK Faculty tab
 - ♦ Infotype 9007 – Admin FES Cost Distribution (CD) Control
 - Indicates if the FES system will be creating IT0027 to control distribution of the base pay; values include:
 - F – Forced to have FES control the distributions (faculty who are not administrators)
 - V – Voluntary is for faculty administrators or faculty with VA 8/8ths appointments whose colleges chose to have FES control the distributions

Display Faculty HR Master Data – PA20



- Additional infotypes:
 - ♦ Infotype 9008 – Primary Academic Appointment
 - ♦ Infotype 9009 – Administrative Appointment
 - ♦ Infotype 9010 – Tenure and Initial Assignment
 - ♦ Infotype 0016 – Contract Elements

Hiring New Faculty – PA40



- When selecting the position, select a position with rank associated with a job that has a title series in the appropriate hierarchy
- When verifying the Organizational Assignment (0001), the Contract should be faculty
 - ♦ This is used to determine the appropriate GL Account

Hiring New Faculty – PA40



- When entering Basic Pay (0008):
 - ♦ If receiving a new administrative stipend that is part of base pay, use Wage Type **1110**; other salary is included in **1010**
 - ♦ Enter Wage Type **1210** if the new faculty hire is part-time (without benefits)
 - ♦ Use Wage Type **1010** with an amount of zero, when the hire is VA faculty receiving all salary from the VA

Hiring New Faculty – PA40



- Deferred Pay Reminders
 - ♦ For a **9-month** appointment, the amount is calculated by dividing the contracted salary by 9
 - Example: $\$90,000/9 = \$10,000$
 - ♦ For a **10-month** appointment, the amount is calculated by dividing the contracted salary by 10
 - Example: $\$90,000/10 = \$9,000$

Hiring New Faculty – PA40



- Deferred Pay Reminders
 - ♦ **NOTE:** The **Annual Salary** will appear overstated; the **True Annual Salary** will be calculated automatically
 - ♦ For 9-month faculty, the **Action Date** must be 08/01 of each fiscal year
 - If the true hire date is 08/15, however, adjust on the **Change Date Specifications (0041)** infotype

Hiring New Faculty – PA40



- Infotype 0016 Contract Elements will appear after the Additional Personal Data infotype
 - ♦ Enter the appropriate contract type:
 - 9-, 10-, 11-, or 12-Month Contract

Create Contract Elements (0016)

Maintain activities

Person ID	10001882	Pers.Assgn	00000364 50102676 00000364
Name	Patricia M Nailer	Empl. %	100.00
EE group	A Staff	Pers.area	1000 Main Campus
EE subgroup	03 Exempt Monthly	Pers.subarea	0001 Reg FT
Start	08/01/2005	to	12/31/9999
Contract type	09 Nine Month		

Recurring Payments/Deductions (0014)



- For full-time faculty whose cost distributions for base pay are controlled by FES, enter cost assignments for recurring payments
 - ♦ This is required because without them, the wage payments would be charged to cost distributions created by FES
- Refer to the Faculty Payment Recommendations Worksheet
 - ♦ Also includes the valid earnings wage types for recurring payments for faculty

Recurring Payments/Deductions (0014)



- For summer supplement assignments, the appropriate wage type is entered as a recurring or additional payments
 - ♦ It is not on Infotype 0008 Basic Pay, since this is not considered base pay
- For overloads (teaching or non-teaching—which can include CE courses), the appropriate wage type 2100 is entered if the overload payment is recurring
 - ♦ It is not on Infotype 0008 Basic Pay, since this is not considered base pay

Recurring Payments/Deductions (0014)



- The wage types of Recurring Payments for faculty include:

2000	Fellowship Payment
2010	Fellowship Trainee Pymt
2100	Monthly Overload
2130	Merit Incentive
2180	Student Health Supplement
2200	Additional Acting Pay
2220	Professorship Sal Suppl
2230	Faculty Admin
2260	Division Chair Stipend
2280	Severance Pay
2310	Winter Sess Flat Tax
2320	Summer Sess 8 wk Flat Tax
2330	Summer Sess 4 wk Flat Tax

2340	Summer Research <1/9
2350	Summer Research > 1/9
2360	Winter Sess Not Current E
2370	Sum Sess 8 Not Current Err
2380	Sum Sess 4 Not Current Err
2390	Summer Admin Stipend
2550	Excess 403(b) Payment
2740	Taxable Fr - KMSF Life
2750	Taxable Fr - Ath Tickets
2770	Taxable Fr - Forgive Loan
2900	Unfunded Retirement Plan

Additional Payments



- One-time payments are entered in IRIS as Additional Payments
- Enter cost assignments for one-time payments for full-time faculty whose cost distributions for base pay are controlled by FES
- Refer to the Faculty Payment Recommendations Worksheet
 - This also includes the valid earnings wage types for one-time payments for faculty

Additional Payments (0015)



- The wage types of Additional Payments for faculty include:

2100	Monthly Overload
2120	Productivity Incentive
2130	Merit Incentive
2140	Professional Practice Pla
2150	KMSF Bonus
2160	IGT Bonus
2170	Faculty Quality Pay
2220	Professorship Sal Suppl
2230	Faculty Admin
2240	Make the Difference Award
2250	Award
2255	Gross up regular method
2260	Division Chair Stipend
2270	Lump Sum Payment

2310	Winter Sess Flat Tax
2320	Summer Sess 8 wk Flat Tax
2330	Summer Sess 4 wk Flat Tax
2360	Winter Sess Not Current E
2370	Sum Sess 8 Not Current Em
2380	Sum Sess 4 Not Current Em
2550	Excess 403(b) Payment
2600	Non Qual Moving Expenses
2610	Special Service - MedLeg
2700	Taxable Fr - Club Dues
2710	Taxable Fr - Cell Phone
2720	Taxable Fr - Auto
2730	Taxable Fr - KMSF Scholar
2740	Taxable Fr - KMSF Life
2750	Taxable Fr - Ath Tickets
2760	Taxable Fr - Travel
2770	Taxable Fr - Forgive Loan
2780	Taxable Fr - Moving Exp
2790	Tax Fr - Spo/Guest Travel
2990	Benefits Advance
2999	Addit'l Retirement Wage

Vacation



- Vacation usage will be tracked in IRIS
- Faculty members (10-, 11-, and 12-month appointees) are granted all allowable vacation on July 1 or on the fire date for new faculty
 - The amount is prorated when the hire date is later than July 1



Leave of Absences



- Use Leave Of Absence With Pay for:
 - ♦ Educational
 - ♦ Scholarly
 - ♦ Sabbatical
 - ♦ Sabbatical Half Pay
 - ♦ Special Leave With Pay
- Use Leave Of Absence Without Pay for:
 - ♦ Educational
 - ♦ Sabbatical
 - ♦ Scholarly
 - ♦ Special Leave Without Pay

Faculty Effort System (FES)



- Distribution of Effort (DOE) changes are entered via the Faculty Effort System (FES)
- Faculty Effort System help and course information can be found on the myHelp website
 - ♦ <http://myhelp.uky.edu/rwd/HTML/FES.html>

Position Changes



- A position change must take place when:
 - ♦ The faculty member changes contract periods
 - From 9-month to 10-, 11-, or 12-month
 - From 10-month to 9-, 11-, or 12-month
 - From 11- or 12-month to 9- or 10-month
 - This is indicated by the Employee Subgroup
 - The faculty contract period on Infotype 0016 Contract Elements also needs to be changed
 - ♦ The faculty member changes rank or title series

Position Changes



- If an employee transfers from a staff position to a full-time faculty position whose distributions are controlled by FES, then cost assignments will need to be checked and, possibly, entered for the payment wage types on Infotypes 0014 Recurring Payments/Deductions and 0015 Additional Payments (see PA_300 class materials)
- If this is not done, the wage payments would be charged to the cost distributions created by FES

Concurrent Employment



- Create an additional assignment using New Assignment when:
 - ♦ The faculty member is performing an overload (teaching or non-teaching)
 - ♦ A 9- or 10- month faculty is teaching, researching, or doing administration in the winter or summer session
 - ♦ Part-time faculty is working for more than one organizational unit
 - ♦ A staff member is teaching UK101 or the Discovery seminar and will be paid on a teaching overload position

Concurrent Employment



- End faculty additional assignments or overloads using PA40
- Reactivating a faculty member's additional assignment is possible through a PA40 action
 - ♦ Use this action when an employee has more than one Personnel number (PERNR) and you need to reactivate an assignment that has a "withdrawn" status
 - ♦ Do not use this action if all assignments have ended; instead you must use the Rehire action
 - ♦ If an employee has only one assignment, follow the normal process for creating an additional assignment

Concurrent Employment



- Reactivating an Additional Assignment example:
 - ♦ A faculty member with a 9-month appointment had an additional assignment to teach in the summer in 2007. This additional assignment was ended after the summer session (with the End of Additional Assignment action). The faculty member plans to teach in the summer of 2008. The personnel administrator can simply reactivate the prior summer assignment.

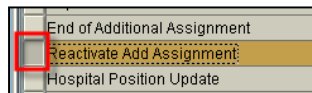
Concurrent Employment



- To complete a Reactivate Additional Assignment action, go to **PA40**



- When the **Personnel Actions** screen appears, choose **Reactivate Add Assignment** from the Actions list



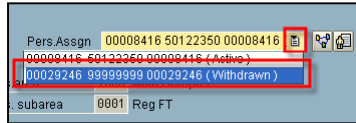
- Enter the **Person ID** or search for the employee, then press **Enter**

Person ID	10009934	Pers.Assgn	000
Name	Harvey Smith	Emp	
EE group	C Faculty	Pers.area	1000

Concurrent Employment



- Click on the **List** icon in the **Pers Assgn** field and select the **Withdrawn** assignment



- After the assignment (PENER) is selected, enter the **Start** date



- Click on the **Execute** icon



Concurrent Employment



- Work through the following infotypes as they appear and send the PAR to Compensation
 - Copy Actions (0000)
 - Create Organizational Assignment (0001)
 - Create Planned Working Time (0007)
 - Create Basic Pay (0008)
 - Copy Date Specifications (0041)

Change Main Assignment



- When a part-time faculty member is filling two part-time positions
 - ♦ One is the Main assignment, but ends at the end of the semester
 - ♦ Contact Benefits to change Main when the first assignment is no longer active

Separation



- Part-time instructors who work in the spring and may or may not come back to teach in the following spring should be separated
- Part-time *Pro Re Nata* (PRN), also known as on-call, faculty that work one month, and then are off one month do not need to be separated
 - ♦ This includes emergency faculty who work on an on-call basis

Separation



- If a 9- or 10-month faculty appointee is not returning for the next academic year, the end-user would normally separate the employee on July 1
 - ♦ Results in normal payments through the end of the year
 - ♦ If it is necessary to separate the faculty member prior to July 1, however, the system will calculate the pay based on what is earned in the month of separation and the balance in the deferral bucket
 - Example: 10-month faculty separating November 1
 - Pay calculated for October plus the deferral balance from the end of September: $\$12,000 + (-\$6,000) = \$6,000$ paid
 - Deferral balance is zero (0) after the October payroll runs

Unit 3 Summary



- Displaying Faculty HR Master Data
- Hiring New Faculty
- Recurring Payments and Deductions
- Additional Payments
- Leave of Absences
- Position Changes
- Concurrent Employment
- Separation
- Phased Retirement



Unit 4

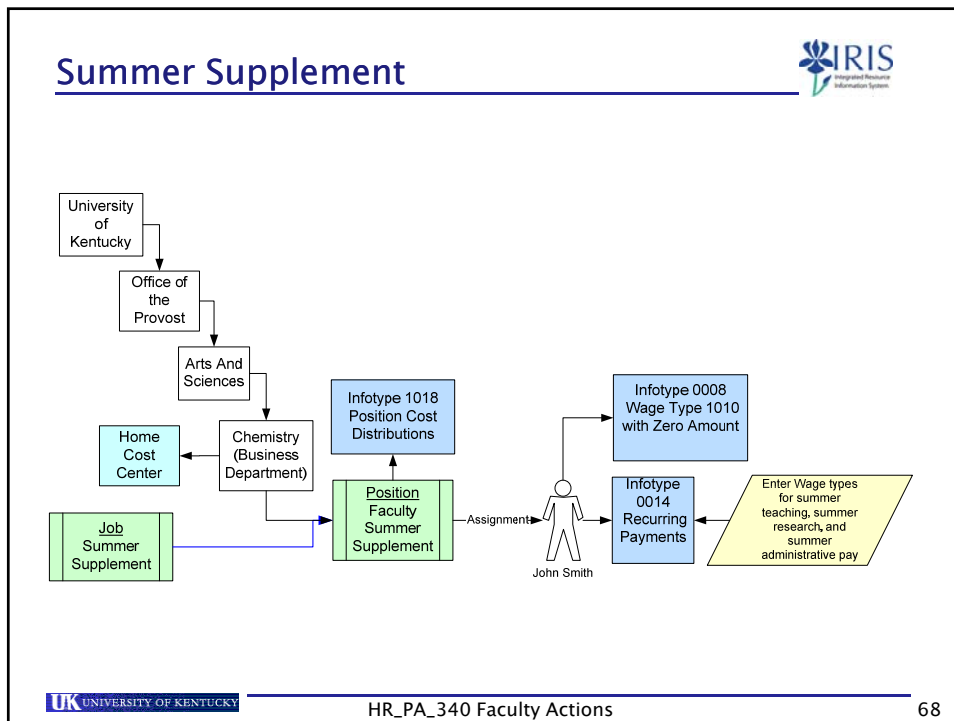
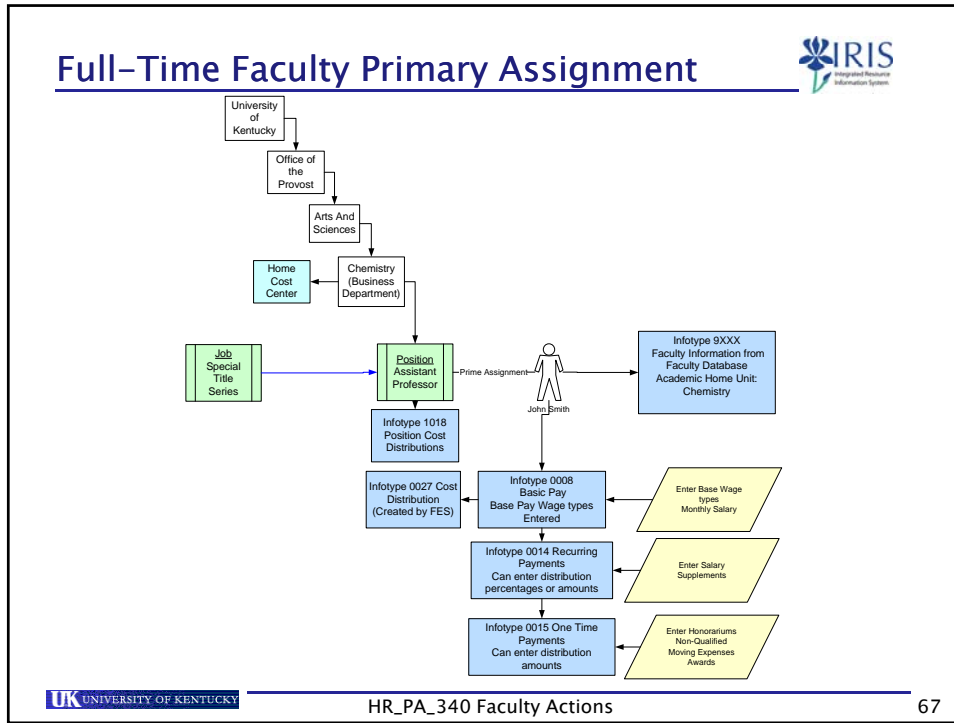


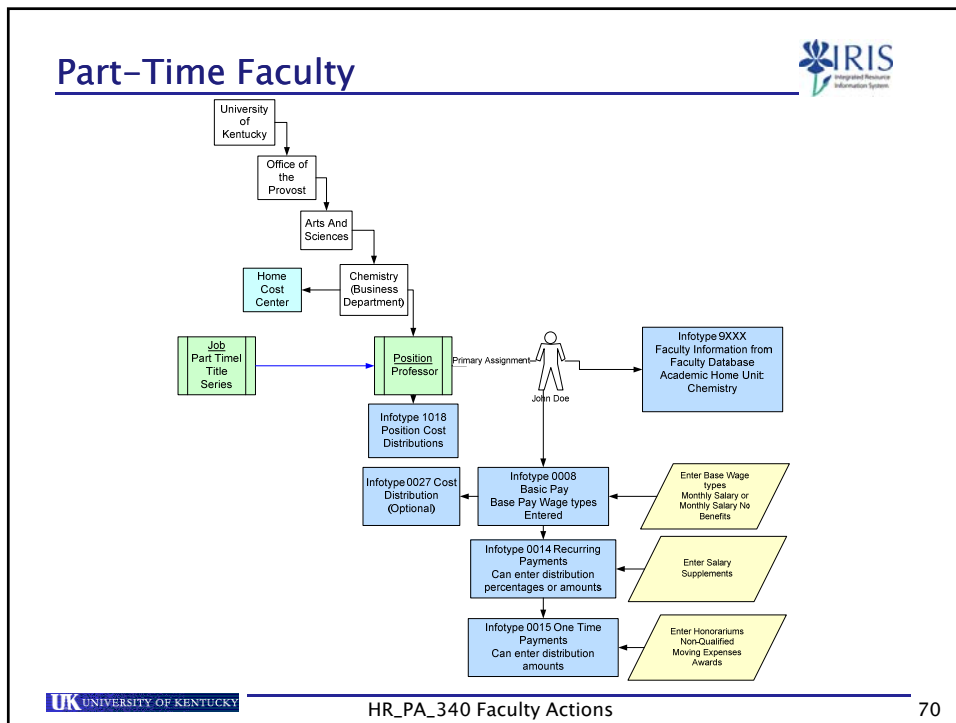
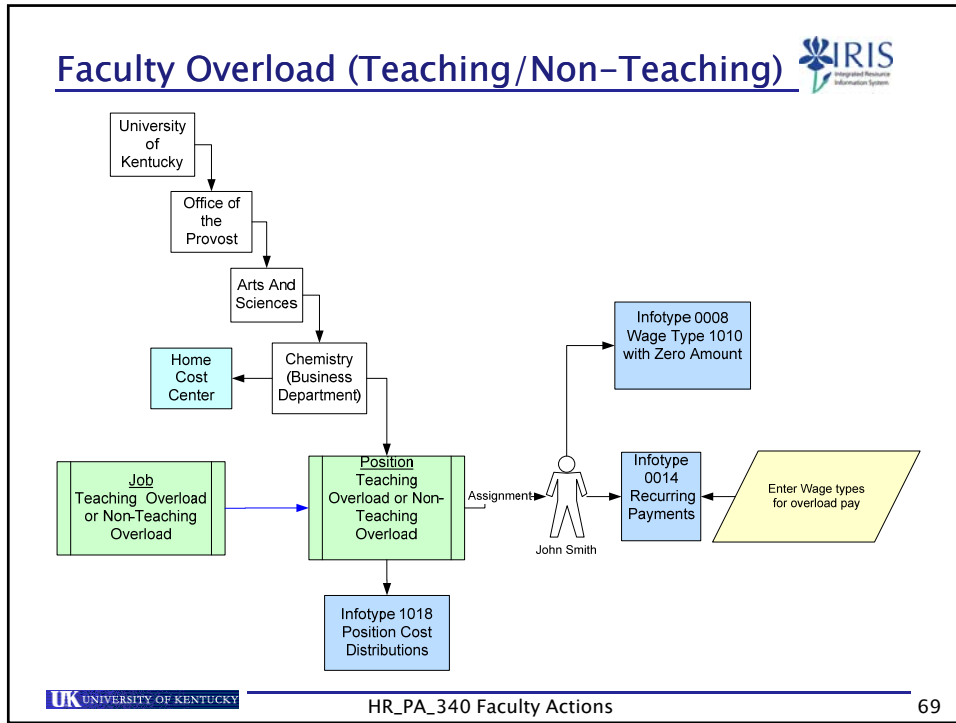
Faculty Pay

Unit 4- Faculty Pay



- Full-Time Faculty Primary Assignment
- Summer Supplement
- Faculty Overload (Teaching or Non-Teaching)
- Part-Time Faculty
- Deferred Pay for 9- and 10-Month Faculty
- Deferred Pay Statements





Deferred Pay



- For faculty who have a 9- or 10-month work contract, but are paid over a 12-month period (paid over 11-months for new faculty)
 - ♦ 9-month faculty work dates are August 16 - May 15
 - New 9-month faculty will receive a paycheck for August through June
 - Returning 9-month faculty will receive a paycheck for July through June
 - ♦ 10-month faculty work dates are August 1 - May 31
 - New 10-month faculty will receive a paycheck for August through June
 - Returning 10-month faculty will receive a paycheck for July through June

Deferred Pay



- 9- and 10-month faculty's Basic Pay Infotype (0008) should show their yearly salary divided by the number of months in their contract
- Example: a 10-month faculty paid \$120,000.00 would have \$12,000.00 ($\$120,000.00 / 10 = \$12,000.00$) on their basic pay screen

Wage Type	Long Text	Q.	Amount	Curr.	L.	A.	Number	Unit
1010	Monthly Salary		10,000.00	USD			0.00	

Additional fields: True Annual Salary 120,000.00

Deferred Pay



- When the system calculates the monthly pay:
 - ♦ It looks to see if the employee is in a contract month (one which is worked and therefore salary is “earned”)
 - ♦ If in contract month, it takes the yearly amount and divides by the contract month to get a total which is considered “earned pay”
 - If in non-contract month, there is no “earned pay” for the month
 - ♦ It will take the yearly amount and divide by the number of pay periods in the fiscal year and get a total which will be the gross amount or “paid amount” on the monthly check
 - ♦ The difference between the “earned pay” and the “paid amount” (positive or negative) will go into the Deferred Pay balances
 - ♦ The faculty’s associated benefits also are calculated and deferred each month along with the earnings

Deferred Pay



Month	Paid	Earned	Deferred Balance
July	\$10,000.00	\$0.00	-\$10,000.00
August	\$10,000.00	\$12,000.00	-\$8,000.00
September	\$10,000.00	\$12,000.00	-\$6,000.00
October	\$10,000.00	\$12,000.00	-\$4,000.00
November	\$10,000.00	\$12,000.00	-\$2,000.00
December	\$10,000.00	\$12,000.00	\$0,000.00
January	\$10,000.00	\$12,000.00	\$2,000.00
February	\$10,000.00	\$12,000.00	\$4,000.00
March	\$10,000.00	\$12,000.00	\$6,000.00
April	\$10,000.00	\$12,000.00	\$8,000.00
May	\$10,000.00	\$12,000.00	\$10,000.00
June	\$10,000.00	\$0.00	\$0.00

Deferred Pay



- If the 9- or 10-month faculty terminates employment prior to the end of the fiscal year, the department will need to review the faculty's deferred balances
- If the deferred balances are negative, they owe the University money and the department is responsible for collecting the earning balance
 - ♦ The department will not need to collect the negative benefit balances; they will be cleared by the Payroll Office
- If the deferred balances are positive, the University owes them money and the system will pay the earnings balance and the associated benefits on the next paycheck

Deferred Pay Balances



Wa...	Wage Type Long Text	O..Amount	Curr...	I...	A...	Number/unit	Unit
1010	Monthly Salary	10,000.00	USD			0.00	
IV 03/29/2006 12/31/9999 10,000.00 USD Payroll Simulation							
Additional fields True Annual Salary 120,000.00							

Click on Payroll Simulation

Enter the Key Date which should be any date within the month of the last monthly payroll run

Choose key date

Key date: 04/01/2006

Selection period: 12/01/2005

To: 12/31/9999

✓ ✗

Deferred Pay Statement



Display reimbursement form

Deferred Pay Statement

Last Name ... 10Mth employee
 Pay Period... 07/01/2005 - 07/31/2005
 Pay Freq ... M Monthly
 Person ID ... 10025292

	Person	Current	Deferral	Total Amt.	YTD Deferral
EARNINGS FOR DEFERRED PAY					
Deferred (1010)	24316	4,583.33	4,583.33-		4,583.33-
EMPLOYER TAXES FOR DEFERRED PAY					
Deferred (404)	24316	269.93	271.77-	1.04-	271.77-
Deferred (406)	24316	83.13	83.56-	0.43-	83.56-
EMPLOYER BENEFITS FOR DEFERRED PAY					
Deferred (Health)	24316	664.00	664.00-		664.00-
Deferred (Life Ins.)	24316	6.20	6.20-		6.20-
EMPLOYER FRINGE FOR DEFERRED PAY					
Deferred (Fac. Fringe)	24316	206.25	206.25-		206.25-

The Deferred Pay earnings balance is negative, therefore, the department would need to collect the money back from the faculty member, if he/she terminates at this point

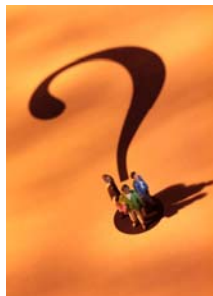
Unit 4 Summary



- Full-Time Faculty Primary Assignment
- Summer Supplement
- Faculty Overload (Teaching or Non-Teaching)
- Part-Time Faculty
- Deferred Pay for 9- and 10-Month Faculty
- Deferred Pay Statements



Unit 5



Frequently Asked Questions

Frequently Asked Questions (FAQs)



- Who creates positions now?
 - ♦ Each college will continue to determine how positions will be created; those same units that set up faculty positions in the past will continue to do so in IRIS-HR/Payroll
- How do you pay a summer supplement for a faculty member on 11-month appointment?
 - ♦ You create an additional assignment using a Summer Supplement position
- The College of Medicine does KMSF billing after payroll runs; how can I capture part-time faculty information?
 - ♦ You can review the Labor Distribution report in BW

Frequently Asked Questions (FAQs)



- Do PRN faculty need to be separated?
 - ♦ No, unless they will no longer be working at the University in the future.
- Can you clarify how cost sharing will be handled and displayed in the new FES?
 - ♦ You will have the ability to enter cost sharing on the DOE in the FES client. Cost sharing for a given grant will be charged to the appropriate cost center, but related to the grant, for reporting purposes. It will be easily identifiable on many of the FES screens and reports.
- Can you clarify the data transfer of faculty positions?
 - ♦ Current appointments were included in the conversion and load of HRS data to IRIS HR/Payroll

Frequently Asked Questions (FAQs)



- The HR/Payroll system uses the calendar year for processing; will the FES operate on the fiscal year?
 - ♦ Yes, FES will continue on a July–June calendar
- Will we have a balancing problem with FES (fiscal year) and IRIS HR/Payroll (calendar year)?
 - ♦ Balancing occurs within FI, rather than HR for federal reporting and certification purposes; UK will report as always on the FY July–June basis
- When your department has a grant involving faculty members from other departments, will you be able to see those faculty members' information in the new system?
 - ♦ The FES Client allows for alternate department viewing

Help Websites



- myHelp website:
 - ♦ <http://myHelp.uky.edu/rwd/HTML/index.html>
 - ♦ Contains Quick Reference Cards (QRCs), updated course manuals, Simulations, Frequently Asked Questions, and other job aids
- IRIS website
 - ♦ <http://www.uky.edu/IRIS/>
 - ♦ Contains Information Directory, Forms, and other references


Course Summary


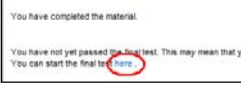
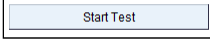
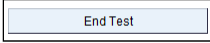



- Review terms and concepts associated with Personnel Administration and Faculty as it relates to UK
- Review the differences between the current process and the IRIS process
- At the end of this course you should be able to:
 - ♦ Identify the policies and procedures
 - ♦ Create faculty positions
 - ♦ Create and maintain faculty master data




Course Assessment Instructions


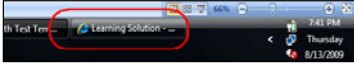
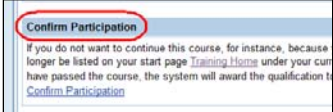
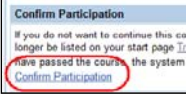


- To begin the course assessment, click **Continue** (bottom left corner of the screen)
 
- Click **Here** to continue when the system message appears
 
- Click **Start Test** to continue
 
- If you pass the assessment successfully, click **End Test** (located at the bottom right of your screen)
 
- Click **Close** (lower right corner of the screen)
 

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Course Completion Instructions



- Click **Logoff** (lower right corner)
 
- When the WBT window closes, go back to your original browser window
 - Click on the browser window in your taskbar and wait for the screen to refresh
 
- Scroll down the page until you see the **Confirm Participation** section
 
- To complete the course, click **Confirm Participation**


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