GUIDE FOR THE TRANSITION TO UTSHARE/PEOPLESOFTR

August 2014
This Guide is not a replacement for UTShare/PeopleSoft training but intended to provide an overview of major changes and key awareness points to assist UTSA campus constituents with the transition to UTShare/PeopleSoft.

This Guide is organized in two major sections:

1. General overview of UTShare/PeopleSoft
2. Major points of change to be aware of based upon your campus role

Readers are encouraged to review the information provided under the General Overview and their specific campus role(s).

Thank you for being part of UTSA’s exciting transition to a new era of software, UTShare/PeopleSoft, supporting UTSA’s path to Tier One.
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What is UTShare?
UTShare is a collaborative effort by University of Texas Shared Services with seven UT institutions (UT Arlington, UT Brownsville, UT El Paso, UT Permian Basin, UT San Antonio, UT System, and UT Tyler) to share products and services in a way that reduces the cost to each campus.

The first UTShare project is implementing Oracle’s PeopleSoft Human Capital Management (HCM), which includes human resources, benefits and payroll; and Financial Management Software (FMS), which includes general ledger, asset management, accounts payable, grants, and purchasing. PeopleSoft as a software application facilitates and integrates all business functions and provides enhanced reporting capabilities.

Over 300 project team members across the multiple institutions have been involved over the past three years to make this happen. Many of our functional committee members have traveled and worked long hours to design and test each function within our PeopleSoft system.

**We will begin using our new system this May 2014 (“Go-Live”).** You will learn more about the changes this system brings to your role and responsibilities during training sessions.

It has been a very exciting process and we appreciate your support as we embark on this new path.

What Can I Expect?
While Oracle’s PeopleSoft software works “out of the box”, our teams have made some modifications based on federal, state, and UT System requirements. We guarantee that processes will not be the same as they are in DEFINE, Point Plus, HRMS and UT Direct and it may take you some time to become comfortable with our new system. While you may experience some challenges, please be patient with yourself and others as we work through this transition period.

**Over Summer 2014 and through Spring 2015, expanded functionality and workflow approval will be added.** By Spring 2015 we will have fully deployed all available UTShare/PeopleSoft functionality to all departments.

Over time we will continue to improve the performance of our system and processes to ensure best practices and optimize shared cost reductions.

Access to UTShare/PeopleSoft
- You will login to UTShare/PeopleSoft with your **MyUTSA ID (abc123) and passphrase.**
- UTShare/PeopleSoft login locations will be located at:

  myUTSA  [http://my.utsa.edu/](http://my.utsa.edu/)
  or
  [http://www.utsa.edu/utshare/](http://www.utsa.edu/utshare/) via the UTShare/PeopleSoft Resources button.
Overall Timeline

March/April 2014
- Administrative staff is trained on UTShare/PeopleSoft interim processes (17 courses available). Sign-up at [https://mytraining.utsa.edu/td/](https://mytraining.utsa.edu/td/).
- Preparing for the transition from DEFINE to UTShare/PeopleSoft.

May 2014
- Conversion of UTSA data in DEFINE to UTShare/PeopleSoft and data validation will be May 1-12, 2014.
- UTSA will use *SharePoint Interim Workflow Solution* forms starting Monday May 12, 2014 for interim approvals.
- UTShare/PeopleSoft will be available for campus use on **Tuesday, May 13, 2014**.

June – September 2014
- UTShare/PeopleSoft is used to conduct campus business.
- UTSA uses *SharePoint Interim Workflow Solution* forms for approval workflow processes.

October- February 2015
- Full PeopleSoft functionality and automated approval workflow are deployed and UTSA’s *SharePoint Interim Workflow Solution* forms are no longer used.
- Additional training and guidance will be provided.

Stay Informed
The UTShare website is being updated frequently with new information including training materials. Stay abreast of changes at [www.utsa.edu/utshare/](http://www.utsa.edu/utshare/).

Need More Information?
Have an idea or perhaps need more help? Contact the PeopleSoft Support and Sustainment Center (PSSC), your Single Point of Contact (SPOC).

UTSA’s PeopleSoft Support and Sustainment Center (PSSC) is operational and available for all faculty and staff questions about the PeopleSoft system and implementation. A dedicated team is ready to answer your questions. There are two ways to contact us:
- Call the PSSC at **458-SPOC (7762)**
- Visit the UTShare Website: [www.utsa.edu/utshare](http://www.utsa.edu/utshare)
- Select on the SPOC icon to open a ticket within the UTShare/PeopleSoft ticketing system. Submit one question per ticket.

For any policy or business related questions, please contact the Human Resources, Financial Affairs and Purchasing Departments.
Employees

Changes that affect employees (faculty, staff, and student employees) with the transition to UTShare/PeopleSoft include:

1. Employees will be uniquely identified in UTShare/PeopleSoft by their Employee ID (EMPL ID), which can be viewed by logging into Employee Self Service (ESS). The DEFINE EID will no longer be used as a unique identifier.

2. Employees must log into Employee Self Service (ESS) to view their paperless earnings statements each pay date starting May 22, 2014. (Earning Statements are known as Pay Advices in UTShare/PeopleSoft.) Neither email notifications nor paper earnings statements via campus mail will be sent as of this pay date. Employee Self Service (ESS) replaces UT Direct where employees are able to:
   a. View their employee ID (EMPL ID), Department ID, Department Name, and other useful information on the View Paycheck page.
   b. Update employee personal information, emergency contacts, and address information on the Personal Information page:
      i. The HOME address must always be the local residence the employee uses while working at UTSA (typically a Texas address). This is important for proper tax withholding.
      ii. The MAILING address may be used for a second address or to receive correspondence. If a mailing address is present, correspondence will be mailed to the mailing address instead of the home address.
      iii. When working in Texas:
         1. Student employees must indicate a local Texas residence as their HOME address. Optionally, students may add a different mailing address such as their parents’ home address.
         2. Foreign employees must indicate a local Texas residence as their HOME address. Optionally, foreign employees may add a different mailing address such as their home country residence.
   c. View and manage paycheck details, under the grouping of Payroll & Compensation, including:
      i. Electronic paperless earnings statements on the View Paycheck page.
      ii. Update deposit information on the Direct Deposit page which allows up to 3 separate direct deposit accounts.
      iii. Update tax withholding on the W-4 Tax Information page.
   d. View leave time balances on the View Absences Balances page.
   e. View compensatory time balances on the Compensatory Time page.
Employees - continued

3. For pay periods beginning May 1, 2014, standardized timesheets will be used during the interim period to record employee absences and time worked.

   a. Employees will record time worked and absences on standardized timesheets and submit to their supervisor for approval. Training will be provided in groups at the department level.

   b. It is recommended that timesheets be completed after the end of each work week (typically Mondays). If Monday is a holiday, the timesheet would be submitted the next business day:

      Exempt Employees:
      i. Faculty members will report sick absences as they occur, but at a minimum once per month to their timekeeper as per current process. Faculty members are not required to complete timesheet forms.
      ii. A&P employees will report absences and should A&P employee work on a holiday, report those hours worked using the weekly “elapsed” timesheet.
      iii. Classified monthly exempt employees will record absences and time worked, including hours worked in excess of their schedule using the “elapsed” timesheet form, and submit on a weekly basis.
      iv. Student monthly exempt employees report hours worked using the “elapsed” timesheet form, and submit on a weekly basis.

      Non-Exempt Employees:
      v. Classified monthly non-exempt employees will record absences and all time worked as it occurs, and submit on a weekly basis, using the “punch” timesheet form.
      vi. Classified hourly non-exempt employees will record all time worked as it occurs and submit on a weekly basis, using the “punch” timesheet form. Leave eligible hourly employees must also record their absences.
      vii. Student hourly non-exempt employees report all time worked as it occurs, and submits on a weekly basis, using the “punch” timesheet form.
      viii. The “punch” timesheet form requires the employee to record “time in” (at the beginning of the day), “time out” (for lunch), “time in” (when he/she returns from lunch) and “time out” (when leaving for the day).

   c. Supervisors will route approved timesheets to their department timekeeper. Timekeepers will enter approved time worked and absences into UTShare/PeopleSoft weekly and at the end of a pay period to meet payroll deadlines.

   d. Employees, supervisors, and timekeepers must know which timesheet (elapsed or punch) to use (dependent on FLSA classification (exempt or non-exempt) and employee type). Employees will learn which timesheet to use from their department timekeeper.

4. Leave must be accrued before it can be used.

   a. Negative leave balances are not allowed by state law, and UTShare/PeopleSoft is configured to be compliant with all applicable regulations.

   b. Vacation, sick leave, and compensatory time must be earned and recorded in UTShare/PeopleSoft before it can be taken.
5. **UTShare/PeopleSoft** provides a Cascading Program within the Absence Management (AbM) module to automatically deduct employee submitted absence hours against a prioritized order of an employee’s accrued leave type balances. **UTShare/PeopleSoft** recommends that the cascading feature be implemented in order to formulate a common use of accrued leave and prevent negative leave type balances from occurring. The cascading order is shown below:

<table>
<thead>
<tr>
<th>Entitlement Element</th>
<th>Order of Depletion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation (VAC)</td>
<td>Vacation FHL Unpaid</td>
</tr>
<tr>
<td>Floating Holiday (FHL)</td>
<td>FHL Vacation Unpaid</td>
</tr>
<tr>
<td>Educational Activities (PTC)</td>
<td>FHL Vacation Unpaid</td>
</tr>
<tr>
<td>Sick (SICK)</td>
<td>Sick FHL PTC Vacation Unpaid</td>
</tr>
</tbody>
</table>

*Hours are transferred from the sick balance, when requested.*

b. The triggering of cascading can be avoided by entering separate entries (time taken or absence events) from available entitlement element leave balances. This, however, will not prevent someone from going unpaid for hours that are not available to be taken.

6. Employees must proactively check their compensatory time balances and expirations in Employee Self Service (ESS) on the Compensatory Time page, as they will no longer receive automatic emails regarding expirations of compensatory balances.

7. All employee vacation hours over the Vacation Allowable Carryover (outlined in UTSA’s HOP), as of August 31st, 2014, will automatically transfer to their sick hours accrued balance during the first semi-month payroll cycle of each Fiscal year in September.

   a. Automatic notices will no longer be sent prior the “lop-off” of an employee’s vacation hours over the Vacation Allowable Carryover.

   b. Employees will be responsible to view their balances via Employee Self Service (ESS) on the Absence Balances page and coordinate any time off in advance with their supervisor.

8. Absence balances in ESS are updated twice per month, at the end of each semi-monthly pay period, on the 15th and last day of the month.

9. Payday dates will remain the same. Employees are paid either on a monthly pay cycle (1st business day following the month) or a semi-monthly pay cycle (within 5 business days after the pay period end date).

10. Full employee names will be displayed in UTSA directories. The ability to override directory information (employee names and department names) will not be available at Go-live.

11. UTSA email accounts are now considered the primary email contact for employees.

   a. At conversion, UTSA email addresses will be indicated as primary in UTShare/PeopleSoft if the employee has a UTSA email address. Non utsa.edu emails will be converted and will be marked as preferred only if a utsa.edu email did not exist in DEFINE.

   b. Post conversion, OIT will continue to provision utsa.edu email addresses for all new employees and UTShare/PeopleSoft will mark it as primary. Employees will no longer be able to change the preferred email flag to a non utsa.edu email address, but can add non utsa.edu emails as secondary email addresses.

   c. OIT must be contacted by the employee to route email to a non-utsa.edu email account.
Employees - continued

12. Employees (and supervisors) are still responsible for communicating and providing HR-Leave Administration information and paperwork, as needed during continuous or intermittent leave. Timekeepers will still be responsible for entering absence events (Vacation, Sick, and Floating Holiday) on behalf of employees who are on continuous “paid” or intermittent leave into UTShare/PeopleSoft.

13. A rounding rule of 15 minutes is uniformly applied to all campus-wide, non-exempt employees’ submitted time worked via the time rules in UTShare/PeopleSoft. The rounding rule acquires the employee’s Reported time and “rounds” to the nearest quarter hour of Payable time. Employees and supervisors are encouraged to ensure that staff arrive and leave on time. Examples:

   d. If an employee reports to work at 7:55 am and records 7:55 am on their timesheet, UTShare/PeopleSoft will automatically round the Payable time worked to 8:00 am.

   e. If an employee leaves work at 5:10 pm records 5:10 pm on their timesheet, UTShare/PeopleSoft will automatically round the Payable time worked to 5:15 pm.

14. Employees must authorize their respective department administrative staff person to enter travel and expense transactions on their behalf in Employee Self Service.
Faculty

Generally, changes that affect employees also affect faculty. Faculty who supervise employees must also be familiar with changes that affect reports to supervisors. Changes that affect only faculty include:

1. Summer insurance premium deductions:
   a. During the May 2014 Go-live:
      i. For faculty members who have elected a 9 month salary spread, insurance premium deductions will be quadrupled on the faculty member’s June 1 check to cover insurance premiums due for the months of May, June, July, and August. This is different from previous communications and is due to the change in the Go-live month from March to May 2014.
      ii. Faculty members on a 12 month salary spread and faculty with summer appointments will continue to have summer insurance premiums deducted monthly.
   b. Starting in spring 2015, all faculty members on 9 month appointments will have insurance premium deductions doubled on the April 1, May 1, and June 1 checks to cover insurance premiums due for the months of June, July, and August. Faculty members on a 12 month salary spread and faculty with summer appointments will continue to have summer insurance premiums deducted monthly.

2. Faculty members will report sick absences as they occur, at a minimum once per month, to their timekeeper. Faculty members are not required to complete timesheet forms.

3. Faculty members must authorize their respective department administrative staff person to enter travel and expense transactions on their behalf in Employee Self Service.

4. Effective September 1, 2014, faculty will be able to continue to spread 9 month salary over 12 months ONLY if the following conditions are met:
   a. During the September 2014 through May 2015 time period:
      i. Will not have salary paid by a grant, other than summer salary.
      ii. No possibility of applying grant funding for salary during the academic year.
   b. If the faculty member receives a grant (anticipated or not) during this time frame, the faculty member will NOT be able to buy out any of their time during the regular academic year using grant funds.
   c. Faculty member must sign the 9/12 month Salary Election Form certifying that they understand the conditions as stated above.

Faculty Who Supervise Staff

5. Faculty members who supervise staff are considered “Reports to” supervisors and have the responsibility to approve employee timesheets weekly and at the end of each pay period.
   a. Supervisors must track their employee’s time worked and absences to verify and approve timesheets outside of PeopleSoft.
   b. Timesheets must be routed to the department timekeeper for timely entry into PeopleSoft.
Faculty - continued

c. Failure to approve timesheets or route documents to the department timekeeper by payroll reporting deadlines could result in hourly employee checks being short or not processed.

d. Policy reminder: Delegation of approvals can be made to another supervisor or manager who is aware of the employee’s time. Delegation for approval cannot be made to Department Administrative or Clerical staff.

6. Faculty Supervisors must communicate employee work schedules to the Payroll Office using the Work Schedule Request form:

a. Employees that are eligible for Holiday and Absence benefits require a work schedule in UTShare/PeopleSoft to apply regulatory rules.

b. This impact requires "reports to" supervisors to ensure correct schedules are applied and updated by completing the Work Schedule Request form and forwarding those forms to the Payroll Office prior to the effective date of the schedule change.

c. For employees that are not eligible for absence benefits, the work schedule functionality is optional as a management tool for supervisors.

d. Incorrect work schedules may trigger incorrect holiday, absence event hours, and comp/overtime calculations in the time and absence processes, which may impact employees pay.

7. Faculty Supervisors (and Employees) are still responsible for communicating and providing HR-Leave Administration adequate information and paperwork, as needed during “paid” continuous or intermittent leave. Timekeepers will be responsible for submitting absence events (Vacation, Sick, and Floating Holiday) on behalf of employees who are on continuous “paid” or intermittent leave.
“Reports To” Supervisors

Changes that affect employees and timekeepers also affect “reports to” supervisors (Supervisors that have direct responsibility for employees). Changes that affect “reports to” supervisors include:

1. “Reports to” supervisors have the responsibility to approve employee timesheets weekly and at the end of each pay period.
   a. Supervisors must track their employee’s time worked and absences to verify and approve timesheets outside of UTShare/PeopleSoft.
   b. Timesheets must be routed to the department timekeeper for timely entry into UTShare/PeopleSoft.
   c. Failure to approve timesheets or route documents to the department timekeeper by payroll reporting deadlines could result in hourly employee checks being short or not processed.
   d. Policy reminder: Delegation of approvals can be made to another supervisor or manager who is aware of the employee’s time. Delegation for approval cannot be made to Department Administrative or Clerical staff.

2. Supervisors must communicate employee work schedules to the Payroll Office using the Work Schedule Request form:
   a. Employees that are eligible for Holiday and Absence benefits require a work schedule in UTShare/PeopleSoft to apply regulatory rules.
   b. This impact requires "reports to" supervisors to ensure correct schedules are applied and updated by completing the Work Schedule Request form and forwarding those forms to the Payroll Office prior to the effective date of the schedule change.
   c. For employees that are not eligible for absence benefits, the work schedule functionality is optional as a management tool for supervisors.
   d. Incorrect work schedules may trigger incorrect holiday, absence event hours, and comp/overtime calculations in the time and absence processes, which may impact employees pay.

3. Supervisors (and Employees) are still responsible for communicating and providing HR-Leave Administration adequate information and paperwork, as needed during “paid” continuous or intermittent leave. Timekeepers will be responsible for entering absence events (Vacation, Sick, and Floating Holiday) on behalf of employees who are on continuous “paid” or intermittent leave into UTShare/PeopleSoft.

4. "Reports to" supervisors are responsible to validate and approve time and absence entries for their employees on a weekly basis and at the end of each pay period; there are no more VSL reports.
Timekeepers

Changes that affect employees also affect timekeepers. Changes that affect only timekeepers include:

1. During the interim processing period, timekeepers:
   a. Will ensure timesheets are eligible for processing by checking for employee and supervisor signatures.
   b. Must enter all supervisor approved, time worked and absences into UTShare/PeopleSoft for all employees during the interim processing period.
   c. Must review and correct system generated exceptions in UTShare/PeopleSoft to meet payroll deadlines and avoid discrepancies.

2. Application of State and Federal time rules are automatically applied to employee time worked that has been entered into PeopleSoft.
   a. It is no longer necessary to calculate straight compensatory time and overtime before data entry.
   b. An employee’s straight Compensatory time and overtime earned hours balances are available to use the following work week after entry of reported hours.

3. Absence balance updates will run twice per month at the end of each semi-monthly pay period and be viewable on the employee timesheet page in UTShare/PeopleSoft.

4. Timekeepers will still be responsible for entering absence events (Vacation, Sick, and Floating Holiday) on behalf of employees who are on continuous “paid” or intermittent leave into UTShare/PeopleSoft.
Department Administrative and Clerical Staff

Department Administrative and Clerical staff are encouraged to become familiar with changes that affect employees, supervisors, and timekeepers. Changes that affect Department Administrative and Clerical staff include:

**Employee and Position Related Changes**

1. Administrative staffs in the front offices (campus departments) will have view only access to position and employee information during the interim approval workflow processing period (May 2014 through spring 2015).

2. All personnel transactions (formerly HRMS assignments) for both benefit eligible and non-benefit eligible employees will be entered into UTShare/PeopleSoft by Human Resources staff using UTSA’s SharePoint Interim Workflow Solution, Departmental HR forms until full UTShare/PeopleSoft functionality is deployed:
   a. Interim approval workflow procedures are explained in each UTShare/PeopleSoft training class.
   b. Position requests, position change requests, and salary requests will be submitted to the HR-Compensation department outside of UTShare/PeopleSoft.
   c. Personnel actions (hires, rehires, and terminations) will be submitted to HR-Day ONE outside of UTShare/PeopleSoft.
   d. During the interim processes period, all appropriate approvals must be obtained before submitting requests to Human Resources. Documentation of approvals must be included with each request.
   e. All employees, including student employees, must be assigned to a unique position so the correct “reports to” supervisor is identified for time approval purposes. Pooled positions will not be allowed under UTShare/PeopleSoft.
   f. The FTE (full time equivalent) value must match on both the position and the job (assignment).
   g. Every faculty member who works during the summer will need a separate position for their summer job assignment. A significant one-time effort will be required to create these positions in May 2014 as part of Go-live. These positions can be re-used in subsequent years.
   h. Reminder: Benefits eligible staff are individuals who work 20 hours or more a week, for a period of 4.5 months (135 days) or longer.

3. Changes in procedure:
   a. New employees will complete a portion of employee-related paper work electronically through Employee Self Service. Electronic paperwork includes the W-4, Direct Deposit form, and the employee section of the I-9. Employees are required to provide I-9 documentation to HR within 3 business days for final completion of their electronic I-9 form.
   b. Employees in A&P titles, regardless of the number of hours worked per week, will be processed in the monthly Payroll and will not be paid hourly.
   c. Employees in non-exempt student titles will be paid hourly and processed on the semi-monthly payroll.
   d. Employees in exempt student titles will be processed in the monthly payroll.
Department Administrative and Clerical Staff - continued

e. Departments will be responsible for attaching Financial Aid and Graduate School approvals when submitting the *interim process form* to Human Resources. The Financial Aid Office and Graduate Studies Office will review new work-study or graduate student jobs (assignments) via reports provided by Human Resources after the hiring.

4. Position funding will be maintained in UTShare/PeopleSoft by Department Administrative and Clerical staff:

   a. Funding of positions is now separate from the creation or modification of a position in UTShare/PeopleSoft and is not viewable on either the position or job (assignment) pages.

   b. Combination codes are used to fund positions and must correspond to either a Cost Center (non-grant) or Project ID (grant).

   c. Every paid position must be funded in the Department Budget Table (DBT) in UTShare/PeopleSoft with a valid combination code to ensure actuals distribution of expenses to the general ledger.

   d. Departments must fund all paid positions with valid funding sources in the Department Budget Table (DBT) through the end of the fiscal year or through the end of the job assignment (if ending prior to August 31).

   e. Default account combination codes cannot be utilized in UTShare/PeopleSoft since these accounts do not have budgetary funding.

   f. Departments have the option to use funding end dates in the DBT as a last resort if sufficient funding is not available. However, departments will be held responsible for acquiring/updating funding sources in a timely manner.

   g. Persons of Interest (POI – employees without salary) positions will not be funded in the Department Budget Table.

5. Funding changes must be approved by the Department Manager (Unit Administrator) outside of UTShare/PeopleSoft during the interim processes period, using UTSA’s *SharePoint Interim Workflow Solution, Departmental HR forms* and before data entry into UTShare/PeopleSoft:

   a. Department administrative and clerical staff who maintain position funding must coordinate closely with Department Managers/Administrators to ensure that positions are funded with the correct fund sources.

   b. UTShare/PeopleSoft does NOT flag insufficient funding at the time combination codes are entered in the Department Budget Table (DBT).

   c. It will be critical for departments to verify available funds prior to initiating funding source updates for positions. This will include using the Budget Overview page in UTShare/PeopleSoft and reconciliation reports to ensure sufficient funds are available to cover labor expenses.

   d. Funding source changes initiated by Departmental Administrative and Clerical staff will need to be manually approved by your Department Manager prior to electronically routing to the Budget Office during the interim processes period.
Department Administrative and Clerical Staff - continued

e. Funding source changes on grant funds will be routed by the Budget Office to the respective Research Service Center for their approval.

f. Department Administrative and Clerical staff must provide reports on positions and funding to their Department Manager for verification and review.

6. The work study funding process has changed:

a. Position attributes are provided by the department; positions are created by HR-Compensation, and upon approval, are funded by the department in the DBT.

b. The Financial Aid Office will enter the awarded amount after the student is assigned an employee ID and has been added to the system with the employee class of "work study" by Human Resources.

c. The Payroll re-distribution process will reallocate the funding of paid salaries to the work-study funding source.

7. All employees (including those currently referred to as occasional workers) must have a position and job (assignment) record in UTShare/PeopleSoft. For today's occasional workers, a high volume of transactions are expected as these employees must be routinely terminated and re-hired to avoid the inappropriate accrual of state service time.

8. The concepts of effective dates and effective statuses are used to track position and job record changes, including the end of employment.

a. UTShare/PeopleSoft does not use the concept of “end dates”, which will significantly impact the way data is entered into the system and reports are interpreted.

b. An “effective date” is the date upon which an HR transaction is considered to take effect. Examples:

   i. An employees’ first date of employment is 4/1/14 so this same date would be used as their effective ‘start’ date.

   ii. An employees’ last date of work is 4/30/14 so their effective ‘end/termination/retirement’ date would be 5/1/14, the first date of their new status.

c. In DEFINE/HRMS one can enter an assignment end date on the same document that is used to create the assignment.

   i. This will not be the practice in PeopleSoft; however, we do have a field to enter an “Expected End Date”. Reports will be run off the “Expected End Date” and once this date approaches and is verified an actual end date will be entered.

   ii. Example- An employee has been hired on 4/1/14 for less than 4.5 months. Day ONE will enter an Expected End Date on the employee’s job record for 7/15/14 in order to manage end dates.
Department Administrative and Clerical Staff – continued

Financial, Purchasing, and Inventory Related Changes

9. The Chart of Accounts structure has changed from DEFINE to UTShare/PeopleSoft. Key changes include:
   a. Chart fields are used to track financial entries:
      i. Unit codes are now called Department IDs (DEPTIDs)
      ii. Budget Groups/Departmental Accounts are now called Cost Centers (non-grant funding) or Project IDs (grant funding).
      iii. Crosswalks have been developed to map DEFINE values to UTShare/PeopleSoft values and will be available in UTShare/PeopleSoft to look up account numbers (Cost Centers) and unit codes (DEPTID) providing a method to identify the new chart field translations.
      i. DEFINE Sub Accounts are not be used in UTShare/PeopleSoft. Example- operation expenses.

10. Interim workflow approval processes (routing) will occur outside of UTShare/PeopleSoft. Use UTSA’s SharePoint Interim Workflow Solution, Departmental Financial Forms for the following business functions until approval workflow is fully operational:
   a. Non-PO Vouchers
   b. Travel Request Authorizations
   c. Expense Reimbursements
   d. Requisitions for purchase orders

11. General changes in procedure include:
   a. Establishing a new Budget Group/Departmental Account (Cost Center or Project ID) will occur within 48 hours. Departments must plan to initiate these requests to ensure sufficient time is available to complete the required set-up.
   b. Grants and Contracts Financial Services will finalize Transfer of Funds requests on Sponsored Programs (Grants) after receipt of a completed Transfer of Funds Request Form.
   c. The process of checking Available Budget (Free Balance) and fiscal year encumbrances and expenses will be available to view in UTShare/PeopleSoft under the Budget Overview pages and is comparable to balances and activity under DEFINE GB2 and GT1 commands.
   d. Departments will continue to forward all supporting document to Disbursements and Travel Services.

12. Travel and expense related changes include:
   a. Travel Authorizations must be final approved before day one of travel.
   b. Expense reports are used to settle travel and reimburse employees for out of pocket expenses.
   c. Departments will settle travel advances on the Expense report. Disbursements and Travel Services (DTS) will no longer perform this function.
d. Departments will be required to create a Non-PO Voucher in UTShare/PeopleSoft for participant and team/group travel advance requests.

e. Travel advances requesting the ACH payment method will be created in UTShare/PeopleSoft by the department and route to Disbursements and Travel Services for approval.

13. Purchasing goods and services changes include:

a. Departments will now use UTShare/PeopleSoft for purchasing goods and/or services. Point Plus will no longer be used.

b. There will no longer be multiple document types (PBO & PB4) for requesting goods and/or services.

c. PO Change Requests will be initiated by departments on a “UTSA Purchase Order Change Request” form and submitted to the Purchasing Department for entry into UTShare PeopleSoft.

d. Items returned to vendor will be tracked using the “Return to Vendor” or “RTV” pages.

e. A “Punch out Catalog” (direct link to a vendor website from within UTShare/PeopleSoft) will be available for purchasing Grainger/Burgoon at Go-live with additional vendor catalogs to be added in the future.

f. Departments will be able to enter their own receipts for goods and/or services shipped directly to departments. Central Receiving will continue to enter receipts for goods shipped to the Central Receiving Warehouse.

g. Online tracking of a purchase and viewing of related documents can be done in UTShare/PeopleSoft using the “Manage Requisitions” pages.

h. Departments will create a requisition in UTShare/PeopleSoft for requested goods and/or services regardless of value. Upon approval, a PeopleSoft process will convert requisitions valued less than or equal to $5,000 into a PO automatically. Requisitions with a dollar value greater than $5,000 will route to the Purchasing Office for completion and issuance of the Purchase Order.

i. Commodity Codes used for purchases will be based on United Nations Standard Products and Services Codes (UNSPSC) and will differ from those codes currently used in Point Plus.

j. Creation of a “Favorites” list and order “Template” will be available to staff who create requisitions for frequently purchased goods and/or services.

k. An interim requisition approval process will be used to obtain signature authorizations for requisitions until workflow is enabled in UTShare/PeopleSoft. The interim approval process will record approvals before a requisition can be created in UTShare/PeopleSoft.

l. Research Service Center staff will create Purchase Orders to encumber funds for Grant Subcontracts.

m. Online tracking of a purchase and viewing related documents will be available in UTShare/PeopleSoft using the “Manage Requisitions” pages.
Department Administrative and Clerical Staff - continued

n. Select Research Service Center staff will be able to encumber funds for Grant Subcontracts by using a Purchase Order document.

14. Asset and inventory related changes include:

a. Asset listings will be provided by the Inventory Department for campus departments to review their inventory as there is not a way to view assets online in UTShare/PeopleSoft. Departmental inventory assets will not be viewable online in UTShare/PeopleSoft as they were in DEFINE.

b. Instead of using a Banner ID, the PeopleSoft Employee ID (EmplID) will be used to designate a custodian for an asset.

15. Budget related changes include:

a. Budget transfers will be processed by departments directly into UTShare/PeopleSoft with a notification to the Budget Office for approval. Budget status reports will provide breakdown of permanent and temporary transfers.

b. Personnel costs in excess of available funds at the cost center level will result in negative balances. Budget categories for personnel costs include Faculty; A&P and Classified; Wages and Benefits. Reporting will need to be closely monitored to ensure fiscal responsibility by VP/AVP/Division/Department levels.

c. Default accounts will no longer be available and departments will need to fully fund positions

d. Budget checking errors will need to be reviewed and resolved by departmental staff.

e. The double deduct for faculty on grants will continue to be re-directed to an institutional funding source identified by the Budget Office. The Annual Operating Budget development for FY14-15 will be performed in DEFINE– BUD system.

f. Next year, Hyperion – PSBP will replace the DEFINE-BUD for developing the FY15-16 Annual Operating Budget.

g. Hyperion-Public Sector Planning & Budgeting (PSPB) is a flexible web and Microsoft Office based planning application with pre-built position planning models, combined with sophisticated planning and budgeting process management features used for planning, budgeting and forecasting.

h. Hyperion-PSPB receives and sends information between PeopleSoft FMS and HCM on a periodic basis. This project is currently under full scale development by the office of Budget Planning and Development. A user group of 50 participants has been established for user testing to take place closer to rolling out Hyperion-PSPB next year.
Department Managers/Unit Administrators

Unit Administrators (called Department Managers in UTShare/PeopleSoft) are encouraged to become familiar with changes that affect employees, reports to supervisors, timekeepers, and department administrative staff. Changes that affect Department Managers/Administrators include:

**Employee and Position Related Changes**

1. Approvals must be documented and included with position and personnel requests (formerly HRMS assignments) submitted to Human Resources outside of UTShare/PeopleSoft during the interim process period, using UTSA’s *SharePoint Interim Workflow Solution, Departmental HR forms* until UTShare/PeopleSoft’s approval workflow is fully operational.
   
   a. Human Resources staff will enter all personnel transactions for both benefit eligible and non-benefit eligible employees into UTShare/PeopleSoft.
   
   b. **Reminder:** Benefits eligible staff are individuals who work 20 hours or more a week, for a period of 4.5 months (135 days) or longer.

2. **The appropriate fiscal management personnel within each division/college must verify sufficient funding is in place for new positions, promotions or salary equity increases** being authorized and submitted to Human Resources.
   
   a. Position funding changes must be approved by the Department Manager/Administrator outside of UTShare/PeopleSoft during the interim processes period and before data entry into UTShare/PeopleSoft. Department administrative and clerical staff who maintain position funding must coordinate closely with Department Managers to ensure that positions are funded with the correct fund sources.
   
   b. Funding of positions is now separate from the creation or modification of a position in UTShare/PeopleSoft and is not viewable on either the position or assignment documents.
   
   c. The system does not flag insufficient funding at the time combination codes are entered in the Department Budget Table (DBT) by department administrative and clerical staff. Position funding is maintained by the Department Budget Table (DBT) in UTShare/PeopleSoft.
   
   d. Department administrative and clerical staff must provide reports on positions and funding to their Department Manager/Administrator. This will include using the Budget Overview page in UTShare/PeopleSoft and reconciliation reports to ensure sufficient funds are available to cover labor expenses and annual salaries (both permanent and temporary positions).

3. Per Department of Labor authority, a rounding rule of 15 minutes has been adopted campus-wide. Time submitted for non-exempt employees could result in un-planned overtime expenses for hourly employees. **Close monitoring of budgets and labor expenses is strongly encouraged.**

4. All hourly or monthly non-exempt employees will be required to document hours worked (using the time in/time out format, including meal periods).
Financial, Purchasing, and Inventory Related Changes

5. The Chart of Accounts structure has changed from DEFINE to UTShare/PeopleSoft. Key changes include:
   a. Chart fields are used to track financial entries:
      i. Unit codes are now called Department IDs (DEPTIDs)
      ii. Budget Groups/Department Accounts are now called Cost Centers (non-grant funding) or project IDs (grant funding)
      iii. Crosswalks have been developed to map DEFINE values to UTShare/PeopleSoft values and will be available in UTShare/PeopleSoft to look up account numbers (Cost Centers) and unit codes (DEPTID) providing a method to identify the new chart field translations.
      iv. DEFINE Sub Accounts are not be used in UTShare/PeopleSoft. Example- operation expenses.

6. Interim workflow approval processes (routing) will occur outside of UTShare/PeopleSoft and use of UTSA’s SharePoint Interim Workflow Solution, Departmental Financial forms for the following business functions until approval workflow is fully operational:
   a. Non PO Vouchers
   b. Travel Request Authorizations
   c. Expense Reimbursements
   d. Requisitions for purchase orders

7. General changes in procedure include:
   a. Establishing a new Budget Group/Departmental Account (Cost Center or Project ID) will occur within 48 hours. Departments must plan in advance to initiate a request to ensure sufficient time is available to complete the required set-up.
   b. Grants and Contracts Financial Services will finalize Transfer of Funds requests on Sponsored Programs (Grants) after receipt of a completed Transfer of Funds Request Form.
   c. The process of checking Available Budget (Free Balance) and fiscal year encumbrances and expenses will be available to view in UTShare/PeopleSoft under the Budget Overview pages and is comparable to balances and activity under the DEFINE GB2 and GT1 commands.
   d. Departments will continue to forward all supporting document to Disbursements and Travel Services.
Department Managers/Unit Administrators – continued

8. Travel and expense related changes include:
   a. Travel Authorizations must be final approved before day one of travel.
   b. Expense reports are used to settle travel and reimburse employees for out of pocket expenses.
   c. Departments will settle travel advances on the Expense report. Disbursements and Travel Services (DTS) will no longer perform this function.
   d. Departments will be required to create a Non-PO Voucher in UTShare/PeopleSoft for participant and team/group travel advance requests.
   e. Travel advances requesting the ACH payment method will be created in UTShare/PeopleSoft by the department and route to Disbursements and Travel Services for approval.

9. Purchasing goods and services changes include:
   a. Departments will now use UTShare/PeopleSoft to request the purchase of goods and/or services. Point Plus will no longer be used.
   b. PO Change Requests will be initiated by departments on a “UTSA Purchase Order Change Request” form and routed to the Purchasing Department to be entered into UTShare PeopleSoft.
   c. Departments will enter receipts for goods and/or services shipped directly to departments and Central Receiving will enter receipts for goods shipped to Central Receiving.
   d. Departments will create a requisition in UTShare/PeopleSoft for requested goods and/or services regardless of value. Upon approval, requisitions valued less than or equal to $5,000 will have the PO created automatically by a PeopleSoft process. Requisitions with a dollar value greater than $5,000 will route to the Purchasing Office for completion of the Purchase Order.
   e. An interim requisition approval process will be used to obtain signature authorizations for requisitions until workflow is enabled in UTShare/PeopleSoft. The interim approval process will record approvals before a requisition can be created in UTShare/PeopleSoft.
   f. Online tracking of a purchase and viewing related documents can be done in UTShare/PeopleSoft using the “Manage Requisitions” pages.
   g. Select Research Service Center staff will be able to encumber funds for Grant Subcontracts by using a Purchase Order document.

10. Asset and inventory related changes include:
    a. Asset listings will be provided by the Inventory Department for campus departments to review their inventory as there is not a way to view assets online in UTShare/PeopleSoft. Departmental inventory assets will not be viewable online in UTShare/PeopleSoft as they were in DEFINE.
    b. Instead of using a Banner ID, the PeopleSoft Employee ID (EmplID) will be used to designate a custodian for an asset.
Department Managers/Unit Administrators – continued

11. Budget related changes include:

a. Budget transfers will be processed by departments directly into UTShare/PeopleSoft with a notification to Budget Office for approval. Budget status reports will provide breakdown of permanent and temporary transfers.

b. Personnel costs in excess of available funds at the cost center level will result in negative balances. Budget categories for personnel costs include Faculty; A&P and Classified; Wages and Benefits. Reporting will need to be closely monitored to ensure fiscal responsibility by VP/AVP/Division/Department levels.

c. Default accounts will no longer be available and departments will need to fully fund positions.

d. Benefits for E&G funds will be allocated at the Cost Center level from an institutional cost center. Monthly allocations will be set up to fund actual benefit costs.

e. Budget checking errors will need to be reviewed and resolved by departmental staff.

f. The Annual Operating Budget development for FY14-15 will be performed in DEFINE– BUD system.

g. Next year, Hyperion – PSBP will replace the DEFINE-BUD for developing the FY15-16 Annual Operating Budget.

h. Hyperion-Public Sector Planning & Budgeting (PSPB) is a flexible web and Microsoft Office based planning application with pre-built position planning models, combined with sophisticated planning and budgeting process management features used for planning, budgeting and forecasting.

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