UTSA Change Leaders Meeting

**Dial-In:** 661-673-8600

**Code:** 1037706#

UTShare PeopleSoft

November 21, 2013
Webinar instructions for asking questions:

Use the “Question” pane in the upper right corner of the webinar screen to reach us for:

- Discussion
- Questions
- *6 to Mute/Unmute your phone during Q&A

Project Leads:

Kari Peterson – Change Management Lead
Jacquelyn Kyle – Project Manager
Magdalena Torres Foley – Training Lead
Carlos Gonzales – Technical Lead
Rene Paniagua – FMS Lead
Doug Hartzler – HCM Lead
Cindy Orth – PeopleSoft Support, Director of DEFINE Admin. Services

Web Moderator: Veronica Guerrero – Change Management Analyst
Agenda

• Project Status & Update
• What’s Changing?
• What’s Next?
• Project Outreach and Survey Results
• Closing and Questions
PeopleSoft Project Status

Jacquelyn Kyle, Project Manager

Status as of November 21
Will begin round 1 of parallel Payroll testing this week using Sept 30th DEFINE data. Will simulate October 2013 payrolls (semi-monthly and monthly pay).

- Continue preparation of Front Office Training courses

- Continue Campus Outreach – Provost, Faculty, Chairs, and Deans meetings held in November and December

- Engaging Change Leaders help with review of course walk-throughs and presentation.
What’s Changing?

Doug Hartzler, Human Capital Management (HCM) Lead

Rene Paniagua, Financial Management System (FMS) Lead
What’s Changing?

• Faculty Salary Spread Elections Starting Fall FY14-15
  • With UTShare/PeopleSoft, all Faculty must make an annual election to be paid either 9 or 12 months for the academic year.

    ✓ If a Faculty member is paid on a grant or anticipates a grant during the academic year, the election must be 9 months.

    ✓ Faculty can no longer split out the non-grant funded portion of their salary for purposes of spreading over 12 months.

    ✓ A Summer only grant does not impact the academic year election.

• Starting in Spring 2014, 9-month Faculty’s (this year) summer insurance premiums for June, July, and August will be paid via double deduction over three months during March, April, and May.
• Student and non-exempt staff’s time worked and absences must be approved and recorded in UTShare/PeopleSoft weekly and at the end of each pay period.
  ✓ Timekeepers will enter approved employee absences and time worked into UTShare/PeopleSoft.
  ✓ If absences and time are not approved by payroll deadlines, employees pay may be delayed.

• Negative leave balances are not allowed by Texas Constitution
  ✓ Pay will be docked for employees with negative leave balances.

• Faculty sick related absences are required to be reported by State law.
Timekeeper Role

• Interim Time reporting process will be used during March 1, 2014 – August 31, 2014
  • Employees: enter absences and time worked in a format external to UTShare at least weekly.
  • Supervisors: approve time worked in a format external to UTShare at least weekly.
  • **Department Timekeepers:** enter pre-approved time and absences into UTShare at least weekly and by the end of each pay period.
  • Payroll: process all time and absences entered into UTShare by timekeepers (without further approval).
  • Once submitted by Timekeeper, supervisors can verify time entered (by Timekeepers) into UTShare via reports.

• Submit timekeeper designations to vslr@utsa.edu by **December 2, 2013.** Include:
  • Timekeeper name
  • EID
  • Unit code (s) that time worked and absences will be entered for

• Questions may be directed to the Human Resources Department, x4648
• FAQ’s will be prepared and distributed by Human Resources
What’s Changing? (continued)

• Research Service Centers will need to enter subcontracts as Purchase Orders so funds can be encumbered.

• DEFINE Budget Group methodology is being replaced with UTShare/PeopleSoft “Chart of Accounts” which reflect the Fund, NACUBO, Object Code, and Department on each transaction for easier reporting.

• Checking of available budget and YTD encumbrances/ expenses will look significantly different in UTShare/PeopleSoft. The two training courses, Chart of Accounts and Statement of Accounts will explain the new approach.

• Procure to Pay Process
  • Receiving reports can be done by Departments
  • Tracking of the Requisition through the Procurement Cycle can be done online
  • PO changes will be completed by the Purchasing Department
What’s Next?

Kari Peterson, Change Management
Training

✓ Refining training schedule to accommodate campus workload, course schedules, locations and instructor availability

✓ Coursework offerings are designed to prepare Administrative Support Staff for transition to UTShare/PeopleSoft

✓ Classes will be held at Main Campus and Downtown Campus

Communications

✓ Notification(s) of campus impacts and additional preparation activities will be published in December
Project Outreach
Project Outreach

Change Leaders Survey Results

- **Survey** – conducted in November for Change Leaders to provide ideas/input for communications across the campus. 45 respondents provided feedback:
  - Simplify terminology, reduce use of acronyms, use language we understand
  - Engage Change Leaders with review of course walk-throughs and presentations
  - Continue email communications; greatest need is information on training
  - Posters – for all departments; distribution through Change Leader community
  - Postcards – for all personnel, UTShare Single Point of Contact (SPOC) awareness campaign
  - Promotional items - Reward and recognition for UTShare Champions, Change Leaders, Volunteers, and early adopters
  - Use Digital Signs/TV Monitors, Flyers and Handouts
  - Campus Communications – UTSA News, UTSA Today, Communications Collective, Newsletters - Spotlight, Horizons (VPBA), and OIT
  - Meet your Change Leader – Monthly interview with Change Leaders, new posting on UTShare website. November Change Leader: **Nathan Flory, Student Financial Aid**

Read more: http://www.utsa.edu/utshare/Change/Articles/112013.html
What UTShare/PeopleSoft information are your Department(s) most interested knowing?

Answered: 30   Skipped: 15

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<tr>
<th>Answer Choices</th>
<th>Responses</th>
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<tbody>
<tr>
<td>Training</td>
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<tr>
<td>Communications</td>
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<tr>
<td>Technical</td>
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<tr>
<td>Project Status</td>
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<tr>
<td>Help Desk / Support</td>
<td>26.67%</td>
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Total Respondents: 30
What method(s) do you use to deliver PeopleSoft Project communications to your department(s)?

Answered: 30    Skipped: 15

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<th>Answer Choices</th>
<th>Responses</th>
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<tr>
<td>Department meeting</td>
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<tr>
<td>Face-to-face meetings</td>
<td>63.33%</td>
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<tr>
<td>Email</td>
<td>80%</td>
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<tr>
<td>Department Newsletter</td>
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Total Respondents: 30
In Closing:

• Kari Peterson will be leaving the UTShare Project team as of November 26th

• Continued Change Management Support for UTShare:
  
  Veronica Guerrero, Change Management Analyst
  
  Contact: Veronica.Guerrero@UTSA.edu  X 8249

Questions?
PeopleSoft - Single Point of Contact (SPOC)

For UTShare/PeopleSoft questions, contact:

- **Call** the PeopleSoft Support and Sustainment Center (PSSC) at 458-SPOC (7762)
- **Visit** the UTShare Website, click on the SPOC icon [http://www.utsa.edu/utshare/](http://www.utsa.edu/utshare/)
- **Email** spoc@utsa.edu

For policy specific or business process related questions, contact the Human Resources, Finance or Purchasing departments.