ARS-PHR Merge
Overview

Barbara Hope
May 2013
ARS-PHR Merge Overview

• ARS Functionality Merged into PHR
  – Tiered Routing
  – Faculty Appointment Data
  – Teaching Overload Course Information

• Approval Summary Changes

• Joint Appointments

• Related ARS Modules

• Implementation
ARS Functionality Merged into PHR

• Tiered Routing
  – PHR Routing expanded to include higher levels of the organization
  – Several types of transactions that routed to the Provost’s Office in ARS will obtain required approval at the Department and/or College level in PHR.
  – Specific transactions will receive final approval after required approvals.
Tiered Routing

• Requires VP/Provost Approval
  – Initial Appts (Salaried, Hourly & Non-Paid)
  – Re-employment Appts
  – Tenure Track Terminal Year Appts
  – Faculty Overloads
  – All Appts for Deans, Dean Direct Reports & Department Chairs
Tiered Routing

- Requires Division/College Approval
  - New Appts for Existing Employees
  - The Following Changes to Existing Appts
    - Change to FTE
    - Change to Appt Salary
    - Salary Addition
    - Appointment Termination
  - Non-Standard Pay Appt
  - Summer Pay Appts
  - Summer Research Appts
Tiered Routing

• Requires One Step Approval (Unit Level)
  – All Faculty Contractual Appts (Cat Stat 25)
  – The Following Changes to Existing Appts
    • LWOP
    • Sabbatical Leave
    • Security Access
    • Funding Changes
  – Summer School Appts
    • OES
    • College Level for Summer School processed outside of OES.
  – Winter Term Appts
Tiered Routing

- Transaction-Specific Final Approvals Occur After Required Approvals:
  - **OIS** for Non-Paid Visa Appts
  - **VPR** for IPA Appts & IPA Salary Additions
  - **Graduate School** for Overloads for Graduate Assistants & Graduate Hourlies
  - **UHR** for Staff Overloads and Staff Salary Additions (except Health & Retirement)
  - **UHR** for Staff Salary Increases of 12-15%
  - **The President’s Office** for Staff Salary Increases over 15%
ARS Functionality Merged into PHR

• Faculty Appointment Data
  – Data Elements from the ARS Appointment (think APTU page 1 & 2).
  – Data Elements that were collected in the ARS Comment.
Faculty Appointment Data

• From the ARS Appointment Screen:
  – IPA Indicator
  – Nepotism
  – Faculty Appointment Duration
    • Faculty Appt Start & End Dates to record Tenure Track terms, Temporary Joints, Lecturer terms, Academic Administrator appts.
  – Duties
    • Checkboxes not Percentages
  – Course Related Information
    • Number of Sections & Credits or Number of Students

• From the ARS Comment:
  – Current State Agency
Faculty Appointment Screen

<table>
<thead>
<tr>
<th>Faculty Appointment Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>U ID: 113770050</td>
</tr>
</tbody>
</table>

**Appointment Start Date:** 01/20/2013  
**Rank Code:** Research Associate

<table>
<thead>
<tr>
<th>Faculty Appointment Duration</th>
<th>Faculty Appt Start Date</th>
<th>Faculty Appt End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Spring Semester</td>
<td>01/20/2013</td>
<td>06/15/2013</td>
</tr>
</tbody>
</table>

**IPA?**  
[ ] Yes  [ ] No

**Notes:**

**Appointment Duties:**
- [ ] Teaching
- [ ] Advising
- [X] Research
- [ ] Administrative
- [ ] Extension
- [ ] Clinical Support
- [ ] Technical Support
- [ ] Other

**Other Duties Desc:**

**Course Info:**
- Total # of Course Sections: 1 AND Total # of Credits: 3
- OR
- Total # of Students: 

**Post Doc?**  
[ ] Yes  [ ] No  
**Nepotism?**  
[ ] Yes  [ ] No

**Currently Employed at Other State Agency?**  
[ ] Yes  [ ] No

- **Current State Agency:**
- **Current State Agency Title:**
- **Current State Agency Supervisor:**
- **Current State Agency Approval Date:**

**Current State Agency Start Date:**
ARS Functionality Merged into PHR

• Overload Sub-Type
• Course Information for Teaching Overloads
  – Term
  – Course Name
  – Number of Sections
Teaching Overload Screen

Record Eff Date: 04/07/2013
Appointment Record Status: Pending Approval
Unit: CMNS-Mathematics(012030001301901)
Category Status: 37,Faculty, Non-Tenured, Non-Regular
Title: Lecturer

Primary Appointment: N
Appointment Action: Overload
Appt Type and Payment: Teaching Overload
Fica: FICA Taxable

*Overload Start Date: 01/08/2013
*Overload Termination Date: 06/15/2013
Overload Termination Reason: Overload Expired

*Total Overload Amount: $2,500.00
Bi-Weekly Overload Amount: $219.30

Overload Sub-Type: Registered Course
Unit Use Only: 

Overload Duties: 

Save

Course Information

<table>
<thead>
<tr>
<th>Term</th>
<th>Course</th>
<th>Number of Sections</th>
<th>Min Credits</th>
<th>Max Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>201301</td>
<td>MATH140 - Calculus I</td>
<td>1</td>
<td>4.0</td>
<td>4.0</td>
</tr>
</tbody>
</table>

Add Course Info
Approval Summary Changes

• Faculty Information Summary link
• Joint Appointment Summary link
• New Warning Messages:
  – Exceeds Faculty Maximum Salary
  – Minimum Degree Requirement Met
• Enhanced Approval Path
<table>
<thead>
<tr>
<th>NAME: Doffy Duck</th>
<th>U ID: 113770135</th>
<th>Internal Id: 400927</th>
<th>Unit: CMNS/Mathematics</th>
<th>Category Status: Faculty Non-Tenured, On Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date: 03/17/2013</td>
<td>Termination Date: 02/10/2016</td>
<td>Reason: Termination of Temporary Appointment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appointment Action: Promotion</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Title: Assistant Professor</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Number: 105132</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>App't Type and Payment: 9 months/22 Pays</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Distribution Code: 11317 - Please change Check Distribution on Employee Info screen if applicable</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FTE%: 100%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base Bi-Weekly: $4,772.73</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base Annual Salary: $105,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FTE Annualized Salary: $105,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salary Explanation/Justification: We thought he was worth the money.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hourly Rate: $29.65</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faculty Rank: Assistant Professor</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional Faculty Information</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TE Unit: CMNS-Mathematics</td>
<td>TE Work Group:</td>
<td>Assistant Professor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base Funding Source:</td>
<td>Account Number: 01111867</td>
<td>Subcode: Faculty Academic Year</td>
<td>Percent Pay: 100</td>
<td>BiWeekly Amt: $4,772.73</td>
</tr>
<tr>
<td>Citiz/Visa Code: H1 - Temporary Specialty Occupation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Process Notes:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Appointment Approval Screen

### Faculty Info Link

### Payroll - Human Resources

#### Faculty Summary

**NAME:** Daffy Duck  
**U ID:** 113770135  
**Internal ID:** 400927  
**Unit:** CMNS-Mathematics  
**Category Status:** Faculty Non-Tenured, On Track

### Education

<table>
<thead>
<tr>
<th>Degree</th>
<th>Other Degree</th>
<th>Degree Date</th>
<th>Discipline</th>
<th>Institution</th>
<th>Other Inst</th>
<th>Honorary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor of Arts</td>
<td></td>
<td>2009/05</td>
<td></td>
<td>Makerere University</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>Doctor of Philosophy</td>
<td></td>
<td>2010/05</td>
<td></td>
<td>Kampala Makerere University</td>
<td></td>
<td>N</td>
</tr>
</tbody>
</table>

**Tenure Home:** CMNS-Mathematics  
**IPA ? N**
**Duration:** Other Academic Year

**Tenure Date:**
- Nopotism ? N
- Start Date: 03/17/2013
- End Date: 06/15/2013

**Tenure Review Yr:** 2019

### Appointment Duties:

**Currently Employed at Other State Agency ? N**

[Return to Approval Summary]
# Appointment Approval Screen

## Approval Path

<table>
<thead>
<tr>
<th>Status</th>
<th>Insert Date</th>
<th>Released By</th>
<th>Release Date</th>
<th>Approved By</th>
<th>Approval Date</th>
<th>Approval Info</th>
<th>Eff Date</th>
<th>Notes</th>
</tr>
</thead>
</table>

- **Salary Addition Type**: 12
- **Salary Addition BiWeekly Amt**: 17.44
- **Salary Addition Total Amt**: 99.39
- **Salary Addition Start Dt**: 10/12/2012
- **Salary Addition Last Pay Dt**: 12/31/2012
- **Salary Addition PP Eff Dt**: 10/07/2012
- **Salary Addition PP Exp Dt**: 01/12/2013
- **Salary Addition Seq Num**: 6132
- **Salary Addition Notes**: nanananananan
- **Acting Position Number**: nanananananan
- **Salary Addition Type**: 12
- **Salary Addition Funding Account Num**: 01111900
- **Sub Code**: 2071
- **Percent of Pay**: 1.0
- **Salary Addition Funding Eff Dt**: 10/12/2012
- **Salary Addition Funding Expir Dt**: 12/31/2012
- **Is Accr in Unit**: Y
- **Salary Addition Seq Num**: 6132
Appointment Approval Screen

Approval Info Link

Released By: Shanice McDonald  Release Date: 10/23/2012 08:25 AM

Highest Organizational Approval Level Required: Division/College

Additional Approvals Required
VPR Approval Ind: Y

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>Approval Date</th>
<th>Approved By</th>
</tr>
</thead>
<tbody>
<tr>
<td>VPR Approval</td>
<td>10/23/2012 08:29 AM</td>
<td>Sally Rennie</td>
</tr>
<tr>
<td>Division/College</td>
<td>10/23/2012 08:28 AM</td>
<td>Sally Rennie</td>
</tr>
<tr>
<td>Department</td>
<td>10/23/2012 08:27 AM</td>
<td>Patricia Ipavich</td>
</tr>
<tr>
<td>Unit</td>
<td>10/23/2012 08:26 AM</td>
<td>Felicia Chelliah</td>
</tr>
</tbody>
</table>

Return to Approval Path
Joint Appointments

- Each unit creates their own piece of the joint appointment
- New Joint Appointment Summary Screen
- Disconnect the automatic calculation of Base Annual Salary from FTE
- Addition of Total Joint FTE Annual Salary & Change Percent fields
- New Salary Change Reason – Joint Base Annual Salary Realignment
## Joint Appointment Summary Screen

**Payroll - Human Resources**

**Joint Appointment Summary**

**UID:**

**Name:**

**Employment Category:** 01. Faculty Tenured

**Joint Status:** Permanent

**Appt Type & Payment:** 12/12

### Table

<table>
<thead>
<tr>
<th>Internal ID</th>
<th>Title</th>
<th>Unit</th>
<th>Pending Actual Change Date</th>
<th>Current FTE</th>
<th>Pending FTE</th>
<th>Current Base Annual Salary</th>
<th>Pending Base Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>341091</td>
<td>Professor</td>
<td>CMNS-Mathematics</td>
<td></td>
<td>37.5%</td>
<td></td>
<td>$85,000.00</td>
<td></td>
</tr>
<tr>
<td>342175</td>
<td>Professor</td>
<td>CMNS-Ctr for Scientific Computation and Math Modeling</td>
<td></td>
<td>62.5%</td>
<td></td>
<td>$95,500.00</td>
<td></td>
</tr>
</tbody>
</table>

### JOINT TOTALS

<table>
<thead>
<tr>
<th>Pending Joint FTE Annual Salary Change %</th>
<th>Current Joint FTE</th>
<th>Pending Joint FTE</th>
<th>Current Joint FTE Annual Salary</th>
<th>Pending Joint FTE Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td></td>
<td></td>
<td>$180,500.00</td>
<td></td>
</tr>
</tbody>
</table>
Related ARS Modules

• Graduate Faculty module of ARS will now be a separate module in PHR.
• J1 & H1 processing will continue in ARS until OIS’ implementation of sunapsis® in January 2014.
Implementation

• The ARS-PHR Merge will be implemented no later than September 2013.
• User Training Sessions will be offered beginning one week prior to implementation and two weeks after.
• Users will pre-register to attend a one hour training session.
• Tip Sheets will be provided at sessions and online.
Questions?

• Contact
  – Barb Hope
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    x55596
  – Marla Bonner
    mbonner@umd.edu
    x57467
  – Siemy Khan
    siemyk@umd.edu
    x53405