ARS-PHR MERGE PROJECT UPDATE

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Today’s Overview

1. ARS-PHR Merge Project Goals
2. ARS Functionality Proposed for Merge into PHR
3. 2011 Changes
ARS-PHR
Merge
Project Goals
Project Goals

• Build needed ARS functionality in PHR

• Build business rules to replace manual review by Provost’s Office

• Implement appropriate final approval levels

• Decommission ARS
ARS Functionality Proposed for Merge into PHR
ARS Functionality Proposed for Merge into PHR – General

• Enhanced faculty functionality
• Multi-level workflow/routing for specified faculty transactions
• Less workflow/routing for exempt transactions
• Utility to handle bulk changes to appointments in lieu of building appointments manually (developing now)
ARS Functionality Proposed for Merge into PHR – Employee & Degree Info

• Export Controls
• Resp. Conduct of Research (implemented)
• Current State Agency Employment
• Faculty inclusion in UG Catalog
• Business rules to ensure completion of degree information
• Automatic calculation of highest degree
• View degree summary in PHR by all users (implemented)
ARS Functionality Proposed for Merge into PHR - Visa

• Exploring software for handling visa case management and SEVIS reporting

• Business rules for H1 extensions, appointment/visa expiration dates, termination date changes, H1 salary compatibility, and visa change notification
ARS Functionality Proposed for Merge into PHR – Faculty/Leave

- Track tenure review delay
- Tenure home change date
- Librarians permanent status information
- View sabbatical leave history
- Partial LWOP
ARS Functionality Proposed for Merge into PHR – Appointments

• Appointment Action Codes will have an important role in PHR
  – Appt Action Codes will direct workflow/approval levels and business rules.
  – Complete review of Appt Action Codes
    • Some current codes will be used for all employment categories
    • Some codes will be specific to employment categories
    • New codes will be added
ARS Functionality Proposed for Merge into PHR – Appointments

• Duties checkboxes, course information, faculty appointment dates, attestation fields for approved contracts

• On-line screens for viewing:
  – Employment history (implemented)
  – Appointment history
  – Appointment transaction history
ARS Functionality Proposed for Merge into PHR - Salary

- Utilize FTE Annual Salary as the basis for other salary related changes
  - FTE changes
  - Salary changes
- Appointment Action Codes work in conjunction with business rules to perform salary calculations and percent changes from current salary
- Enter Change Salary reason
- Salary calculator tool
ARS Functionality Proposed for Merge into PHR – Joint Appointments

- Appt FTE = FTE paid, not time & effort
- Joint Appointment type on the PHR Appt screen will be automatically pulled and displayed from Position Management
- Each unit builds and routes their own appointment
- Business rules will utilize position management, FTE salary, and total FTE across joints to ensure unit appts do not exceed total FTE and to detect FTE annual salary change
- On-line screen to view joint appt info by all units involved in joint appt (implemented)
ARS Functionality Proposed for Merge into PHR - Workflow

• Increase levels of workflow/routing in PHR
• Reduce final approval level for many appt actions
  – Provost’s Office is final approver for initial, re-employment, and overload appts
  – College Office is final approver for most appts actions
• VPR is final approver for IPA transactions
• OES is final approver for Summer School/Winter Term appts
• If appointee on a visa, OIS will be final approver
ARS Functionality Proposed for Merge into PHR – Special Payments

• Overloads
  – New fields to store overload description and supervisor info
  – Graduate Asst overloads route to Graduate School for final approval

• Non-standard payments
  – Final approval at the College level
ARS Functionality Proposed for Merge into PHR – Special Payments

• IPA
  – New IPA section on Faculty Screen
  – New IPA salary addition type

• Summer Pay/Summer Research/Summer School
  – Based on type, rules to pre-populate existing salary and prevent exceeding max payment allowed (implemented)
ARS Functionality Proposed for Merge into PHR – Timeline

• Next steps
  – Making decisions on functionality that needs further clarification
  – Writing functional/technical specs and performing OIT analysis
  – Software development
  – Testing
2011 Changes
2011 Summer School Appointments via Extended Studies

• If appointee not on a visa or overload
  
  – No records created in ARS
  – If initial appointment, department completes PHR employee demographic and degree screens
  – OES creates and is final approver for summer school appointment
2011 Summer School Appointments via Extended Studies

• If appointee is on a visa or overload:
  – Department completes ARS screens and appointment routes through normal path
  – If initial appointment, department completes PHR employee demographic screen
  – OES builds PHR appointment after ARS approval
FY12 ARS Reappointments

• College is final approver in ARS for FY12 reappointments in the following employment categories:
  – 03 Lecturer, Non-Tenured Term Contract
  – 15 Non-Tenured Term, Continuing
  – 37 Non-tenured term contract

• If appointee is on a visa, OIS is final approver after college approval
FY12 ARS Exempt Routing Change

• College is final approver in ARS for all FY12 exempt appointment transactions

• If appointee is on a visa, OIS is final approver after college approval
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QUESTIONS?