TTUHSC Current and Future Labor Change

Texas Tech University Health Sciences Center El Paso

Budget Office

Revised March 2015

Contents

TTUHSC Current and Future Labor Change

Purpose

The purpose of the TTUHSC Current and Future Labor Change PAF is to change the funding on an employee for pay periods that have not been paid.

The Current and Future Labor Change PAF is only used to change the labor distribution of an employee. It cannot be used to change an employee's FTE, salary, or title.

There are many reasons why you may need to process a Current and Future Labor Change EPAF. Here are a few examples:

- Your department has received a new grant and the labor distribution of an employee needs to reflect this grant funding.

- The initial new hire EPAF was processed with the incorrect labor distribution.

- An employee in your department has been paid from a grant that ended and their job labor needs to be moved to another funding source.

- Restructuring is done within your department and labor must be changed to fund employees correctly.

- At the beginning of the fiscal year you notice that an employee was funded incorrectly during the budget prep cycle.

- Your department uses multiple organization codes to allocate expenditures and an employee's pay needs to be allocated to a different organization code.

- During the fiscal year the department experiences funding issues requiring that an employee's pay needs to be changed to an alternate funding source.

Preparation

Required Information

- **Employee's R-ID number, position number and suffix to be changed**
  The Cognos Report - *Human Resources Reports> Departmental Users > HR121 – Current and Future Appointment Report* should be used to find the R-ID number, the position number and suffix. This report will also display the employee's current funding source.

- **Effective date of change**
  The effective date of the change must be later than the Employee's Last Paid Date. The effective date of the change must also be at the beginning of a pay period. The beginning of the pay period is the 1st of the month for all exempt employees and either the 1st or 16th for a non-exempt employee.

- **FOAP's to be used for the employee's new Labor Distribution**
  There are a variety of Finance and Budget Cognos reports containing FOAP information and available balances in each FOAP. Below is a list of three reports that provide this information:
    - HSC Finance>Finances Relative to Budget >Budget Account Code Summary report

    - Budget>Budget Financial Reports>RPT_BAVL_005 – Available Balance by Organization (BAVL)

    - Budget>Budget Financial Reports>RPT_OPAL_005 – Operating Ledger

- **Percentage to be paid from each FOAP**
  The percentage applied to each FOAP may be up to 2 decimal places. The FOAP percentage may be calculated based on the total annual salary and the annual salary per FOAP as outlined in the following examples:

  Example #1
  Employee A's annual salary is $25,000/year. Employee A should be paid $10,000/year from 101049-201401-612002-60 and $15,000/year from 181033-201801-612002-60. The calculation to derive the FOAP percentage would be:

    - 101049-201401-612002-60: ($10,000/$25,000)*100 = 40.00%
    - 181033-201801-612002-60: ($15,000/$25,000)*100 = 60.00%

  Example #2
  Employee B's annual salary is $22,216/year. Employee B should be paid $12,834 from 101049-201401-612002-60, $3,515 from 181033-201801-612002-60, and $5,867 from 221022-201001-612002-20. The calculations to derive the FOAP percentages would be:
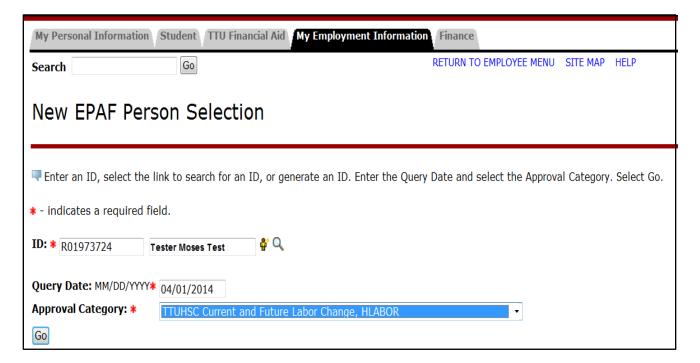
    - 101049-201401-612002-60: ($12,834/$22,216)*100 = 57.77%
    - 181033-201801-612002-60: ($3,515/$22,216)*100 =15.82%
    - 221022-201001-612002-20: ($5,867/$22,216)*100 = 26.41%

  In this example, the FOAP percentage was rounded to the 2nd decimal place.

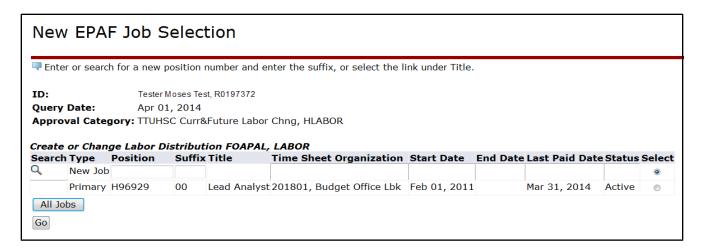# Completing the TTUHSC Current and Future Labor Change PAF

New EPAF Person Selection:

1. Enter the R-ID or search by employee name.

2. Enter the Query Date. The query date defaults to today's date. Please change this date to match the effective date of the Labor Distribution change.

   a. The effective date must be later than the Employee's Last Paid Date.

   b. The effective date must also be at the beginning of a pay period. The beginning of the pay period is the 1st of the month for all exempt employees and either the 1st or 16th for a non-exempt employee.

3. Select the Approval Category: TTUHSC Current and Future Labor Change

4. Click Go

| My Personal Information | Student | TTU Financial Aid | My Employment Information | Finance |

Search [   ] Go   RETURN TO EMPLOYEE MENU   SITE MAP   HELP

New EPAF Person Selection

💬 Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

✱ - indicates a required field.

ID: ✱ [R01973724] [Tester Moses Test] 👤 🔍

Query Date: MM/DD/YYYY ✱ [04/01/2014]
Approval Category: ✱ [TTUHSC Current and Future Labor Change, HLABOR ▾]
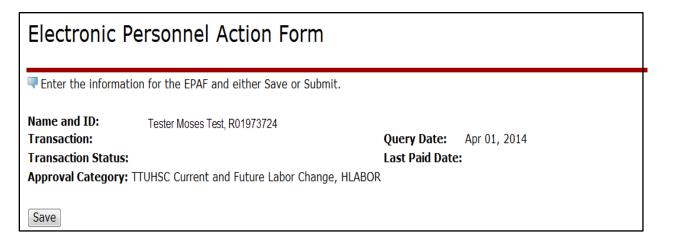[Go]

New EPAF Job Selection:

1. Choose an existing position number and suffix by clicking the select radial box next to the correct position number and suffix.

2. Click Go

New EPAF Job Selection

Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: Tester Moses Test, R0197372
Query Date: Apr 01, 2014
Approval Category: TTUHSC Curr&Future Labor Chng, HLABOR

Create or Change Labor Distribution FOAPAL, LABOR

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									◉
	Primary	H96929	00	Lead Analyst	201801, Budget Office Lbk	Feb 01, 2011		Mar 31, 2014	Active	○

[All Jobs]

[Go]
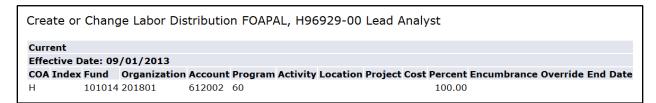
Electronic Personnel Action Form

EPAF Header

1. Verify that the EPAF Header information is correct. If the incorrect data, such as employee name, position number, position suffix or effective date, are shown you will need to start a new EPAF.
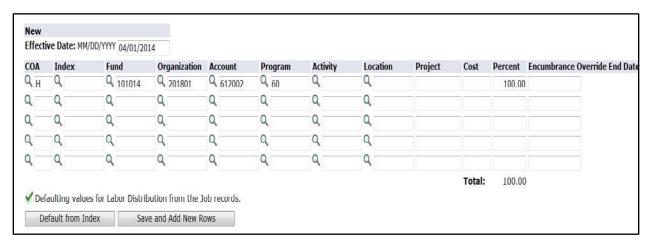
Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: Tester Moses Test, R01973724	
Transaction:	**Query Date:** Apr 01, 2014
Transaction Status:	**Last Paid Date:**
Approval Category: TTUHSC Current and Future Labor Change, HLABOR	

[Save]

Current Labor Distribution

1. The Current Labor Distribution is shown as well as the effective date for this Labor Distribution

Create or Change Labor Distribution FOAPAL, H96929-00 Lead Analyst

Current
Effective Date: 09/01/2013

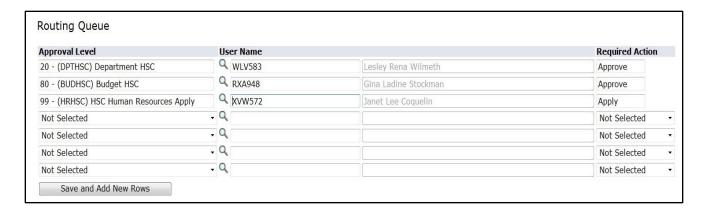| COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
H		101014	201801	612002	60					100.00		

New Labor Distribution

1. Verify that the new effective date is at the beginning of the pay period.

2. Adjust the FOP elements as necessary.

   a. The Account code will NOT need to be changed. If you feel that the Account code is incorrect, please contact the Budget Office.

3. Adjust the percent as necessary.

4. Add a FOAP line if an additional funding source is needed.

5. Remove a FOAP line if it is no longer needed.

6. Click the 'Save and Add New Rows' button.

   a. This will verify the FOAP elements

   b. Ensure that the Total percent equals 100%.

7. Make adjustments if necessary

8. Click 'Save and Add New Rows' button to save any changes.

Routing Queue

There are 3 required approvers for the TTUHSC Current and Future Labor Change PAF.

1. Choose your departmental epaf approver

2. Choose the Budget Office approver

3. Choose the HSC Human Resources approver

4. Click 'Save and Add New Rows'

Routing Queue

Approval Level	User Name		Required Action
20 - (DPTHSC) Department HSC	WLV583	Lesley Rena Wilmeth	Approve
80 - (BUDHSC) Budget HSC	RXA948	Gina Ladine Stockman	Approve
99 - (HRHSC) HSC Human Resources Apply	XVW572	Janet Lee Coquelin	Apply
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected

Save and Add New Rows

Comments

Comments are extremely helpful to the Budget Office when reviewing the EPAF. The Budget Office would like to see the following information in the comments:

1. **Identify the funding source**
   The Budget Office would like to know the Budget Account Code that should be reduced to cover the cost of the labor change.

2. **Special Circumstances**
   There may be an instance where a department submits the Labor Distribution change to free up funding for another use. Please specify any such special circumstance in the comments.

3. **Is the Labor Change permanent or temporary?**
   A permanent labor change indicates the employee will continue to be paid on this funding source next fiscal year. A temporary funding source generally lasts only a few months and you do NOT wish for the employee to be paid from this source next fiscal year.
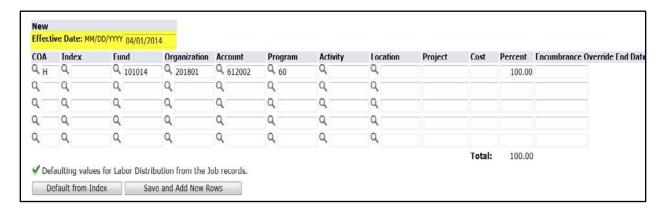
   If the change is permanent then you will see this new funding source in salary planner during the budget prep cycle. If the change is temporary, the old funding source will be populated to salary planner for budget prep.

Troubleshooting Errors

Here are some common errors that you may see on the Labor Distribution Change EPAF and how you can correct these errors.

- **ERROR* Effective Date must be greater than the Last Paid Date of 31-March-2014* - If you receive this error it means that you are trying to change the labor distribution for a pay period that has already been processed by Payroll Services. This particular error is telling the user that the employee has been paid through the month of March, and that the effective date on the EPAF must be AFTER 3/31/2014.

- o To correct this EPAF, the user can change the effective date in the New Labor Distribution section of the EPAF.

- o The user can also VOID this epaf and start a new one. Please be sure to input a query date that matches the effective date of the Labor Distribution Change.

- *ERROR* New effective date must be greater than the last date of 01-JUN-2014* - This error means that a Labor Distribution Change is already in the system with an effective date of 6/1/2014. The system cannot create another Labor Distribution Change if a future change exists.

  - o To correct this error, please contact the Budget Office and ask that the future Labor Distribution record be removed from the system. The Budget Office will need to know if you'd like to have this future record re-instated after the EPAF is applied.

Budget Office Contact Information

If you have questions concerning the TTUHSC Current and Future Labor Change EPAF, feel free to contact the Budget Office.

Phone: 915-215-4636
Email: BudgetElp@ttuhsc.edu