

# MINUTES

## TO THE JANUARY 23, 2012 QUARTERLY FINANCE AND ADMINISTRATION UPDATE MEETING

### **BABAR KHAN, PAYROLL SERVICES**

#### **W2 form 2011 W 2 Issued**

##### Electronic Access to W-2 form available

E-mail was sent to all employees who elected to receive 2011 W 2 electronically. This was sent on January 20<sup>th</sup>, 2012.

##### 1042S Issued for Non Resident Alien Employees

1042 S equivalent to a W-2 are issued to Non US person who are on visa in the United States,. They were also issued on January 20<sup>th</sup>, 2012. In most cases they will need a W 2 and or a 1042S to file their US income taxes.

Within the next 2 weeks all NRA employees who received a 1042S will receive an e-mail from Glacier about the tax software so they can use this software to do their US tax return.

##### 2011 w-2 forms Mailing:

2011 W 2's have been printed and will be mailed starting January 28<sup>th</sup>. W 2's are not available in the Payroll Services area for pick up. All employees who have separated or did not elect to retrieve electronically, will receive their W-2 by mail after the 28<sup>th</sup>.

##### Duplicate W 2

Payroll Services will start processing requests for duplicate W-2s or reprints February 15, 2012. Please email ALL requests and questions to [webmaster.payroll@ttu.edu](mailto:webmaster.payroll@ttu.edu). (For privacy purposes, NO requests will be taken over the phone).

#### **Web Leave Report Started/incomplete but not submitted for approval**

Effective October Payroll Services is sending e-mails to employees who started their web leave reports for a given month but never submitted or returned for correction. E-mails are sent to the employee and their approver. Encourage the approvers to sign off once the leave reports are submitted for approval.

### **LESLEY WILMETH, BUDGET OFFICE**

See next page for powerpoint presentation



# Budget Office Update

*January 23, 2012*

# Labor Redistributions



# New Labor Redistribution OP

- HSC OP 70.58 Labor Redistributions
- Please review the OP for LRD Deadlines

<b>Fiscal Quarter</b>	<b>Labor Redistribution Due Date All Funding Sources</b>
September – November	January 15
December – February	April 15
March – May	July 15
June – August	October 15

*Still having trouble with.....*

# **Labor Redistribution Justifications**



# Justification for eating ice cream

- Why did you eat ice cream for breakfast?
  - Examples of inadequate justification:
    - My brother told me to.
    - There was nothing else to eat.
    - I'm too young to buy groceries.
  - Example of adequate justification
    - I was having a difficult time finding anything for breakfast and I remember learning that ice cream contains milk. To make it healthier I had a banana with the ice cream. So that I won't eat ice cream for breakfast again, I'll remind you that I'm out of Lucky Charms.



# Justification for LRD

- Why is this Labor Redistribution necessary?
  - Inadequate Justification
    - Someone told me to do this.
    - We had extra money on this fund.
    - I didn't know the new grant existed until yesterday.
  - Adequate Justification
    - The new “Ice cream is good for breakfast” grant was established in September 2011. During a recent review of the grant expenditures it was noticed that Dr. V. Nilla's salary was not being charged to the grant. Dr. V. Nilla worked 10% of her time to the grant during the month of September. To prevent this from occurring in the future an employee has been assigned to review this grant more frequently and reconcile expenditures.

# Cognos 10



# Cognos 10 Upgrade

- Cognos will be upgraded to Cognos 10
- Weekend of February 11<sup>th</sup>
- Should see no changes other than screen color

# FY13 Budget Prep



# Budget Prep Cycle

- Summer Budget
- Tentatively to begin in May
- More information at April meeting

# What's New



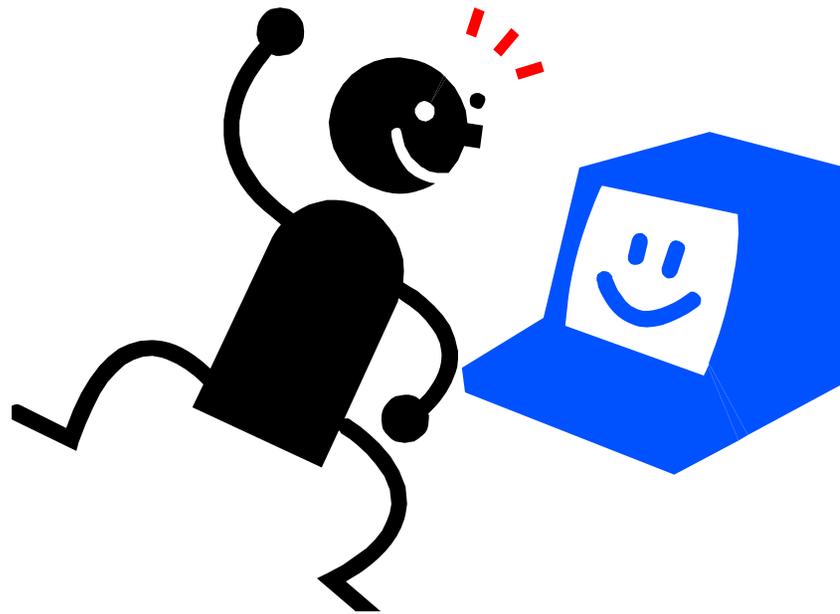
# Voice over IP

- The Budget Office is part of a pilot program for the new Voice over IP system.
- Effective March 1<sup>st</sup>
- Main line will NOT change
  - 806-743-7717
- Extensions will change
  - From 3 digit to 5 digit extensions
  - We can be dialed directly without going through main line
  - New extensions and direct #'s will be published on our website.

# LRD Notification emails

- Currently testing LRD notification emails
- Emails will be sent to the LRD originator
  - When the LRD has been approved by the Budget Office. The LRD will post that night.
  - If an LRD has been returned for correction.
- Emails will be sent to Fund Managers
  - Sent after approval by the Budget Office
  - To Fund Managers on every fund listed in the LRD
  - Serves as notification that an action may have occurred on the fund.
- This group will be notified when the emails go-live

# Exciting News!!!!



# Budget Revision System



Texas Tech University System

TTUSPRD WL583

Lesley Wilmeth

## Budget Revision System

eRaiser  
Sign Out

### Welcome to the Budget Revision System

[Home](#)

The Budget Revision System is an on-line system for submitting a change or addition to the Operating Budget. It can be used to adjust the expense budget within a fund, to budget from fund balance, to change a revenue budget, or to transfer budget between funds.

### Create a Budget Revision

Create a  
Budget  
Revision

To create a Budget Revision or to finish an incomplete Budget Revision, please click on the [Create a Budget Revision](#) link on the left.

### Status

Use the [Status](#) link on the left, to search for a Budget Revision that has been entered into the system. This link will be used to search the Budget Revision History to view documents that have been processed. It can also be used to track a Budget Revision through the approval process.

Status

Texas Tech University System  
Copyright 2012 © Texas Tech University System

# BRS Features

- Current Budget and Available Balance Display
  - Reads live Banner Finance data

Expense Acct Entry

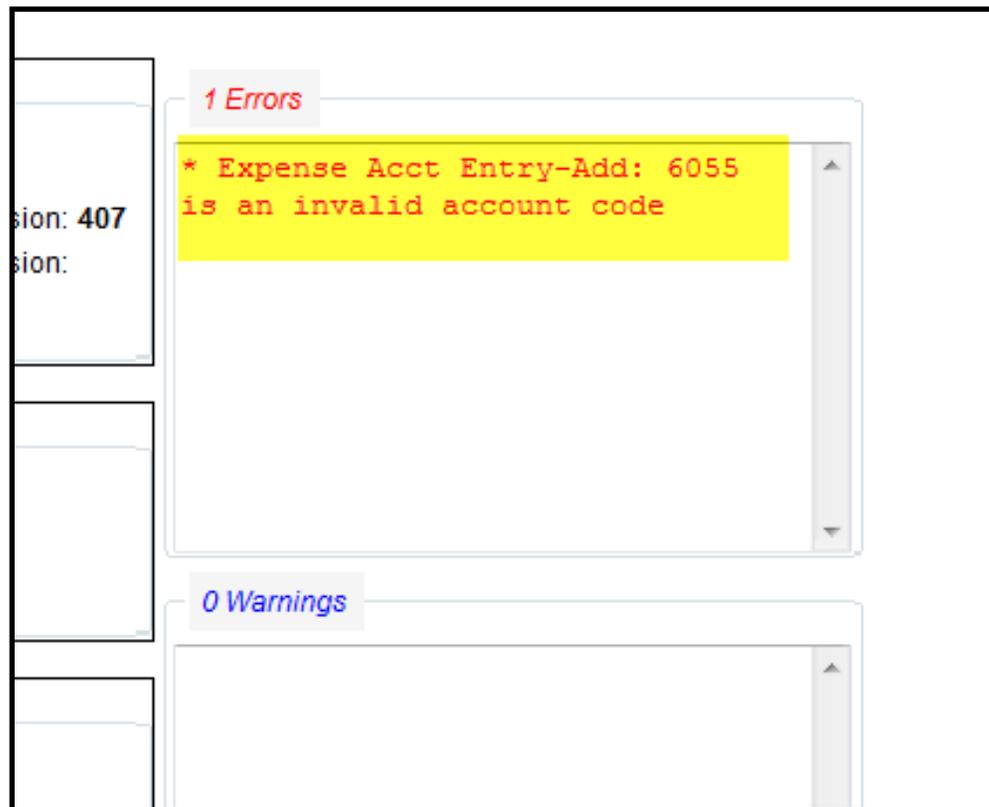
Default Organization:  
Default Program: 60 Institutional Support

Document Total:

Fund Code	ORGN Code	Orgn Code Description	Program Code	Account Code	Account Code Description	Current Budget Amount	Budget Available Balance	Amount	Plus Minus	
181032	201801	Budget Office Lbk	60	7017	Communications	4,697.00	5,305.77	10.00	-	Edit
	<input type="text"/>		<input type="text" value="60"/>	<input type="text"/>				<input type="text"/>	Select ▼	Add Clear

# BRS Features

- Automated Editing
  - Error/Warning panel
  - Help alleviate data entry errors



# BRS Features

- Automated Routing
  - System will route automatically and be approved through ATS

Approval Routing

Group Name	Approver Name	Additional Approvers	Group ID	
Fund Approver	Penny Harkey	<a href="#">See Additional Approvers</a>	181032	
HSC BUDGET OFFICE	Lesley Wilmeth	<a href="#">See Additional Approvers</a>	HSCBUD	

# BRS Features

- Allows for Comments and Attachments

Comments

Maximum: 2500 Characters

Comment#5 made by Lesley Wilmeth at 1/20/2012 2:45:04 PM  
reverse BR000003

Attachments

File Name	Activity Date	User

Maximum size for the file to be uploaded is 4MB

# BRS Features

- Tracking and History

Page Size: 25  Currently viewing 'Show All'

Rev Type	Originator	Trans #	Fiscal Year	Chart	Fund	Orgn	Banner Document	Date	Status
1	Lesley Wilmeth	BR000001.00	12	H	181032	201801	BA000001	1/19/2012 11:01:38 AM	Approved
3	Lesley Wilmeth	BR000003.00	12	H	181032	201801	BA000002	1/19/2012 2:23:16 PM	Approved
1	Lesley Wilmeth	BR000005.00	12	H	181032	201801	BA000003	1/20/2012 2:43:30 PM	Approved
3	Lesley Wilmeth	BR000006.00	12	H	181032	201801		1/20/2012 3:01:31 PM	Submitted to ATS

1



Approval Status

Status	Approved Date	Pending Since	Approver/Proxy	Group Chart	Group ID	Approver	Approving As
PENDING		1/20/2012 3:01:29 PM	Approver - Penny Harkey	H	181032		
			Approver - Lesley Wilmeth and Proxy - Gina Stockman	H	HSCBUD		

# Other BRS Features

- BRS sends approved documents to Banner Finance every 15 minutes throughout the day.
- Many revisions moving funds between 2 expense codes will require no approvals.
- Originator will be notified when a revision is posted to Banner Finance.

# Budget Revision System Roll-Out

- Pilot Groups – next week
- System Live February 15<sup>th</sup>
- Training at all locations February 16<sup>th</sup> – March 8<sup>th</sup>
- Excel forms accepted until March 19<sup>th</sup>

# Training Classes



# Training

- Budget Basics
  - 1 ½ hour class
  - Types of funds
  - Budgeting Revenue
  - Fund Balance
  - Transferring between 2 funds
  - Positions and Position Funding
  - Employee Funding
  - Organization Codes

# Training

- Budget Revision Approver Training
  - 30 minute class
  - Intended for Fund Managers who may need to approve a Budget Revision, but will never need to prepare one.

# Training

- Budget Revision System Training
  - 1 ½ hour class
  - Teach users the different types of Budget Revisions
  - How to input and submit a Budget Revision
  - How to track a revision
  - Viewing budget revision history
  - Approvals will be included in this class

# Training

- Come and Go Hands On Training
  - Open time where we will be available live and in person to answer Budget Office related questions.
  - Bring a revision you need to process and we'll log on together to input it into the system and submit it.
  - Need help with an LRD, we'll log in and work on it together
  - Want to know about Budget related Cognos reports – we'll take a look at them.
  - Very informal session

# Training Times

- Odessa
  - Wednesday, February 15<sup>th</sup>
- Amarillo
  - Thursday, February 23<sup>rd</sup>
- El Paso
  - March 7<sup>th</sup> and 8<sup>th</sup>
- Lubbock
  - February 16 – 24
- Abilene
  - TBD

**Questions?**



## **ARTHUR PARE, GENERAL SERVICES**

**Doclink**

See next page for powerpoint presentation.



TEXAS TECH UNIVERSITY  
HEALTH SCIENCES CENTER™

# General Services – Doc Link

Viewing Invoices and Supporting Documents using Laserfiche WebLink

Arthur Paré  
*Assistant Director*

*January 23, 2011*

UNIVERSITY HEALTH



## Purpose of Doc Link



- Customer Convenience
  - *25+ types of invoices at single location*
  - *Directly accessible*
  - *Multiple concurrent views*
- Departmental Efficiency
  - *Saves time for user and department*
  - *Standardization*
- Compliance
  - *Audit, Records Retention, Verification*



## Accessing Doc Link Search

- F&A Worktools
- Laserfiche WebLink
- BusAff - eRaider
  - *Perform a Search*
    - Field – Doc Link
    - Enter Document ID or  
Document Reference

# Doc Link



portal.texastech.edu/tag:71c2f19694a59b61.render.userLayoutRootNode.uP?uP\_root=root&uP\_sparam=activeTab&activeTab=u2452611s13&uP\_tparam=frm&frm=

Most Visited Latest Headlines GS Citi Portal TTUHSC OP's Canon GS Sharepoint AMS Job Site ELB

**Employee Type of Change Effective Date Action**  
Create New PAF

**Human Resources**  
HR Home

- ATS (Approval Tracking System)
- EOPS (Employee Overtime Payment System)
- ePAF
- ePAF Learning Community (Username: ttuhsc\your eRaider username, Password: your eRaider password)
- Staff Performance Management System
- Staff Performance Management Website
- Forms
- Human Resources Operating Policies
- HR PAF Tracking (Old System)
- Pre-Employment Background Investigation
- Reports
- TEAM App
- TechJobs Hiring Managers Site
- Training and Staff Development
- Xtender
- Need Help

**HR ANNOUNCEMENTS**

- Questions concerning W-2 Forms? Visit [Payroll Services FAQs](#)
- It's time to begin completing your self assessment through the Staff Performance Management System; see TTUHSC Announcements, PM website, and Self Assessment User Guide for more info.
- Non-Exempt Employee January 1, 2012 through January 15, 2012 approved electronic timesheets must be submitted by 6:00 pm CT on January 18, 2012.
- December 2011 approved electronic exempt employee leave reports are due on January 15, 2012.
- January 2012 approved electronic exempt employee leave reports are due on February 15, 2012.
- Reminder: Remember to use your HSC Holiday Comp leave since the maximum accrual is 24 hours.
- [Instructions for Preferred First Name in Directory](#)
- Retirement Manager: [Link](#) and [Guide](#)

**MONTH AT A GLANCE**

- [Department End User Calendars](#)

**Budget Home**

- Reports
- Budget Prep System
- Budget Prep Security (Team App)
- Forms
- Labor Redistribution
- Budget Office Contact List
- Budget Office Mailbox

**BUDGET ANNOUNCEMENTS**  
Budget News

**Finance Home**  
Cognos Connection  
Online PARs  
Effort Certification and Reporting Technology (ecrt) LIVE!!!

**Accounting Services**  
Accounting Services Home

- Reports
- New Fund Request
- New Fund Request Information
- Approval Tracking System (ATS)
- Forms
- Grant Accounting
- Procedures
- Accounting Services Operating Policies
- Contacts

**Finance Reporting**  
Finance Reporting Home  
financereporting@ttuhsc.edu

- Cognos Connection
- Finance Reporting User Group
- Report Documentation

**Finance Systems Management**  
Finance Systems Management Home

- TEAM Application
- Financial Training Center
- Gateway
- ePrint

**Property Inventory**  
Property Inventory Home

- Reports
- Property Inventory System
- Forms

**Student Business Services**  
Student Business Services Home

- Cash Receipts
- Cash Receipts Help

**Additional Links**

- [Swift Print Online](#)
- [Parking Services \(Lubbock\)](#)
- [Laserfiche Weblink](#)
- Xtender - Coming Soon

**FINANCE ANNOUNCEMENTS**

**Purchasing**  
Purchasing Home

- Reports
- PO/Encumb Change Requests
- Vendor Payments
- TechBuy Information
- TechBuy System
- Purchasing Manual
- Purchasing Operations Policies
- Approved Membership List

**Contracting**  
Contract Database

- Contracting A/R
- Online Contracting and A/R Help
- Reports
- Contract Manual
- Contract Operating Policies

**Accounts Payable**  
Accounts Payable Home  
Direct Pay Home

- Reports
- Vendor Payments
- Forms
- Accounts Payable Operating Policies
- Direct Pay Operating Policies

**Purchasing Card**  
Purchasing Card Home

- Reports
- Forms
- Purchasing Card Operating Policies

**Travel**  
Travel Home

- Reports
- Vendor Payments
- Travel System
- Forms
- Travel Operating Policies

©2007 by Texas Tech University System, All Rights Reserved

Select  
Laserfiche Weblink  
from  
F&A Work Tools





## Laserfiche Weblink

Please click on the repository below that you would like to access through Laserfiche Weblink.

### Laserfiche Repositories



**Business Affairs** (Use for HSC Purchasing, Payables, Contracts, and Accounting documents)

**TexasTech (TTU)**

**HSC**

**TTPL (MPIP)**

**FP&C**

**Project G**

**Project S**

### Laserfiche Weblink Training Videos

- [Logging In \(video\)](#)
- [Performing Searches \(video\)](#)
- [Weblink Interface & Browsing \(video\)](#)

For more Laserfiche training videos, visit our Laserfiche Training Video website here:  
[Laserfiche Training Videos Website](#)

# Doc Link



Verify Repository.

Log in using your eRaider username and Password.

Online Help

**Laserfiche WebLink™** Version 8.0.0

Repository: Business Affairs - eRaider

User Name: TTUHSC\apare

Password: [Redacted]

Please log in with this format:

**TTU Users**  
Username: TTU[eRaider Username] (ex: TTU\jsmith)  
Password: [eRaider Password]

**TTUHSC Users:**  
Username: TTUHSC[eRaider Username] (ex: TTUHSC\jsmith)  
Password: [eRaider Password]

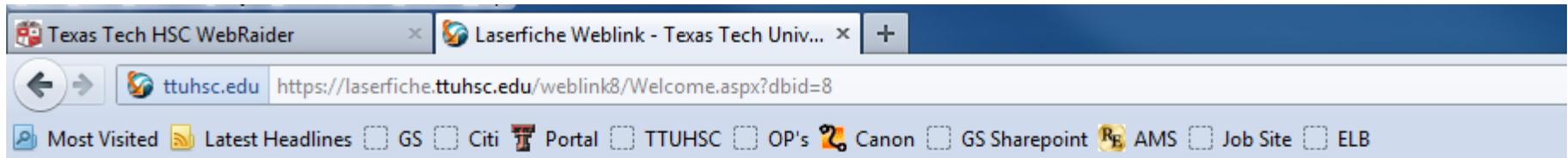
[Click Here to view a short training video for logging in.](#)

[Experiencing Problems Logging In?](#)

**Legal Notice for Use**  
Use of this system is restricted to authorized users only and shall be used in accordance with the acceptable use policy. This system may be subject to monitoring. Unauthorized access is a violation of applicable TTUHSC, state and federal laws and regulations and will be subject to criminal prosecution.

Document management portal powered by Laserfiche WebLink 8.0.0 © 1998-2009 [Laserfiche](#)

# Doc Link



Welcome to Laserfiche Weblink!  
Click on a link below to get started.

 [Perform a Laserfiche Search](#)

## Laserfiche Weblink News

**New Search Results Layout**  
Posted 7/19/2010

The search results page has been changed to display the search results in a grid format, similar to an Excel spreadsheet with field values as headers.

# Doc Link



The screenshot shows the Laserfiche WebLink search interface. On the left, the 'Customize Search' panel is visible with the following fields:

- Field: **Field** (selected)
- Template: **GS Doc Link** (selected)
- Doc ID: **KP013521**
- Doc Ref: **KP013501**
- Internal Ref: (empty)
- Transaction Date: (empty)
- to: (empty)
- Dept: (empty)
- Job Number: (empty)

At the bottom of the search panel are 'Search' and 'Reset' buttons. Red arrows point from the search criteria to the search results table.

Name	Hits	Hits	Page Count	Doc ID	Doc Ref	Internal Ref	Transaction Date	Dept	Job Number
193830610/6/201110:00:14 AM	0	0	1	KP013521	29026		10/6/2011 12:00:00 AM	9003	2028
KP013501	0	0	0	KP013501	16544		9/29/2011 12:00:00 AM	9003	2028

2 Entries Results

## Execute a Doc Link Search

- Select Field
- Select GS Doc Link
- Enter either Doc ID or Doc Ref
- Select Search

# Doc Link



Search - Laserfiche WebLink - Mozilla Firefox

ttuhsc.edu https://laserfiche.ttuhsc.edu/WebLink8/Search.aspx

Modify View Options

My WebLink | Help | About | Logout

Home Browse Search

Customize Search

Field

Template

GS Doc Link

Doc ID

KP013521

Doc Ref

Internal Ref

Transaction Date

to

Dept

Job Number

Name	Hits	Hits	Page Count	Doc ID	Doc Ref	Internal Ref	Transaction Date	Dept	Job Number
193830610/6/201110:00:14 AM	0	0	1	KP013521	29026		10/6/2011 12:00:00 AM	9003	2028
KP013501	0	0	0	KP013501	16544		9/29/2011 12:00:00 AM	9003	2028

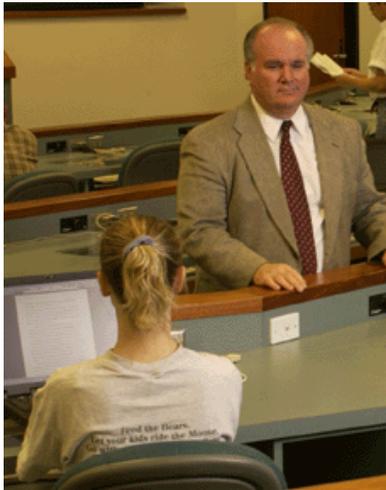
2 Entries Results

Search Reset

## View Results

- View Fields
- Click on item
- Multiple documents may be available





## Modifying View Preferences

- My WebLink
  - *Search Options*
  - *Column Headings*
- Sort
  - *Sort by Accounting Period*
  - *Standardization*
- Search
  - *Full text OCR*

# Doc Link



You can customize your Laserfiche WebLink view to show which columns appear and in what order.

The screenshot shows the Laserfiche WebLink interface in a Mozilla Firefox browser. The browser tabs include "Texas Tech HSC WebRaider" and "My WebLink - Laserfiche WebLink". The address bar shows the URL "https://laserfiche.ttuhsc.edu/weblink8/MyWebLink.aspx?dbid=8". The interface features a navigation menu with "Home", "Browse", and "Search" options. The "Search Options" section is active, displaying a list of fields to be displayed in the search results. The "Fields Selected" list includes "Hits", "Page Count", "Doc ID", "Doc Ref", "Internal Ref", "Transaction Date", "PCARD - Fiscal Year", "PCARD - Last Six Digits on Ca", "PCARD - L Name", "PCARD - Accounting Period", "PCARD - Cycle End Date", "Scan Date", "PCARD - Dept", and "PCARD - Job". A "Restore Defaults" button is visible at the bottom of the search options section.

My WebLink - Laserfiche WebLink - Mozilla Firefox  
File Edit View History Bookmarks Tools Help  
Texas Tech HSC WebRaider My WebLink - Laserfiche WebLink  
ttuhsc.edu https://laserfiche.ttuhsc.edu/weblink8/MyWebLink.aspx?dbid=8  
Most Visited Latest Headlines GS Citi Portal T TUHSC OP's Canon GS Sharepoint AMS Job Site ELB

**Laserfiche WebLink**  
Home - Browse - Search

Connection Information  
Browse Options  
Search Options  
View Document Options  
Export Options

**Search Options**  
Choose Displayed Fields:  
Template  
Payables Stop Payment - bla  
Payables Stop Payment - Sc  
Payables Stop Payment - De  
Payables Stop Payment - Job  
-- Payables/Contracts --  
Contract  
Payables/Contracts - Blank1  
Payables/Contracts - Blank2  
Payables/Contracts - Blank3  
Payables/Contracts - ScanDe  
Payables/Contracts - Dept  
Payables/Contracts - Job  
-- PCARD --  
-- PO --  
PO  
Restore Defaults

Fields Selected:  
Hits  
Page Count  
Doc ID  
Doc Ref  
Internal Ref  
Transaction Date  
PCARD - Fiscal Year  
PCARD - Last Six Digits on Ca  
PCARD - L Name  
PCARD - Accounting Period  
PCARD - Cycle End Date  
Scan Date  
PCARD - Dept  
PCARD - Job

Document management portal power



## Additional Announcements



- Pcard Scanning
  - *Change My WebLink Settings*
  - *Search by Name or Last 6 Digits*
  - *Began in December*
  - *Invoicing*

# Additional Announcements



## Additional Announcements



- Postage Rate Changes 1/22/2012
  - *1<sup>st</sup> Class Letter increases to 45¢*
  - *2<sup>nd</sup> Ounce presorted no additional charge*
  - *Postcards 32¢*
  - *Mexico and Canada 85¢*
  - *Other International \$1.05*

# Any Questions ?

debbie.cate@ttuhsc.edu  
arthur.pare@ttuhsc.edu  
yuren.diaz@ttuhsc.edu  
don.stout@ttuhsc.edu



TEXAS TECH UNIVERSITY  
HEALTH SCIENCES CENTER™

## **RICARDO MARTINEZ, HUMAN RESOURCES**

### **Salary Administration OP**

On February 1, 2012, Texas Tech University Health Sciences Center will implement the following change to HSC OP 70.37 "Salary Administration", Item 13 Promotion, Transfer, or Demotion; paragraph (d) Pay Rate Adjustment Upon Promotion, Transfer or Demotion; subparagraph (1) Promotion.

Upon promotion or upward reclassification of an employee's present position, an employee may be granted a salary increase within a range of 2 to 9.9% or to the minimum of the pay range, whichever is greater. The previous pay range was from 2 to 5%. The proposed rate of pay will not exceed the maximum salary or be less than the minimum salary rate established for the new position. A current annual performance evaluation with an overall rating of "4" or better is required in order to grant the promotion or reclassification.

Administrators should consider the impact the extended range will have upon the internal equity of their departments, their campus, and ultimately the Health Sciences Center when submitting reclassifications or promotions.

If you have any questions, please contact Ricardo H. Martinez, CCP Section Manager-Wage & Salary at 806-743-2865 ext 233 or [Ricardo.Martinez@ttuhsc.edu](mailto:Ricardo.Martinez@ttuhsc.edu).

## **GINA KETCHERSIDE, HUMAN RESOURCES**

### **Staff Performance Management Process**

See next page for powerpoint presentation.

# F&A Meeting Update

January 2012

Staff Performance Mgmt System

# Deadlines

- Position Description – extended to Feb 1;  
advanced supervisor security shortly following
  - Send original/signed PD to local HR office
- Performance Evaluations – end of February
  - Send original/signed printout to local HR office
  - Include evaluation & self assessment

# How to Access PM System?

- Employees – See HSC Employee tab and Announcements section
- Supervisors – Add HSC Supervisor tab
- Administrators – F&A WorkTools tab
- Accessible through Staff Performance Management link on HR website

## ation



[WTE\) / Web Leave Reporting](#)

[ar Guide](#)  
[ar Guide](#)

WTE/WLR routing queues, grant  
ess, etc.

[deo Tutorials](#)  
[t Cognos Security](#)  
[System \(ATS\)](#)  
[ide](#)

[er User Guide](#)

[a worked on grants or certify PI](#)

## ments

[Development](#)  
[orts \(Compliance, EEO\)](#)  
[ies](#)

[e](#)  
[Policies](#)  
[liance](#)  
[3C Policies prohibiting](#)  
[nination, including sexual](#)

[Statements](#)

## Supervisor Announcements



### Supervisor Announcements

- Submit your employees Position Descriptions using the Staff Performance Management System before the evaluation process begins. See the [Staff Performance Management website](#) for more details.
- Watch for Staff Performance Management training opportunities within your region:
  - [Amarillo](#)
  - [El Paso](#)
  - [Lubbock](#)
  - [Permian Basin](#)
  - [CMHC](#)

## Important Announcements



- **Questions concerning W-2 Forms? Visit [Payroll Services FAQs](#)**
- It's time to complete your self assessment through the [Staff Performance Management System](#):
  - [Click here](#) to go to the Staff Performance Management System.
  - Select New Self Assessment to start a self assessment.
  - To edit a self assessment, click Existing Forms.
  - Be sure to click the Save Form button regularly to save your work because the system will time-out after shorts periods of inactivity.
  - See [TTUHSC Announcements](#), [PM website](#), and [Self Assessment User Guide](#) for more info and resources.
- Non-Exempt Employee January 16, 2012 through January 31, 2012 approved electronic timesheets must be submitted by 6:00 pm CT on February 2, 2012.
- January 2012 approved electronic exempt employee

## HR Processes

[HR Offices](#)  
[Personnel Operating Policies and Procedure](#)

### Compensation

- [New Position / Reclass form and Inst](#)
- [Pay Plan](#)
- [Salary Adjustment Form](#)

### Employee/Org Development

- [Workforce Education](#)
- [SkillSoft CBT Courses](#)

### Managing Leave

- [FML FAQs](#)
- [Leave wo/ Pay form](#)

### Onboarding

- [ePAF at Level 73](#); nightly feed enable of eRaider next day through [IT Solut](#)
- [Information Technology](#)
- [New Employee Checklist](#)
- [New Hire Forms](#)

### Performance Management

- [HSC OP 70.12 Staff Performance Mar](#)
  - [Attachment A - Supervisor's G Performance Management](#)
  - [Staff Performance Managemen](#)
  - [Staff Performance Managemen](#)
- [HSC OP 70.31 Employee Conduct, Dis Separation of Employees](#)
  - [Attachment A - Supervisor's G Progressive Discipline](#)

### Recruiting

Form has been saved

Return to home

Save Form

Form 86% completed

Instructions

- Employee Information
- Acknowledgement
- Section 1 - Competencies
- Section 2 - Function / Standards
- Section 3 - Improvement / Development (Previous Year)
- Section 4 - Evaluation Summary
- Section 5 - Improvement / Development (Next Year)
- Section 6 - Summary Comments

Attachments (optional)

Complete Evaluation

Print a copy

6 of 7 required sections completed

Status Legend

- Incomplete Section
- Completed Section
- Informational/Optional

Previous

Next

Rating: 3.25

## Section 2 - Performance Standard for Organizational Productivity

The evaluator should rate employee's performance during the evaluation period for each of the job functions (based on associated standards) listed below utilizing the rating scale provided.

**Essential (E):** The fundamental reason the position exists is to perform that function or because the function is highly specialized.

**Marginal (M):** Function of the job that do not meet the criteria for essential functions.

### Performance Level Rating (1-7)

1. Consistently below expectations
2. Frequently below expectations
3. Occasionally below expectations
4. Meets expectations
5. Occasionally above expectations
6. Frequently above expectations
7. Consistently above expectations

Job Function Performance Standard(s)	E/M		Performance Level						
	E	M	1	2	3	4	5	6	7
<b>1. Job Functions</b> Design, manage and evaluate protocols, sample selection, questionnaires, data collection forms, and spreadsheets for research studies. <b>Performance Standard</b> Employee must be able to develop questionnaires and various study forms for research studies using Microsoft Word, as well as provide input on sample protocols and sample selection.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>2. Job Functions</b> Determine which statistical tests are most appropriate for proposed study designs and performing statistical analyses. <b>Performance Standard</b> Employee must be able to discuss and select appropriate statistical tests for proposed study designs and analyses for various research	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>				

# Comments

- If a rating is a 1, 2, 3, or 7 requires a comment
- If an employee did not submit a self assessment, note that in the overall comments section

# Who can see what?

- Once PD is submitted -> employee can see under Existing Forms
- Once SA is submitted -> supervisor can see under Existing Forms & prints as part of the evaluation
- ORGN Mgr – have supervisor/employee relationship view with ability to set temporary relationships and report available to see supervisor progress

File Home Insert Page Layout Formulas Data Review View Add-Ins

From Access From Web From Text From Other Sources Existing Connections Refresh All Connections Properties Edit Links Sort Filter Clear Reapply Advanced Text to Columns Remove Duplicates Data Validation Consolidate What-If Analysis

K63 fx 1

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Superv	Superv	Superv	Superv	Superv	Subord	Subord	Subord	Subord	PDStart	PDCom	Assess	Assess	EvalSta	Eval
2	AA	VP Acader	R0090786	Woodwar	Executive	R1035973	Johnson, A	Anesthesi	Unit Coord	0	0	0	0	0	0
3	AA	Classroom	R0054092	Henderso	Director	R0053663	Pleasant, C	Classroom	Sr Busines	0	1	0	0	0	0
4	AA	Classroom	R0054092	Henderso	Director	R0052094	Russell, L	Classroom	Coordinat	0	1	0	0	0	0
5	AA	Classroom	R0054092	Henderso	Director	R0053015	Smith, Rar	Classroom	Unit Supe	0	1	0	0	0	0
6	AA	Classroom	R0054092	Henderso	Director	R0053409	Welborn, C	Classroom	Unit Coord	0	1	0	1	0	0
7	AA	Classroom	R0054092	Henderso	Director	R0090586	Woodard, C	Classroom	Coordinat	0	1	0	0	0	0
8	AA	VP Acader	R0053334	Rolfe, Rial	Professor	R0054092	Henderso	Classroom	Director	0	1	1	0	0	0
9	AA	Library Lbl	R0090895	Ballew, B	Sr Directo	R1027860	Simonsen	Library An	Unit Assoc	0	1	0	0	0	1
10	AA	Library An	R1027860	Simonsen	Unit Assoc	R0090371	Wilson, Te	Library An	Unit Assis	0	1	1	0	0	0
11	AA	Library An	R1027860	Simonsen	Unit Assoc	R1037861	Yaguchi, Y	Library An	Unit Assis	0	1	1	0	0	0
12	AA	Library An	R0090371	Wilson, Te	Unit Assis	R0051672	Harshman	Library An	Unit Supe	0	1	1	0	1	0
13	AA	Library Lbl	R0052909	Wood, Ric	Executive	R1037861	Yaguchi, Y	Library An	Unit Assis	0	1	1	0	0	0
14	AA	Library An	R1037861	Yaguchi, Y	Unit Assis	R0091084	Mills, Ron	Library An	Specialist	0	1	1	0	0	0
15	AA	Library An	R1037861	Yaguchi, Y	Unit Assis	R0091099	Weaver, C	Library An	Specialist	0	1	1	0	0	0
16	AA	Library Lbl	R0090895	Ballew, B	Sr Directo	R0052929	Bustillos, L	Library Elç	Unit Assis	0	1	0	0	0	0
17	AA	Library Elç	R0052929	Bustillos, L	Unit Assis	R0091016	Carl, Lillia	Library Elç	Section Su	0	1	1	0	0	0
18	AA	Library Elç	R0052929	Bustillos, L	Unit Assis	R1041522	Chavez, G	Library Elç	Specialist	0	1	0	0	0	0
19	AA	Library Elç	R0052929	Bustillos, L	Unit Assis	R0090965	Contreras	Library Elç	Unit Supe	0	1	1	0	0	0
20	AA	Library Elç	R0052929	Bustillos, L	Unit Assis	R0090432	Rivera, Mi	Library Elç	Section Su	0	1	0	0	0	0
21	AA	Library Elç	R0052929	Bustillos, L	Unit Assis	R0052867	Romero, A	Library Elç	Unit Supe	0	1	1	0	0	0
22	AA	Library Elç	R0052929	Bustillos, L	Unit Assis	R1050005	Romero, J	Library Elç	Specialist	0	1	1	0	0	0
23	AA	Library Elç	R0091016	Carl, Lillia	Section Su	R1043946	Estorga, G	Library Elç	Specialist	0	1	2	0	0	0
24	AA	Library Elç	R0090965	Contreras	Unit Supe	R1049416	Langgle, P	Library Elç	Specialist	0	1	0	1	0	0
25	AA	Library Elç	R0090432	Rivera, Mi	Section Su	R0053279	De La Cruz	Library Elç	Specialist	0	1	1	1	0	0