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This publication was designed to provide assistance to departmental representatives responsible for processing the paperwork required to appoint and pay employees. We hope that this information will clarify the process and make it simpler for you. Each department has a personnel technician in Payroll and Employee Services who is assigned to process payroll and provide other services related to pay and benefits for that department and its employees. Your personnel technician will answer your questions and help you with procedures that may appear confusing. Don’t hesitate to call.

Payroll and Employee Services is located at 905 Asp, Nuclear Engineering Laboratory Building, Room 244; Phone 325-2961.
NEW EMPLOYEE INFORMATION

New Hire and Rehire Paperwork

All new employees need to complete a new hire packet. The packets are located on the Payroll website under Employment Forms & Verification or in the Payroll and Employee Services Office, Room 244 in the NEL Building.

Forms to be completed by all new and rehired employees within the “new hire packet” are as follows:

- Personal Data Form
- Loyalty Oath
- I-9 Form Employment Eligibility
- Automatic Deposit Transmittal Authorization Information (form obtained from Payroll Distribution, BH 105)
- W-4 Form Tax Withholding
- State Income Tax Withholding
- Tuberculosis Testing & Certification (Norman Campus Only)
- Foreign National Information Form (Foreign Nationals Only)
- Confidential and Proprietary Information Disclosure Form

The Form I-9 is included in the new hire packet. It helps employers verify the identity and the employment eligibility of each person that is hired. The form is provided by the Department of Homeland Security: U.S. Citizenship and Immigration Services (USCIS).

Deadlines for completing the Form I-9 are as follows:

**Section 1** should be completed on or before date of hire. This is when employment begins.

**Section 2** should be completed within three (3) business days of the date employment begins.

The Form I-9 must be E-Verified by Payroll and Employee Services within three (3) business days of the date employment begins.

The Form I-9 must be completed in black or blue ink. Payroll cannot accept copies, faxes, or paperwork completed in pencil or colored ink.

University policy requires an employee to complete a new I-9 if he/she has been rehired after a break in service (even if it is only one day).

All new employees must present an original signed social security card to Payroll and Employee Services. A copy of this card will be made by Payroll and Employee Services to be kept on file. This is a university policy guided by Social Security Administration and Internal Revenue Service published recommendations.
How Employees Can Complete Paperwork When They Are Out of State

The employee can download the appropriate paperwork from the Payroll website under Employment Forms & Verification or the department can mail the paperwork to the employee.

If an employee is unable to hand deliver the paperwork to the department or Payroll and Employee Services they may mail it.

Before mailing the completed paperwork to Payroll and Employee Services, the employee must:

1. Have the Loyalty Oath notarized.

2. Provide notarized copies of the original supporting documents for the I-9. The notary must provide a written statement that he/she has viewed the original documents.

The employee can mail the completed paperwork to:

Payroll and Employee Services
905 Asp Ave., Room 244
Norman, OK 73019-1094

Questions may be emailed to payroll@ou.edu or by contacting our office at (405) 325-2961.

Affiliate Appointments

Affiliate title is used to appoint faculty who will not hold a paid position at OU, but will be serving on committees or assigned as instructor without pay. Use a paper PAF for submission; position number is not required on the PAF. Departments will appoint the person to the job code 8888 Affiliate, indicate the academic rank on the PAF, and enter zero in the salary portion of the PAF. The PAF is forwarded to the Office of the Provost. Also have the faculty provide a Personnel Data Form (PDF). These forms are forwarded to Payroll and Employee Services for processing into PeopleSoft which generates an e-mail address and Sooner ID for the appointee. Remarks should explain the reason for the appointment, i.e. serving on dissertation committee.

Effective date is the first day of the new status
How to Obtain Access to Payroll Systems

An employee must have Department User or Reporting HCM role. In order to access account information such as running extracts, an employee must be the department sponsor or be given the role of proxy. The account sponsor or a designated proxy with the ability to create proxies needs to assign the “HR Reports” option to the employee in FAMS, Financial Account Management System. FAMS may be accessed by following the provided link: https://webapps.ou.edu/fams/ (An employee must have Department User or Reporting HCM role also)

Human Capital Management (HCM) and ePAF Security

PeopleSoft (HCM) Security

Log-in – The User ID for active employees is their 4 plus 4 and their password set up through IT. New employees must activate their account before they can access PeopleSoft (HCM). Follow this link to the IT website regarding OU Net IDs: https://webapps.ou.edu/it/support/ounetid.cfm. All active employees can access PeopleSoft Self-Service to view their personal information.

HCM (PeopleSoft) Access

Roles – In order to access other personnel information in HCM, a role will need to be assigned to the user. Roles are assigned by completion of the HCM User Access Add/Drop Form: http://ou.edu/content/dam/payroll/docs/HCM_HRMS_add-drop%20form.pdf. Return the original form through campus mail to: Information Technology – Merrick Computing Center – 1610 Newton Drive, Norman, OK 73019.

Definitions of Users’ Roles for PeopleSoft (HCM) Security

Each role is assigned to a specific Department ID. If you need access to multiple Department ID’s be sure to list all of them.

Departmental Users – This Role is generally assigned to managers, supervisors, and department representatives. Individuals in this Role will be able to run reports or queries and view all information for all authorized divisions at or below the department level. Refer to the “Access by User Role” chart to review the information that is available at this level. Individuals in this role can also be a time entry preparer or approver. NOTE: Access to some information may be limited to account sponsors or their assigned proxy. Refer to the information on Account Level Security.

Time Entry Preparer – This role is assigned to individuals who will only be entering time (payroll data) for a designated area. This role is assigned by IT and Payroll & Employee Services.

Time Entry Approver – This role is assigned to the individual who approves the time (payroll data) entered by the time entry preparer. This role is assigned by IT and Payroll & Employee Services. If a user has both the time entry preparer and approver roles, they cannot approve time they entered as a preparer.

Manage Faculty Events – This role is assigned to individuals that require access to applicable faculty related information. The Office of the Provost will approve all requests for this access.

Reporting – Individuals in this Role will only be able to run reports. Granting access to this role is not necessary if the employee is also granted the Departmental User Role.
**ePAF Preparer** – This role is assigned to individuals that require access to prepare ePAF's in Department Self Service. List all HR Departments which ePAF preparer access is granted.

For additional information about the roles and their access or other instructions, please view the HCM User Access Add/Drop Form.
**ePAF Security**

There are different roles within ePAF which are assigned by different methods. Security for the preparer, department head and dean/director roles can be requested through the Security Self Service link in PeopleSoft (HCM). Account Sponsor security is set up through Financial Account Management System (FAMS). Vice President Security needs to be requested via e-mail to Kay Huebsch or Michelle Boydstun.

**ePAF roles that can be submitted via Security Self Service**

(See Instructions on next page for submitting a role change)

- **Preparer (GT_OU_PREPARER)** – This role is assigned to employees that will prepare and submit ePAF’s. Employees with this role need the Departmental User role for PeopleSoft (HCM/HRMS) to access all components of ePAF.

- **Department Head Approver (GT_OU_DEPT)** – this role is assigned to employees that will approve ePAF’s at the Department Head level.

- **Dean/Director Approver (GT_OU_DD)** – this role is assigned to employees that will approve ePAF’s at the Dean/Director level.
Directions for Completing the Security Self Service ePAF Role Form

Any employee with an active ePAF role can submit the Security Self Service form for themselves or someone else. The form then routes to the Dean/Director level for approval unless the preparer has the Dean/Director role. Finally, the form routes to Payroll & Employee Services for processing.

Steps to add a role for an employee

1. Log into PeopleSoft (HCM) using your 4x4 and password.
2. Select **Security Self Service** from the PeopleSoft menu
3. Select **Security Form Homepage**
4. Select **Submit a New Role Change** on the Role Change Homepage

5. Enter the Employee ID of the employee that you are adding a role for in the **Empl ID** box.
6. Click the search button.

7. Select the **Role Name** by clicking on the magnifying glass symbol and then choosing the appropriate role.
Request Security Roles

Step 1 of 3: Choose Roles

To request a new Security Role for this user, type the role name in the blank below, or click the magnifying glass icon for a list of possible roles. To add another role, click the Plus icon and another row will appear.

To request that a role be revoked, click the Revoke checkbox by an existing role.

User Info

User ID:

Email:

Form Data

<table>
<thead>
<tr>
<th>Roles</th>
<th>Personalize</th>
<th>Find</th>
<th>Revoke</th>
<th>Requested</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Role Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 GT_OU_DD</td>
<td></td>
<td></td>
<td></td>
<td>Grant</td>
<td></td>
</tr>
<tr>
<td>2 OU_Token_Preparer</td>
<td></td>
<td></td>
<td></td>
<td>Unchanged</td>
<td></td>
</tr>
</tbody>
</table>

eForm ID: 398364

<< Search | Next >>
8. Click the yellow **Next** button when you have selected the role(s).

9. List the Department ID(s) the employee needs access for in the box below **Department Override Setup**.

10. Click the yellow **Next** button when you have completed the Department ID.
11. Read and then click the box in the Form Messages section next to Legitimate Use
12. Note any applicable Comments in the Your Comment section
13. Click the yellow Submit button
Steps to remove an entire role for an employee

1. Follow steps 1-5 for **adding a role for an employee**
2. Click the box below the **Revoke** column for the role that needs to be removed. The Requested Action will change from Unchanged to Revoke
3. Click the yellow **Next** button
4. Read and then click the box in the Form Messages section next to **Legitimate Use**
5. Note any applicable Comments in the **Your Comment** section
6. Click the yellow **Submit** button
Steps to remove a Department ID only for an employee’s Role access

1. Follow steps 1-5 for adding a role for an employee
2. Click the yellow Next button
3. Highlight the department ID that needs to be removed in the section under **Department Override Setup** and push the delete key on your keyboard
4. Click the yellow **Next** button
5. Read and then click the box in the Form Messages section next to **Legitimate Use**
6. Note any applicable Comments in the **Your Comment** section
7. Click the yellow **Submit** button

If an employee cannot access the Security Self Service form to submit a request, an e-mail from the Vice President’s Office or Dean’s Office can be sent to your Kay Huebsch or Michelle Boydstun in Payroll and Employee Services. The e-mail must include the employees’ name, Empl ID, role name, and Dept ID.
**Account Sponsor & Internal Auditing Rules**

**Account Sponsor** – This role is assigned through FAMS [https://webapps.ou.edu/fams/](https://webapps.ou.edu/fams/) by an account sponsor or their proxy. To be able to approve at the account sponsor level, receive emails and have the ePAF appear on their worklist, an employee must be set up in FAMS as a Proxy with *PAF Approval* selected.

![Department Table Image]

**Vice President** – this role is set up by an e-mail request sent to Kathryn Huebsch or Michelle Boydstun in Payroll & Employee Services and approved by the appropriate Department Head for that area.

**Internal Auditing ePAF Security Rules**

1. A Preparer cannot approve an ePAF that they have created
2. An employee can only approve an ePAF at 2 of the following 3 levels:
   - Account Sponsor, Department Head, and Dean/Director
3. No one can approve an ePAF for themselves at any approval level
Steps for employee look up

1. Log into PeopleSoft (HCM) using your 4x4 and password.
2. Follow the menu path: Home > Workforce Administration > OU HRMS > Employee Lookup
3. Enter Employee’s ID in the **Empl ID** field or enter the employee’s last name in **Last Name** field.
4. Click the yellow **Search** button

This page allows you to lookup any employee that has been hired into PeopleSoft whether they work in your department or not.
The Employee Lookup panel shows an employee’s status, department, location, job code, FTE and Benefit Program.

**Employee Name Changes**

In order for Payroll to change an employee’s name in Peoplesoft, we must receive a copy of the new social security card. We can **NOT** use a marriage license or other documents as supplemental documentation.
1. To access Job Data follow the path:

   Home > Workforce Administration > Job Information > Job Data

2. Enter an Employee’s ID in the **Empl ID** field or enter the employee’s last name in **Last Name** field

3. Click the yellow **Search** button

   Job Data contains the following principle panels:

   - Work Location
   - Job Information
   - Payroll
   - Compensation
   - Employment Information
- The **Work Location** panel contains the employee’s status, position number, department and location code.

  **Note:** the earnings statements are mailed to the Location listed for employee record “0”
The **Job Information** panel shows the job code, FTE and work period an employee is appointed with.
- The **Payroll** panel shows the pay group, the employee type and FICA status.
The Compensation panel shows the employee’s salary and their budgeted amount (the two amounts can/may be different for faculty members). If you click on the arrow next to pay rates, it will show the annual, monthly, daily and hourly rates of pay for all employees except faculty.
Employment Data

To access Employment Data click the 2nd tab on the bottom of the Job Data page.

- **Original Start Date**: This is the start date for this job record in the system. This date may *not* be the effective date of the first job record or the effective date of the job data row with the action of **HIR**.

- **First Start Date**: Displays the first start date for this record. The system populates this field with the effective date of the first job data row with the action of **HIR** (for employees).

- **Company Seniority Date**: This date is normally the same date as the Benefits Service Date. The date may be earlier if the employee had a break in service and returned to work at the university. This date will then reflect an altered seniority date to reflect their total benefit eligible years of service.

- **Benefits Service Date**: This date calculates the total years, months, and days of service for a worker. This date is used to calculate benefits eligibility for leave.
Compensation / Earnings Statement

1. After logging into PeopleSoft follow the path:
   
   Main Menu > Self Service > Payroll and Compensation > View OU Compensation Letters
2. From this page you may select which compensation statement you would like to view by year.

**Note:** Your total compensation includes much more than your regular paycheck; the variety of benefits and privileges provided by the University are valuable in both monetary terms and the financial security they may provide. This information provides an estimate of the current annual value of Retirement, FICA/Medicare, and insurance benefits (Sooner credits, workers and unemployment compensation) paid by OU, in addition to your University base salary. Your University base salary does not include any supplemental/additional payments. Sooner credits are based on your FTE status and include employee health, dental, life, and AD&D insurance. These calculations are based on your projected annualized University base salary only and benefits as of the date of this report. If you have questions regarding this report please contact your department representative or the Benefits Office.
Personal Action Forms

**Electronic PAF (ePAF) vs Paper PAF**

The Personnel Action Form (PAF) is used in Payroll to hire, re-hire, or change the status of an employee. The form is also used to pay a monthly employee for summer money (SUM), supplemental pay (SUP), or overload base (OLB).

**When to use ePAF:**

- ePAF’s are required to be used except in certain circumstances. It is much easier to check the routing process in ePAF and to locate it once it has been approved. **ePAF enables a faster approval process.**

**When to use paper:**

- Affiliate PAFs of any sort
- Appointments of Adjuncts when the employee is already 1.00 FTE
- Extensions of Adjuncts that will receive only supplemental pay
  (Payroll records them as .10 FTE at zero pay)
- When 2 different effective dates happen within the same pay period, one can be online or both can be done on paper
- Changing a staff position job code to a faculty job code or vice versa
- Exceptions that are instructed by Payroll to do on the paper form

**Things to Remember:**

Help: If you have problems while using the ePAF system, please send an email to your payroll technician or payroll@ou.edu or call PES at 405/325-2961. Please include a screen shot and details of any problems that you are having.

- If you are creating a transaction that involves hiring, rehiring or transferring someone to your department, create a **hire** ePAF.
- If an approver doesn’t want to receive email notifications, send an email to kryter@ou.edu, mboydston@ou.edu or payroll@ou.edu and ask them to remove that person from the email notification list.
- Please do use the “previous” and “next” buttons on the ePAF pages

- Please do **not** use the browser’s back and forward buttons

- To transfer an employee, the receiving department will do a **hire** ePAF, and the “old” department will be notified. To make a change to an employee in your department, please use the job change form.
1. First you will need to navigate the ePAF Home Page by following the path:

   Main Menu > Department Self Service > ePAF Home Page

**Description of Links:**

**My Worklist:**

Will show you the ePAF’s waiting on your approval before they can be passed on to the next step in the approval process. You will electronically approve or “sign off” on work instead of signing a paper form.

**Start a New ePAF:**

Allows you to initiate a new ePAF. This includes initiating a new hire, transfer, status change, source change, termination, leave of absence and additional pay.

**Resubmit, Change, or Withdraw an ePAF:**

Allows you to make a change or pull back an ePAF that has not yet been fully processed into the system.

**Evaluate an ePAF:**

Will show you any ePAF’s that you need to approve before they can be passed on to the next step in the approval process. You will electronically approve or “sign off” on work instead of signing a paper form.

**View ePAF:**

Allows you to view ePAF’s for your department that were created.
My Worklist

- Your work list will show the ePAF’s that are awaiting your approval
- To open your worklist, select “My Worklist” on the “ePAF Home Page” or select the work list quick link at the top right side of the page.

Select the link for the ePAF that you want to approve (click the blue link)
You can see from this page which type of ePAF form the action is (Termination, Add Pay, etc.)
**Step 1:** Go to the ePAF Home Page

You have two options for looking up an ePAF:

- **View an ePAF** – Allows you to view ePAF’s processed for your department that were originated within the last 30 days.

**Step 2:** Select which type of ePAF you want to view (hire, termination, etc.)

**Step 3:** Enter search criteria.

- You can use any of the existing values (see below) to search for an ePAF.
- If you enter nothing and hit “Search”, it will bring back all ePAF’s you have security to see.
- The employee ID or ePAF form ID are the quickest ways to search.
ePAF Employee History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

- Empl ID: begins with
- Empl Record: =
- eForm ID: begins with
- Name: begins with
- Last Name: begins with
- Workflow Form Type: begins with
- Workflow Form Status: =
- Original Operator: begins with
- Originated Date From: >=
- Originated Date Thru: <=
- Last Operator: begins with

Case Sensitive

Search  Clear  Basic Search  Save Search Criteria
Step 4: On this page you can see the ePAF that was created for a staff member.
From here we can see the preparer’s name, number and email on the ePAF, also, we can see the action reason for the ePAF generation.
Step 5: By clicking the **NEXT** button, you can view the transaction history of an ePAF. This will tell you where the ePAF is, and its progress up until this point.

Step 6: if you click “Who can work this form?” you will see whose work list the ePAF is in.

Step 7: The Transaction / Signature Log will show you who/when the ePAF has been approved.
ePAF Terminology

Pending: The ePAF form preparer has submitted the ePAF. No one has approved this ePAF yet. You can resubmit, change or withdraw an ePAF with this status.

Partially: At least one approver has approved the ePAF.

Approved: You can resubmit, change or withdraw an ePAF with this status unless it has been approved by the Provost Office for academic areas.

Authorized: The approval process is complete. You cannot resubmit, change or withdraw an ePAF with this status.

Executed: The ePAF has been processed and loaded into the system. You cannot resubmit, change or withdraw an ePAF with this status.

Denied: An approver has rejected the ePAF. Approvers should make a comment when they deny an ePAF. This permanently ends processing for the ePAF. You can still view it. You cannot resubmit, change or withdraw an ePAF with this status.

Withdraw: The ePAF originator has withdrawn the ePAF. A comment should be made when an ePAF is withdrawn. This permanently ends processing for the ePAF. You can still view it. You cannot resubmit, change or withdraw an ePAF with this status.
Resubmit, Change or Withdraw an ePAF

Make changes to an ePAF that has been recycled or needs to be updated. Only forms that have not had final approval or have not been processed into the system will be accessible.

Resubmit, Change or Withdraw an ePAF

Update a Hire ePAF

Use this link to change, resubmit or withdraw a request to hire an employee.

Edit Existing Job

Use this link to change, resubmit or withdraw a request to edit a job for an employee.

Change Employment Status

Use this link to change, resubmit or withdraw a request to change employment status for an employee.

Update an Additional Pay ePAF

Use this link to change, resubmit or withdraw a request to add additional pay for an employee.

Update an Ad Hoc Training Assignment

Use this link to change, resubmit, or withdraw a request to add ad-hoc training for an employee.
• When an ePAF has already been submitted, and you need to make a change or withdraw the ePAF, select: “Resubmit, Change, or Withdraw an ePAF”.

• In order to make changes or withdraw an ePAF, you need to make sure that the ePAF has not been approved past the Provost level for academic areas and Payroll for all other areas. You can do this through the view option.

• If the ePAF’s Workflow Form Status is ‘Authorized’, ‘Executed’, ‘Denied’ or ‘Withdrawn’, you will be unable to make changes to the ePAF.

Step 1: Go to the “ePAF Home Page”
Step 2: Select “Resubmit, Change or Withdraw an ePAF”
Step 3: Select the form type (hire, termination, etc.)
Step 4: Enter search criteria (name, employee ID, etc.)
Step 5: Review the form content of the ePAF.

To make a change to an ePAF:

• Make your change(s).
• Document your change(s) in the comments box.
• Select “Resubmit.”

To withdraw an ePAF:

• Make a comment explaining why you are withdrawing the ePAF.
• Select “Withdraw”
• This permanently ends processing for the ePAF. You can still view it.
Evaluate an ePAF

Evaluate an ePAF
Participate in the approval process for an ePAF. This link allows you to search for the ePAF you want to evaluate.

When an ePAF has already been submitted, but does not show up in your worklist, select evaluate an ePAF.

**Step 1:** Go to the “ePAF Home Page”

**Step 2:** Select “Evaluate an ePAF”

**Step 3:** Enter search criteria (name, employee ID, etc.)

**Step 4:** Evaluate the ePAF you have selected.
Step 1:

If you enter the information into the 3 required fields, select the ‘search’ button and the person you are looking for is not in the database, the “Add” button will appear.
Step 2:

Personal Info:

1. Name needs to be typed EXACTLY as it appears on the employee’s social security card
2. Do not type in ALL CAPS
Step 3:

Note: After this step the employee ID is assigned automatically.
Step 4:

**Personal Info**
- **Name:** Smith, John
- **Empl ID:** 468184

**Hire Form Data**
- **eForm ID:** 428209
- **Effective Date:** 11/01/2017
- **Empl Group:** Faculty
- **Position:** 00022818 Instructor
- **Job Code / Title:** 1774 Instructor
- **Job Function:** FAC Faculty
- **Department:** ACASLIS Library & Information Studies
- **Budgeted:** Budgeted/Single

<< Search | Next >>
Step 5:

Note: Here you will assign (Annual Compensation, FTE, Contract Length, and High School Graduate)

The circled section appears as it is in the Budget system
Note: Here you would indicate the position title, start/end date – **required for academic titles and regents PAF’s**
Step 7:

Note: The Employee Training Assignment page allows you to assign necessary work trainings as specified by departmental preferences.
Step 8:

Note: This is the final step prior to submission. You must acknowledge the message regarding the I-9 requirements and that the employ must also complete a loyalty oath. In addition, please select if the employee is or is not a transfer from HSC.
Step 1: Enter the Employee ID for the employee needing a Job Change

Note: The Job Change form is used to edit any information on an employee that currently works in your department. Examples of this might be: internal promotions, FTE changes, pay rate changes, academic/regents title changes.

Only update the fields that are changing.
Step 2: Enter the effective date of the new Job Change.
Step 3: Make sure that the hourly rate, budgeted rate, and FTE values are correct.
Step 4: Double check all changes and insert any necessary comments, click submit to finalize changes.
Change Employment Status

Use this form to submit a termination, retirement, leave of absence or return from leave.

Change Employment Status

Select An Employee

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Empl ID: begins with
Empl Record: =
Name: begins with
Last Name: begins with
Department: begins with
Employee Group: =

Search Clear Basic Search Save Search Criteria

Step 1: Enter the Employee ID for the employee needing a Job Change

Note: Change Employment Status form is used to submit a termination, retirement, leave of absence or a return from leave.
Step 2: Insert the event effective date, action, reason and any necessary comments. Then click submit.
Action Options:

- “Leave of Absence” is leave without pay. An employee placed on ‘Leave of Absence’ will not be paid until you process an ePAF to ‘Return from Leave’.

- “Paid Leave of Absence” is leave with pay.

- If you terminate or retire an employee with pay, they will be paid until a PAF has been processed to terminate them.

- You will use this form to put an employee out on a leave of absence and to bring them back from a leave of absence.

- You will need to submit one ePAF to put an employee on a leave of absence, and another ePAF to return an employee from leave.
Miscellaneous ePAF Information

Top Reasons not to print ePAF’s

1. Privacy laws such as HIPPA, Social Security, data privacy, etc. Do you really want to try and keep up with ever changing laws when Payroll already has to?
2. Keeping a duplicate I-9 could result in fines for your department if all the data is not correct and you are audited
3. If your office was broken into, your department would be responsible for telling employees their data was breached. If PeopleSoft is breached IT would be responsible for notifying the employees.
4. Payroll no longer keeps paper copies of anything unless mandated by the government. Everything we get is imaged and then destroyed.
5. The University of Oklahoma is trying to go green.
6. Who really wants to file or purge all that paperwork?
7. All the data is already stored in PeopleSoft and reports can be written by Payroll for you.
8. Payroll is the system of record for Personnel files, etc. We have forms and procedures that must be followed when someone wants to review a file.

PAF Tips

- Regular employees can’t be appointed to more than 1.0 FTE and student employees can’t be appointed to more than a combined .99 FTE. Be sure to verify the employees current FTE on Employee Lookup so you can appoint them to the appropriate FTE. Employee Lookup can be found by going to: PeopleSoft/Workforce Administration/OU HRMS/Employee Lookup
- Graduate students can be placed on leave without pay for the summer by creating an ePAF using LOA/SUM effective the first day without pay. They must be returned from leave at the end of the summer by using RFL/SUM. If you need to transfer their position when they return, you can combine the two action/reasons. Begin by processing an ePAF to transfer the position. At the end of the ePAF you will check the box that states the “employee is currently on LOA, do you want to return them?” This will trigger the action reason codes XFR/POS or XFR/JOB and RFL/SUM.
- Graduate students are always paid on a monthly basis regardless of the length of their appointment. You must calculate the rate of pay based on 12 months and you must terminate the graduate student when their appointment ends.
- Terminations should only be processed when the employee is ending their employment with the University. If the employee is transferring to another department at the University and there is no break in service, the department the employee is transferring to needs to complete a Hire an Employee ePAF to transfer their job.
- Leave of Absence (LOA) is leave without pay and Paid Leave of Absence (PLA) is leave with pay. If an employee is placed on LOA, they cannot be paid until a PAF is approved to return them from leave or place them on PLA.
- Employees can only have one active appointment to a position number. If you need to pay the employee two different pay rates, they must be appointed to two different position numbers.
- An employee can only be appointed to one pay group (HRY, MTH, 9/9). Monthly paid employees may work hourly, but must be paid by supplemental pay on their monthly check.
Frequently Used Action/Reasons

When using ePAF, the system will choose the action/reason codes based on data entered on the form, except when using the “Change Employment Status” link. Be sure to confirm the form’s codes are correct prior to its submission.

Action/Reason codes to be used on PAFs can be found on the Payroll website:
http://ou.edu/content/payroll/managers-and-coordinators/ePAF.html

HIR/HIR - This code is to be used when appointing anyone that has never had an active job on PeopleSoft.

HIR/HAF – This code is used to hire an employee who is coming from HSC.

REH/REH or REH/RET – These codes should be used to rehire an employee that has terminated or retired. It does not matter if the termination or retirement was from your department or from another department.

XFR/POS or XFR/JOB – These codes are to be used when changing the position number within the department, or when the employee is transferring to another department on campus. These action/reason codes can be combined with RFL/SUM or RFL/RFL.

DTA/CFT – This code is to be used in the event of a voluntary change to an employee’s current appointment FTE. This code can be combined with other applicable codes. Only the FTE shall be changed by using this code.

PAY/INC or PAY/DCR – This is to be used when the rate of pay is changed from the current amount in PeopleSoft. This code can be combined with other applicable codes. Only the hourly rate or annual salary shall be changed by using this code.

POS/JRC or POS/TTL

When creating an ePAF for this type of change follow these steps:

- Leave position number and employee group the same
- Enter effective date
- Enter new job code
- Proceed to next page and change remaining data
Payment Procedures & Types

**Contract Pay for Faculty**

Contract pay options are 9 paid in 10 months (9/9) or paid in 12 months (9/12) faculty. See Faculty Payment Option below.

Contract pay is **NOT** paid to Graduate students or staff members.

Monthly amounts for 9/9 employees can be calculated using the Contract Pay Spreadsheet sent out by Payroll and Employee Services. If you do not have a copy, contact your payroll representative and they can e-mail it to you. Faculty are paid a partial month in August and May which is based on working days.

Monthly amounts for 9/12 employees can be calculated by dividing the annual amount by 12. The employee will be paid the same monthly amount for August through July. **Newly hired 9/12 employees will be paid a partial amount in August with the remainder of the contract paid over the next 11 months.**

The department must extend the contract for non-budgeted or pool positions every semester (4.5 months) or year (9 months). This can be done by completing an ePAF using DTA/CEX. Start a new ePAF/Edit Existing Job – enter the Empl ID then enter the effective date the contract extension will begin. Finally, check the box that asks if you want to extend the contract.

When transferring an employee in a faculty title from one pay group to another (such as 9/9 to monthly), put in the remarks that the employee is “moving from 9/9 to monthly appointment” (or other pay group). In ePAF, choose the appropriate new contract months under the FTE and compensation information.

**Faculty Payment Option**

Faculty members appointed for nine months have the option of receiving their salary in 10 payments or 12 payments. Faculty members must complete a Faculty Payment Option Form located on the Payroll website under Payroll Managers & Coordinators – PeopleSoft Payroll Codes & Payment Types [http://ou.edu/content/payroll/managers-and-coordinators/peoplesoft-actions-payment-types.html](http://ou.edu/content/payroll/managers-and-coordinators/peoplesoft-actions-payment-types.html). Changes must be made before August 5th of the following contract year. Changes can not be made after August 5th due to IRS regulations.

**Calculating Contract Pay Changes**

The first step taken when calculating a contract pay change (increase or decrease) is to determine a blended rate based on a 9/9 contract. If the employee is being paid 9/12 you still need to determine the blended rate based on a 9/9 contract.

To calculate the blended rate, determine the total amount the employee should be paid prior to the pay rate change and the total amount the employee should be paid after the pay rate change. Add the two totals together to get the blended rate. See Appendix A.

The final step is to determine the **remaining payments** for the contract. This step is not the same for a 9/9 and 9/12 contracts.

- **9/9 remaining payments** will be paid based on the contract spreadsheet. See Appendix A.
- **9/12 remaining payments** will need to be calculated as follows:
Pay Increase for 9/9 Contract effective Jan 1

Calculating 9 month Employees Paid over 9 months

<table>
<thead>
<tr>
<th>Pay Periods</th>
<th>Contract Days/PS Remaining</th>
<th>Days in Month</th>
<th>Monthly Amt</th>
<th>Goal amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>August</td>
<td>9.000000</td>
<td>0.523810</td>
<td>4,049.07</td>
<td>65,925.93</td>
</tr>
<tr>
<td>September</td>
<td>8.476190</td>
<td>1.000000</td>
<td>7,777.78</td>
<td>58,148.15</td>
</tr>
<tr>
<td>October</td>
<td>7.476190</td>
<td>1.000000</td>
<td>7,777.78</td>
<td>50,370.37</td>
</tr>
<tr>
<td>November</td>
<td>6.476190</td>
<td>1.000000</td>
<td>7,777.78</td>
<td>42,592.59</td>
</tr>
<tr>
<td>December</td>
<td>5.476190</td>
<td>1.000000</td>
<td>7,777.78</td>
<td>34,814.81</td>
</tr>
<tr>
<td>January</td>
<td>4.476190</td>
<td>1.000000</td>
<td>7,777.78</td>
<td>27,037.04</td>
</tr>
<tr>
<td>February</td>
<td>3.476190</td>
<td>1.000000</td>
<td>7,777.78</td>
<td>19,259.26</td>
</tr>
<tr>
<td>March</td>
<td>2.476190</td>
<td>1.000000</td>
<td>7,777.78</td>
<td>11,481.48</td>
</tr>
<tr>
<td>April</td>
<td>1.476190</td>
<td>1.000000</td>
<td>7,777.78</td>
<td>3,703.70</td>
</tr>
<tr>
<td>May</td>
<td>0.476190</td>
<td>0.476190</td>
<td>3,703.70</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>70,000.00</td>
</tr>
</tbody>
</table>

The blended rate is the total amount the employee will be paid for the contract.

The effective date of the pay increase was January 1. Therefore, the employee won’t be paid a total of $70,000 for the contract.

Calculating 9 month Employees Paid over 9 months

<table>
<thead>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>70,000.00</td>
</tr>
</tbody>
</table>

The remaining payments on the contract will be paid as indicated on the contract spreadsheet.
Pay Increase for 9/12 Contract effective Jan 1

When calculating a pay increase for a 9/12 contract, you must find a blended rate just as you would for a 9/9 contract. See Appendix A.

For this example, we will use the same effective date and contract pay information as the previous 9/9 pay increase example.

**Beginning Contract Rate $60,000**

**New Contract Rate $70,000 (effective Jan 1)**

**Blended rate would be $64,343.56**

Employee has already been paid $25,000.00 (5 months at a rate of $5000)

Annual rate $60,000/12 months = $5000 month

Employee is owed $39,343.56 (blended rate less what has already been paid)

\[
\frac{39,343.56}{7} = \text{Amount owed months remaining (Jan – Jul)}
\]

Remaining monthly payments would be $5620.51
Paid Leave

**Description:** Benefits eligible employees earn Paid Time Off (PTO) through a leave accrual program as part of the comprehensive benefits package provided at OU. PTO is a combined leave bank of time for all approved time off, including vacation, personal time, bereavement, personal illness, and illness of a family member.

**Employees Who Earn PTO:** Paid leave benefits are available to staff and 12-month faculty who hold benefits eligible appointments. Leave for medical residents and post-doctoral fellows at HSC and 9-month faculty is described on the HSC Programs link under Leave Accrual Rates below. Students and temporary employees are not eligible for paid time off.

**Maximum Accrual:** Paid leave time can be accrued up to the maximum allowance described under the Leave Accrual Rates table below. Time accrued beyond the maximum allowance will be deposited in an Extended Sick Leave (ESL) account.

### Paid Leave – Per Years of Service

<table>
<thead>
<tr>
<th>Employment Type</th>
<th>Years of Service</th>
<th>Biweekly Paid Accrual Per Hour</th>
<th>Monthly Paid Accrual Per Month</th>
<th>Annual Accrual</th>
<th>Maximum Accrual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Officers, Administrative Officers, and 12-Month Faculty</td>
<td>Each year</td>
<td>0.1269</td>
<td>22 Hours</td>
<td>33 days (264 Hours)</td>
<td>42 days (336 Hours)</td>
</tr>
<tr>
<td>P-TF</td>
<td>1st-5th year (0-60 months)</td>
<td>0.1038</td>
<td>18 Hours</td>
<td>27 days (216 Hours)</td>
<td>42 days (336 Hours)</td>
</tr>
<tr>
<td></td>
<td>6th-10th year (61-120 months)</td>
<td>0.1154</td>
<td>20 Hours</td>
<td>30 days (240 Hours)</td>
<td>42 days (336 Hours)</td>
</tr>
<tr>
<td></td>
<td>11 or more years (121+ months)</td>
<td>0.1269</td>
<td>22 Hours</td>
<td>33 days (264 Hours)</td>
<td>42 days (336 Hours)</td>
</tr>
</tbody>
</table>

**Payroll Calculation for Leave Accruals**

Example 1. John/Jane Smith has worked a complete biweekly pay period of 80-hours. He/she has been employed on the Norman campus for approximately 6 years; therefore, the employee receives 20 hours of PTO per month. However, for a biweekly calculation we would use the 0.1154 value to calculate the current payroll cycle accrual.

- 80 hours x 0.1154 = 9.232 hours earned for the current payroll cycle
- 9.232 x 26 payrolls annually = 240.032 = 240 hours possible annually
Awards

In almost every circumstance, gifts, prizes and awards given to university employees are reportable as income and are included in the recipient's taxable wage if the gift is paid for by the university. If the gift, prize, or award is cash, it should be processed as a supplemental payment (see above tab) and must be paid through the payroll system with appropriate taxes withheld. Non-cash gifts, prizes, or awards should be reported to payroll by the department initiating the gift, prize, or award. The fair market value of the item is taxable and will be reported on the recipients W-2.

The department may choose to pay the employee's share of taxes on a gift, prize, or award; however, the taxes paid by the employer are taxable wages to the employee.

Please contact Payroll and Employee Services if you have any questions regarding the payment of gifts, awards, and prizes.
Supplemental Payments

Supplemental Earnings can be classified as two different types; they are used to pay a current monthly employee for work performed in another department on campus.

- One-time payment
- Recurring payment
  - An employee can only be appointed to one pay group (HRY, MTH, 9/9). Monthly paid employees may work hourly, but must be paid by supplemental pay on their monthly check.

**Note:**
A total of 3 signatures are required for supplemental payroll correction forms; Account Sponsor, Dean and Provost/Vice President, if the account the funds are to be withheld from is a Grant account, then a signature from Grants and Contracts will be necessary as well. In this case 4 signatures would be needed.

Paper supplemental forms can be found on the Payroll website under PeopleSoft Actions & Payment Types – Supplemental Payments. These forms should only be used for hourly employees or terminated employees unless otherwise instructed by Payroll and Employee Services.

The form must be completed and approved by the appropriate levels before the supplemental is entered into PeopleSoft time entry system. Internal Auditing does audit this information.

The department is responsible for entering a supplemental for current pay periods. The form should be retained in the department’s files.

Payroll and Employee Services must enter supplemental payments for previous pay periods and lump sum payments to hourly employees.

Terminated employees can be paid a one-time supplemental. If the employee worked after the termination date, they must complete an I-9(with supporting documents) and Loyalty Oath and submit them to Payroll and Employee Services with the supplemental form. If the terminated employee needs to be paid more than one supplemental, the department must rehire the employee.

Questions about whether or not an employee can be paid a flat rate supplemental should be directed to Employment and Compensation and/or the Provost Office.

Supplemental payments for active monthly employees should be submitted through ePAF Additional Pay. Once the ePAF has been submitted do not enter the supplemental payment through time entry; otherwise it will result in an overpayment for the employee.

Please note: Supplemental payments that have an hourly rate and amount can be applied to an hourly employees’ timesheet by a Manager, Time Keeper, and/or Supplemental User.

- Use the additional pay form to pay a monthly employee a supplemental pay, summer money or overload base pay. **The paper supplemental pay form is still required for hourly employees to determine overtime consideration.**

- All the fields with asterisks are required fields and must be completed before the ePAF can be submitted.
• If the first month of the additional/supplemental pay is a partial amount, then a 2nd ePAF will need to be completed for the remaining months. Additional/supplemental pays do not prorate by working days – it pays the monthly amount regardless of the working days.
Step 1: Select “start a new ePAF from the home ePAF menu and click “Add Additional Pay” to begin the supplemental and select an employee, path:

Main Menu > Department Self Service > ePAF Home Page > Start a New ePAF > Add Additional Pay

Earnings Code Options

OLB

- Over Load Base is used when it is necessary to pay for additional duties during a set period. Overload work is for the same basic type of work under their regular title within the department, such as stepping in to teach an additional course when the scheduled instructor could not because of illness, additional committee work, etc.

- This pay is included in the annual salary rate when calculating the 25% overload supplemental payments and the defined contributions benefit, but not salary increases.

SUM

- Summer money can only be paid to 9 paid in 9 or 9 paid in 12 employees. Monthly employees may be paid from summer money by changing their earning distribution on the budget system.
- Faculty appointments for the summer period may be made from May 16 through August 15. The regular summer instructional period is June 1 through July 31.

**SUP**
- Supplemental earnings are used to pay a current OU employee for work performed in another job or department on campus for an additional job worked outside normal working hours or on leave time.
- Permission for Supplemental Pay for OU Full-Time Employee form must be approved prior to the work for a supplemental payment. See the Norman Campus Staff or Faculty Handbook.

**Additional Pay Account**
- Combination Code is the paying department number and account code.

![Additional Pay Accounts](image1)

See the list of Account (object) codes used in budgeting at [http://www.ou.edu/budget/instr.htm](http://www.ou.edu/budget/instr.htm)

**Academic/Regents Titles**
- Titles may be added for faculty and staff over $60K. End dates are required for these temporary titles.

![Academic/Regents Titles](image2)

**Transaction log**
- A transaction log is now included when evaluating any ePAF.
- This log will show every person (and their associated role) that has approved the ePAF - without using the “View an ePAF” screen.
Return to Contents
Summer Money

Summer money earnings are for faculty. A monthly, hourly or student employee would not receive these payments. The payments can be calculated per below instructions to help guide departments.

Any nine-month faculty being paid with summer money (whether they are paid 9/9 or 9/12) will require an Additional Pay ePAF. Distribution for the summer pay should be shown on the ePAF. Please do not send an Earnings Distribution Request (EDR) for such distributions to the Budget Office.

Monthly faculty salaries may be no more than one-ninth of the 9-month contract salary in a given month. The following is an example of how to calculate the amount of summer money a faculty can receive in May, June, July or August.

Calculating Salary for May and August
Annual Rate of Pay divided by 9, divide by 2
($40,000 / 9 = 4,444.44 / 2 = 2,222.22 for May and August)

Calculating Salary for June and July
Annual Rate of Pay divided by 9
($40,000 / 9 = 4,444.44 for June and July)

Use the Budgeted Rate

Please use the budgeted rate for calculating summer money and not the annual rate of pay on JOB; the annual rate amount could reflect a blended rate depending on salary changes during the year. The budgeted rate is located in PeopleSoft on the JOB page under the 'compensation' tab. Colleges are given the discretion of allowing July and half of August to be paid to faculty receiving ranked promotion increases at their new rate. These increases will not be updated on the budgeted rate until August 16th.

Summer Money Tips

- If you are paying a partial amount for May, it must be processed on a separate ePAF than the full months. This is because payroll must pay the full amount listed in the “Monthly Amount”. For example, you want to pay an employee $1250 for May and $2500 in June and July. You must process an ePAF for May with $1250 in the Monthly Amount and Goal Amount, then another ePAF for June-July with the $2500 in the Monthly Amount and $5000 in the Goal Amount.

- If August is the last month to be paid, it can be combined with the previous full month payments. For example, you want to pay an employee $2500 for June, $2500 for July, and $1250 for August. You may process an ePAF with $2500 in the Monthly Amount and $6250 in the Goal Amount.

- If you use an effective date of July 1st when combining payments for June and July, PeopleSoft will process the payments in July and August. To prevent this you must:

  Use an effective date of June 1st (the ePAF must be received in Payroll by the PAF deadline for June) – payments will be made in June and July.
Or

Use an effective date of July 1st with the monthly amount and the goal amount both equal to the total payment for two months (the ePAF must be received in Payroll by the PAF deadline for July) – payment will be made in July.

- When correcting summer money ePAF’s, you must list the new amount and new goal balance not the difference on the corrected ePAF. Put in the remarks that it is a correction of the previously submitted ePAF ID#. 

![Compensation Page Screenshot]
Terminal Paid Leave (TPL)

Terminal paid leave is paid to twelve-month employees who terminate under satisfactory conditions in a benefits-eligible position and are not paid on a grant. (Beneficiaries of deceased employees will be paid terminal paid leave when applicable). Terminal paid leave cannot exceed the amount of their annual accrual regardless of the number of hours they have accrued. Retiring employees and deceased employees may be paid the maximum hours available to the employee (not to exceed 336 hours).

The department is responsible for entering the terminal paid leave hours on the employee’s last paycheck. Term Paid Leave can be processed by going through ADD Time and Earnings if the employee no longer shows up on the time entry screen for the department. The department can e-mail Payroll for assistance calculating leave time or if the employee isn’t eligible for payment.

When calculating terminal paid leave, be sure to subtract any time used since the last accrual date and add time accrued thru their termination date. Monthly employees must work on or after the 15th of the month to accrue paid leave for the current month. (Please see Leave Accrual Rates on the Payroll website at http://ou.edu/content/payroll/managers-and-coordinators/peoplesoft-actions-payment-types.html.)
Payroll Expense Transfer

Payroll Expense Transfers are only used to correct past payroll actions such as an employee’s salary being paid from an incorrect account number and/or object code. Earnings Distribution Request forms should be submitted to correct future payroll actions.

If the amount is split between accounts, only list the amount that was paid incorrectly. For example, the employee’s salary is paid 50% from one account and 50% from another account and only the 50% of the salary was paid from the wrong account. The payroll expense transfer should only list the 50% that was paid incorrectly.

Payroll Expense Transfers will not show up on the extracts. They will show up on the Statement of Accounts (Commitment vs. Budget).
**Hourly Payroll Corrections**

Payroll corrections, such as a difference in rate of pay due to a pay increase submitted after the deadlines, must be submitted on a Supplemental Pay/Payroll Correction form. The difference in the rate of pay should be listed along with the hours and total amount due. Submit for signatures and forward to Payroll for approval and entry.

- The payroll corrections will not be paid unless the ePAF to change the rate of pay has been approved.
- Payroll corrections are **not** required for monthly employees. (Retro will be paid automatically after the ePAF has been approved)
- Be sure you account for any overtime worked during the period
**Income Assignments**

Income Assignments are checks that can be requested if an employee misses a payroll for reasons such as late PAF, late paper work, or late time sheets. There is a $50.00 processing fee per check that is issued for a processing error made by the sponsoring department or employee. Income Assignment checks take 7-10 business days to process and can take longer during peak times or if paper work is not received.

Income Assignments can be requested once appropriate paper work such as PAF, employee paper work, and/or time sheets are received by Payroll and Employee Services.

**Note:** The department representative cannot sign as the Account Sponsor or Dean/Director. The Account Sponsor and Dean/Director must be 2 different names/signatures.

The process for income assignments:

Complete the [Emergency Check Request Form](#). It can be found on the Payroll website under **PeopleSoft Codes & Payment Types**.

1. The form needs to be completed by the department and submitted to the Payroll and Employee Services.

2. Once the paper work is processed in PeopleSoft, Payroll will request an estimated check for the missed payroll by submitting appropriate forms to Financial Support Services. A $25 amount will be debited from the net amount for employees that are not benefits eligible. The employee will receive that amount back on their next paycheck. This is withheld to ensure that there are funds available to withhold the income assignment.

3. The net income assignment is debited from the Payroll income assignment account not the department account.

4. The check will be sent from FS to Payroll and Employee Services. If direct deposit hasn’t been set up, the department will be notified that the check is ready to be picked up in the NEL building Room 244, Payroll and Employee Services. The employee must present a valid photo ID when picking up the check.

5. On the next payroll date, the gross wages will be charged to the departments account. Expect to see the gross amount on your extract at that time.

6. The Income Assignment amount (net) will be deducted from the employee’s paycheck and credited back to Payroll’s income assignment account. The department will not be able to see that transaction, but the employee will see the deduction on their check.

We prefer not to process income assignments if the employee can wait until the next payroll. Before requesting an Income Assignment, please verify that the employee needs the money before the next payroll.
Overpays

Overpays can occur for many reasons. When an employee is overpaid, the department will be responsible for making arrangements with the employee to collect the amount of overpay. Payroll will calculate the net or gross amount to be repaid and notify the department.

If the employee is still employed, the overpayment must be withheld from the employee’s future paychecks not to exceed 3 pay period deductions. It can only be withheld in the same calendar year that the overpayment occurred. For an overpay that occurs in November, Payroll must withhold the full amount on the December paycheck. Overpays must be corrected in the current year so that the employees W-2 will be correct.

Payroll will e-mail an Overpayment Agreement form to the department. The employee needs to read, designate the amount withheld per pay period, sign, date, and return the form to Payroll and Employee Services. This is a courtesy to give the employee an option of deducting the amount from more than one paycheck. If the form is not returned by the next payroll deadline and other arrangements have not been made, Payroll will withhold the full amount from the employee’s next paycheck.

If the employee is terminated, the employee must write one check to the University of Oklahoma for the full amount. The employee will be responsible for repaying the net amount during the same calendar year the overpayment occurred. The deadline for repaying the net overpay is November 30th. The employee will be repaying the full gross amount if paid after November 30th or in a future calendar year.
University Time & Pay Reporting Procedures

University Payroll Schedules

The hourly and monthly pay schedules can be located on the Payroll website at: http://www.ou.edu/payroll

From the Payroll homepage choose Payroll Managers & Coordinators, then select Payroll Calendar & Processing Deadlines. From here you may select the Hourly or Monthly payroll calendars and processing deadlines.

Or you may click the following link to go directly to the Payroll website:

http://ou.edu/content/payroll/managers-and-coordinators/payroll-calendar-processing-deadlines.html

<table>
<thead>
<tr>
<th>Monthly Earnings Paid/Previous Month Time Reported</th>
<th>Payroll Begin Date</th>
<th>Payroll End Date</th>
<th>ePAFs to Payroll</th>
<th>Deadline for Workforce Employee Time Entry 2:00 P.M.</th>
<th>Deadline for Workforce Approval of Time Entry 2:00 P.M.</th>
<th>View Extracts 8:00 - 11:00</th>
<th>Check Issue Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEC</td>
<td>12/01/18</td>
<td>12/31/18</td>
<td>12/03/18</td>
<td>12/03/18</td>
<td>12/04/18</td>
<td>12/06/18</td>
<td>12/21/18</td>
</tr>
<tr>
<td>JAN</td>
<td>01/01/19</td>
<td>01/31/19</td>
<td>01/14/19</td>
<td>01/14/19</td>
<td>01/15/19</td>
<td>01/17/19</td>
<td>01/31/19</td>
</tr>
<tr>
<td>FEB</td>
<td>02/01/19</td>
<td>02/28/19</td>
<td>02/11/19</td>
<td>02/11/19</td>
<td>02/12/19</td>
<td>02/14/19</td>
<td>02/28/19</td>
</tr>
<tr>
<td>MAR</td>
<td>03/01/19</td>
<td>03/31/19</td>
<td>03/11/19</td>
<td>03/11/19</td>
<td>03/12/19</td>
<td>03/14/19</td>
<td>03/29/19</td>
</tr>
</tbody>
</table>

- **PAFs and back dated time to Payroll and Employee Services** - This is the day the completely approved PAF is due to Payroll and Employee Services. If you start a PAF on this day, there is no guarantee that it will be completed in time for the payroll.

- **Time entry deadline** - Time and earnings must be entered and approved in PeopleSoft by 5 pm on this date.

  Time can be entered once time entry is opened which is typically several days before the deadline.

- **Workforce Approval deadlines** - Employees should enter their time daily, at the end of the pay period the employee must submit their timesheet to their supervisor by the date listed. The supervisor should review all employees time, communicate with employees on any corrections needed and approve their employees time by the date listed.

- **View extracts** - This is the deadline for reporting corrections to your payroll tech. All corrections and appropriate documentation must be to Payroll by 11am.
**Time Entry & Deadlines**

**Hourly Employee Time Sheets**

Hourly employees are required to properly record time worked, leave time and/or holiday time on their Workforce timesheet for the current pay period. Time is either recorded on the directly by the employee or by means of utilizing a Time Clock terminal or the Webclock function in Workforce Time & Attendance. Employees should be recording their time each day as it occurs to ensure proper and accurate time reporting. After each pay period has concluded employees will receive up to two email notifications to ‘submit’ completed timesheets for supervisor approval and payroll processing.

**Back Dated Time Sheets**

Back dated time sheets can be completed by ‘amending’ time in Workforce. Employees have the ability to amend previous timesheets to account for missing or incorrect time entry. Amendments may be made by the employee directly and/or by departmental representatives with direction provided by the employee. Once a timesheet has been amended the changes will take effect ‘after’ the amended timesheet has been approved by the supervisor or departmental approvers; changes will not take effect until the amended timesheet has been approved. After approval, amendment changes will be processed on the current payroll in which the approval was confirmed.

Departments and employees have the ability to make amendments on past timesheets up to 1-year in the past.

**Monthly Certifications**

Monthly employees are required to properly record leave time and/or holiday time on their Workforce timesheet at the end of each month. The monthly timesheet is prepopulated with the pay code ‘Work Elapsed’ for non-Faculty monthly employees based on the employees’ position Full Time Equivalency (FTE). For instance, a salaried employee at a 1.0 FTE will have 8-hours of Work Elapsed time recorded on their timesheet each working day of the month. Work Elapsed time is used for recording Affordable Care Act (ACA) work hours and can be updated by employees when necessary to account for changes in work schedule. After each pay period has concluded employees will receive up to two email notifications to ‘submit’ completed timesheets for supervisor approval and payroll processing.

Please Note: Monthly timesheets are entered one month behind as related to the payroll, i.e. January’s monthly certification is entered on February’s payroll.

**Note:** Hourly and Monthly Time Entry –

If you are not able to Enter/Approve time for your given department please complete an ‘OU Time System Roles Approval Form’ to gain Supplemental/Time Keeper role access and return the complete form to Payroll and Employee Services for role delegation. Otherwise, if you need to be classified as an employees’ supervisor in Workforce this can be done by making a change in supervisor selection on the ‘ OU Employee Approver’ screen in PeopleSoft by a departmental representative that has ePAF approval access.
Hourly & Salaried Employee Time Reporting

All timesheets need to be submitted by the employee and approved by the supervisor and/or Time Keeper.

**Hourly employees** - should record the time worked and leave taken during each pay period on their Hourly timesheet record in Workforce Time & Attendance. Fractional hour conversion definition can be provided by utilizing the Workforce conversion chart on the Norman Payroll website. Any time from a past pay period can be updated by ‘amending’ the previous time period.

**Salaried employees** should record leave taken each pay period on their Monthly Timesheet included in Workforce Time & Attendance.

**Faculty Payment Option** allows faculty members appointed for nine months have the option of receiving their salary in 10 payments or 12 payments. Faculty must determine their pay schedule by completing the Faculty Payment Option Form, located below.

To access the timesheet forms, please visit the Payroll website page “Paying Your Employees” http://ou.edu/content/payroll/managers-and-coordinators/paying-your-employees.html
Hourly & Salaried Workforce Timesheet Functions

The Time Entry Window

For additional information related to time entry, leave options, and timesheet information please visit the payroll website at www.ou.edu/payroll to access the Workforce Time & Attendance user information guides.

The time entry window comprises various fields and tabs which allow easy view and entry of your time. After you login to Workforce and (if necessary) select the appropriate assignment, open your timesheet by selecting My Timesheet from the Home Screen. Your name will appear on the timesheet as your legal name. No preferred names will appear in Workforce for any employee.

The time entry window provides the options necessary for completing time entry. From this window, depending on your role, you can perform one or more of the following tasks:

- Enter/view time on your timesheet
- View your schedule (if applicable)
- View or acknowledge any exceptions (errors or warnings) about your timesheet
- View details of available time off
- See a preview summary of time entered on the timesheet

The following is an example of an employee time entry window. The exact appearance of the timesheet varies according to your Workforce configuration.
In most configurations, the top panel displays the Timesheet tab while the bottom panel includes tabs for Messages, Results, Schedule, Time Off, and more.

<table>
<thead>
<tr>
<th>Date</th>
<th>Exception Message</th>
<th>Severity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sat 03/01</td>
<td>10.0 hours reported exceeded 8.0 Standard Daily Hour(s) for the day.</td>
<td>Warning</td>
</tr>
<tr>
<td>Sat 03/01 - Fri 03/09</td>
<td>32.2 hours reported is less than 40.0 Standard Weekly Hour(s) for the week.</td>
<td>Warning</td>
</tr>
</tbody>
</table>

Notice the following user interface features:

- Hover the pointer on the line separating the panels to activate the “adjust height” control. Click and drag the line up or down to adjust the relative height of the panels.
- Click on the arrow to hide the bottom panel. Click it again to display it.
- Use the scrollbar to access parts of the timesheet which are not currently visible.

**Function Buttons**
Several buttons reside at the top of your timesheet. These buttons execute certain program functions.

**Button** | **Button Name** | **Function**
--- | --- | ---
| ![Date Selector](306x73) | Period Selector | Selects the pay period to view. Click the calendar icon to access a pop-up calendar from which to select a Pay Period. |
| ![Submit](306x73) | Submit | Sends your completed timesheet to your manager for approval. |
| ![Save](306x73) | Save | Saves your timesheet data. This is typically done every time you enter new data or make changes. An orange ‘save’ button indicates you have changes on the page you need to save. |
The More button reveals the Print, Print Preferences, and Reload Data buttons. The Print Preferences function enables you select the components to be printed:

Reload Data refreshes the timesheet with the previously saved data.

View
Select the List View, Day View, or Table View of the timesheet. The view you select alters the presentation of the data on the Timesheet tab.

Calendar
Opens an interactive calendar from which you can navigate to a specific date or pay period. Additionally, this calendar may be configured to display days containing timesheet exceptions or planned time off. Click the question mark icon to access a legend that details the colors used in the calendar.
Changing the Pay Period
The pay period selector allows you to move forward or backward one period at a time, using the arrow icons, or to select a specific period to move to using the calendar icon.
1. Click the respective arrow on the **Pay Period** date range bar to retreat or advance a pay period.

2. Click the **Pay Period** date range bar to access a pop-up calendar, and then select a pay period or click the **Default Period** button.

3. Click anywhere in the row in which you want to enter or modify time.
4. Record your time and attendance information (see *Entering In/Out and Elapsed Time*).
5. Click the **Save** icon after every timesheet change.
6. Click the **Submit** icon at the end of every pay period to send your time and attendance information to your manager for payroll processing.

**Notice:** Falsification of timesheets, whether submitting or approving, can be grounds for immediate termination.
Timesheet Views

Workforce provides views (or formats) for displaying timesheet information: List View and Table View. Each view displays timesheet information for an entire Pay Period. Your ability to view any or all depends on your Workforce configuration. Select the respective view through the View button.

List View
The List View is the default view; it displays the days in the selected Pay Period as a list.

![List View Example](image1)

Totals per time slice appear on the right side of the window, with the sum total for the Pay Period displayed in the bottom right corner.

Table View
The Table View eliminates the need to enter repetitive information for each entry on your timesheet. For example, instead of selecting a pay code for each day, you can enter this information once in Table View and simply enter hours for each day of the Pay Period.

![Table View Example](image2)

Totals per pay code appear on the right side of the window, and totals for each day at the bottom of the window.
Information Tabs

The time entry layout shows one or more information tabs, depending on your role.

**Messages Tab**

The Messages Tab displays exception messages. An exception is a conflict noted between your time and attendance information and the rules under which your timesheet is processed. Exceptions generate messages which appear in the Messages tab on the Time Entry window. A common exception message would include entering less than forty hours in a week or trying to overdraw vacation time. Some messages are informational and require no action; others require a satisfactory resolution before the timesheet can be successfully submitted. Error level exceptions must be corrected before the respective time is paid.

Each exception message shows the:

- Date of the exception
- Exception message describing the problem
- Severity of the exception (Informational, Error, or Warning)
- Any action that may be required

Exception messages are color-coded to identify the level of severity:

- **White**: No exceptions or only informational messages present
- **Yellow**: Warnings present
- **Red**: Errors present

By default, exception messages are displayed in decreasing order of severity.

The rank of severity codes, from highest to lowest, is as follows:

<table>
<thead>
<tr>
<th>Severity Level</th>
<th>Field Options</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Most Severe</strong></td>
<td>Error – entire timesheet not paid/held</td>
</tr>
<tr>
<td></td>
<td>Error – record not paid</td>
</tr>
<tr>
<td></td>
<td>Warning – paid differently than entered</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
</tr>
<tr>
<td><strong>Least Severe</strong></td>
<td>Informational message – action may be required</td>
</tr>
<tr>
<td></td>
<td>Informational message – no action required</td>
</tr>
</tbody>
</table>

Time entries associated with exceptions appear on the timesheet marked with a colored pin.

1. Click the pin to display the exception message.
Time Off Tab
For any given bank, notice the interface functions in the following example:
1. Click the **Show Details** link in the lower right corner of a bank to see more details about the period’s bank transactions.

2. Click the **Hide Details** link to return to the summary view.

Results Tab
The Results Tab shows the calculated results of the data input on the main timesheet, including overtime, shift premiums, etc. User-controlled grouping capabilities are provided on this tab. All columns will be available for grouping, by default the data will be grouped by Pay Code. The **Results** tab reports the calculated results of the data input on the main timesheet, including overtime, shift premiums, etc.
- You can sort the data according to any column. By default, the data is sorted by **Work Date**. Click a column title to display the sorting arrow and sort in increasing order. Click it again to sort in decreasing order. All columns can be sorted.

- Click and drag the line separating two columns to modify the width of the left-hand column.

- Click and drag a column title to change the display order of the column.

- Click the arrow on top of the right-hand scroll-bar to display the menu that allows you to show/hide columns by checking or un-checking the appropriate check boxes.
Basic Time Entry
To enter time into timesheets, follow these steps.
1. From the Home Screen, select the My Timesheet link to open your timesheet.
2. Display the body of your timesheet using the default view or the view of your choice.
3. Ensure that the correct pay period displays.
4. Click anywhere in the row in which you want to enter or modify time.
5. Record your time and attendance information (see Entering In/Out and Elapsed Time below).
6. Click Save after every timesheet change.
Entering In/Out and Elapsed Time

A pay code is the category to which your hours are assigned. Different categories of employees have access to different pay codes.

1. Click in a **Pay Code** cell to see the drop-down list of pay codes you can access. If a pay code cannot be modified, it will appear with a shaded grey background and the cursor will change into a “Stop” symbol when placed over that row:

2. Select a **Pay Code** and enter the time in the **Hours** column.

   - For pay codes associated with elapsed time (if applicable), simply enter the number of hours. For example: Paid Leave Unscheduled, comp time, etc.

   - For pay codes associated with In/Out times, enter the In time on the first row of the **Hours** column and the Out time on the second row.
     
     - In/Out times can be entered in a variety of ways, for example:
       - Enter “5” on the first row and click outside the cell. The system will interpret the time as 5 a.m. and enter it on the timesheet in the correct format.
       - Enter “Xp” (where X is a number from 1 to 12) to enter p.m. times.
       - 5 p.m. can also be entered as “17”.

   - Work Elapsed hours are prepopulated onto timesheets based on salaried employees’ FTE percentage, i.e. if fulltime 1.0FTE working days would display 8-hours of Work Elapsed automatically.

   **Note:** A **Pay Code** is the category to which your hours are assigned. Different categories of employees have access to different pay codes.

---

**Note:** Employees can only enter paid leave unscheduled on their timesheet. Paid leave scheduled is automatically entered on the timesheet once the manager approves the request through the Request Time Off function.
- The system prevents you from entering out times that are before in times or in times that are after out times. The system will highlight the error and display a warning message:

<table>
<thead>
<tr>
<th>In/Out</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00</td>
<td></td>
</tr>
<tr>
<td>08:00 am</td>
<td></td>
</tr>
<tr>
<td>07:00 am</td>
<td></td>
</tr>
</tbody>
</table>

- For shifts which start on the previous day, type in “-“ (the minus sign) before the time; for shifts that end the next day, type in “+” (the plus sign).

---

**Monthly employee paid by supplemental payment**

If you are a monthly paid employee that does work for another department and they pay you with a supplemental payment on the monthly payroll, you will need to enter the elapsed hours that you worked on your timesheet, select the department you did the work for and add a comment that explains what the extra work was.

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**Activity Tracking**

If you perform separate tasks, you can differentiate the hours worked as long as your department has requested this functionality for your area. In Workforce, Activity Tracking (sometimes referred to as “Labor Distribution” or “LD”) is used to charge worked hours to labor categories. Fields are present on the timesheet for capturing Activity Tracking information. Employees may enter values directly in the fields or select from pull down lists. Entries are validated when saving the timesheet.

<table>
<thead>
<tr>
<th>Department</th>
<th>Project</th>
<th>Work Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADAE Architectural &amp; Engineering</td>
<td>13-07 Imhoff Road Reconstruction</td>
<td></td>
</tr>
</tbody>
</table>
Comments Field
Use the **Comments** field to enter additional information related to a particular time entry. Click the field to enter text.

In the **Table View**, the comments are accessible for a selected row by clicking the arrow.

Another method of accessing the Comments field is to press Shift + Enter. This hotkey toggles the field open and closed.

The **Comments** field in **Table** view:

The **Comments** field in **List** view:
Approving Timesheets

Managers can approve hours for individual employees or for an entire group. When you review employee hours, the system allows you to see whether an employee’s timesheet contains any exception messages.

Timesheets with errors need attention before approval. You can choose to open and edit timesheets to correct any condition causing an exception, to reject timesheets and direct employees to correct them, or approve them despite exceptions. If there is a mixture of error-free timesheets and timesheets with exceptions, you have the option of approving the error-free timesheets immediately. The primary focus of approving or rejecting hours is to correct timesheets to eliminate exceptions.

CAUTION: It is always recommended for a supervisor to return a timesheet to an employee and have the employee make the correction/change. There are some instances where the employee is unable to make the correction (ex. Time/web clock punches) and the supervisor must update the employees’ timesheet. In these instances, be sure to note in the comments why you are making the change and keep back up for your records.

7. To approve or reject employee time, select Time Entry ➔ Approve Timesheets. The Approve Timesheets window appears.

8. From the assignment tree, select the group for which you want to approve or reject hours.

9. The Approve Current Timesheets window appears. The names of the employees in the group populate the main window.

10. You can view an employee’s timesheet by clicking on the row of the respective employee.

11. If you would like to view timesheets ending on a different date than the default (the current date), do the following:
I. Select the checkbox in the Employees Active On field. A pop-up calendar appears.

II. Select a different date. The window updates with timesheet information for the period containing the date you selected.

III. If you would like to return to the current date, deselect the checkbox in the Employees Active On field.

12. To approve employee timesheets, do the following:

I. To approve an individual employee’s hours, select the Approve checkbox in the Manager’s Approval field. The Approve button for an accepted timesheet includes a green check mark.

   ![Approval](image)

   This is a toggle; you can click it again to undo the approval.

II. If the timesheet data indicates that all timesheets have been submitted without any errors or exceptions that will prevent you from approving them, you can approve them at once using the Approve All button.

III. If the timesheet data indicates a mixture of error-free timesheets and timesheets with exceptions, you can approve the error-free timesheets immediately by checking the box for Manager’s Approval. Of course, you may choose to correct all timesheet errors first, and then approve all employees at once.

13. Click Save Approvals.

   The hours for the applicable employees are saved for the specified work period. When employees access their timesheet for that work period, a note appears informing them that the hours have been approved. They will not be able to enter changes to their timesheet for that work period.

   **Notice:** Falsification of timesheets, whether submitting or approving, can be grounds for immediate termination.
Rejecting Timesheets
To reject an employee timesheet, do the following:

14. Click the **Reject** timesheet button in the **Manager Approval** field.

15. The **Reject Timesheet** window appears.

16. If the employee has an email address on file you can send an email notification to the employee about their rejected timesheet. Complete the fields in the **Reject Timesheet** dialog, using the following table as a guideline.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notify</td>
<td>The employee to be notified about the rejected timesheet.</td>
</tr>
<tr>
<td>Email subject</td>
<td>The subject title of the email to be sent to the employee. (The email subject can be changed.)</td>
</tr>
<tr>
<td>Email message</td>
<td>A message to convey to the employee about the rejected timesheet.</td>
</tr>
<tr>
<td>Comments</td>
<td>Additional information about the rejected timesheet.</td>
</tr>
</tbody>
</table>

17. Do one of the following:

- Click **Reject** to reject the timesheet and send the e-mail message.
- Click **Close Window** to quit the **Reject Timesheet** window without rejecting the timesheet.
- Click **Undo** to rescind the previous rejection of a timesheet. This option is enabled only if you previously rejected the timesheet.

**Note:** Clicking **Undo** moves the timesheet to a neutral status. You can also undo a rejected timesheet by selecting the checkbox on the **Approve** button and clicking **Save Approval**. This method will save the timesheet as “approved.”
18. If you have rejected the timesheet, the Approve button is “grayed out.” Click **Save Approvals**. Once saved, the Approve button for a rejected timesheet is no longer “grayed out”.

19. Click the **History** button to view the approval or rejection history for an employee timesheet.

20. The **Approval History for Employee** window appears. The **Approval History** window displays the action taken, who took action, the date and time of the action, any e-mail messages sent, and comments made.

21. Review and click **Close Window**.
## Hourly PeopleSoft Earnings Codes

<table>
<thead>
<tr>
<th>Description</th>
<th>Code</th>
<th>When code would be used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Leave</td>
<td>ADM</td>
<td>When determined to be in the university’s best interest that an hourly employee not return to work for a specified period of time or designated emergency closing of the university.</td>
</tr>
<tr>
<td>Class Hours</td>
<td>CLS</td>
<td>Used to report hours that an hourly employee has been allowed to take as class hours.</td>
</tr>
<tr>
<td>Commission</td>
<td>COM</td>
<td>Pre-determined payments made solely on the sale of goods/services, approved by Compensation Services.</td>
</tr>
<tr>
<td>Compensatory Time Accrued</td>
<td>CPA</td>
<td>Alternative method to report overtime hours on hourly employees that work overtime and have agreed to accept compensatory time in lieu of overtime pay.</td>
</tr>
<tr>
<td>Compensatory Time Taken</td>
<td>CPT</td>
<td>Used to report hours taken by an hourly employee with an available compensatory time balance.</td>
</tr>
<tr>
<td>Extended Sick Leave</td>
<td>ESL</td>
<td>Used to report hours an hourly employee has taken while out on extended sick leave due to an extended personal illness requiring more than five days. It is assumed a person who is on ESL is eligible for FMLA and once the ESL code is used, FMLA will be tracked by the system.</td>
</tr>
<tr>
<td>Family &amp; Medical Leave with Pay</td>
<td>FML</td>
<td>Used to report hours an FMLA eligible hourly employee has taken while out on Family and Medical Leave when they have paid leave hours available. Employees who have no ESL will use this FML code. The FML code will also be used, the first 5 days before employees can access ESL hours. All FMLA hours will be tracked by the system.</td>
</tr>
<tr>
<td>Family &amp; Medical Leave without pay</td>
<td>FMN</td>
<td>Used to report hours an FMLA eligible hourly employee uses if they have no paid or extended sick leave or if they have exhausted all paid and Extended Sick Leave balances.</td>
</tr>
<tr>
<td>Holiday Leave</td>
<td>HOL</td>
<td>Used to report time hourly benefits eligible employees are excused from work with pay on days recognized by the university as holidays.</td>
</tr>
<tr>
<td>Jury Duty</td>
<td>JRY</td>
<td>Used to report time away from work due to being subpoenaed for jury duty or as a witness before a court of law, legislative committee or judicial body by a benefit eligible hourly employee.</td>
</tr>
<tr>
<td>Military Leave</td>
<td>MIL</td>
<td>Used for the first 30 days that an hourly employee has been called to active or inactive military duty during the current federal fiscal year.</td>
</tr>
<tr>
<td>On The Job Injury</td>
<td>OJI</td>
<td>Used to report hours off work due to an on-the-job injury. Any FMLA eligibility will be tracked by the system.</td>
</tr>
<tr>
<td>Overtime Earnings</td>
<td>OVT</td>
<td>Used to report time worked in excess of 40 hours in a week. Overtime hours will be paid at a rate of time and one-half of the hourly employee’s regular rate of pay. For the purpose of computing overtime pay, scheduled paid leave and holidays will be treated as hours worked.</td>
</tr>
<tr>
<td>PEAK Employees</td>
<td>PEK</td>
<td>Used to report hours worked for PEAK employees. Allows the general ledger interface to calculate amount owed for the PEAK administration fee based on the gross PEAK amount paid.</td>
</tr>
<tr>
<td>Paid Leave Scheduled</td>
<td>PLS</td>
<td>Used to report “approved” hours an hourly employee is off work.</td>
</tr>
<tr>
<td>Paid Leave Unscheduled</td>
<td>PLU</td>
<td>Hours an hourly employee is off work that were not approved in advance, such as calling in sick.</td>
</tr>
<tr>
<td>PEAK Overtime</td>
<td>POV</td>
<td>Used to report hours worked by PEAK employees once they have worked more than 40 hours in a week. POV will be paid at the rate of time and one-half for the time worked in excess of 40 hours per workweek.</td>
</tr>
<tr>
<td>Hourly Regular Earnings</td>
<td>RGR</td>
<td>Compensation for regular earnings reported by hourly employees.</td>
</tr>
<tr>
<td>Shift Differential</td>
<td>SFT</td>
<td>Salary for shift work (not flex time) that normally is at a different rate of pay.</td>
</tr>
<tr>
<td>Stipend</td>
<td>SPD</td>
<td>Used to pay employee additional pay based on performance when it is the employer’s discretion as to whether the employee receives the stipend.</td>
</tr>
<tr>
<td>Supplemental Pay</td>
<td>SPM</td>
<td>Used to pay a current hourly employee for work performed in another department on campus.</td>
</tr>
<tr>
<td>Terminal Paid Leave</td>
<td>TPL</td>
<td>Used to report payment of paid leave for an hourly employee at the time of termination.</td>
</tr>
</tbody>
</table>

**Notes:**
1) Supplemental Earnings are one-time payments and are to be entered on the Time & Earnings screens.
2) Additional Pays are a specific amount of pay for a short period of time not considered a part of an employee’s base pay (e.g., Additional duties for a specified period of time). Not entered on Time & Earnings screens. Must be submitted on a PAF.
# Monthly PeopleSoft Earnings Codes

## Monthly Earnings Codes

<table>
<thead>
<tr>
<th>Description</th>
<th>Code</th>
<th>When code would be used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Leave</td>
<td>ADL</td>
<td>Used when it is determined to be in the best interest of the university that a monthly employee not return to work for a specified period of time or for designated emergency closing of the university.</td>
</tr>
<tr>
<td>Class Hours</td>
<td>CLA</td>
<td>Used to report hours that a monthly employee has been allowed to take as Class Hours.</td>
</tr>
<tr>
<td>Extended Sick Leave</td>
<td>XSL</td>
<td>Used to report hours a monthly employee has taken while out on Extended Sick Leave due to an extended personal illness requiring more than five days. Also used in reporting hours a faculty member has taken while out on Extended Sick Leave due to personal illness.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Faculty members can access their Extended Sick Leave immediately. It is assumed a person who is on ESL is eligible for FMLA and once the ESL code is used, FMLA will be tracked by the system.</td>
</tr>
<tr>
<td>FMLA With Pay</td>
<td>PFM</td>
<td>Used to report hours an FMLA eligible monthly employee has taken while out on Family and Medical Leave when they have paid leave hours available. Employees who have no ESL will use this FML code. The FML code will also be used the first 5 days before employees can access ESL hours. All FMLA hours will be tracked by the system.</td>
</tr>
<tr>
<td>FMLA Without Pay</td>
<td>UFM</td>
<td>Used to report hours an FMLA eligible monthly employee uses if they have no Paid Leave or ESL or if they have exhausted all paid leave and ESL balances. All FMLA hours will be tracked by the system.</td>
</tr>
<tr>
<td>Holiday</td>
<td>HLD</td>
<td>Used to report time monthly benefits eligible employees are excused from work with pay on days recognized by the university as Holidays.</td>
</tr>
<tr>
<td>Jury Duty</td>
<td>JUR</td>
<td>Used to report time away from work due to being subpoenaed for jury duty or as a witness before a court of law, legislative committee or judicial body by a benefit eligible monthly employee.</td>
</tr>
<tr>
<td>Military Leave</td>
<td>MLT</td>
<td>Used for the first 30 days that a monthly employee has been called to active or inactive military duty during the current federal fiscal year.</td>
</tr>
<tr>
<td>On The Job Injury</td>
<td>OJI</td>
<td>Used to report hours off work due to an on-the-job injury. Any FMLA eligibility will be tracked by the system.</td>
</tr>
<tr>
<td>PEAK Supplemental Earnings</td>
<td>PSL</td>
<td>Used to pay a current (monthly) employee for PEAK work performed in another department on campus.</td>
</tr>
<tr>
<td>Stipend</td>
<td>SPD</td>
<td>Used for payments made for performance based accomplishments.</td>
</tr>
<tr>
<td>Paid Leave Scheduled</td>
<td>SPL</td>
<td>Used to report “approved” hours a monthly employee is off work.</td>
</tr>
<tr>
<td>Supplemental Earnings</td>
<td>SUP</td>
<td>Used to pay a current monthly employee for work performed in another department on campus.</td>
</tr>
<tr>
<td>Terminal Paid Leave</td>
<td>TPM</td>
<td>Used to report payment of paid leave for a monthly employee at the time of termination.</td>
</tr>
</tbody>
</table>

Notes: 1) Supplemental Earnings are one-time payments and are to be entered on the Time & Entry screens. 2) Additional Pays are a specific amount of pay for a short period of time not considered a part of an employee’s base pay (e.g., Additional duties for a specified period of time). Not entered on Time & Entry screens. Must be submitted on a PAF.
<table>
<thead>
<tr>
<th>Pay Code</th>
<th>Hourly/Salaried</th>
<th>When Code Would Be Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Leave</td>
<td>Hourly &amp; Salaried</td>
<td>Used when it is determined to be in the best interest of the university that an employee not return to work for a specified period of time or for designated emergency closing of the university. Admin leave for full-day closures will be applied by main Payroll based on employee FTE determination, partial day closures will be applied by the department directly.</td>
</tr>
<tr>
<td>Banked Holiday</td>
<td>Hourly &amp; Salaried</td>
<td>Used to “Bank” holiday hours for benefits eligible employees are excused from work with pay on days recognized by the university as holidays.</td>
</tr>
<tr>
<td>Class Hours</td>
<td>Hourly &amp; Salaried</td>
<td>Used to report hours that an hourly employee has been allowed to take as class hours.</td>
</tr>
<tr>
<td>Clock Time</td>
<td>Hourly</td>
<td>Worked “regular” time that is reported using a Time Clock terminal or the Web Clock feature.</td>
</tr>
<tr>
<td>Commission</td>
<td>Hourly</td>
<td>Pre-determined payments made solely on the sale of goods/services, approved by Compensation Services.</td>
</tr>
<tr>
<td>Comp Time</td>
<td>Hourly</td>
<td>Used to report hours taken by an hourly employee with an available compensatory time balance.</td>
</tr>
<tr>
<td>Comp Time Banked</td>
<td>Hourly</td>
<td>Alternative method to report overtime hours on hourly employees that work overtime and have agreed to accept compensatory time in lieu of overtime pay.</td>
</tr>
<tr>
<td>Comp Time Payout</td>
<td>Hourly</td>
<td>Comp Time that is paid out to the employee after exceeding the 90-hour limit, or 1-year of accrual balance.</td>
</tr>
<tr>
<td>Extended Sick Leave</td>
<td>Hourly &amp; Salaried</td>
<td>Used to report hours an hourly employee has taken while out on extended sick leave due to an extended personal illness requiring more than five days. It is assumed a person who is on ESL is eligible for FMLA and once the ESL code is used, FMLA will be tracked by the system.</td>
</tr>
<tr>
<td>FMLA With Pay</td>
<td>Hourly &amp; Salaried</td>
<td>Used to report hours an FMLA eligible hourly employee has taken while out on Family and Medical Leave when they have paid leave hours available. Employees who have no ESL will use this FML code. The FML code will also be used, the first 5 days before employees can access ESL hours. All FMLA hours will be tracked by the system.</td>
</tr>
<tr>
<td>FMLA Without Pay</td>
<td>Hourly &amp; Salaried</td>
<td>Used to report hours an FMLA eligible hourly employee has taken while out on Family and Medical Leave when they have paid leave hours available. Employees who have no ESL will use this FML code. The FML code will also be used, the first 5 days before employees can access ESL hours. All FMLA hours will be tracked by the system.</td>
</tr>
<tr>
<td>Holiday</td>
<td>Hourly &amp; Salaried</td>
<td>Used to report time hourly benefits eligible employees are excused from work with pay on days recognized by the university as holidays. Holiday closure time is pre-populated onto each benefit eligible employees’ timesheet based on FTE determination.</td>
</tr>
<tr>
<td>Intermittent Leave of Absence</td>
<td>Hourly &amp; Salaried</td>
<td>FMLA - intermittent leave may require an employee to take time off in separate periods of time due to a single illness or injury as determined by the health...</td>
</tr>
<tr>
<td>Category</td>
<td>Type</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Investigative Leave</td>
<td>Hourly &amp; Salaried</td>
<td>Authorization of up to 5-days of admin leave while conducting an internal employee investigation, approval required by the CHRO.</td>
</tr>
<tr>
<td>Jury</td>
<td>Hourly &amp; Salaried</td>
<td>Used to report time away from work due to being subpoenaed for jury duty or as a witness before a court of law, legislative committee or judicial body by a benefit eligible hourly employee.</td>
</tr>
<tr>
<td>Meal Break</td>
<td>Hourly</td>
<td>Used to report ‘meal break’ or lunch period time for the day.</td>
</tr>
<tr>
<td>Military Leave</td>
<td>Hourly &amp; Salaried</td>
<td>Used for the first 30 days (240 hours) that an hourly employee has been called to active or inactive military duty during the current federal fiscal year. The leave with pay will not be charged against paid leave or other accrued benefits.</td>
</tr>
<tr>
<td>Military Leave Without Pay</td>
<td>Hourly &amp; Salaried</td>
<td>Military Leave Without Pay (LWOP) after initial 240 annual hours have been exhausted.</td>
</tr>
<tr>
<td>Natural Disaster</td>
<td>Hourly &amp; Salaried</td>
<td>Used to report time in accordance with a ‘natural disaster’ as provisioned by the president.</td>
</tr>
<tr>
<td>Non Cash Benefit</td>
<td>Hourly &amp; Salaried</td>
<td>Used to report a ‘non cash benefit’ that is afforded to an employee. The value for the NCB will be added to the employees’ gross income amount.</td>
</tr>
<tr>
<td>On Call</td>
<td>Hourly</td>
<td>On call is used to report travel time for employees who respond to calls. 2-hour minimum policy – counts toward Overtime and Leave accrual.</td>
</tr>
<tr>
<td>On the Job Injury (OJI)</td>
<td>Hourly &amp; Salaried</td>
<td>Used to report hours off work due to an on-the-job injury. Any FMLA eligibility will be tracked by the system.</td>
</tr>
<tr>
<td>On the Job Injury Without Pay</td>
<td>Hourly &amp; Salaried</td>
<td>Used to report hours off work due to an on-the-job injury. Any FMLA eligibility will be tracked by the system. Unpaid code.</td>
</tr>
<tr>
<td>Overtime</td>
<td>Hourly</td>
<td>Used to report time worked in excess of 40 hours in a week. Overtime hours will be paid at a rate of time and one-half of the hourly employee’s regular rate of pay. For the purpose of computing overtime pay, scheduled paid leave and holidays will be treated as hours worked.</td>
</tr>
<tr>
<td>Paid Leave Scheduled</td>
<td>Hourly &amp; Salaried</td>
<td>Used to report “approved” hours an hourly employee is off work.</td>
</tr>
<tr>
<td>Paid Leave Unscheduled</td>
<td>Hourly</td>
<td>Hours an hourly employee is off work that were not approved in advance, such as calling in sick.</td>
</tr>
<tr>
<td>Peak Supplemental</td>
<td>Hourly</td>
<td>Used to pay a current hourly ‘PEAK’ employee for work performed in another department on campus.</td>
</tr>
<tr>
<td>Severe Weather Coordinator</td>
<td>Hourly &amp; Salaried</td>
<td>This code is for our Severe Weather Coordinators, the university has trained around 60 employees to act as Severe Weather Coordinators. When weather conditions are favorable for severe weather, these coordinators will be activated and serve as coordinators at the campus buildings designated as a ‘refuge area’. These employees will receive an hourly rate (not subject to overtime) above and beyond their regular pay for serving in this capacity.</td>
</tr>
<tr>
<td>Stand By</td>
<td>Hourly</td>
<td>Stand By is applied for on-call employees that do not report. Standby is limited to one entry per day with a maximum of 3-hours total.</td>
</tr>
<tr>
<td>Shared Leave Donated</td>
<td></td>
<td>Donated leave available to ‘approved’ benefits eligible Faculty/Staff as determined by the Shared Leave Committee.</td>
</tr>
<tr>
<td>Description</td>
<td>Type</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Stipend</td>
<td>Hourly</td>
<td>Used to pay employee additional pay based on performance when it is the employer’s discretion as to whether the employee receives the stipend.</td>
</tr>
<tr>
<td>Stop Auto LOA Leave Deduction Today</td>
<td>Hourly &amp; Salaried</td>
<td>Used to ‘stop’ the auto deduction of Paid Leave or Extended Sick Leave during a continuous FMLA event. The use of this code will result in a change to an unpaid (LWOP) status.</td>
</tr>
<tr>
<td>Supplemental Pay</td>
<td>Hourly</td>
<td>Used to pay a current hourly employee for work performed in another department on campus.</td>
</tr>
<tr>
<td>Terminal Paid Leave</td>
<td>Hourly &amp; Salaried</td>
<td>Used to report payment of paid leave for an hourly employee at the time of termination.</td>
</tr>
<tr>
<td>Work Elapsed</td>
<td>Salaried</td>
<td>Daily hour value applied to Salaried employee timesheets in Workforce based on employee FTE. Used to report time worked each day for employee activity tracking and ACA purposes.</td>
</tr>
<tr>
<td>Worked In/Out</td>
<td>Hourly</td>
<td>Hourly regular time entry in Workforce. Used to report time Worked In and Out for each day/shift.</td>
</tr>
</tbody>
</table>
Payroll Extracts

The Payroll Extract report provides the department with payroll auditing information including the dollar amount and position number that the employee will be paid from for that payroll ending date.

Note: if you are unable to run extracts due to a security provision in FAMS please follow the HCM & FAMS security directions for adding a representative role as outlined above under User Roles for HCM Security.

Issues with the rate of pay on the extract should be reported to your payroll technician. The rate of pay displayed is the rate appointed on Job Data. If paying a different rate of pay such as PEAK, multiply the rate you are paying times the hours worked and verify against the amount paid. Issues with the account number the wages are paying or not paying from should be reported to the Budget Office unless it is a supplemental payment or PEAK.

It is extremely important that the extracts be thoroughly reviewed during the period listed according to the payroll deadlines that are posted on the payroll website. Payroll can only make corrections while extracts are open. Payroll depends on the departments to notify them of any issues during that time.

If you have created an ePAF to terminate an employee, verify that the ePAF has been processed and the employee is not on the payroll. Contact your payroll technician if the ePAF has not been processed or the employee is being paid. Payroll can turn the employees pay off or reduce the amount, so the employee is not overpaid.

If you have created an ePAF to decrease an employee’s rate of pay, verify that they are being paid the appropriate rate to avoid overpaying an employee. Contact your payroll technician if an employee is being overpaid.

Payroll can correct data entry errors. Your payroll technician will need the original time sheet, monthly certification, or supplemental form in order to make the changes.

The payroll actuals reports provide departments with a final report that shows how employees’ earnings were distributed when sent to the General Ledger. Actuals are found through OU Mange Time and Earnings/OU Reports/Payroll Actuals. The actuals report cannot be run until three (3) days before the actual pay date.
Running Payroll Extracts

Accessing Departmental Payroll Extracts:

**Step 1:** Log into PeopleSoft

**Step 2:** Select **OU Manage Time and Earnings** from the PeopleSoft Menu, follow path:

**Step 3:** Select **OU Reports**

**Step 4:** Payroll Extract by Account Number

Main Menu > OU Manage Time and Earnings > OU Reports > Payroll Extract by Account Number

If you have run an extract before, select or type in your run control ID (If not, follow instructions on next page)
1. Select the **Add a New Value** tab at the top of the page
2. Type in any number or letter you choose to be your run control ID
3. Select **Add**
1. Type in the Pay Period End Date
2. Select either the hourly or monthly radio button
3. Select if you want to run all accounts or just selected accounts
4. If you want to select specific accounts, use the plus or minus buttons to add or remove accounts
5. Select **Run**
1. Leave the **Server Name**, **Recurrence**, and **Time Zone** blank
2. **Type** should equal Web
3. **Format** should equal PDF (these usually default in but always check to make sure they are correct)
4. Select [OK]
1. Select Process Monitor

1. Click the Refresh button until the Run Status shows success and the Distribution Status shows that the report has posted
1. Click on the details link to the report you wish to view

1. Click on the **View Log/Trace**
1. Click on the **PDF** file link. Another window will open showing your report.
Can a department have an internal policy that sets a minimum number of hours an employee needs to have before they can use leave time?

Yes. This policy would need to be approved by Employee Relations and the VP office.

If a student employee does not work one week should he/she turn in a timesheet with no hours?

Yes.

What are sooner credits?

As one part of your total compensation package, “Sooner Credits” are the University’s contribution to your benefits. The Sooner Credits are used to pay premiums for the core benefits package:

- Medical
- Dental
- Life Insurance
- Accidental Death & Dismemberment

Full-time employees are benefits eligible employees and receive 100% of the Sooner Credits provided by the University. Part-time employees are benefit eligible if they work at least 20 hours per week. The Sooner Credit amount received is based on the employee’s FTE (Full Time Equivalent) as shown below:

<table>
<thead>
<tr>
<th>Full Time Equivalent (FTE)</th>
<th>.50 - .59</th>
<th>.60 - .75</th>
<th>.76 - 1.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits premiums covered by Sooner Credits</td>
<td>50%</td>
<td>75%</td>
<td>100%</td>
</tr>
</tbody>
</table>

An hourly employee needs to be terminated if he/she hasn’t worked for what period of time?

6 months. Payroll and Employee Services can run a query for your department that shows the last time your employees were paid.
What is the correct procedure to follow if you need to transfer an employee from one position to another, but you didn’t receive notification until after the effective date of the change?

1. Process a retroactive ePAF for the transfer. (record must show the correct information)
   a. No change in pay rate – submit PET to move the money
   b. Change in pay rate – let Payroll take care of the adjustments
   c. *when in doubt, contact your Payroll representative

Extracts are not in department order. ETA for the fix?

IT is aware of the problem. ETA is unknown at this time.

How do we know the actual accrual is current? This month or last month’s accrual?

Monthly accrual will always be one month behind. When the accrual screen shows April 30th – the balance does not include the accrual for April or any paid leave used in April.