CONTENTS

New Employee Information
New Hire and Rehire Paperwork
Completing Paperwork Out-of-State
Affiliate Appointments

University PeopleSoft Processes & Security
HCM/HRMS and ePAF Security
  How to Obtain Access to Payroll Systems
  User Roles for (HCM/HRMS) Security
  ePAF Security/Access
  Directions for Security Self Service ePAF Role Form
  Removing Security ePAF Roles
  Removing Department ID from Employee Role Access
  Account Sponsor & Internal Auditing Rules
PeopleSoft – Commonly Used Screens & Processes
  Employee Look Up
  Employee Name Changes
  Job Data
  Compensation / Earnings Statement

Personal Action Forms
  Electronic PAF (ePAF) vs Paper PAF
  ePAF (How To)
    Worklist
    View Employee ePAF & ePAF History
    ePAF Terminology
    Resubmit, Change, or Withdraw an ePAF
    Evaluate an ePAF
    Hire Form
    Job change
    Change Status
  Miscellaneous PAF Information
    PAF Tips
    Frequently Used Action/Reasons

University Employee Payment Types
Payment Procedures & Types
  Contract Pay for Faculty
    Pay Change 9/9 Contract example
    Pay Change 9/12 Contract example
  Paid Leave
Special Payments
  Awards
  Supplemental Payments
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
- 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 can be directed to (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 departmental users. If an employee will be preparing ePAF’s, running reports or queries, or viewing all information for authorized divisions at or below the department level, they must have this role. This role is assigned by IT.

- **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. The Account Sponsor must grant the user access to run reports for each account/department number in the Financial Account Management System (FAMS).

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.

7

Return to Contents
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
eForm ID: 398364

Roles
<table>
<thead>
<tr>
<th>Role Name</th>
<th>Personalize</th>
<th>Find</th>
<th>Revoke</th>
<th>Requested Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>GT_OU_DD</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OU_Talen_Preparer</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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/] 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.

![Account Sponsor & Internal Auditing Rules Table]

**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
PeopleSoft – Commonly Used Screens & Processes

Employee Look Up

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.
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 Adjunct 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, mboydstun@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 and ePAF:

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

Evaluate and 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 and 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

<table>
<thead>
<tr>
<th>Field</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Empl ID</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>Empl Record</td>
<td>=</td>
<td></td>
</tr>
<tr>
<td>eForm ID</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>Workflow Form Type</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>Workflow Form Status</td>
<td>=</td>
<td></td>
</tr>
<tr>
<td>Original Operator</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>Originated Date From</td>
<td>&gt;=</td>
<td></td>
</tr>
<tr>
<td>Originated Date Thru</td>
<td>&lt;=</td>
<td></td>
</tr>
<tr>
<td>Last Operator</td>
<td>begins with</td>
<td></td>
</tr>
</tbody>
</table>

- **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.

Withdrawn: 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

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.

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.

Return to Electronic Personal Action Form (ePAF) Home Page
• 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.
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:

Hire an Employee

Step 4 of 9: Job Information

**Personal Info**

Name: Smith, John

**Empl ID:** 468184

**Hire Form Data**

*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
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
Step 6:

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 employer must also complete a loyalty oath. In addition, please select if the employee is or is not a transfer from HSC.
Job Change

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.
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/Working Days in Month</th>
<th>PS</th>
<th>Monthly Amt</th>
<th>Goal Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remaining</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>August</td>
<td>9.000000</td>
<td>0.523810</td>
<td>3,492.06</td>
<td>56,507.94</td>
</tr>
<tr>
<td>September</td>
<td>8.476190</td>
<td>1.000000</td>
<td>6,666.67</td>
<td>49,841.27</td>
</tr>
<tr>
<td>October</td>
<td>7.476190</td>
<td>1.000000</td>
<td>6,666.67</td>
<td>36,507.94</td>
</tr>
<tr>
<td>November</td>
<td>6.476190</td>
<td>1.000000</td>
<td>6,666.67</td>
<td>23,174.60</td>
</tr>
<tr>
<td>December</td>
<td>5.476190</td>
<td>1.000000</td>
<td>6,666.67</td>
<td>16,507.94</td>
</tr>
<tr>
<td>January</td>
<td>4.476190</td>
<td>1.000000</td>
<td>6,666.67</td>
<td>9,841.27</td>
</tr>
<tr>
<td>February</td>
<td>3.476190</td>
<td>1.000000</td>
<td>6,666.67</td>
<td>3,174.60</td>
</tr>
<tr>
<td>March</td>
<td>2.476190</td>
<td>1.000000</td>
<td>6,666.67</td>
<td>0.00</td>
</tr>
<tr>
<td>April</td>
<td>1.476190</td>
<td>1.000000</td>
<td>6,666.67</td>
<td>0.00</td>
</tr>
<tr>
<td>May</td>
<td>0.476190</td>
<td>0.476190</td>
<td>3,174.60</td>
<td>0.00</td>
</tr>
</tbody>
</table>

60,000.00  30,158.74

Blended Rate

| Aug – Dec | $30,158.74 |
| Jan – May | $34,184.82 |

$64,343.56

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>
<tr>
<th>Pay Periods</th>
<th>Contract Days/Working Days in Month</th>
<th>PS</th>
<th>Monthly Amt</th>
<th>Goal Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remaining</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>August</td>
<td>9.000000</td>
<td>0.523810</td>
<td>4,074.07</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>
</tbody>
</table>

70,000.00  34,814.82

Remaining Payments

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>All of Staff</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 recipient's 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.

- 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.

> 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.

> 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)

**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.
### Additional Pay Accounts

<table>
<thead>
<tr>
<th>Combination Code</th>
<th>Description</th>
<th>Percentage</th>
<th>Monthly Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 122787903-605005</td>
<td>CCE DEVELOPMENTAL MATH</td>
<td>100.000</td>
<td>825.00</td>
</tr>
</tbody>
</table>

---

### Titled Data

#### Academic Rank: EEO Job Group:

#### Academic Regent Titles

<table>
<thead>
<tr>
<th>Department</th>
<th>From Date</th>
<th>End Date</th>
<th>Edit?</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACASNMATH</td>
<td>08/16/2016</td>
<td></td>
<td></td>
<td>INSTRUCTOR OF MATHEMATICS</td>
</tr>
</tbody>
</table>

---

### Form Messages

**Message Text:**

I acknowledge that I do not enter this additional pay through time entry.

---

### Comments

**Your Comment:**

**Comment History:**

- Shad Satterthwate
  - Thu, Jul 17, 04:50:37 PM
  - Approved by AD Satterthwaite
- Pam Sheppam

**View Transaction Log**

**Approve**  **Deny**  **Recycle**

**Held**

---

### Transaction Log

<table>
<thead>
<tr>
<th>Log Instance</th>
<th>Current Date/Time</th>
<th>Role Name</th>
<th>User ID</th>
<th>User Description</th>
<th>Form Action</th>
<th>Workflow Form Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>06/30/2017 8:20:45AM</td>
<td>Preparer</td>
<td>406127</td>
<td></td>
<td>Submit</td>
<td>Pending</td>
</tr>
<tr>
<td>2</td>
<td>06/30/2017 10:25:08AM</td>
<td>Account Sponsor</td>
<td>410756</td>
<td></td>
<td>Approve</td>
<td>Part Approv</td>
</tr>
<tr>
<td>3</td>
<td>07/05/2017 4:50:42PM</td>
<td>Dept Head</td>
<td>410743</td>
<td></td>
<td>Approve</td>
<td>Part Approv</td>
</tr>
<tr>
<td>4</td>
<td>07/05/2017 4:50:37PM</td>
<td>Dean/Director</td>
<td>410743</td>
<td></td>
<td>Approve</td>
<td>Part Approv</td>
</tr>
<tr>
<td>5</td>
<td>07/07/2017 9:00:53AM</td>
<td>Vice President</td>
<td>403969</td>
<td></td>
<td>Approve</td>
<td>Part Approv</td>
</tr>
</tbody>
</table>

---

**Return**
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

\( \frac{\$40,000}{9} = 4,444.44 \times \frac{1}{2} = 2,222.22 \) for May and August

Calculating Salary for June and July

Annual Rate of Pay divided by 9

\( \frac{\$40,000}{9} = 4,444.44 \) 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#.
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](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:

1. Complete the Emergency Check Request Form. It can be found on the Payroll website under PeopleSoft Codes & Payment Types.

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

3. Once the 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.

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

5. 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.

6. 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.

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

Payroll Schedules

The hourly and monthly pay schedules can be located on the Payroll website: 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>Benefits Deducted For</th>
<th>Payroll Begin Date</th>
<th>Payroll End Date</th>
<th>PAFs &amp; Backdated Time to Payroll</th>
<th>Time Entry Deadline</th>
<th>View Extracts 8:00 - 11:00</th>
<th>Check Issue Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOV</td>
<td>10/15/16</td>
<td>10/28/16</td>
<td>10/28/16</td>
<td>10/31/16</td>
<td>11/02/16</td>
<td>11/10/16</td>
</tr>
<tr>
<td>DEC</td>
<td>11/12/16</td>
<td>11/25/16</td>
<td>11/29/16</td>
<td>11/29/16</td>
<td>12/01/16</td>
<td>12/09/16</td>
</tr>
<tr>
<td>DEC</td>
<td>11/26/16</td>
<td>12/09/16</td>
<td>12/08/16</td>
<td>12/12/16</td>
<td>12/14/16</td>
<td>12/22/16</td>
</tr>
<tr>
<td>JAN</td>
<td>12/10/16</td>
<td>12/23/16</td>
<td>12/15/16</td>
<td>12/16/16</td>
<td>12/20/16</td>
<td>01/06/17</td>
</tr>
<tr>
<td>JAN</td>
<td>12/24/16</td>
<td>01/06/17</td>
<td>01/06/17</td>
<td>01/09/17</td>
<td>01/11/17</td>
<td>01/20/17</td>
</tr>
<tr>
<td>FEB</td>
<td>01/07/17</td>
<td>01/20/17</td>
<td>01/23/17</td>
<td>01/24/17</td>
<td>01/26/17</td>
<td>02/03/17</td>
</tr>
<tr>
<td>FEB</td>
<td>01/21/17</td>
<td>02/03/17</td>
<td>02/06/17</td>
<td>02/07/17</td>
<td>02/09/17</td>
<td>02/17/17</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.

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 a signed and dated time sheet for the current pay period. The time sheets should be given to the supervisor for signature. The signed time sheet should be submitted to the department payroll representative for processing.

Back Dated Time Sheets

Back dated time sheets should be completed to pay an employee for time worked in a previous pay period. The form can be located on the Payroll website under Norman Payroll Timesheets & Time Reporting Codes http://ou.edu/content/payroll/managers-and-coordinators/paying-your-employees.html.

The back dated time sheet should be completed with only the necessary changes that need to be made and submitted to the payroll. The original time sheet needs to be attached to the back dated time sheet and submitted to Payroll and Employee Services before the payroll deadline for the current pay period.

Back dated time must be entered by Payroll and Employee Services so time can be reported for the correct week and overtime is not incurred unless applicable. Departments can only enter time for the current pay period.

Monthly Certifications

Monthly employees are required to properly record leave time and/or holiday time on a signed and dated monthly certification at the end of each month. The monthly certification should be given to the supervisor for signature. The signed monthly certification should be submitted to the department payroll representative for processing.

Monthly certifications 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 an Add/Drop Form will need to be completed by your department to allow you to Enter/Approve time. The Add/Drop form will also need to be completed to remove access from an employee who no longer needs time entry privileges.
Hourly & Salaried Employee Timesheets

All time sheets must be signed and dated by the employee and supervisor.

**Hourly employees** - should record the time worked and leave taken during each pay period on the Hourly Time Sheet included in the PDF Forms listed below. Convert fractional hours from minutes to tenths using the hourly time conversion chart. Any time from a past pay period must be submitted using the back-dated time sheet.

**Salaried employees** should record leave taken each pay period on the Monthly Certification Time Sheet included in the PDF forms listed below.

**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](http://ou.edu/content/payroll/managers-and-coordinators/paying-your-employees.html)
Employee Hourly Time Entry – Hourly Time and Earnings

Step 1: Log into PeopleSoft

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

Step 3: Select Hourly Time and Earnings

Main Menu > OU Manage Time and Earnings > Hourly Time and Earnings

Step 4: If the Search Box comes up with information in any of the fields, select the yellow Clear button at the bottom of the page before proceeding

Step 5: To view all your hourly employees for payroll entry enter your Department ID and the Payroll Period End Date and press search

A list of all hourly employees in your department will appear below the Search Box. Select the first hourly employee listed.

OR

To view one employee in your department, enter your Department ID in the Department field and the employee’s ID in the EMPL ID field.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action (Week 1 Section)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Select the appropriate <strong>Earnings Code</strong> from Lookup choices. To view the available choices, select the magnifying class icon to the right of the appropriate field</td>
</tr>
<tr>
<td>2.</td>
<td>Enter the number of <strong>Hours</strong> for the selected earnings code. A complete list of earning codes and their definition is located on the payroll website. Select Payroll Managers &amp; Coordinators/ Hourly-Monthly Earnings Codes (Both page and PDF available) See Appendix C.</td>
</tr>
<tr>
<td>3.</td>
<td>If additional hours need to be entered for Week 1, click the yellow <strong>Plus</strong> button. A new row will be added. Repeat steps 1 and 2. To correct a data entry error, select the <strong>Minus</strong> button to remove, and then reenter the correct information. Do not try to &quot;space out&quot; the data in the fields. This will not work.</td>
</tr>
<tr>
<td>4.</td>
<td>Continue processing until all Week 1 hours for this employee have been entered.</td>
</tr>
<tr>
<td>Step</td>
<td>Action (Week 2 Section)</td>
</tr>
<tr>
<td>------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>5.</td>
<td>Select appropriate <strong>Earn Code</strong> from the Lookup choices.</td>
</tr>
<tr>
<td>6.</td>
<td>Enter number of <strong>Hours</strong> for selected Earnings Code.</td>
</tr>
<tr>
<td>7.</td>
<td>If additional hours need to be entered for Week 2, click the yellow <strong>Plus</strong> button to add a new row. Repeat steps 1 and 2.</td>
</tr>
<tr>
<td>8.</td>
<td>Continue processing until all Week 2 hours for this employee have been entered.</td>
</tr>
<tr>
<td>9.</td>
<td>After all hours have been entered; select the <strong>Save</strong> button at bottom of page.</td>
</tr>
<tr>
<td>10.</td>
<td><strong>If you entered your search by Department ID, the <strong>Next in List</strong> button will appear at the bottom of the page. You can select this button to bring up the next employee’s page. OR</strong></td>
</tr>
<tr>
<td></td>
<td><strong>If you entered your search by Employee ID, the <strong>Next in List</strong> button will not appear. You will have to select <strong>Return to Search</strong> button and enter the next employee’s ID number to access their page.</strong></td>
</tr>
</tbody>
</table>
Add Hourly Time & Earnings

**Step 1:** Log into PeopleSoft

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

**Step 3:** Select **Add Hourly Time and Earnings**

Main Menu > OU Manage Time and Earnings > Add Hourly Time and Earnings

**Step 4:** If the Search Box comes up with information in any of the fields, select the yellow **Clear** button at the bottom of the page before proceeding

**Step 5:** To view all your hourly employees for payroll entry enter your **Department ID** and the **Payroll Period End Date** and press search

A list of all hourly employees in your department will appear below the Search Box. Select the first hourly employee listed.

**OR**

To view one employee in your department, enter your Department ID in the **Department** field and the employee’s ID in the **EMPL ID** field.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action (Weeks 1 &amp; 2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Select appropriate Earnings Code in <strong>Earn Code</strong> field. Other boxes may open requiring additional information. If the <strong>Add Data</strong> button appears, see Page 11 for instructions. A complete list of earning codes with their definitions is located on the Payroll website under Payroll Managers &amp; Coordinators/Hourly-Monthly Earnings Codes (Both page and PDF available) See Appendix D.</td>
</tr>
<tr>
<td>2.</td>
<td>Enter the number of hours worked in <strong>Hours</strong> field.</td>
</tr>
<tr>
<td>3.</td>
<td>Enter hourly rate in the <strong>Rate</strong> field. NOTE for Peak: No entry is necessary unless you wish to pay more than the employee’s appointed rate of pay. The system will not allow you to enter a rate lower than the employee’s appointed pay.</td>
</tr>
<tr>
<td>4.</td>
<td>Enter the account code from which the earnings will be paid in the <strong>Account Code</strong> field. WARNING: Double check the account code. Make sure it's the right one. If the account code turns red, contact Payroll and Employee Services.</td>
</tr>
<tr>
<td>5.</td>
<td>After all hours have been entered for the employee, select <strong>Save</strong></td>
</tr>
</tbody>
</table>
Monthly Time & Earnings

Monthly Time & Earnings is used to record a monthly employee’s Salary Exceptions (Paid Leave, etc.)

Accessing Monthly Time & Earnings:

**Step 1:** Log into PeopleSoft

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

**Step 3:** Select **Monthly Time and Earnings**

Main Menu > OU Manage Time and Earnings > Monthly Time and Earnings
### Salary Exceptions

Company: NRM  Pay Group: MTH  Department: ADCTPES  Pay Period End Date: 11/30/2017

<table>
<thead>
<tr>
<th>Earnings Code</th>
<th>Hours</th>
<th>Rate</th>
<th>Earnings</th>
<th>Account Code</th>
</tr>
</thead>
</table>

**Step** | **Action**
--- | ---
**Note:** For Monthly Terminal Paid Leave, enter the earnings code **TPM** and the number of hours. Paid leave data entry for monthly employees is **for leave taken in the previous month**, i.e. leave taken in April will be data entered in May. The earning codes with definitions are located on the Payroll website.

1. **Select appropriate Earnings Code** from Lookup choices

2. **Enter number of hours/ or earnings in the Earnings field** for the selected earnings code.

3. **If additional entries need to be entered,** select the yellow **Plus** button to add an additional row. Select the **Minus** button to delete any data entry errors, and then reenter the correct information. Do not try to "space out" the data in the fields. This will not work.

4. **Once all entries for this employee are made,** [Save].

5. **If you entered your search by Department ID,** the **Next in List** button will appear at the bottom of the page. You can select this button to bring up the next employee’s page **OR**

   **If you entered your search by Employee ID,** the **Next in List** button will not appear. You will have to select the **Return to Search** button and enter the next Employee’s ID number to access their page.
Add Monthly Time & Earnings

Accessing Monthly Time & Earnings:

Step 1: Log into PeopleSoft

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

Step 3: Select Add Monthly Time and Earnings

Main Menu > OU Manage Time and Earnings > Add Monthly Time and Earnings
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note:</td>
<td>This page may be used for any information departments would like to enter. This data will not be moved into the Payroll Time Entry System.</td>
</tr>
<tr>
<td>1.</td>
<td>Enter number in <strong>Reference Number</strong> field. This is an internal reference number for your organization (Example: PIF numbers at CCE)</td>
</tr>
<tr>
<td>2.</td>
<td>Enter date in <strong>Begin Date</strong> and <strong>End Date</strong> fields. (Suggested example: The dates for which work was performed.)</td>
</tr>
<tr>
<td>3.</td>
<td>Remarks for the official record should be entered in the <strong>Comments</strong> field. Caution should be used when entering any remarks. Courts can subpoena this information.</td>
</tr>
<tr>
<td>4.</td>
<td>Select yellow [OK] button at bottom of page. This will return the user to the Time and Earnings/Salary Exceptions page.</td>
</tr>
</tbody>
</table>
Time Entry Approvals

Accessing Time and Earnings Approvals:

**Step 1:** Log into PeopleSoft

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

**Step 3:** Select **Time and Earnings Approvals**

Main Menu > OU Manage Time and Earnings > Time and Earnings Approvals

---

**Time and Earnings Approvals**

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

- **Find an Existing Value**

**Search Criteria**

- **Company:** begins with
- **Pay Group:** begins with
- **Pay Period End Date:** =
- **Department:** begins with

**Save Search Criteria**

---

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Enter Departmental ID in <strong>Department</strong> field.</td>
</tr>
<tr>
<td>2.</td>
<td>Select <strong>Search</strong>.</td>
</tr>
<tr>
<td>3.</td>
<td>Select the payroll you wish to approve (For example: 9/9, 9/12, FAA, HRY, MTH, PTC). The Employee will appear under his/her appointed pay group.</td>
</tr>
</tbody>
</table>
Step | Action
---|---
1. | Verify accuracy of earnings codes and time entered.
2. | If any of the information has been entered incorrectly, have your Time Entry Person return to the Employee’s Time and Earnings record to make correction(s). The Approver cannot make the changes.
3. | After correction(s) are made, return to Approvals page.
4. | Click in box to insert check  
5. | Select yellow  button at bottom of page. **Remember**: employees will appear under his/her appointed pay group.
Fixing a Time Entry Error “After” Approval

The Process Status Description located on the Time and Earnings Page will reflect the current phase of the Time Entry process. If the process description indicates “Processed” you will not be able to correct the error. Your payroll representative will need to fix the error. There are three "process stages". They are:

<table>
<thead>
<tr>
<th>Process</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Indicates that the designated payroll is open for time entry.</td>
</tr>
<tr>
<td>Approved</td>
<td>Indicates that the designated payroll entries have been approved.</td>
</tr>
<tr>
<td>Processed</td>
<td>Indicates that the designated payroll has been moved for processing. No changes can be made at this point. You will need to contact your payroll representatives to fix any errors.</td>
</tr>
</tbody>
</table>

Correcting errors that have been Approved, but not Processed:

1. The Approver returns to Approval screen for the appropriate pay group; 9/9, 9/12, HRY, MTH or PTC

2. The Approver removes the Approval Check Mark from the Approved Box.

3. The Time Entry person returns to the Time Entry screen and corrects information.

4. To delete a row, use the Minus button. Do not "space out" the data. This will not work.

5. The Approver returns to the appropriate Approval screen and re-approves by re-inserting the Approval Check Mark for the proper pay group; 9/9, 9/12, HRY, MTH or PTC,
<table>
<thead>
<tr>
<th>Description</th>
<th>Code</th>
<th>Description</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.</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.</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.</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. 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.
University Personnel and Payroll Reports

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 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?

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.