

Questions and Answers from MFE Session 2 – December 19, 2007

Do we still have to affix these cases to a specific Board Date even though the college presidents can approve most transactions?

Yes, a Board Date must be on each faculty transaction because the Board Date is a required field. The Board Date is the key field when any kind of campus-approved or Board-approved report is pulled out of the HR Data Mart. This key is used to help separate transactions. For Promotion and Tenure transactions use the April 16th board date. For all other campus approved transactions you may use any upcoming board date that fits the needs of reporting at your campus. Transactions that still require board approval need the corresponding board meeting date.

Can you define what a Major Faculty Appointment is, or tell us where to find the definition?

Major Faculty Appointments are positions such as Deans and VPs. Major Faculty Appointments no longer require Board Approval.

Are we to use the BCat of Rehired Retiree for these appointments? In other words, is this the standard across the system?

Yes, rehired retirees should be coded as such through the BCat, however this is not being done consistently across the system. BCats were revamped in 2003 to be a 6-digit field. The first three-digits are composed of the BCat “category” and the fourth digit is the BCat “subcategory”. Using “Z” as the fourth character indicates that the employee is a rehired retiree. BCats for rehired retirees should have whatever the first three appropriate digits are and a “Z” as the fourth character.

We are frequently asked for reports listing rehired retirees to ensure that none of them have been accidentally placed in full-time positions, and to ensure that they are making less than half of their retired salary. Here at OIIT, we have often had difficulty differentiating rehired retirees from regular part-time employees. Using the standard of “Z” as the fourth character and setting the positions at .49 will help us pull standardized reports using this information.

How do we classify rehired retirees? Are these retirees from our institution or any USG institution? Do they include school system retirees?

Any USG system retiree who is subject to the provisions of the Rehired Retiree policy (802.0903 Employment Beyond Retirement) should be classified as a Rehired Retiree.

A TRS retiree who is hired into a position that is eligible for ORP can return to work Full-Time and should not be labeled as a Rehired Retiree through the BCat classification system. A TRS retiree who is hired into a TRS position is not required to be included on the Board Agenda as the policy of including Rehired Retirees on the Board Agenda only applies to USG Retirees. However, these Rehired Retirees should be classified with the Rehired Retiree BCat.

Does Education information for Rehired Retirees under the new Employee ID need to be updated, since it was already listed under their retired Employee ID?

Education information does not need to be entered for Rehired Retirees under their new, rehired Employee ID.

In the hiring panels, there is an education field. Is there any way to populate that data in the hiring panels automatically from the MFE Education pages?

*Right now, that cannot be done. There's actually only one field, "Highest Education Level", on the Hiring pages that refer to Education. Our reports pull an employee's highest education level from the Education pages, which includes detailed information on all the employee's degrees. I should note that most reports do include criteria that looks to the "Highest Education Level" field in the Hiring pages in the event that the Education pages are **not** populated*

If something is Pending BOR Approval, can we pull it before it gets approved?

*Yes, you can. If you already created a case for a person and then you realize that the case either was created in error or that it is no longer necessary, you can always change the case status to Voided if it is something that should never have been entered. If you enter a case as Pending BOR Approval and then you realize that it is now a Campus-Approved case, you can always go back into the case and modify the case status from Pending BOR Approval to Campus-Approved, or whatever the appropriate case status is. **It is important to note that you should not delete a case because the case may still remain in the data mart. Always change the case status to VOID if the case or case type was entered in error.***

I stopped doing Part-Time Bulk Reappointment Processes since they are now Campus-Approved. I enter a case for new part-time faculty though. Is this okay?

Part-time transactions are not reported on. If a school wants to keep track of their part-time appointments, the Part-Time Bulk Reappointment Process is fairly simple if you wanted to enter them to run queries or reports but they are not required.

Are you aware that not all campuses are using the same BCat for part-time faculty?

This has become evident when we have tried to run centralized reports. We need more direction from the top-down on what needs to be entered. We can make recommendations, but we need the actual mandate to come from the system office as far as what should be standard for this type of employee. That is the reason we have not come out with real strong mandates on what BCats need to be entered for different types of employees. The exception to this is Rehired Retirees, which we have already discussed.

How can I obtain a listing of all of the Run Control IDs?

A Run Control ID is an identifier that, when paired with your User ID, uniquely identifies the process you are running. The Run Control ID defines parameters that are used when a process is run. This ensures that when a process runs in the background, the system does not prompt you for additional values. The advantage of creating your own Run Control ID is that you can create one that makes sense to you, and one that you will most likely remember and be able to use again and again. There is no listing of Run Control IDs because they are uniquely created by each user. You can use whatever name you choose. Some folks use the same Run Control ID for every process and report they run; other folks use a different Run Control ID for each one. The Run Control ID saves whatever you entered on the parameters page, so that every time you run that process under that ID, those same parameters will appear.

Can you add Campus-Approved to the Approved Agenda Report?

The Approved Agenda Report has already been updated to include Campus Approved transactions. When running the Approved Agenda Report, users have the option to run the report for BOR Approved, USO Approved, Campus Approved, or All Approved transactions.

Can we have training on running queries?

There is a query class scheduled for January 14, 2008, and it will be held here in Athens.

Can you review the slide on Emeritus Processing?

Emeritus processing is no longer required to go before the Board, and unlike Promotion and Tenure, it is not reported on. This is another transaction type (similar to Part-Time Reappointments) where it is up to the individual campus to decide if they want to input Emeritus transactions for the purpose of running queries or reports.

Can you go over the Faculty Validation email?

There is a new Discover Report that we publish to the HR Data mart and that will allow you to view who your faculty is as of November 2007. The System Office likes to freeze a data set so it can be used for various reporting on faculty. They select a year, for example this will count as your Fiscal Year 2008, which is Fall 2007 Faculty. Once everyone goes in and takes a look at their faculty and makes any necessary changes, you sign off with the System Office via email, indicating that your faculty is correct. The System Office then freezes that data so it can be used for a variety of reports. It is very important for everyone to review this information. If you need assistance, please submit a Help Desk ticket, and we can help you get through this process. The Discover Report that you are reviewing comes from the Data Mart and not from PeopleSoft. The Data Mart is populated with data from PeopleSoft, but it is important that the data is updated in Data Mart because the System Office uses the Data Mart to publish all of your faculty reports.

How often should we load to the HR Data Mart?

As often as possible. Many schools are not loading often enough. Data should be loaded to the HR Data Mart at least every payroll, which is weekly or bi-weekly at the very minimum.

Would it be possible to get a standard template for the various transactions we are required to enter so we can all be on the same page? With the decentralized process, we need some guidance and clarity to insure all of our data is consistent across the system.

This is a good question. As we mentioned during the session on Monday, a new person has been hired to take Dr. Horn's place. This person begins on January 7, 2008. We have been told that this is going to be one of the things this new person will be charged with, and that is to try to standardize as many procedures as possible for faculty and regarding faculty data. The System Office is aware that there is a lot of miscommunication. As far as standard templates for various transactions, we are down to two types of transactions that are required for the Board Agenda. Everything else is left up to the campuses, but perhaps the System Office will have a recommendation as to what you can enter. Promotion and Tenure still have to be entered. We are trying to be instrumental in being a voice for the schools, so continue to keep asking this question.