

CAS Finance and Operations Meeting
July 8, 2015

OA Classification and Compensation Project

Guests: VPFA, Jamie Moffit and Director of HR Programs, Kaia Rogers

Please refer to HR's project website for information and FAQs: <http://hr.uoregon.edu/oa/class-comp-project>. HR is working with consultants from Aon Hewitt on this project. Most of the topics we discussed are available on the HR site. A couple other relevant details:

- The position descriptions that HR has for CAS positions are the ones units provided to Shari Powell recently.
- Managers indicated they'd appreciate a position description template. CAS is working on this.

CASweb relaunch update (Anna and Haley)

The focus groups have provided information on which processes the new CASweb should include. The development site will be available for unit staff to see, possibly as early as July 20th. For updates on the project please continue to view the project website:

<https://wiki.uoregon.edu//display/CASWeb/CASweb+Redesign+Project+Home>.

GTF late pay issues (Sherri)

Sherri and Alicia met with the Graduate School to discuss issues of late pay for GTFs. See the attached email summary "FW: Graduate School Processing of PRFs," from Laura Jacek, who is the new Assistant Dean in the Graduate School.

Carryforward (Sherri)

BRP will be having us do carryforward on spreadsheets this year. Units will provide carryforward information for all funds and route to CAS. Sherri received tentative dates from BRP: Process begins the week of July 27th. Deadline to have information to CAS will be August 14th. Deadline for CAS to have information to BRP will be August 28th.

Contract renewal process (Sherri)

A group of managers provided some feedback to HR on the 2015-16 contract renewal process. HR's response is attached here.

Anna Duncan

From: Sherri Nelson
Sent: Thursday, July 16, 2015 3:58 PM
To: Anna Duncan
Subject: FW: Graduate School Processing of PRFs

From: Laura Jacek
Sent: Friday, June 26, 2015 3:48 PM
To: Alicia De Gonzalez; Sherri Nelson
Cc: Gordon Taylor; Scott Pratt
Subject: Graduate School Processing of PRFs

Dear Alicia and Sherri,

It was so nice to meet you the other day, thank you for coming! I have some answers to questions that you asked, and am hopeful that the answers will help abate any lingering concerns that CAS has around our process. You are important to us, and we will continue to strive to improve our turn-around time, even with this less-than-optimal process. As to the answers to your questions:

- We process in the order the PRFs are received, but do make adjustments to that order to attempt to get through PRFs where paychecks are coming due, so that as few paychecks as possible are late.
- PRFs are not held when there are two appointments, and the second appointment has not yet come through, except in cases of PRFs showing appointments at less than .2 FTE. In these cases, the PRF is held until the second PRF is received, moving the student's appointment above the required level.
- PRFs that have been set aside for issues that required contact with a department are processed as soon as possible after resolution is reached.
- We do not recheck CAS calculations, trusting instead to the CAS calculator.
- In terms of PRFs for which levels sent in are based on credits or degrees not yet earned – levels must always be supported by earned credits/degrees. We don't count credits in process, or degrees that should be awarded shortly. In these cases, the PRFs are set aside until the grades or degrees in question are posted. Most often, unless the reason for the higher level is clear, the department will be contacted.

You also asked what was required/requested to be added to the "Job Change Reason" category at the top of the PRFs, as that is routinely not filled in. I have pasted an excel table below, showing the typical entries, and a more detailed description of each. I hope this helps.

I have sent a request for a meeting to be arranged between us, adding Keri Bartow in payroll, so that we can discuss Fall processing, and possible ways to mitigate any delays there. Again, it was good meeting with you, and please don't hesitate to contact me with issues or concerns. Kind regards,

Laura Jacek, Ph.D.
Assistant Dean
UO Graduate School
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Additional Job	Additional GTF position, such as a .09 admin the same term as a .49 teaching position
Appointment Percent Change	For FTE changes (increase or decrease)
Appointment-Type Change	If they are switching Grades (e.g., teaching to research) MID-TERM. Not from one term to the next; that's just a reappointment
General Pay Increase	If a department is doing an across-the-board salary increase for all its GTFs (at one, two, or all three levels) (this is sometimes used for level increases, but I prefer not - although if it is I don't have a problem with it)
Job Record Begins	Same as initial hire
Job Record Ends	For separations (resignations, voluntary or otherwise)
Labor Distribution Change	Self-explanatory, although this should be used for LD changes ONLY. If they are also changing something else, they should use MULTI
Multiple Job Changes	If multiple things are happening (e.g., a reappointment with a level increase, simultaneous FTE and level increases, change to Grade and labor distribution)
Other / See Comments	Mostly used for stipend (BUOGOP) payments
Pay Increase--Other	Sometimes used for level increases by some departments, but for that I prefer the next one (I only included this one because it gets used frequently, and I don't have a problem with that)
Promotion	Level increases. I know it doesn't mention the salary increase, but for almost all departments (I know there are some exceptions), a salary increase is implied by a level increase
Reappointment	Rehire from one GTF position into another GTF position, with or without lapse. The pooled position doesn't necessarily have to be the same

6/15/15

Concerns Regarding Unclassified Contract Renewal Process

While we understand the contract renewal process is in the process of being streamlined, some CAS department managers have the following concerns:

TIMING

1. Contract renewals submitted in April, 2015 have not been processed yet. In many cases, this has resulted in delays in processing where they did not exist previously. We hope the bugs will get worked out this year.
2. If HR is holding fall contracts until September to complete, this is problematic for departments who submit paperwork early so that it can appear in Banner early. If it doesn't appear in Banner early, then it creates more work for departments as managers must follow up on a contract multiple times until it does appear in Banner. Would HR consider making the spreadsheet renewal process optional?
3. A start-to-finish timeline for contract renewal completion would be helpful.

COMMUNICATION

1. Uniform, consistent communication of information by various constituents (Academic Affairs, HR, UPS, CAS) is requested. Conflicting information creates more work for everyone.
2. Verification (perhaps an email or other electronic notification) of processing and/or completion of spreadsheet contract renewals would be helpful so that managers need not spend a lot of time following up on contracts and their status.
3. Lack of notification when an RTO has been changed once it has left the department is **VERY** problematic. In order to accurately respond to inquiries and manage department operations, it is vital for the department manager to have a copy of contractual information as described in RTOs. Is it possible to receive email notification when changes have been made?

PROCESS

1. Will this be the process going forward?
2. Concern regarding the inability to make labor distribution changes during the contract renewal process. This results in the need for the department to complete an additional step to ensure accurate pay.

Thank you for sharing your thoughts and concerns regarding the current contract renewal process. Your feedback is greatly appreciated and imperative to process improvement. I also want to take a moment to apologize for the delayed response. I have had a chance to review the information shared by Shelley Elliott, and certainly want to continue an exchange on this issue.

Let me begin by acknowledging there are limitations in our current contract renewal process. The work flow for the volume of contract renewals processed annually is taking considerably longer than anticipated, and your feedback highlights the impact felt by campus units. It is not HR's intention to affect your work negatively, and we are committed to making measurable improvement in the future. At this moment in time, HR is squarely focused on completing the current renewal process expeditiously and accurately. HR fully intends to engage campus partners this fall in a discussion to identify opportunities for improvement and gain an even better understanding of your needs. The concerns expressed in Shelley's summary highlight the need for a clearer expedited timeline, improved communication from HR that is consistent across departments, and most of all, process change to better serve units, employees and HR.

I will continue to reflect on your feedback and discuss within HR a plan for reviewing and implementing change for the next contract renewal cycle. Please be assured that there will be future opportunities for us to discuss further your concerns and address your thoughts and feedback in more detail. You can anticipate additional conversations regarding the contract renewal process to occur this fall and I look forward to engaging and including you in this critical process improvement opportunity.

In the meantime, please do not hesitate to contact me or a member of my team to address immediate issues you encounter. We are here to assist you any way we can. Your patience and understanding as we complete the final stages of the current cycle is greatly appreciated.

Sincerely,
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