Agenda

• Summer Teaching and Research Processing

• Review of Graduate Assistant Allowance Plans

• Workday Processing Reminders

• Workday and HRM Updates
Summer Teaching

• Instructions have been sent out by Budget & Planning

• Loaded via a Period Activity Pay EIB

• Refer to instructions for deadlines set by Budget & Planning
<table>
<thead>
<tr>
<th>Dates</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 6th - May 18th</td>
<td>Units can upload completed budget files in Reports-to-Geaux. Updated files must be uploaded by 4:30 pm May 18th</td>
</tr>
<tr>
<td>May 21st</td>
<td>Verification file can be accessed in Reports-to-Geaux</td>
</tr>
<tr>
<td>May 22nd - June 7th</td>
<td>Email Budget &amp; Planning to make any revisions.</td>
</tr>
<tr>
<td>June 8th – end of Summer Session</td>
<td>Contact HRM for any personnel changes, e.g. canceled courses.</td>
</tr>
</tbody>
</table>
Summer Research

• Summer research processed via One Time Payments (OTPs)

• Separate forms must be loaded for multiple costing

• Coverage dates must be entered

• Comments must be entered
  • Include formula calculation and indicate teaching or no teaching
  • Example: $150,000*0.003623*92 ; no teaching

• PM-3 overages must be maintained by the worker.
  • Justification for PM-3 overages must be attached to the OTP.
### Summer Research Calendar

<table>
<thead>
<tr>
<th>Coverage Date Range</th>
<th>Effective Date Range</th>
<th>Pay Date</th>
<th>Accounting Year</th>
<th>Must be to HR Partner (HRM) by</th>
<th>Successfully Completed by</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/15/18 – 6/30/18</td>
<td>5/15/18 – 6/14/18</td>
<td>6/29/18</td>
<td>FY 18</td>
<td>5/30/18</td>
<td>6/25/18</td>
</tr>
<tr>
<td>7/1/18 – 7/14/18</td>
<td>6/15/18 – 7/14/18</td>
<td>7/20/18</td>
<td>FY 19</td>
<td>6/27/18</td>
<td>7/13/18</td>
</tr>
<tr>
<td>7/15/18 – 8/14/18</td>
<td>7/15/18 – 8/14/18</td>
<td>8/21/18</td>
<td>FY 19</td>
<td>8/1/18</td>
<td>8/14/18</td>
</tr>
</tbody>
</table>
# Summer Research

<table>
<thead>
<tr>
<th>SESSION</th>
<th>EFFECTIVE DATES</th>
<th>STB COMPENSATION (FULL-TIME)</th>
<th>MAXIMUM SUMMER RESEARCH COMPENSATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>5/30-8/3</td>
<td>2/9 of AY</td>
<td>AY x .004273 x 26</td>
</tr>
<tr>
<td>B</td>
<td>5/30-7/11</td>
<td>2/9 of AY</td>
<td>AY x .004273 x 26</td>
</tr>
<tr>
<td>Research Only</td>
<td>5/15-8/14</td>
<td>3/9 of AY</td>
<td>AY x .003623 x 92</td>
</tr>
</tbody>
</table>
Graduate Assistant Summer Compensation

• Allowance Plans vs. Continuation of Salary

• Allowance Plans:

  1. Graduate Assistant Instructional Allowance-
     - GA is teaching during the summer and does not qualify to remain a GA per Grad School policy

     - The dates should follow the summer school calendar
Graduate Assistant Summer Compensation

• Allowance Plans (continued):

2. Graduate Assistant Student Allowance-
   - GA is conducting research or performing other non-teaching duties over the summer and does not qualify to remain a GA per Grad School Policy

   - The dates should reflect the dates the GA will be working between 5/15-8/14
Graduate Assistant Summer Compensation

• Allowance Plans (continued):
  • Monthly frequency

• No proration

• The number of pay periods the dates cover will determine the number of payments and the monthly amount of the allowance

• A compensation actual end date is needed to stop payment
Graduate Assistant Summer Compensation

• Example:
Graduate Assistant Summer Compensation

• Allowance Plan Example:
  - GA is teaching from 5/30/18 – 7/11/18 and is not eligible to remain a GA during the summer. The GA is to earn $3,000 for teaching the course.

  \[
  5/30/18 – 7/11/18 = 3 \text{ professional pay periods (3 total payments)}
  \]

  \[
  $3,000 / 3 \text{ payments} = $1,000 \text{ monthly}
  \]
## Summer School Dates

<table>
<thead>
<tr>
<th>Summer Session</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer A</td>
<td>5/30/18 – 8/3/2018</td>
</tr>
<tr>
<td>Summer B</td>
<td>5/30/2018 – 7/11/2018</td>
</tr>
</tbody>
</table>
Graduate Assistant Summer Compensation

• Continuation of Salary:
  - If the GA is working in any capacity over the summer and qualifies to remain a GA per Grad School policy, they will continue to be paid through their salary.

  - If the GA is teaching, the dates of the summer pay should follow the summer school calendar. Job profile should be updated to appropriate Teaching Assistant profile.
Graduate Assistant Summer Compensation

• Continuation of Salary:
  - If the GA is conducting research or performing other non-teaching duties, the dates entered should follow when the GA is performing work. A compensation actual end date is needed to stop payment.

  - The salary must be an annualized amount with an annual frequency and does prorate based on the dates entered and the number of working days in each pay period.

  - **Job Change>Job Continuation must be loaded to extend compensation.**
Workday Processing Reminders

- Annual Work Period/Disbursement Plan Period (AWP/DPP)
  - 4/4, 9/9, or 12/12

- Required on a hire action

- Must have “Academic Salary Plan”
Workday Processing Reminders

- Located on initial hire screen

- Under “Additional Details” section
Workday Processing Reminders

- Terminating 4/4 academic workers not continuing
  - System cleanup
  - Security access

- Example: teaching during Fall semester, not returning in the Spring.
  - May or may not return the following fall
Workday Processing Reminders

• Moving a worker from a leave eligible to leave ineligible position (vice versa)
  • Leave eligibility – 50% effort and greater than 180 days

Step 1: Must terminate from leave ineligible position
  • Transient, WAE, GA, Student

Step 2: Employee to be hired into leave eligible position
Workday Processing Reminders

• 9 Month Academic Employee Terminations:
  • Old Process:
    • 9 month academic employees who terminated employment at the end of an academic year would keep insurance coverage through September 30
  • New Process (effective beginning with the 2017-2018 academic year):
    • 9 month academic employees who terminate employment at the end of an academic year will lose insurance coverage on May 31
    • The new process will result in budget savings for university departments and will help keep insurance premiums down
  • Overpayment of premiums will be refunded to the employee by Payroll once the termination is complete in Workday
Workday Processing Reminders

• The Dependent Event in Workday now has fewer steps
  • Employees are able attach their dependent verification documents on the same screen that they use to enter the dependent demographic information
Workday & HRM Updates

- Legal Names
  - Legal name should match the name entered on the workers government documents
  - Do not enter preferred name in the legal name field

- Use of Middle Name
  - To better identify workers with similar names add a middle name of the worker

- As an HR Analyst to edit legal or preferred name use Maintain Names under “Personal Data.”
Workday & HRM Updates

• Hiring guidelines for rehired retirees
  • 60-Day Required Break (1 Year Break TRSL Retirees)
  • Contract Worker vs Regular Paid Employee
  • FTE and Duration of Appointment
  • Continuations Require HR Approval
Workday & HRM Updates

• Upcoming Recruiting Module Changes:
  • Reference Check

• Relocation

• Service Now