

An aerial photograph of a university campus during sunset. The sky is filled with vibrant orange, pink, and purple clouds. The campus below is a mix of brick buildings, green lawns, and trees. A prominent tall brick tower is visible in the lower center. The text "Welcome to Focus on Finance & HR!" is overlaid in large, bold, white letters with a black drop shadow across the top half of the image.

Welcome to Focus on Finance & HR!

March 16, 2021



Agenda

- Temporary Employee E-Contract Preview
- Performance Appraisals...During a Pandemic
- Planning for Fall 2021
- Announcements & Deadlines



TEMPORARY EMPLOYEE E-CONTRACT PREVIEW

Danny Linton
Associate Director, Human Resources



Temporary Employee E-Contract Preview

- Effective April 1, 2021, all requests to appoint temporary employees must be completed via e-contract. No paper forms will be accepted, and the links to those paper forms will be disabled.
- This applies to all types of temporary appointments:
 - New appointments, including those brand new to the University (people with NO U#)
 - Reappointments
 - One-time payments

Temporary Employee E-Contract Preview



- PPR forms are still required as of today, and these must be completed prior to beginning this new temp e-contract process.

Temporary Employee E-Contract Preview



Key Difference

- This will be the first e-contract that is initiated by entering the appointee's Banner ID (U#) rather than his/her username.



Temporary Employee E-Contract Preview

Keep in Mind

- All temporary appointments are non-exempt and overtime eligible.
- With the exception of one-time pays, all temporary employees will be reporting hours worked via Web Time Entry (or Kronos or Departmental Time Entry). Temporary employees can also become eligible for insurance if they work an average of 30+ hours over a rolling 10-month period.

Temporary Employee E-Contract Preview



Keep in Mind

- Student workers who worked in the spring semester and are enrolled in the upcoming fall semester may continue to be paid as student workers over the summer, and should use the Student Appointment E-Contract instead of the one for temps.



Temporary Employee E-Contract Preview

Process Overview

- eContract: The legally-binding electronic contract offered from your department to the employee. Accessed at www.memphis.edu/econtract
- EPAF: An **E**lectronic **P**ersonnel **A**ction **F**orm in Banner. The EPAF gets created by Shared Services when the eContract is finalized.
- No eContract? No EPAF. No EPAF? No timesheet/job.

Temporary Employee E-Contract Preview



Temp Appointments Workflow

(times indicated are for brand new temps; reappointments generally will take 24-48 hours only in HR)

1. Hiring Department Originator
2. Hiring Department Financial Manager/Designee
3. Dean (optional)
4. HR Service Center (expect 24-72 hours, dependent on background check)
5. HR Business Partners (24-48 hours, reviewing salary & entering Banner PEAEMPL & PPAIDEN screens)
6. AVP of Human Resources (24 hours, review)
7. HR Business Partners (24 hours, confirming start dates)
8. Employee
9. Shared Services (24 hours)



Temporary Employee E-Contract Preview

Process Overview

- One contract per position/occurrence
- For Temporary Appointments, there are NO REVISIONS beyond the Financial Manager returning to the Originator. Need to make any other change? Cancel and start over!
- If any approving authority disapproves a contract, that contract is nullified and the originator is notified



Temporary Employee E-Contract Preview

Temps can come in many forms

- Reappointment, has a Banner ID
- New appointment, has a Banner ID
- Brand new appointment with no previous affiliation to the University and no Banner ID



Temporary Employee E-Contract Preview

- The first two are fairly straightforward; a person with no Banner ID will use this electronic appointment process to get a Banner ID, memphis.edu e-mail, and an invitation to New Employee Orientation.
- For brand new appointments, verify the appointee has applied in WorkforUM and then key the appointee's name and personal e-mail address to start the e-contract.

Temporary Employee E-Contract Preview



- Pay attention to the notices that may appear as you start your contract. There may be issues that could prevent your temp from being processed in a timely manner.



Temporary Employee E-Contract Preview

- THIS PREVIEW WASN'T TRAINING!
- Join us for the real thing at Temporary Employee E-Contract training on one of the dates below.
- Monday, March 22
2:30pm
- Thursday, March 25
8:30am
- Register in [Learning Curve!](#)

Temporary Employee E-Contract Preview



QUESTIONS?



PERFORMANCE APPRAISALS... DURING A PANDEMIC

Melanie Drisdale
Director, Employee Engagement, Learning & Development

Annual Performance Appraisals – Why?

- **Vital** to employee development
- Aids in the University's successful attainment of its **strategic goals**
- Encourages a **culture of service excellence**, ongoing coaching, feedback, and recognition
- Sets **measurable departmental goals** in line with the University's mission and strategic plan
- Identifies and plans professional development
- Evaluates past performance and **clarifies future expectations**
- Creates a **coaching and mentoring interactive process** between employee and supervisor by revisiting goals and performance expectations.



Performance Appraisal 1:1

- Use a video and audio technology conferencing platform, or a telephone conference call
- **Be agile**; given the current state of the world, the appraisal meeting method may be different for each employee
- **Be compassionate**. Working remotely may have alienated the employee and the appraisal process may generate additional stress.
- Participate in **SAMS training** if you haven't done so in the past or feel additional training is needed.
- Review **SMART goals** to ensure the employee's goals align with **departmental goals** which **should align with the University strategic goals**.



Performance Appraisal 1:1

- Use the performance appraisal as a **guide** for the meeting.
- Allow the **employee time** to ask questions or reveal concerns.
- Discuss **personal career goals** with the employee.
- **Encourage** the employee to reach out to you if additional guidance or help is needed.
- **Follow-up** via email to ensure the employee has a written account of the meeting.



Performance Appraisal Reminders

- The **deadline** for all performance appraisal assessments for staff is **April 30, 2021**.
- Employees currently within their probationary period will be evaluated at the end of their six-month performance cycle.
- If you have any questions, please contact your HR Business Partner at hrbusinesspartners@memphis.edu or Employee Engagement at engagement@memphis.edu.
- www.memphis.edu/performance



PLANNING FOR A FALL 2021 RETURN TO IN-PERSON CLASSES

Kristil Davis

Director, Strategic HR Initiatives & Talent Management



Planning for Fall 2021

- As we all know, the President and Provost have both announced the plan to return to in-person classes this fall.
- It's hard to imagine it's been a year now since the onset of the pandemic. We have a few poll questions that will better prepare us for the fall. (Answers are anonymous so please be honest.)



Planning for Fall 2021

How comfortable are you with our planned return to campus?

- Comfortable
- Neither comfortable or uncomfortable
- Uncomfortable



Planning for Fall 2021

When thinking of some of your fears, which of the following is your biggest fear about returning to campus?

- Overall safety
- Exposure to COVID-19
- Inadequate safety equipment
- People not recognizing safety precautions, such as wearing masks and social distancing
- Something else



Planning for Fall 2021

How would you rate your mental/emotional well-being right now?

- Excellent
- Good
- Ok
- Not So Good
- Not Well at All



Planning for Fall 2021

What are some things you would like us (HR) to do to help minimize your fears? (choose all that apply)

- Provide more COVID-related trainings
- Engage the State's EAP program for more well-being trainings
- Work with managers on establishing better work/life balance guidelines
- Something else

Planning for Fall 2021



A question for the chat (not anonymous):

What are some *positives* that you've seen since COVID that you would like to see continued when we return to campus?

Planning for Fall 2021



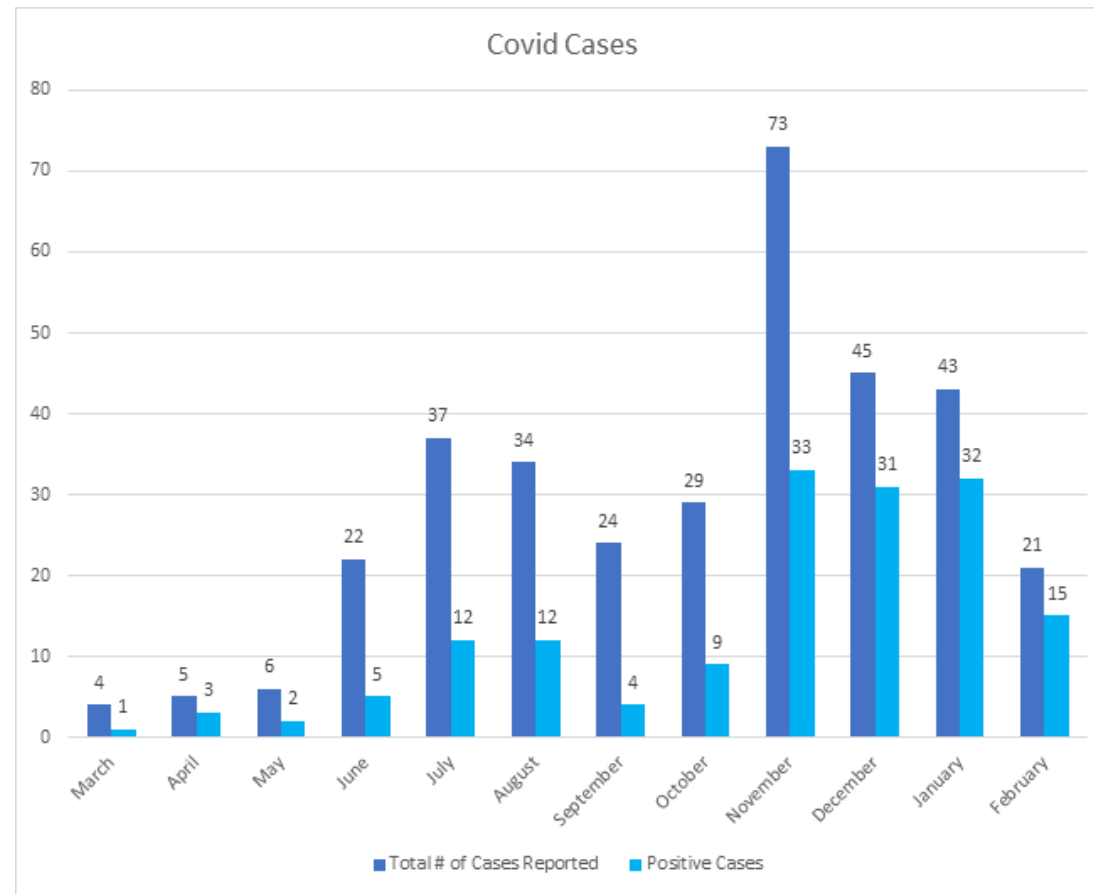
What are some of your questions/concerns we didn't cover that you would like us to address in the April meeting?

Answer in the chat or e-mail us at hr@memphis.edu.

Planning for Fall 2021



- COVID Case Statistics



Planning for Fall 2021



- Work Location Statistics as of 3/10/2021

REGULAR FACULTY/STAFF ONLY		
Working on Campus	617	25.7%
Working Remotely	866	36.0%
Hybrid (Both)	917	38.2%
No Answer Received	4	0.1%
TOTAL	2,404	100%

REGULAR FACULTY/STAFF + TEMPS & PTF		
Working on Campus	696	22.6%
Working Remotely	1,279	41.6%
Hybrid (Both)	1,031	33.6%
No Answer Received	68	2.2%
TOTAL	3,074	100%

ALL EMPLOYEES (INCLUDING TEMPS, PTF, STUDENT WORKERS, GAs, etc.)		
Working on Campus	1,117	23.6%
Working Remotely	1,996	42.2%
Hybrid (Both)	1,401	29.6%
No Answer Received	216	4.6%
TOTAL	4,730	100%



ANNOUNCEMENTS & DEADLINES

Announcements & Deadlines



- Welcome to all first-time attendees at Focus on Finance & HR!



Announcements & Deadlines

- Don't forget to review the University's current job openings at workforum.memphis.edu.
- Follow the Division of Business & Finance on Twitter at [@uofmemphisbf](https://twitter.com/uofmemphisbf)!
- Subscribe to our WorkforUM Twitter feed at [@umemphisjobs](https://twitter.com/umemphisjobs)!
- Follow us on Instagram! [@uofmhr](https://www.instagram.com/uofmhr)

Announcements & Deadlines



2021 Mid-South Heart Walk Digital Experience

Results with Every Step

Are you ready? When you join the Heart Walk, you make a difference from day one.

Save Lives

You help fund lifesaving science that can create an artificial heart valve, prevent a stroke, put scientific advances into doctors' hands, correct heart defects in newborn babies and someday find a cure for high blood pressure that can teach us all how to live longer and healthier.

Be Healthy For Good

You learn how to live healthier with proven, science-based tips and information on how to eat smart, move more and be well. And you get to be a trailblazer in our Healthy For Good movement.

Announcements & Deadlines



2021 Mid-South Heart Walk Digital Experience

One Million Strong

You join more than a million Heart Walk Heroes in more than 300 locations across the country, funding the kind of breakthrough science that saves lives every day. Who wouldn't want to be part of that?

Just a Few Simple Steps

- **Register** online @ [2021 Mid-South Heart Walk](#). Choose the University of Memphis as your corporate team or join a sub team under the University of Memphis.
- **Set** a goal and personalize your fundraising page to make it easy for your friends and family to donate.
- **Raise** money to support lifesaving research and programs.
- **Make** a personal contribution.
- **Walk** your heart out.
- **Save** lives.

Told you it was simple! So, let's go.

Announcements & Deadlines



2021 Mid-South Heart Walk Digital Experience

For more information:

[2021 Mid-South Heart Walk Webpage](#)

[2021 Mid-South Heart Walk Facebook Event Page](#)

[UofM Employee Engagement Webpage](#)

Announcements & Deadlines



- ITS Reminder!

PASSWORD CHANGES

Spring Budget – Key Dates



- Revenue Projections ~ Due Friday, March 19, 2021
 - Email with instructions sent out Friday February 26, 2021
 - Instructions for preparing revenue budget revisions can be found on the Financial Planning website under the Frequently Asked Questions tab
- Capital/R&R/Facility Projects ~ Due Monday, March 29, 2021
 - If a Summer project is planned, submit by Spring deadline
- Expenditure & Position PDF Budget Revisions ~ Due Monday, March 29, 2021
 - Email with instructions sent out Friday March 5, 2021
 - Submit revision to cover any newly hired Limited position and those FY21 Limited positions that have not been covered previously
 - If a position needs to be transferred for Fall, submit the transfer BR before deadline
 - Remember: no base budget revisions will be entered between the deadline and the opening of FY22
- BD4 Online Budget Revisions ~ Due Friday, April 9, 2021 *with all approvals*
 - Remember to align department budgets for the remainder of FY21
 - No functional changes after deadline

Budget Revision Process



- All budget revisions must be submitted to Financial Planning as PDF documents. Excel and paper versions will be returned for PDF version.
- DocuSign cannot be used to approve budget revisions. Please add signatures in Adobe software. Directions can be provided upon request by Financial Planning.
- Approved budget revisions should be submitted to the “inbox” email address: FPRevisions@memphis.edu.
(Academic Affairs units to submit to Provost Office first)
(Auxiliary units to submit to Colis Chambers – cchambrs@memphis.edu)
- Please direct all questions to budget@memphis.edu.



Announcements & Deadlines

- The [Student Employment website](#) has been updated with Summer and Fall employment dates.
- Questions? E-mail Student Employment at StuEmp@memphis.edu.



Announcements & Deadlines

- As we approach the end of the fiscal year, employees are reminded to review their annual leave balances.
- Balances in excess of the maximum (as specified on the chart) will be transferred to sick leave at the close of the fiscal year, unless the employee is on terminal leave, in which case the full amount of accrued annual leave shall be carried forward. Employees should review their annual leave balances now to determine how many hours would need to be used prior to the June 30 roll date.
- Exempt (executive, administrative, professional, and twelve-month faculty employees) may carry forward 315 hours (42 days) to the next fiscal year. Any hours above this amount will be rolled over to sick leave.

Non-Exempt Employees Years of Service	Maximum Accumulation Carried Forward to Next Fiscal Year
0–5	225.0 hours
5–10	270.0 hours
10–20	292.5 hours
20 or more	315.0 hours



Announcements & Deadlines

Annual Records Inventory Due June 30

- New, all electronic process
- For details, register for training in Learning Curve



Announcements & Deadlines

- Be sure to keep your Work Location Status updated in the top middle section of the MyMemphis Employee tab.
- You may choose from Working on Campus, Working Remotely, or Hybrid (Both).
- This applies to ALL employees, including temps, GAs, part-time faculty, and student workers.



Announcements & Deadlines

- The standard staff employee evaluation period is May 1, 2020 thru April 30, 2021. Start planning now by reviewing last year's (and next year's) goals!
- Performance Management training sessions have been added to Learning Curve.
- memphis.edu/performance
- Questions? emprelations@memphis.edu



Announcements & Deadlines

- 4th Annual Excellence Awards nominations are being accepted through March 19, 2021.
- The Presidential Award
- The TIAA Award
- The Community Service Outreach Award
- Nominations accepted [online](#).



Announcements & Deadlines

- 2021 Career Milestone Awards
- Friday, March 26
10am
- Watch your e-mail for a link to this year's virtual ceremony!



Announcements & Deadlines

March 2021 Accounting/Payroll Trainings

- Accounts Payable: What to Send to the AP Group Email
March 23, 2:30pm
- Payroll: Adjustment Time Sheets
March 25, 11am
- General Accounting: Accounting Basics
March 30, 2:30pm
- Register in [Learning Curve!](#)



Announcements & Deadlines

May/June 2021 Accounting/Payroll Trainings

- Accounts Payable: Check Request Form
May 25, 2:30pm
- General Accounting: Accounting Basics
May 26, 2:30pm
- Payroll: Form W-4
June 17, 11am
- Register in [Learning Curve!](#)



Announcements & Deadlines

- WorkforUM Training
April 28 at 9:30am
Sign up in [Learning Curve](#)!
- E-Contract trainings for the spring have also been added to [Learning Curve](#).

Announcements & Deadlines



- Other Finance & HR Trainings can be held via Zoom, dependent upon demand.



Announcements & Deadlines

- Need someone added to the Focus on Finance & HR mailing list?
- Don't forward to them—forward to us!
- hr@memphis.edu

An aerial photograph of the University of Memphis campus during a vibrant sunset. The sky is filled with soft, colorful clouds in shades of orange, pink, and purple. The campus buildings, mostly brick and multi-story, are visible below, interspersed with green trees and lawns. The overall scene is peaceful and scenic.

NEXT MEETING

Tuesday, April 20, 2021 @ 2:30pm
memphis.edu/focuszoom

An aerial photograph of the University of Memphis campus during a vibrant sunset. The sky is filled with soft, colorful clouds in shades of purple, pink, and orange. The campus below is a mix of brick buildings, green lawns, and trees. A prominent tall brick tower is visible in the lower center. The overall scene is peaceful and scenic.

THANK YOU FOR ATTENDING!

[memphis.edu/focus](https://www.memphis.edu/focus)