

Welcome to HR Partners!
January 8, 2019



Agenda

- **University Records Management**
- **Benefits: Wellness Program**
- **New Faculty Reappointment Form Draft Feedback**
- **Solving Web Time Entry Issues**
- **Announcements and Deadlines**
- **Spin the Wheel!**

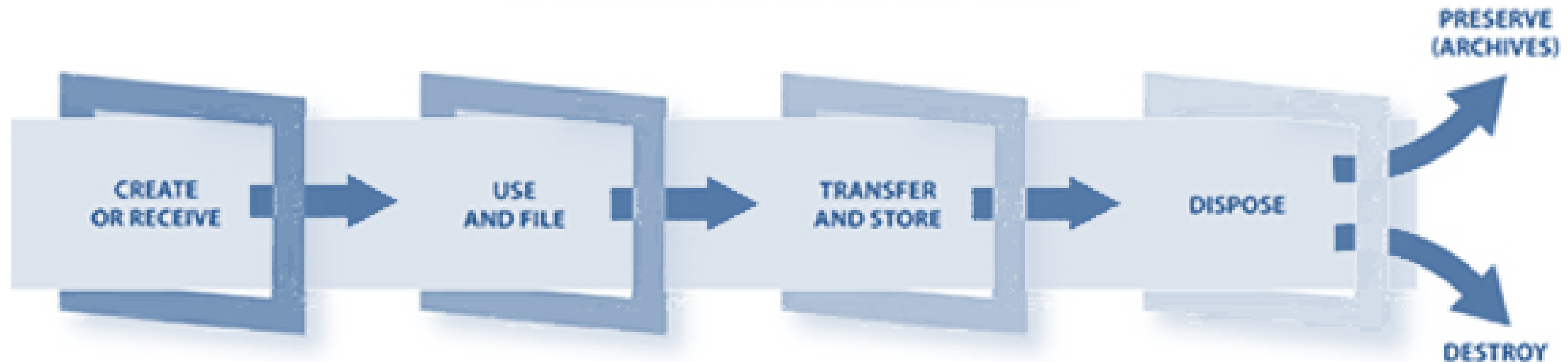
University Records Management

Ladonnal Curry

**Assistant Director, Business & Finance
Operations**

University Records Management

RECORDS LIFE CYCLE



Ladonnal Curry, Assistant Director
Business & Finance Operations
Office of the Chief Financial Officer

University Records Management

Annual State of Tennessee Records Holding Report Due



University Records Management

Training – Let's Get Organized
Records Training – January 2019



RETENTION & DISPOSITION SCHEDULE

Records Retention Schedule

<https://bf.memphis.edu/vp/recordretention.php>



Record Retention and Disposition Schedule

The Records and Disposition Schedule lists common record series found in university departments and should be used when managing university records. It provides retention guidelines based on administrative, fiscal, historical, and legal value.

To use the Records and Disposition database, search for records by "Office of Record" or using simple search terms.

For assistance, please contact Ladonnal Curry at 901-678-2121 or lcurry@memphis.edu.

Search by Office

Search [\(Reset\)](#)

48 records found.

Record Name	Description	Office	RDA Number	Period
Accounting Journal Vouchers and Deposit Slips	Documents Relating to Accounts Receivables and Deposits with Supporting Documentation EXAMPLES: AG - Agency Only Approval Journals, AL - Allocation Process, AM - Assets Management, AP - Accounts Payable, AR - Accounts Receivable, BA - Balances from STARS, BI - Billing, CL - Closing Process, CM - Cash Management, CN - Contracts, DA - Division of Accounts Approval, EX - External Application, FM - Fleet Management, GM - Grants, IN - Inventory, IU - Inter-Unit Transaction, JV - Online Journal Voucher, KK - Commitment Control Journals, LA - Accrued Liabilities, LM - Enterprise Learning Management, MU - Mult-Unit Transactions, PM - Plant Management, PR - Project Closing, PY - Payroll, RA Accrued Revenue, RV - PS exp to STARS, TR - Transactions from STARS, TV - Travel (Expenses), YA - Year End Adjustments This RDA is not applicable for the Division of Accounts, Dept. of Finance and Administration.	Bursar/Accounting	SW01	5 years
Accounting Reports	Documents relating to monthly accounting reports. This series also includes Accounting reports from Edison or the STARS System	Accounting	SW02	5 years
Inactive Human Resources Employee Documentation	Documents pertaining to the proof of eligibility to work, included in this record series is human resource documentation kept in agency. Examples: Cards or sheets showing name, address, telephone number, and similar data for each office employee; performance evaluations, liens, garnishments, wage-related child support orders, employment verifications. Records covered under SW19 Active Employee Files shall not be destroyed under this RDA	Human Resources	SW03	5 years - destroy
Employee Medical Records	Documents relating to confidential employee medical records. Examples: Documentation of physicals and health status, Alcoholics Anonymous treatment statement, drug related treatment, injured in the line of duty and workers' compensation claims.	Human Resources	SW04	Files are cut off upon termination of employee, maintained for 30 years.

Questions?



Wellness Program

Patricia Polania

**Assistant Director, University Benefits
Administration**

Wellness Program for 2019

- Starting January 1, our new partner, ActiveHealth Management <http://go.activehealth.com/wellnesstn>
- Active higher education employees and spouses only.
- Each participant will be able to earn the maximum of \$250 per person
- Up to \$500 for the employee and spouse annually

Three easy steps to earn up to \$250 each

Step 1:

- Log in to www.myactivehealth.com/wellnesstn. Then complete your online HA.

Step 2:

- Complete your choice of activities to start earning incentives. Activities are tracked online at www.myactivehealth.com/wellnesstn

Step 3:

- Check your paystub to see your incentives add up. Up to \$250 for you. And up to \$250 for your enrolled spouse.

****The incentive is taxable and subject to withholding and reporting. This will impact the actual amount in your paycheck**

Activate your wellness program and get:

- Cash incentives
- A complete assessment of your health
- Coaching support, online, group or on the phone
- Weight management support – a brand new program (for active members only)
- Personal health tips
- A hub for your fitness devices

There's no cost to you. You can get started on January 1. To learn more, visit <http://go.activehealth.com/wellnesstn>

January 2019- Preferred Drug List

- Effective January 2019 State of Tennessee Preferred Drug List (PDL) has been updated in the University Benefits Administration webpage and the state's specific webpage at info.caremark.com/stateoftn.
- As with each quarterly formulary update, Caremark will mail notification letters to members who are negatively affected by tier changes or drug exclusions.
- Employees are encourage to use the state's specific webpage at to view the most current version of the drug list, as well as to review their prescription drug benefit information, request mail service orders and research drug information

Questions?



New Faculty Appointment Form Feedback

Sheila Mathis

**Academic Services Specialist,
Faculty Administrative Services**

New Faculty Appointment Form Feedback

- The Faculty Appointment form is being overhauled and we'd like your feedback!

Solving Web Time Entry Issues

Danny Linton

Assistant Director, Human Resources

Solving Web Time Entry Issues

- **ISSUE:** Don't approve the record without...looking at it first.
- **SOLUTION:** Ensuring a time sheet or leave report's accuracy is the entire reason approvals are needed. If the employee has keyed something in error, left off a decimal point, reported everything as overtime, etc., it will sail through wrong if you approve it when it's wrong!

Solving Web Time Entry Issues

- **ISSUE:** Overtime is not being accurately reported.
- **SOLUTION:** The November 2016 HR Partners presentation has lots of good examples of overtime scenarios and how they should be reported. Remember—overtime is not necessarily reported the day it is worked. It isn't reported as overtime until the week's total hours have pushed the employee into an overtime status.
- If you're unsure about overtime calculations, contact Payroll at payroll@memphis.edu before submitting hours.

Solving Web Time Entry Issues

- **ISSUE:** You should never, ever, ever approve your own time sheet or leave report!
- **SOLUTION:** Let a proxy or other superuser for the approver approve the record. Do not “Select All” and approve en masse when YOU are part of the “all.”

Solving Web Time Entry Issues

- **ISSUE:** Approvers shouldn't wait past the approval deadline for acknowledgers.
- **SOLUTION:** Remember that acknowledging in WTE is optional and the approver can still approve without them taking any action. Of course, acknowledging is a helpful tool for approvers who may not be as familiar with an employees time, but approving by the deadline is more important!

Announcements & Deadlines

Announcements & Deadlines

- **New HR Partners**
- **New HR Employees**
 - **Joe T. Simmons, Workforce Management**
 - **Dean Lewis, Jr. HR Associate for Physical Plant**
 - **Chris Powell, HR Service Center**

Announcements & Deadlines

- Don't forget to review the University's current job openings at workforum.memphis.edu.
- Subscribe to our Twitter feed at [@umemphisjobs](https://twitter.com/umemphisjobs)!

Announcements & Deadlines

- Duo Multi-Factor Authentication is now a requirement for all employees!
- Sign up at iam.memphis.edu.

Announcements & Deadlines

- **WorkforUM Issues with Posting Language**
- **Review all verbiage before you approve a Request to Fill! (And remind your chairs/deans to do so as well!)**

Announcements & Deadlines

Upcoming:

- Salary Database Similar to that on TNTech site
- 2018 Total Compensation Statements
- 2018 W-2s & 1095s
- Salary Increase Web Dashboard (Financial Planning)

Announcements & Deadlines

- **Spring Brown Bag Sessions**
 - **Jan. 23: Actions You Can Take to Dramatically Improve Your Health**
 - **Jan. 30: Nutritional Approaches**
 - **Feb. 6: Dietary Supplementation**
 - **Feb. 13: Physical Activity & Exercise Recommendations**
- **Sign up in Learning Curve**

Announcements & Deadlines

- **Customer Service Training**

January 8, 2-3:30pm

AD177B

February 12, 2-3:30pm

AD177B

Announcements & Deadlines

- **Banner Admin Pages Navigation**
January 29, 2019
10 a.m. AD178

Announcements & Deadlines

- **Banner 8 INB is dead!**

Announcements & Deadlines



A Fond Farewell!

Thank you for attending!
memphis.edu/hrpartners

