

Welcome to
HR Partners!



HR PARTNERS: AGENDA

- Year of Giving Campaign
- Estate Planning Preview
- HR/Payroll Deadlines
- Position-Based Training Requirements
- HR Announcements:
 - Performance Appraisals, WorkforUM,
Twitter, Upcoming Trainings
- Spin the Wheel!

HR PARTNERS: YEAR OF GIVING CAMPAIGN

Angela Norwood, Student Leadership

HR PARTNERS: ESTATE PLANNING PREVIEW

Dan Murrell, Planned Giving

Know What You Have & Know Where It Will Go!

Dan H. Murrell, CFRE
Dir. of Planned Giving
University of Memphis



Estate Planning is an act of love -
an intimate, deeply personal act.

- Pass on values.
- Tell your story.
- Shape your legacy.
- It is your last word.

Question:

If you were given a substantial amount of money with the one condition that you had to give it all away, how would you do that?

Estate planning is simply the systematic approach to getting your personal and financial affairs in order in the event you become mentally incapacitated or die.

Don't have a will?

Your state has one for you.

Need more than a will.

Power of Attorney

Health Care Agent

Advance Care Plan

Get a free estate planning workbook!

What is an estate plan?

Your estate plan:

- is a living document that represents all that you value.
- provides you with the opportunity to ensure that your values continue to impact society and those you love.
- may need to be evaluated to ensure a true reflection of what you value most.

THE UNIVERSITY OF
MEMPHIS
Dreamers. Thinkers. Doers.

Values-Based Estate Planning

A special free and confidential opportunity provided by the University of Memphis



Values-based estate planning is a personalized process. You work with a consultant to develop an estate plan that highlights your values, captures your priorities, outlines your intentions and protects your assets.

Take advantage of this opportunity for values-based estate planning with Jeremy Pharr of Thompson & Associates (www.ceplan.com), a firm that works exclusively with nonprofit organizations and offers expertise in charitable estate planning strategies.

This service is provided at no cost to friends of the University. All information shared will be held in the strictest confidence and will not be disclosed to the U of M or any other source, unless you direct it. The feedback that we have received indicates that many individuals care deeply about the University and are pleased to learn more effective ways to support both the University and their families through their estate plans. Thompson & Associates does not draft documents, manage money, sell any products, or ask you to make a gift.

Thompson & Associates provides unbiased counsel in connecting your lifetime values with asset strategies. Attorney Jeremy Pharr has assisted with hundreds of estates across the country.

The University of Memphis and Jeremy Pharr gave us an invaluable service. The process was easy, confidential, extremely informative, highly practical, and tremendously helpful. We cannot thank you enough for this experience – and it was free!

- Ruthbeth Finerman & Ross Sackett

Know What You Have & Know Where It Will Go!

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HR PARTNERS: INITIATIVES TO MINIMIZE PAYROLL EXCEPTIONS

Sidonna Foust
Interim Asst. Director
HR Records Management

HR PARTNERS: INITIATIVES TO MINIMIZE PAYROLL EXCEPTIONS

Issues:

- Pending contracts processed after Payroll
- Graduate Assistants leaving jobs early (graduation, resignation)
- Indebtedness/collection of overpayments

HR PARTNERS: INITIATIVES TO MINIMIZE PAYROLL EXCEPTIONS

Payroll Process with Pending Contracts:

- Possible Cause: Due to varying deadlines, departments require a reminder for the contracts in process
- Possible Solution: Auto reminder in eContract workflow on 12th of month for departments to review eContracts marked “Sent to SSC” and pending eContracts Any contracts submitted after the 15th of month at 4:30 p.m. will be tracked by HR.

HR PARTNERS: INITIATIVES TO MINIMIZE PAYROLL EXCEPTIONS

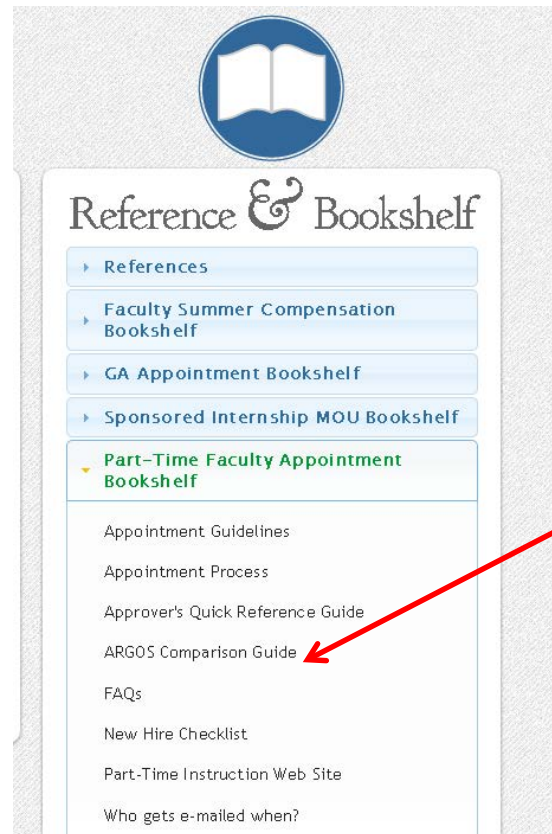
memphis.edu/econtract

The screenshot displays the Memphis HR Partners eContract system interface, organized into three main columns:

- Messages:** Features a circular icon with two people. The text reads: "This section displays a count of outstanding contracts of which you may want to track or follow-up with: Sidonna Foust (sfoust), your contracts include: (13) Incomplete GA contract(s). (7) GA contract(s) not accepted by the student." A red arrow points to the "(7) GA contract(s) not accepted by the student." line.
- Applications:** Features a circular icon with a document. It contains several blue buttons: "Faculty Summer Compensation", "Graduate Assistant Appointments (TEST)", "Sponsored Internships MOU", "Part-Time Faculty Appointments", "Shared Service Center Reports", and "(DEV) Graduate Assistant Appointments".
- Reference & Bookshelf:** Features a circular icon with an open book. It contains a list of links: "References", "Faculty Summer Compensation Bookshelf", "GA Appointment Bookshelf", "Sponsored Internship MOU Bookshelf", "Part-Time Faculty Appointment Bookshelf", and "Application Data Charts".

HR PARTNERS: INITIATIVES TO MINIMIZE PAYROLL EXCEPTIONS

Prior to the 15th, departments should view ARGOS



HR PARTNERS: INITIATIVES TO MINIMIZE PAYROLL EXCEPTIONS

ARGOS Comparison Report

Assignment Begin Date(>=): // [19]

Term: [v]

(ALL or UID <ENTER>) Faculty ID (UID): ALL

(ALL or Originator <ENTER>) Originator UUID: ALL

Organization: [102000, 110000, 110000]

BannerID	Avg_EmpFi...	EmplLastName	Term	BannerTer...	Contract_	Assignment...	ApproverN...	Originator	ApproverB...	ApproveDate
0 items										

EContract

UID: []
Name: []
Status: []

Contract#: [] Version: [v] []
Position#: [] []
Asgn Begin Date: [] []
Asgn End Date: [] []
Total Pay: [] []
Job Change Reason: [] []
Factor: [] []
Pays: [] []
Earn Type: [] []
Hire Dept Index: [] []
eContract Originator: [] []
eContract Created: [] []
FOAPAL: [] []

EPAF

UID: []
Name: []
Trans Category: [v]
Transaction#: [v]
Transaction Status: []
Contract#: []
Position: [] Suffix: []
Job Begin Date: []
Job End Date: []
Annual Salary: []
Job Change Reason: []
Factor: []
Pays: []
Earn Code: []
Queue Status: [v] Select Level: [v]
Queue Status Date: []
Originator: []
Approver: []
FOAPAL: []

Banner Data

Visa Type: []
I-9 ind: []
I9 Expire Date: []
MA Address Warning: []

HR PARTNERS: INITIATIVES TO MINIMIZE PAYROLL EXCEPTIONS

Graduate Assistants leaving jobs early (graduation, resignation)

- Possible Cause: Dept. unaware of employee graduating; Early termination
- Possible Solution: *Suggestions?*

HR PARTNERS: INITIATIVES TO MINIMIZE PAYROLL EXCEPTIONS

Indebtedness/Collection of Payroll Overpayments

- Issue: Delays in process
- Solution: Review process to accommodate earlier set-up of Payroll deductions for active employees

HR PARTNERS: INITIATIVES TO MINIMIZE PAYROLL EXCEPTIONS

Q & A

HR PARTNERS: POSITION-BASED TRAINING REQUIREMENTS

Iliana Ricelli, Workforce Management

HR PARTNERS: POSITION-BASED TRAINING REQUIREMENTS

- Over the past few months, HR has met with various departments around campus who offer training courses of various types
- These training courses include:
 - Sexual Harassment
 - Accounting Basics
 - Budget Basics
 - Lab Safety
 - FERPA
 - WorkforUM
 - Customer Service
 - Many more!

HR PARTNERS: POSITION-BASED TRAINING REQUIREMENTS

- Based on these meetings, we have identified trainings to be marked as required based on position titles
- Required trainings are now being added to staff position descriptions in Workforum (not yet viewable)
- Successful completion of the training requirements will be reflected on performance appraisals starting with 2016 cycle

HR PARTNERS: POSITION-BASED TRAINING REQUIREMENTS

https://workforum.memphis.edu/hr/position_descriptions/1497/edit?tab=11

Check spelling

Training

Major Duties and Respo...
Funding
Classification Title
Position
Supervisory Position
Supplemental Documenta...
Requisition Form
Supplemental Questions
Applicant Documents
Training
Employee
Summary

University/Position Required Training Courses

- Accounting Basics
- Banner Navigation Training
- Bloodborne Pathogens Training
- Budget Basics
- Bursar Cash Handling Training - Goldbook
- Bursar Cash Handling - Including Online Access
- Business & Finance Systems Overview Training
- Customer Service Training
- Diversity Training
- Employment Discrimination Prevention Training
- Environmental Training
- FERPA Training
- Lab Safety Training
- Performance Appraisal Training
- Radiation Safety Training
- Security Awareness (ITS) Training
- Sexual Harassment Training
- Title VI Training
- Workforum Training

Departmentally Required Training Courses

- Accounting Basics
- Banner Navigation Training
- Bloodborne Pathogens Training
- Budget Basics
- Bursar Cash Handling Training - Goldbook
- Bursar Cash Handling Training - Including Online Access
- Business & Finance Systems Overview Training
- Customer Service Training
- Diversity Training
- Employment Discrimination Prevention Training
- Environmental Training
- FERPA Training
- Lab Safety Training
- Performance Appraisal Training
- Radiation Safety Training
- Security Awareness (ITS) Training
- Sexual Harassment Training
- Title VI Training
- Workforum Training
- Other

HR PARTNERS: ANNOUNCEMENTS

- Follow Business & Finance on Twitter!
@uofmemphisbf
- Upcoming Trainings:
 - Customer Service Excellence: March 24, 2015; April 14 & 28
 - Banner Navigation: April 20, 2015
 - GA E-Contracts: TBA in May 2015
 - WorkforUM: June 1, 2015
 - Part-Time Faculty E-Contracts: June 16, 2015

HR PARTNERS: ANNOUNCEMENTS

- Performance Appraisals
 - Exempt Due March 31; Non-Exempt already overdue!
- WorkforUM
 - Later users in a workflow now CAN edit/remove/replace uploads from previous users!
 - Check on Position Management (orange side) outstanding actions stuck in Draft status. If they are not needed, please cancel them!
 - Blue side reminder: Temp applications are under the **Pools** menu; every other employee type under **Postings**
- Got a topic for HR Partners? E-mail us at hr@memphis.edu or danny@memphis.edu!