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Finance/HR

HR-Human Resources

The Integrated System's Human Resources modules, collectively referred to as the Human Resources Management System (HRMS), allow you to view and process HR data based on your responsibility, which include the following:

- **HRMS Viewers** - view employee information
- **HRMS Specialists** - enter new faculty and students, update employee information, and run departmental HRMS reports
- **HRMS Faculty/Staff Reviewers** - review faculty and staff hires and salary changes
- **HRMS Records Specialist** - enter new faculty and students, update employee information, run departmental HRMS reports, review faculty and staff hires and salary changes, and enter special one-time payments.
- **HRMS Student & Faculty Wage Approvers** - approve student and faculty wage hires and salary changes

At the completion of this module, depending on your responsibility and the needs of your department, you will be able to:

- View departmental HR information
- Approve salary actions
- Use date-tracking
- Hire salaried faculty employees
- Hire University executive staff
- Hire student and professional research staff wage employees
- Hire non-UVa employees
- Hire postdoctoral fellow employees
- Hire non doctoral fellow employees
- Hire GRA/GTA, and faculty wage (Goal Payment) employees
- Rehire ex-employees
- Maintain employee information
- Maintain assignment information
- Use views and reports

The following actions require special handling by central Human Resources. The Integrated System HRMS Support Request form to request support is located in the Human Resources Toolkit ([http://www.hr.virginia.edu/other-hr-services/employee-development/sys/hrms-tk/](http://www.hr.virginia.edu/other-hr-services/employee-development/sys/hrms-tk/)) page and the HR/Finance User Group Community.

- Reverse Termination
- Incorrect hire date
- Emergency Entry (system unavailable due to payroll processing)
- Need degree type or school added to List of Values
- Purge or delete a record (person, assignment, salary, etc.)
- Change a person type
- Employee missing an IS user account in Employee Self-Service (but employee is in HRMS)
After completing this course, online help (http://www.virginia.edu/integratedsystem/gettingStarted/Using_Online_Help_Quick_Guide.pdf) is available within the Integrated System and the printed guide can be found in the toolkit (http://www.hr.virginia.edu/other-hr-services/employee-development/sys/hrms-tk/) for each module.

To navigate to a training topic:

1. Double-click on "HR-Human Resources".
2. Double-click on the section(s).
3. Click on the topic.
4. Click "Try It" to interact with the simulation. Click "Print It" to print out a job aid.

Approving Salary Actions

**Please note:** Departmental business processes are beyond the scope of this training. Please consult your departmental HR for information regarding policies and practices in your area. General policies for faculty and students are located on the Provost’s website (http://virginia.edu/provost). Policies for staff employees are on the central Human Resources website (http://hr.virginia.edu/)

Note that the UVA HRMS Specialist, UVA Faculty Staff/Reviewer and UVA HRMS Records Specialist responsibilities are removed while Human Resources runs payroll. Check the Payroll System Availability (http://www.hr.virginia.edu/calendars/hrms-payroll-system-availability/) calendar for the dates/times the responsibility will be disabled.

The HR Toolkit (http://www.hr.virginia.edu/other-hr-services/employee-development/sys/hrms-tk/#resources) contains a link to a guide in pdf format for Approving Salaries.

In the Integrated System, the following responsibilities have the ability to approve salary actions:

- UVA HRMS Staff Approver-Staff salary changes are entered and approved by HR delegates. For classified Staff, refer to DHRM policy 3.05 (http://www.dhrm.virginia.gov/hrpolicies). For University staff, refer to University Policy HRM-024 (https://policy.itc.virginia.edu/policy/policydisplay?id=HRM-024).

Information on the University pay philosophy (http://www.hr.virginia.edu/other-hr-services/hr-consulting-services/compensation/pay-practices/pay-structure-for-university-staff) is located on the UHR website.

Additional detail on Types of salary changes, processing instructions, and documentation requirements may be found on the HR Kiosk (http://tinyurl.com/og4r5gq).
• UVA HRMS Student and Faculty Wage Approver—Student and Faculty wage salary changes are approved by the HRMS Student and Faculty wage approver in the department.
• UVA HRMS Faculty Approver—Faculty salary changes are approved by the Provost office.

Anyone who has this responsibility has sole ownership of ensuring the approvals are completed before each payroll (http://www.hr.virginia.edu/calendars/2014-payroll-calendar/) deadline (http://www.hr.virginia.edu/calendars/2015-payroll-calendar/), so their employees will be paid.

At the completion of this section you will be able to approve salary actions. The process consists of three steps:

1. Running the HR_Approvals for Hires and Salary report.
2. Querying the Salary Management report by department organization.
3. Approving all salary actions.*

*If you need to approve salary actions for a future date you need to date-track to that date (see topic).

Running the HR_Approvals for Hires and Salary Changes Report

Discoverer is used to run reports in the Operational Data Store (ODS). The ODS is a nightly copy of the IS database. Custom reports are created in Discoverer and may be run by anyone with access to the ODS.

The default responsibility is UVa ODS Specialist. If your responsibility is:

• ODS Specialist-Limited OR
• ODS Specialist-Restricted OR
• ODS Specialist-Limited PLUS

You will have to log in by appending the role with a dash (-) and the suffix as seen in the bullets above.

The specific HR report to run to view the salaries for approval is the HR_Approvals for Hires and Salary Changes. The report displays information entered as of 5 p.m. the previous day. HRMS Specialist and Faculty/Staff Reviewers who enter a new salary on the deadline date, must communicate with the appropriate approver to ensure the employee receives payment.

Procedure

In this exercise you will run the HR_Approvals for Hires and Salary Changes report.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by logging into Discoverer and clicking the <strong>Browse</strong> button.</td>
</tr>
</tbody>
</table>

**Browse...**
### Step | Action
---|---
2. | Scroll to the workbook. Click the **vertical** scrollbar.
3. | Select the **HR_Approvals for Hires and Salary Changes** report.
4. | To run the query, click the **Yes** button.
5. | The **Edit Parameter Values** window displays. The report pre-populates the 'Enter an employee type* with the value '0' (All). Alter the number according to the type of salary you wish to approve. The **Description** area contains values for each employee type of salary action.
6. | In this exercise, you will run the report to view student and faculty wage salary actions. Enter the appropriate value into the **Enter an employee type** field. The quote sign before and after the value is required. Enter "'1'".
7. | Enter your org code in the **Pick an organization** field, followed by the wild card. The single quote sign in front of the org number and after the percent sign is required. Enter a valid value e.g. '31815%'.
8. | Click the **OK** button.
9. | The report displays with the current salary actions for org code '31815'. **Note for Faculty Salaried Approvers**: Faculty salaried actions have an extra step: the HRMS Faculty/Staff Reviewer or the HR delegate in each department reviews the salary actions before approval and places a 'Yes' or 'No' in the Add'l Salary Admin. Details field. If a value is selected the value displays in the **Reviewed** column of the report. Any salary actions marked 'No' or the value is missing (not reviewed) will not be approved, but the salary actions marked 'Yes' are acted upon.
<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>An 'N' in the approved column signifies the salary is not approved. Once the approver has reviewed and approved the salary, the <strong>Reviewed</strong> column will display a 'Y' for 'Yes' which signifies approval for each record displayed in the report. In this report view, all salaries need reviewing and approval.</td>
</tr>
<tr>
<td>11.</td>
<td><strong>Salaried staff</strong> actions are approved by Human Resources or the person in the department who has HR delegated authority and are not typically reviewed by the department. The salary is discussed with the department and agreed upon during the Jobs@UVa process to hire, transfer, etc.</td>
</tr>
<tr>
<td>12.</td>
<td>Scroll to the <strong>Hourly Rate (New Value)</strong> column. Click the horizontal scrollbar.</td>
</tr>
<tr>
<td>13.</td>
<td>The person approving the salary must ensure the salary listed in this column is the correct salary for all employees listed in the report. If the salary is incorrect, do not approve. You must notify the HRMS Faculty/Staff Reviewer or HRMS Specialist in the department who must correct the salary.</td>
</tr>
<tr>
<td>14.</td>
<td>Note the salary change date column. <strong>Important Note:</strong> If a salary change date is beyond today's date (in the future), in the application date-track to the latest future date before approving your salary actions. If you do not date-track to the future date your query will return the salary records that are effective as of today's date or before only.</td>
</tr>
<tr>
<td>15.</td>
<td>All approvals must be performed before the payroll deadline for the pay period effective date listed in the <strong>Salary Change Date</strong> column. The employee will NOT be paid if the salary is not approved. The Payroll Calendar (<a href="http://www.hr.virginia.edu/calendars/2015-payroll-calendar/">http://www.hr.virginia.edu/calendars/2015-payroll-calendar/</a>) displays the deadline date for all pay periods in the <strong>Last Day Dept Enter OTL, LD, &amp; Approve Hires</strong> column. In this example, the 17-Jun-2013 salary actions must be approved by 01-Jul-2013.</td>
</tr>
<tr>
<td>16.</td>
<td>Congratulations! You have completed the simulation for <strong>Running the Approval for Hires and Salary Changes Report</strong>. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>

**Approving a Salary Action**

The person who enters the salary record can also change information but cannot update the Add'l Salary Admin. Details form or the Approved checkbox on the Salary Administration or Salary Management form.
The person reviewing the salary proposal can enter and change information and update the Add'l Salary Admin Details form but not check the Approved checkbox on the Salary Administration or Salary Management form.

The final approver can approve salary proposals via the Salary Management form but cannot enter/change information or update the Add'l Salary Admin. Details form.

As the final approver you will:

- Review the records on the Salary Management form
- Erase records that are incorrect and will not be approved
- Select and approve all remaining records
- Contact the department to discuss any actions not approved

**Procedure**

In this exercise you will approve student and faculty wage salaries for org '31815'.

<table>
<thead>
<tr>
<th>Step</th>
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</tr>
</thead>
</table>
| 1.   | Begin by navigating to the **Salary Management** form.  
      Click the UVA HRMS Student & Faculty Wage Approver link. |
| 2.   | Click the **Salary Management** link.  
      Salary Management |
| 3.   | The **Salary Management** form displays. The form has a built-in query that searches for salary proposals requiring your approval.  
      **Decision: Find all records in this folder?**  
      - If you are in charge of approving salaries for the whole university, click 'Yes' to find all unapproved salary proposals. This query may take a few minutes to run, please be patient.  
      - If you are in charge of approving salaries for a specific organization, click 'No' to search for your organizations unapproved salary proposals (recommended).  
      In this exercise, you want to view only unapproved salary proposals for org '31815'.  
      Click the **No** button. |
<table>
<thead>
<tr>
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</tr>
</thead>
</table>
| 4.   | To select search criteria:  
      Click the View menu. |
| 5.   | Click the Query By Example > Enter list item.  
      [Enter] |
| 6.   | Enter search criteria to find a particular salary proposal or group of salary proposals.  
      In this exercise, you want to search by org code. In the Organization field, enter the org code followed by the (%) wild card.  
      Enter a valid value e.g. 31815%. |
| 7.   | To run the query:  
      Click the View menu.  
      [View] |
| 8.   | Click the Query By Example > Run list item.  
      [Run] |
| 9.   | The salary proposals to approve display.  
      You can scroll horizontally to review all columns of information. |
| 10.  | To remove records:  
      For salary proposals that need correcting, if you do not want to approve one or more of the salary proposals, place your cursor in front of the salary proposal to remove and click the Clear Record icon on the toolbar. |
| 11.  | There are two methods of approving your salary proposals:  
      (1) Individually - place your cursor on a row and click the Approve button. Repeat for each row. |
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<tr>
<td>12.</td>
<td>(2) All (recommended) - click the <strong>Edit</strong> menu.</td>
</tr>
<tr>
<td>13.</td>
<td>Click the <strong>Select All</strong> list item.</td>
</tr>
</tbody>
</table>
| 14.  | All of the salary proposals are highlighted.  
Click the **Approve** button. |
| 15.  | The message on the toolbar displays the number of approved records and any failed records. |
| 16.  | In this view, the form is scrolled to the far right to show you the **Approved** column's check boxes.  
**If a record is incomplete:** the process will approve all records located above the incomplete record. To clear the record from the view, select the record's row and click the **Clear Record** icon. Request the department verify all required fields are entered, then re-query and approve again. |
| 17.  | **When all records are complete:** the Approved column checkboxes show that all records were approved.  
In this exercise the incomplete record has been fixed and you have queried and approved the salary proposals. |
| 18.  | Congratulations! You have completed the simulation for **Approving a Salary Action**.  
**End of Procedure.** |