FLAC Implementation – Reality Check

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Session Rules of Etiquette

• Please turn off your cell phone/pager
• If you must leave the session early, please do so as discreetly as possible
• Please avoid side conversation during the session

Thank you for your cooperation!

FLAC Implementation – Reality Check

• Life Before FLAC
• Implementation Goals & Strategy
• Challenges & Successes
• Tables
• Benefits
• Payroll Perspective
• Lessons Learned from Parallel Processing
• Additional Features
• Summary
Life Before FLAC

- Paying approximately 800 adjuncts each semester
- Paper & time intensive process
- Deadline was 1 week before the beginning of the semester
- First check received 1 month into the semester

ODU Environment

- 6 Colleges & distance learning environment
- Adjuncts paid by the course
- Adjuncts in pooled positions by department
- Compensation calculated: rate by rank * credit hours
- All paperwork for adjuncts approved by Academic Affairs Office – big log jam
- Copies of paperwork submitted to Payroll and Human Resources

Implementation Goals & Strategy

- Goals:
  - Checks to adjuncts more timely
  - Information to adjuncts about how they are being paid
  - Save Time – reduce redundancy
  - Reduce the paperwork
Implementation Goals & Strategy

- Strategy
  - Cross functional team
  - Academic Affairs or Provost's Office
  - Registrar’s Office
  - College Representative
  - Payroll & Human Resources
  - Computer Services

- Get “Buy-in”
- Pilot Group
- Only adjunct & overload payments

Challenges

- Retro-fitting our current Banner set-up
  - Default Earnings
    - We had never used default earnings for any earn code except REG
    - Adjunct earn codes would not default into existing jobs
    - Worked for new jobs once we changed the codes to default
    - Began using different job suffix – this is considered a new job
  - Update PTREARN
    - Change the attribute of the adjunct earn codes to “RP” regular pay
  - PTRECLS
    - Allow default earnings for those employee classes
Challenges

• Cross Functional Module & Team
  — No one had the whole picture
  — Working with Student side
  — Working with non-Banner people

• Lots of pieces to the puzzle
  — Student schedule side, faculty records, security, self service, table set-up, HR, Payroll

• Error messages have multiple pieces
  — “Missing rate type…” error could multiple have causes & therefore solutions (see cheat sheet)

• Exception situations
• Time to Test & Test & Test

Approvals

• Paper process – signatures from department, dean’s office, and Academic Affairs.

• Our Compromise
  • Department will print the spreadsheet and get the department signature.
  • This spreadsheet goes to the dean’s office.
  • Dean reviews & locks records
  • Email to Academic Affairs – Ready for review
    — Review for abnormal payments – not all the detail they had reviewed before

Job Type – Overload on NBAJOBS

• PEPFCAP creates only Primary or Secondary job types on NBAJOBS – will not create Overload jobs
  • Computer Services created a process to run after PEPFCAP that changes Secondary jobs to Overload for FT employees
Successes

Successes & Non-problems

- Uploading to SIAASGN
- Paying our FT faculty their overload payments or our staff and administrative faculty to teach courses

Tables
### Table Set-UP

- **PTVFLIC & PTRFLIC** – related to incremental pay
  - Several Options to start with – ended up with just a few
  - Travel, Distance Learning, Special Skill
- **PTVFLCL** – faculty levels
  - We already used this concept
- **PTRFLCT** – each semester
  - Dates for job records
- **PTRFLAC** –
  - Everything comes together on this rule table
  - Term specific – can be copied

### PTRFLAC – Merges data from both sides

<table>
<thead>
<tr>
<th>Field</th>
<th>Student Side</th>
<th>HR/Payroll Side</th>
</tr>
</thead>
<tbody>
<tr>
<td>College</td>
<td></td>
<td>• Faculty Level</td>
</tr>
<tr>
<td>Campus</td>
<td></td>
<td>• Compensation Rates</td>
</tr>
<tr>
<td>Schedule Type</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract Type</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Instructional Rates Table

<table>
<thead>
<tr>
<th>Name</th>
<th>Rate</th>
<th>Type</th>
<th>Schedule Type</th>
<th>Faculty Level</th>
<th>User ID</th>
<th>Activity Date</th>
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</thead>
<tbody>
<tr>
<td>ACTING</td>
<td>2000.00</td>
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<td>MWF/THURS</td>
<td>INSTRUCTOR</td>
<td>UNIV1</td>
<td>09-01-2020</td>
</tr>
<tr>
<td></td>
<td>2000.00</td>
<td>1</td>
<td>MWF/THURS</td>
<td>ASSOCIATE PROF</td>
<td>UNIV1</td>
<td>09-01-2020</td>
</tr>
<tr>
<td></td>
<td>2000.00</td>
<td>1</td>
<td>MWF/THURS</td>
<td>PROFESSOR</td>
<td>UNIV1</td>
<td>09-01-2020</td>
</tr>
<tr>
<td></td>
<td>2000.00</td>
<td>1</td>
<td>MWF/THURS</td>
<td>FACULTY PROF</td>
<td>UNIV1</td>
<td>09-01-2020</td>
</tr>
<tr>
<td></td>
<td>2000.00</td>
<td>1</td>
<td>MWF/THURS</td>
<td>DEAN</td>
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<td>09-01-2020</td>
</tr>
<tr>
<td></td>
<td>2000.00</td>
<td>1</td>
<td>MWF/THURS</td>
<td>PRESIDENT</td>
<td>UNIV1</td>
<td>09-01-2020</td>
</tr>
</tbody>
</table>

### Faculty Instructional Level Rate

<table>
<thead>
<tr>
<th>Faculty Level</th>
<th>Rate</th>
<th>User ID</th>
<th>Activity Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEAN</td>
<td>2000.00</td>
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<td>09-01-2020</td>
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<tr>
<td>PRESIDENT</td>
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<td>09-01-2020</td>
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<tr>
<td>FACULTY PROF</td>
<td>2000.00</td>
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<td>09-01-2020</td>
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<td>PROFESSOR</td>
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<td>ASSOCIATE PROF</td>
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<td>09-01-2020</td>
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<tr>
<td>INSTRUCTOR</td>
<td>2000.00</td>
<td>UNIV1</td>
<td>09-01-2020</td>
</tr>
</tbody>
</table>
Error messages

• Error: Missing rate for this schedule type “?”, “description” for CRN 99999.
  — PTRFLAC doesn’t have the correct combination of: Term, College, Campus, schedule type . Create an entry that matches the course.
• “Missing rule for contract type PT – Part Time Contract
  — Check the campus, schedule type to make sure that there is a rule on PTRFLAC for that combination
  — Check that the contract type is on the PTRFLCT (Faculty Contract Type Control Rules Form)

Error messages

• “Invalid Schedule Type Rate for Faculty Course Compensation”
  — Could mean that the faculty compensation level is not on PTRFLAC as one of the compensation levels for that college, campus and schedule type.

Benefits

Timing Changes
Role Changes
Compare
Before FLAC (5-6 weeks)
• 800 Adjuncts
• AA appoints & creates PPAIDEN
• Departments prepare 5 part form for each faculty
• Chair & Dean sign-off
• AA verifies paper against Banner data

After FLAC (3 weeks)
• 800 Adjuncts
• AA appoints, creates PPAIDEN, PEAFACT & SIAINST
• HR creates PEAEMPL
• Dept updates SIAASGN with Pos# and contract type
• PEPFLAC creates self service environment
• Review by department & deans

Compare
Before FLAC (5-6 weeks)
• AA signs form & distributes to HR, Payroll and back to department
• HR Creates PEAEMPL & NBAJOBS
• Payroll sets up default earnings on NBAJOBS with start & end dates
• Payroll is run

After FLAC (3 weeks)
• Records are locked in self service
• Faculty receive email to view their compensation
• AA Reviews self service
• AA runs PEPFCAP
• Payroll reviews audit reports
• Payroll is run

Roles & Responsibilities
• Table set-up – Academic Affairs with HR support
• SIAASGN – Academic departments
  Processes
  — PEPFLAC - Academic Affairs
  — PEPFCAP - Academic Affairs
  — Creating PEAEMPL records
  • HR
    — PEAFACT & SIAINST
    • Academic Affairs
• Payroll Processing
  — Payroll
Customization

Processes

- **SWPASGN**
  - Updating SIAASGN with contract type, position number and suffix via spreadsheet upload

- **PWPOVSO**
  - Run after PEPFCAP – changes the “job type” to Overload on NBAJOBS as needed

Reports

Payroll

- Report to verify all locked records moved from self service to NBAJOBS
- Report to capture number of pays for each faculty member, amount of pay, start and end dates for each employee, position number, budget code and sub account charged
Lessons Learned from Parallel Processing

Worked for Us!
- Standard rates for adjunct faculty – by rank
- Updating SIAASN with contract type, position number and suffix via spreadsheet upload
- Involve people who know the processes & can make decisions
- Start with small pilot group
- Keep it simple

Evisions and Banner Document Management Suite
What can Evisions do for FLAC?

- **FormFusion**
  - Document Customization
  - Output Options
  - Print
  - Email
  - BDMS
  - Archive Electronic Copies
  - Ease of use

- **IntelleCheck**
  - Document Customization
  - Output options

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FormFusion Document Enhancement

- Banner Output from GLRLETR

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FormFusion Document Enhancement

- Finished Output
FormFusion Document Enhancement

- Standard Banner GLRLETR Output
  - Use a population selection to get your contract recipients

FormFusion Document Enhancement

- Adding Custom Data to the Form

FormFusion Document Enhancement

- Editing the template
FormFusion Document Enhancement

- Configuring the output options

IntelleCheck and FLAC
Don’t reinvent the wheel!

- Creating the FormFusion Template
  — Download it from evisions.com COOP
  — Customize it to your school’s template
  — Choose the way you would like to deliver it
  — Make contract delivery seamless for your end users

- Adding to the notes in IntelleCheck
  — Make a request through the Evisions helpdesk for the Cayuga Community College modification to the Notes section of your checks or direct deposit advices

Additional Features and Considerations

Additional Features

- Luminis Channels

- Workflow
  — Delivered
  — Custom
Considerations

• Team Structure
  — Academic Affairs / Provost Office
  — Human Resources
  — Payroll
  — Information Technology

• Implementation / Testing Plan
  — Dedicated Team Meetings
  — Which College / Campus?
  — Which Department?
  — Which Faculty Members?

• Communication

Considerations

• Banner Forms
  — Who ‘owns’ the forms?
  — Who can view the forms?
  — Updates to rule and validation forms

Summary

• This was tough!
  — It is well worth it
  — Time savings is significant
• Give yourself plenty of time to test
• Ease of implementation depends to some extent on your current banner set-up & your business practices
• Colleges are asking if there is a module like this for graduate assistants
Questions & Answers

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