Managing the Leave Accrual Process

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- 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!

Introduction

- Leaves processing varies dramatically from school to school
- Banner leave processing is powerful and most rules can be handled; sometimes with a bit of creativity.
- Best practices are a crucial part of setting up leaves
Leave Processing Topics Include:

- Reviewing the current processes
- Banner Forms and Decision Making
  - PTRINST
  - PTVLCAT
  - PTRLEAV
  - PTRLCAT
  - PTRERN
  - PEALEAV
  - PEILHIS
  - PHIACCR
- Best Practice Review

PTRINST

- Institutional Set-up
- Leave by Employee or Leave by Job?
- Take then Accrue or Accrue then Take?
- Proration based on Jobs based on FTE or Appointment Percentage?
- Minimum Leave Day Increment
- Leave Balance Roll Order
  - Before Usage and Accrual
  - After Usage and Accrual

PTVLCAT

- Need one for each group of employees that have separate leave rules
  - Not needed for changes based solely on length of service
- Payroll v Leave Report Indicator
  - Both process leaves with no problem
  - Leave processing will not process anything involving dollars
    - No overtime
    - All leaves must allow negative balances
- Days v Hours
  - Can only use Days with Leave Reporting
  - People see days – actual processing remains in hours
Ptrleav
- Name Types of Leaves
- Same Name can be used in Multiple Categories
- Types of Leave here are ones that are going to be tracked
  - Not funeral
  - Definitely Sick and Vacation?
  - Compensation Time?
  - Student hours worked?

Ptrlcat – the Heart of Leave Processing
- Frequency of Accrual
  - Pay Period
  - Once a Year
  - Anniversary
- Base Date
  - Current Hire
  - Adjusted Service Date
  - Original Hire
  - Seniority
- Cut off Day

Ptrlcat – the Heart of Leave Processing
- Bank Frequency
- Roll Dates
  - Will Change Begin Balances
- Accrual Method
- Accrue in Pays
PTRLCAT – the Heart of Leave Processing

• Leave Accrual Schedule
  — As few or as many as needed
  — Always in hours
  — Roll number CANNOT be less than maximum or it will roll only that much

• Priorities
  — As many as needed
  — Can use Leave or Payroll reporting

PTREARN

• Need an earnings code for each type of leave

• Leave Taken

• Leave Earned

PEALEAV

• Begin Balance
  — Changes at Roll

• Accrued

• Taken

• Banked

• Changes made here
  — Comments Available
  — Can go over Maximum
PEILHIS

- PEALEAV History – all data
- Includes user and Activity Date

- PHIACCR
  - Accrual History by Pay Period
  - Available at Disposition 38
  - Careful in Yearly Accruals

Summary

- Very Powerful
  - Can do most (but not all) leave set-ups

- Be Creative in use

- Analyze for best practices
Higher Ground℠ Methodology

Business Process Modeling

Methodology
- Define every step and activity that must occur to achieve a particular outcome
- Identify when the business processes are out of control, occur too slowly, or fail, the institution cannot succeed
- Effective processes are key to institutional success in academic and business units
- Co-develop potential process improvements
- Pilot/simulate proposed redesign to validate outcomes
- Outline implementation requirements

Assess
- Critical issues
- Impacts
- Value
- Metrics for performance indicators

Align
- Strategic
- Technology
- People
- Impacted Processes

Measure
- Validate
- Configure
- Test
- Execute

Implement

Current State

Strategic

Technology

People

Impacted Processes

Value

Metrics for performance indicators
Current State View: Many processes are managed in Silos

Outcomes of BPM...Cross-Enterprise Processes

Processes operate horizontally – across functional boundaries

Outcomes of BPM...Cross-Enterprise Processes

Processes operate horizontally – across the UDC
What are the steps involved in a BPM engagement?

BPM Strategy
- Process Execution
- People Alignment
- Technology Foundations
- Process Visualization
- Process Implementation
- Process Execution

BPM Strategic Frame-working
Framework Grid Foundation Definitions

Sample

Strategic

Important but Not
Strategic

Performance
(Low to High)

Institutional Functions

Managing Electronics

Managing Changes to a Student’s Program

Managing Post Credits

Managing Graduation Applications, Audits, and Evaluations

Help Desk

Managing Admissions Eligibility, and Academic Placement / Proficiency Exams

Managing Transfer Credit Evaluations

Providing Academic Services and Support

Managing Student Academic Issues Withdrawal, interrupt, and resume student advising

Student Finance Advising

General Student Academic Advising

Probation / Dismissal / Appeals Counseling

Managing Exemptions and Waivers

Advising Practicum Students

Capstone / Senior Project Pre-Req. Review Advising

Managing Location Transfers

Managing Profile Changes

New Student Clearance and Advising

Managing Faculty Issues and Course Concerns
What is a Business Process Model?

Business Process Modeling – Improved to Future State

Institutional Business Processes – Ideal State

- Processes that are aligned with your Strategic Goals and Objectives
- Processes that support Humber’s needs
- Processes that can be measured and used as KPIs
- Processes that are proactive and cross-functional
• Initiatives and Action Items

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Action Item / Initiative / Decision</th>
<th>Date Assigned</th>
<th>Assigned To</th>
<th>Comments</th>
<th>Priority (High, Medium, Low)</th>
</tr>
</thead>
</table>

What are the outcomes and deliverables?

- Findings and Recommendations
- Executive Report
- Completed Process Outlines
- Specific ideal-state Business process models
- Enterprise Portfolio matrix – from both S&A and BPM
Why is this important

- Establishes a plan of action
- Creates ideal state business process models
- Ties people, processes, and technology to educational and business goals
- Provides a common language
- Supports coherent decision-making
- Documents all enterprise applications
- Establishes rules and parameters

Questions & Answers

Thank You!

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