HR ‘Ohana Meeting
Wednesday, April 2, 2014
9:00AM – 11:00AM
Kuykendall Auditorium
Agenda

I. Welcome
   • Debra Ishii

II. Update - Title IX and Violence Against Women Act
    • Jenn Rose

III. HR Trends 2014
    • Debra Ishii

IV. S397 Updates & Multiple Appointment Inquiry
    • Shannan Yoshimura

V. Leave Tips
    • Stacy Shigemura

VI. Benefits Related Updates & Benefits Cost Overview
    • Diane Ho & Clifford Shinchi

VII. Overload v. Overtime for APT personnel
    • Debra Ishii

VIII. Other Updates & Announcements
    • Debra Ishii

IX. Closing
HR Trends
Prepared for HR ‘Ohana Meeting, April 2, 2014

6 Expert Panels
- Ethics / Corporate Social Responsibility & Sustainability
- Global
- HR Disciplines
- Labor Relations
- Technology & HR Management
- Workplace Diversity & Inclusion

Broader Trends
- Continued impact of economy
- Educated & skilled workforce
- Technology developments
- Work / life balance
- Metrics & data
- Market volatility
- Government regulation

Future Insights, SHRM

CSRS
- Held accountable by community
- HR assistance with incorporating values
- Employees seek CSRS based organizations

Employee Health, Safety & Security
- Employee obesity – year 2030, 50% obese
- OSHA standards & compliance
- GINA
- Prescription opioids & legalized marijuana
- Organizational resilience management
- Technology

Future Insights, SHRM, 2014
Employee Relations
• Globalization & virtual workplace
• Lean workforce
• Legislation – interpretation & implementation
• Work / life boundaries
• Qualitative performance assessment
• Technology-based training

Ethics
• Decision-making
• Work / life boundaries
• Increasing diversity
• Multinational & multicultural environments
• Social networks
• Legal & ethical complaints
• Workplace behaviors

Global HR
• Leadership redefined
• Immigration
• Globalization impact
• Demand for education (technical & soft skills)
• Regulatory compliance & liability

Organizational Development
• Leadership development – expertise, innovation, value contributions
• Complex and dynamic organizations
• 5 generations of employees
• Career planning
• Forecasting with data
• Training – pulled v. pushed
Staffing Management

- Country or regional recruiting strategies
- Individualized experience
- Leadership scarcity
- STEM talent
- Job boards & broad networks

Technology & HR Management

- Employee data security
- Gamification exploration
- Innovative collaboration tools
- Cross-functional innovation teams
- Mobile tool evolution
data → hands → time → device → task
- Big data analysis → business performance results

Total Rewards / Compensation & Benefits

- Health care reform
- Wellness & disease management
- Total rewards
- Work / life balance
- Retiree benefits
- “Global commuters” & virtual workers

Workplace Diversity & Inclusion

- ADAAA amendments
- Cultural competence
- Women representation
- LGBT related
- 5 generations
- Aging workforce
- Career gaps
What does HR need to do?

- Stay abreast of trends and laws
- Work with campus HR leads on issues
- Understand intent of policies, procedures and practices
- Be an advisor
- Shape direction
- Plan for future

Future Insights, SHRM, 2014
S397 Updates

S397 Updates in PeopleSoft
- Production – To be determined
- Full instructions – Dec. 10, 2013 HR ‘Ohana Meeting
- Action/Reason Code
  - JED 397 (G-fund to S397)
  - JED 398 (S397 to G-fund)
  - Note: use JED 580 if other than S397
- Auto convert back to G-fund – July 1, 2014
  - Only if the account code is marked “Completed” on the “S397 Conversion Control” Panel
    - Includes all employees with an S397 account code (even if hired after conversion date)
  - One-to-one match of S397 to G-fund account codes

S397 for BU 08 Only
- MOU dated September 18, 2013
  - Contract period from 07/01/13 to 06/30/15
- Memo to HGEA is not required if:
  - Effective date of S397 account code change is 07/01/13 or later
  - Must meet 3 conditions of MOU:
    1. Temporary change
    2. No impact on wages & benefits
    3. Original funding source restored by July 1 of next fiscal year

S397 PNFs for BU 08 Only
- Use Steve Yamada’s two emails dated 03/14/14 as reference for:
  - Appropriate remarks to include on the PNF
  - Notifying employees when making a retroactive change from JED 580 to JED 397
S397 Quick Reference

<table>
<thead>
<tr>
<th>Action/Reason</th>
<th>G-fund to S397</th>
<th>G-fund to non S397</th>
</tr>
</thead>
<tbody>
<tr>
<td>BU 08 (Meets)</td>
<td>RJ 08</td>
<td>RJ 08 (Does not meet)</td>
</tr>
<tr>
<td>1. Temporary change</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>2. No change in wages &amp; benefits</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>3. Funding source restored by July 1 of next fiscal year</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

BU 08 only - meets 3 MOU conditions?

Memo to HGEA

S397 Remarks on PIF

Action/Reason - G-fund to S397

JED 397 JED 397 JED 397 N/A N/A

Action/Reason - S397 to G-fund

JED 398 JED 398* JED 398 N/A N/A

Action/Reason - G-fund to non S397

N/A N/A N/A JED 580 JED 580

Action/Reason - non S397 to G-fund

N/A N/A N/A JED 580 JED 580

*M on S397 Conversion Control Panel in PeopleSoft, account code will be electronically converted to G-fund on 07/01/xx. Manual changes may be needed to reflect account code and/or effective date.

M.A.I. Things to Remember

- Ability to search for any employee across all departments
- Displays all appointments in PeopleSoft
  - Top row of each record number
  - Excludes student employment (SECE)
- Helpful for:
  - Hires – check for other active appointments within UH
  - Transfers – if you need a record transferred
  - Eligibility – GA appointment with another dept.
1. Multiple employees in the same position number will cause problems with approval hierarchy. The leave system will not know who to send leave requests to. This occurs when someone is retiring and a new employee is hired into the position before the current incumbent has vacated the position.

2. On line leave correction request forms and advance accrual requests forms are located on the OHR web site www.hawaii.edu/ohr under HR forms under leave system section. Please do not submit any draft forms.

3. Comp time timesheets. There should only be one timesheet for the first half of the month and one for the second half of the month. I’ve been getting multiple timesheets for the first or second half of the same month. Please hold onto the timesheet until the end of the period and consolidate the timesheets if necessary.

4. Purged leave requests. If the employee has a PeopleSoft action that affect FTE, transfers, termination, LWOP, LWP, etc with an effective date prior to an approved leave request(s) the system will purge all approved leave requests from the effective date of PNF action forward. The leave system can’t determine if the leave requests are still valid. The PO will receive a leave system purged leave request email and will have to ensure that if the leave requests are still valid that they are all re entered into the leave system.

5. Employees who have transferred from another leave accruing position have to make sure that when they request leave they are requesting using the current position (not the one that they transferred from). If they request leave from their prior position, the supervisory hierarchy no longer exists for that prior position and the leave request will go to exception routing and will not get approved.

6. Advance accruals can now be granted retro to time of conversion. Please submit advance accrual request form to me. Remember the accruals must be posted the day prior to it being taken as accruals are posted at 11:59pm of the effective date.
Employee Benefits Update

April 2, 2014

Island Flex – Flexible Spending Account Program Open Enrollment

• March 10 – April 30, 2014
• Plan year July 1, 2014 – June 30, 2015
• Must enroll each year to participate
• Enrollment forms must be postmarked by April 30, 2014

New For 2014 – 2015 Plan Year

• Medical Spending Account Only
  – Carry-over up to $500
  – Automatic Carry-over (September 30, 2015)
  – $2,400 + $500 = $2,900

Hawai‘i Employer-Union Health Benefits Trust Fund (EUTF) Open Enrollment

• April 7, 2014 – May 2, 2014
• Effective July 1, 2014
• Information sessions throughout the State
  – Governor approved paid time off
• OE information posted on EUTF’s website and OHR homepage
### Changes

- HMSA supplement medical plan eliminated
- HMSA PPO medical plan bundled with prescription drug plan
  - No stand-alone HMSA PPO and stand-alone Drug plan
- Prescription – out of pocket maximum
  - Individual $6,350 and Family $12,700
  - Calendar year
- Rates Change
- EC-1 Rev. Apr 2014

### HMSA PPO Bundled with Prescription Drug – General Rule

- Follow medical plan currently enrolled in
  - Drug coverage
  - Tier (Self, 2-Party and Family)
  - Dependents
- Employee does nothing – automatically enrolled
- Do NOT want automatic change
  - Must submit EC-1 form

### Hawai‘i Employer-Union Health Benefits Trust Fund (EUTF)

- Employee’s EC-1 deadline to HR rep
  - COB May 2, 2014
- HR representative deadline to EUTF
- COB May 9, 2014
  - Must be received by EUTF - not postmarked
  - EC-1 should be mailed or hand-carried to EUTF
  - OHR will collect and deliver

### Required Notices

- HIPAA (Reference Guide)
- Marriage certificate
  - New hire
  - Never been enrolled in an EUTF plan
- Birth certificate – dependent has different last name from employee
Premium Conversion Plan (PCP) Open Enrollment

- April 7, 2014 - May 2, 2014
- Voluntary benefit program
- Deduct health plan premiums on a pre-tax basis
- Make PCP election on bottom of EC-1 form
- DHRD does not need copy of OE EC-1

PCP Reminder

- Must have an eligible event to change or cancel PCP enrollment
- Mid-year changes - submit PCP-2 form to submitted to DHRD and EUTF
- DHRD does not need copy of EC-1 for mid-year changes
- Prospective basis

Pre-Tax Transportation Benefit Pilot Program (PTBP)

- Open Enrollment
- May – June
- Cancel during summer months
- Re-enroll for Fall semester

Benefits Cost Overview
## Pension

- Employers’ Retirement System (ERS) Pension Accumulation
  - 16%
  - July 1, 2014 – 16.5%
  - July 1, 2015 – 17%
- Pursuant to Section 88-122 (e)
- ERS Pension Administration Fee
  - 0.01%

## Taxes

- Social Security Taxes
  - 6.20%
- Medicare Taxes
  - 1.45%
- Internal Revenue Code

## Workers’ Compensation

- Workers’ Compensation
  - 0.51%
- Calculated by a third-party actuary
- HRS 386 – Workers’ Compensation Law

## Unemployment

- Unemployment Insurance
  - 0.30%
- Calculated by Office of Research Services (ORS)
- HRS 383, Hawai‘i Employment Security Law
Health Benefits

- Retiree Health Insurance
  - 10.35%

Employer’s Share of Premiums
- Percentage Rate Varies
  - Type of Coverage (HMSA, Kaiser etc)
  - Tier (self, 2-party and family)
  - Bargaining Unit

Thank you
<table>
<thead>
<tr>
<th>Description</th>
<th>Percentage</th>
<th>Actual Monthly Amount</th>
<th>Comments</th>
<th>Authority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employers’ Retirement System Pension Accumulation</td>
<td>16%</td>
<td>$640.00</td>
<td>No limit to eligible salaries and wages. Note: Federal tax limit on pension compensation limits employee’s contribution to the ERS and limits the benefits payable from the ERS. Effective July 1, 2014, the employer contribution rate will increase to 16.50%. Effective July 1, 2015, the employer contribution rate will increase to 17.00%.</td>
<td>HRS 88-81.5 Federal tax limits on annual compensation. HRS 88-122 (e), Determination of employer normal cost and accrued liability. Percentage rate is mandated by law.</td>
</tr>
<tr>
<td>Employers’ Retirement System Pension Administration</td>
<td>0.01%</td>
<td>$0.40</td>
<td>No limit to eligible salaries and wages. Percentage rate is provided by State of Hawai‘i Department of Budget and Finance.</td>
<td>HRS 88-81.5 Federal tax limits on annual compensation. HRS 88-122 (e), Determination of employer normal cost and accrued liability. Percentage rate is mandated by law.</td>
</tr>
<tr>
<td>Social Security Taxes</td>
<td>6.20%</td>
<td>$195.60</td>
<td>Eligible salaries and wages up to a maximum amount (2014 - $117,000). Calculation is based on health benefits paid on a pre-tax basis.</td>
<td>Tax rate is mandated by law (Internal Revenue Code)</td>
</tr>
<tr>
<td>Medicare Taxes</td>
<td>1.45%</td>
<td>$45.74</td>
<td>No limit to eligible salaries and wages. Calculation is based on health benefits paid on a pre-tax basis.</td>
<td>Tax rate is mandated by law (Internal Revenue Code)</td>
</tr>
<tr>
<td>Workers' Compensation</td>
<td>0.51%</td>
<td>$20.40</td>
<td>No limit to eligible salaries and wages. Percentage rate is calculated by a third-party actuary.</td>
<td>HRS 386, Workers’ Compensation Law</td>
</tr>
<tr>
<td>Unemployment Insurance</td>
<td>0.30%</td>
<td>$12.00</td>
<td>No limit to eligible salaries and wages. Percentage rate is calculated by University Office of Research Services (ORS).</td>
<td>HRS 383, Hawai‘i Employment Security Law</td>
</tr>
<tr>
<td>Retiree Health Insurance</td>
<td>10.35%</td>
<td>$414.00</td>
<td>No limit to eligible salaries and wages. Percentage rate is provided by State of Hawai‘i Department of Budget and Finance.</td>
<td>HRS 87A-33 State and county contributions; retired employees</td>
</tr>
<tr>
<td>Employer’s Share - MEDICAL</td>
<td>16.11% *</td>
<td>$644.28</td>
<td>The employer's cost is a set amount based on the health plan chosen by the employee. Employer's cost is based on EUTF’s Active Employee Rates and Contributions - Effective July 1, 2013.</td>
<td>HRS 87A-32 State and county contributions; active employees</td>
</tr>
<tr>
<td>Employer’s Share-EUTF PRESCRIPTION DRUG</td>
<td>3.30% *</td>
<td>$131.82</td>
<td>Employer's cost is based on EUTF's Active Employee Rates and Contributions - Effective July 1, 2013.</td>
<td>HRS 87A-32 State and county contributions; active employees</td>
</tr>
<tr>
<td>Employer’s Share-DENTAL PLAN</td>
<td>1.51% *</td>
<td>$60.36</td>
<td>Employer's cost is based on EUTF's Active Employee Rates and Contributions - Effective July 1, 2013.</td>
<td>HRS 87A-32 State and county contributions; active employees</td>
</tr>
<tr>
<td>Employer’s Share-VISION PLAN</td>
<td>0.22% *</td>
<td>$8.76</td>
<td>Employer's cost is based on EUTF’s Active Employee Rates and Contributions - Effective July 1, 2013.</td>
<td>HRS 87A-32 State and county contributions; active employees</td>
</tr>
<tr>
<td>Group Life Insurance</td>
<td>0.10% *</td>
<td>$4.16</td>
<td>Employer pays 100% of insurance cost. Cost is based on EUTF’s Active Employee Rates and Contributions - Effective July 1, 2013.</td>
<td>HRS 87A-17 Group life insurance benefits or group life insurance, HRS 87A 32 (b) State and county contributions; active employees</td>
</tr>
<tr>
<td>TOTAL</td>
<td>56.05%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vacation Reserve (only charged on extramural accounts)</td>
<td>3.25%</td>
<td>$130.00</td>
<td>Eligible salaries and wages on grants and contracts. ORS has reinstated assessments for participation in the vacation reserve for employees that accrue vacation. Percentage rate is calculated by ORS.</td>
<td></td>
</tr>
<tr>
<td>Total for extramural accounts</td>
<td>59.30%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Percentage rate varies based on health plan chosen, type of coverage, and salary earned
**Overtime v. Overload**

- **Overtime**
  - Article 19A, Overtime
  - In excess of 40 hours per week
  - Applies to 11 month personnel
  - Form D55 (A&B – time & a half) & PNF (C&D – stipend)
  - ERS eligible – if hired on or prior to 6/30/12
  - Non-ERS eligible – if hired on or after 7/1/2012

- **Overload**
  - Article 22, Overload
  - Form 6 – straight time
  - Non-ERS eligible compensation

**What is the difference?**

- **Overtime**
  - Additional duties consistent w/scope & assigned duties/responsibilities in PD
  - Workload issue – in excess of 40 straight time hours per week

- **Overload**
  - Work outside of normal scope of duties & outside of normal work hours
  - Secondary to normal duties
  - e.g., research or teaching

- Require prior approval
- Must fulfill primary duties in productive manner

**Question – overtime or overload?**

1. The communications specialist feels he/she must work an additional 3 hours each on Monday and Wednesday to complete a media campaign.

2. The fiscal administrator in the College of Yoga is asked to provide fiscal support for the College of Zumba as a staff member in College of Zumba is on leave. A critical fiscal deadline must be met. Total hours per week shall not exceed 20 hours, and will be done after work hours.
3. A database specialist in the College of Turbo Kick is asked to provide database support after normal work hours for the campus technology office.

4. The HR specialist with responsibilities for HR information system in the system HR office is asked to provide support after hours in the review of classification and compensation requests for the School of Yoga while a position is in recruitment.

5. The fiscal administrator in the department of biology is asked to provide fiscal support for the dean’s office after work hours. The PD includes providing support to the entire college as needed.

6. The HR specialist provides assistance to the fiscal office during the normal work day while a staff member is on leave.