HR ‘Ohana Meeting
Tuesday, December 10, 2013
9:00AM – 11:00AM
Kuykendall Auditorium
Agenda

I. Welcome
   • Debra Ishii

II. Tobacco: History, Trends and Workplace Impact
    • Dana Funai

III. Recruitment/Priority Candidates, Personnel Executive Policies Update
     • Brenna Hashimoto

IV. PeopleSoft Updates: Degree History for Faculty & E/M, Tenure Upon Appt,
    Personnel Action Reason, S397
     • Shannan Yoshimura

V. PNF Reminders
    • Darrick Tanigawa

VI. Top 5 Leave Tips
    • Stacy Shigemura

VII. BU08 Supplemental Time Off/Professional Development Update
     • Debra Ishii

VIII. FMLA Refresher
     • Clifford Shinchi

IX. Benefits Related Updates
    • Diane Ho

X. Closing
Executive Policies Update

- Previously 26 Executive Policies in Chapter 9 - Personnel
  - 13 Rescinded
  - 8 Updated
  - 4 Current (no changes proposed)
  - One pending further review
- Updates posted to APIS
- Check citations to ensure accuracy

APT Priority Status

First, let’s review Article 9 – Employment Security

- APTs serve a 3-year probationary period
- Probationary APTs may be terminated with 30 days notice or by non-renewal
- After 3-year probation, APTs gain “employment security” and “reemployment rights” under Article 10A

APT Priority Status

- Article 10A - Three types:
  - Priority 1 – When a temporary APT with employment security is given notice of termination (up to 60 days prior to COB)
  - Priority 2 – After termination of appointment (maximum duration 18 months)
  - Priority 3 – All members of Unit 8 (permanent and probationary appointees)
- Excluded APTs (BU 78) have similar priority for excluded positions (BORP, Chapter 9)

APT Priority Status

- Temporary APTs with reemployment rights being terminated shall…
  - Upon request, be provided information on vacancies (work@uh)
  - Be afforded priority status when applying for vacancies 60-days prior to termination date
  - Be provided written notice of termination, which shall include…
**APT Priority Status**

- Written notice shall include:
  - Effective date of the termination (COB)
  - Notice of Priority 1 status
  - Notice of when Priority 2 status begins
  - Instructions on applying for vacancies and self-identifying as a priority candidate
  - Offer to meet with the APT to explain

- Other details...
  - Priority candidates must meet MQs to be considered for vacancies
  - Priority 1 and 2 status applies to positions in the same or lower pay band (not valid for positions in higher bands)
  - APTs selected through Priority placement serve a new 6-month probationary period, which may be extended an additional 6 months

**Other Reminders…**

- Selection panels should be briefed on:
  - EEO/AA dos and don’ts
  - Balanced panel (gender and race)
  - Confidentiality
  - Conflicts of interest
  - Use of culling criteria when not interviewing all applicants
  - Be consistent

**APT Priority Status**

On the horizon…

- Background checks

Questions?
Why a New Education Panel?

- Act 134 Section 131
  - New hire Faculty and E/M after 06/30/13
- Collect historical data of higher education degrees
- Data used for report to the Legislature
- Education data on two PeopleSoft panels
  - UH Menu – Update Personal Information
  - Workforce Development – Track Person Competencies – Education

Professional Ed. And Training Tab
- Degree – A, B, M, D
- Year Completed – Optional
- School Code – OTH, UH
Faculty Tenure Upon Appointment

New Tenure Code

- Location: Job Data/ Employment Information/ Tenure Data
- Code: FTA – Faculty Tenure Upon Appt

Personnel Action/Reason Table

- Explanations of each P/S action/reason
- On OHR web site / HR Info Systems / PeopleSoft / Table Code Listings
S397 Account Code Conversion

S397 Overview

- S397 is an account code (DAGS)
  - Special funds (tuition and fees)
- Used when general funds nearly depleted
  - G-funded (people data)
  - Budget type = J1 (position data)
- PeopleSoft panel created to mass convert G-fund accounts to S397
  - Reverts back to G-fund effective 07/01 of the new fiscal year

New Panel (currently test only) S397 Conversion Control

Search by Fiscal Admin Code

- Only acct codes assigned to the FA will be displayed
- Data as of nightly KFS download
Run & Effective Dates

- Last Update Date/Time = row inserted into Job Data at 9:00 PM held in suspense
- Run Date = row will be approved and sent to Payroll at 9:00 PM
- Effective Date = date which the G fund account codes are converted to S397 account codes

Add & Delete Account Codes

- One-to-one correspondence required between G fund and S397 account code
- Error checking on entered account codes:
  - Valid account codes
    - Assigned to the FA in KFS (prev night)
    - Valid EAC within the FA’s authorization
- Press “Save” button

Notes

- PNFs placed in PageCenterX
  - On Run Date
  - Different pagesets for Civil Service and BOR
- Effective 07/01/xx of next fiscal year
  - All S397 accts converted back to original G fund
  - PNFs generated
- New Personnel Action/Reason Code
  - JED/397 – Move to/from S397 Acct Code

Notes

- Multiple acct codes can be converted at different times
- Users with Job Data access will automatically have access to the S397 panel
  - Other users – P/S security worksheet – new column to authorize access to the S397 panel
- Release date: TBD
Questions?
**Demographic Data**

- **Name**
  - Ensure name on Social Security card is what is entered in PeopleSoft. Let the system truncate appropriately.

- **Payroll Numbers (P/R)** - refer to Administrative Procedure A8.870
  - “5-day Lag” refers to employees hired prior to July 1, 1998
  - “After-the-fact” refers to employees hired on or after July 1, 1998
  - Additional “unofficial” source: [http://www.fmo.hawaii.edu/payroll/payroll_numbers.pdf](http://www.fmo.hawaii.edu/payroll/payroll_numbers.pdf)

**Demographic Data (cont.)**

- **Payroll Numbers (P/R)** – refer to Administrative Procedure A8.870 (cont.)
  - All BU 07 Faculty are considered “Lag” regardless of the date of hire
    - Faculty hired prior to July 1, 1998 transferred to an E/M appointment will remain as “lag”
    - Faculty hired on or after July 1, 1998 and transferred to an E/M appointment moves from “5-day lag” to “after-the-fact” impacts pay dates
  - BU 67 Faculty are considered “After-the-fact” if hired on or after July 1, 1998

**Demographic Data (cont.)**

- **Warrant Distribution (WD) Codes**
  - Indicates location pay stubs/checks are sent
    - Click on the magnifying glass to see the various code numbers and use the appropriate code for your college/department/school
    - This is not the Fiscal Administrator number

- **Marital Status**
  - Married, single or married filing as single are the only choices you should be selecting
    - Married filing as single are for tax purposes only
      - Ensure that the tax forms reflect as such – code on the PNF will be “T”
Demographic Data (cont.)

- Federal Exempt and State Exempt Taxes
  - Audit tax forms appropriately and file in personnel folder
    - E/M – submit the original tax forms with the PNF to OHR for processing – if the action on the PNF is for change in taxes only, no fiscal authority signature is required. The HR rep who creates the PNF should sign as the approving officer
  - Additional withholding amounts are submitted as negative exemptions
    - Federal exemptions are posted in $5 increments (e.g. additional amount of $10 would be entered as –2)
    - State exemptions are posted in $2 increments (e.g. addition amount of $10 would be entered as –5)

Demographic Data (cont.)

- Pay Class
  - Is the Pay Group in PeopleSoft – indicates the manner in which the pay of the employee is calculated
    - Default is SM or semi-monthly
      - will always be SM for Executive/Managerial
  - For members prior to July 1, 2012:
  - For members after June 30, 2012:
  - For employees NOT eligible for ERS:

Demographic Data (cont.)

- Island code (ISL)
  - Reflects the island employee performs work
- Visa
  - If employee has a Visa, ensure appropriate code is used and monitor if/when renewal is required
- Tenure
  - Use appropriate tenure codes
  - FTA code has been established for employees who are granted tenure upon appointment
  - Indicate appropriate year of tenure
Demographic Data (cont.)

- UH Appointment Date
  - Most current and continuous UH appointment/hire date
  - Date used to determine appropriate Payroll number
- Appointment Period
  - APT – dates of probationary period; leave blank when employee has security
  - E/M – dates of interim appointment or multi-year appointment
  - Tenured faculty – leave blank

Personnel Actions

- Be sure to use the appropriate personnel action (P/A) codes.
- Partial Pay
  - Portion of a single day needs to be paid
    - e.g. – LWOP for 4 hours
    - Partial pay info is entered in the PNF Maintenance
    - Based out of 1000 (e.g. 500 = half = 4 hours)

Position Info

- E/M – if interim appointment, enter “Interim” in title
- If E/M is tenured as a faculty, ensure that the academic title is entered (e.g. Dean & Prof.)
  - This is done in the BOR Title box. No other information should be included
    - Not a Working Title box
- Always check the salary amounts
- Check with your fiscal office on account code(s) to use
  - Fiscal office should also be auditing the PNFs

Remarks

- Briefly indicate for corrections, approvals, period of leaves, account code changes, amount to pay outside of the base salary, etc.
  - Provide detailed (as much as possible) explanation for clarity to payroll office and other reviewers
  - References for historical purposes
- Limited to 216 characters
FAMILY LEAVE REFRESHER
12/10/2013

Unpaid Job Protected Leave

- Federal Family Leave
  - Family and Medical Leave Act (FMLA) of 1993
  - Title 29, Part 825 of the Code of Federal Regulations (CFR)
  - Up to 12 weeks per calendar year
  - 2008 revision to the law
    - Add Military Leave
    - Documentation Requirements
  - 2013 revision to the law

- State Family Leave
  - Hawai‘i Family Leave Law (HFLL)
  - Chapter 398, Hawai‘i Revised Statutes
  - Up to 4 weeks per calendar year

- Military Leave

- Documentation Requirements

- 2008 revision to the law

Eligibility

- HFLL
  - 6 consecutive months of employment
- FMLA
  - 12–months (which need not be consecutive) of employment
  - Worked 1,250 hours in 12–months period immediately prior to date leave begins
Qualifying Events

- HFLL
  - Birth of a child and to care for the newborn
  - Placement of a child with you for adoption
  - To care for spouse, civil union partner, reciprocal beneficiary, child, parent, parent-in-law, legal guardian, grandparent or grandparent-in-law with a serious health condition

- FMLA
  - Birth of a child or placement of a child for adoption or foster care (includes bonding time)
  - Your own serious health condition
  - To care for spouse, child or parent with a serious health condition (does not include in-laws or grandparents)
  - Because of a qualifying exigency on covered active duty or call to covered active duty status with the Armed Forces
  - Because you are the spouse, child, parent or next of kin of a covered servicemember with a serious injury and illness (26 weeks of military family leave)

Employer Responsibilities

- When employee requests or employer acquires knowledge:
  - Provide to employee within 5 business days:
    - Notice of Eligibility and Rights & Responsibilities (WH 381)
    - Indicates employee is eligible/ineligible for HFLL and/or FMLA
    - Requests certification from employee to determine if qualify for family leave
    - FMLA “Poster” (General Notice)

- Send follow-up memo if employee does not provide documents within 15 calendars days from receipt of notice
- Provide employee the designation notice (WH–382 optional) upon receipt of documents
Family Leave Practices

- Family leave runs concurrently if employee qualifies for both HFLL and FMLA (no stacking)
- Substitution of Paid Leave
  - HFLL – may substitute vacation, sick and compensatory time
    - Must maintain 15 days of sick leave required by TDB
  - FMLA – may substitute vacation and compensatory time
    - May substitute sick leave for own illness

- Substitution of Paid Leave
  - HFLL – may substitute vacation, sick and compensatory time
  - FMLA – may substitute vacation and compensatory time

Spouses work at UH
- HFLL up to 4 weeks each
- FMLA combined total not to exceed 12 weeks
  - (Birth, adoption or foster care placement)
- BU 7 – allowed up to 4 months of family leave
- UH follows calendar year
  - HFLL – For birth or adoption, employee is not entitled to more than 4 weeks of leave in a 12-month period

“Serious Health Condition”

- May take leave intermittently or in blocks of time
  - Intermittent leave – count by hours
  - Block of time (includes holidays)
- Part-time employees is based on work schedule
- HFLL – intermittent leave for any covered reason including birth or adoption of child
- FMLA – intermittent leave for birth or adoption of child not permitted unless employer agrees

- Physical or Mental Condition
- Involves inpatient care
- Incapacitated for 3 full days and either
  - 2 or more treatments within 30 days
  - 1 treatment plus regimen of continuing treatment
- Incapacity due to pregnancy or for prenatal care
- Incapacity or treatment due to chronic condition (asthma, diabetes, epilepsy)
- Permanent or long-term incapacity for which treatment may not be effective (Alzheimer's, severe stroke, terminal stages of a disease)
Birth of Child

- Regulation: when employer acquires knowledge, we must notify employee within 5 business days
- Current Practice
  - Allow employee to use sick leave (medical certificate for 6 to 8 weeks)
  - After 6 to 8 weeks of sick leave – employee may apply for 4 weeks HFL – sick leave
  - Then 8 weeks of FMLA – vacation
- Revisiting practice and consulting DHRD
EMPLOYEE BENEFITS UPDATE

December 10, 2013

Affordable Care Act

- October 1, 2013 – Distribute notice to all new hires
- January 1, 2014 – Individual mandate to obtain coverage (no action by HR)
- January 1, 2015 – Employer mandate to provide coverage to eligible employees
- UH is in consultation with DHRD and EUTF regarding employer mandate
- Impact to HR – distribute ACA notice available in new hire checklist

Retirement

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<th></th>
<th>ERS</th>
<th>City of Detroit</th>
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<tr>
<td>Active Members</td>
<td>62%</td>
<td>39%</td>
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<tr>
<td>Retirees</td>
<td>38%</td>
<td>61%</td>
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<td>2013 Employer Contributions</td>
<td>$550 million</td>
<td>None</td>
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<tr>
<td>Borrowed Funds</td>
<td>None</td>
<td>2005 - $1.4 billion</td>
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- Source: July/August/September ERS Retirees Holomua Newsletter - available on OHR homepage

Hawai‘i Marriage Equality Act of 2013

- Governor signed Act 1, SLH 2013, on November 13, 2013
- Legalizes marriage for same-sex couples in Hawai‘i
- Provides marriage equity regardless of gender
- Effective December 2, 2013
Impact to HR

- Documents to complete when an employee gets married remains the same for all marriages
- EUTF
  - Employee completes EC-1 to add same-sex spouse or change partner’s designation from “civil union partner” or “domestic partner” to “spouse” within 30 days of marriage; submit copy of marriage certificate to HR asap
  - Effective date is either (a) date EC-1 submitted to HR, (b) 1st day of pay period following date of submittal, or (c) 1st day of second pay period following date of submittal
  - If want coverage effective on date of marriage, must submit EC-1 to HR prior to date of marriage
  - No revisions to EC-1

Tax Issues

- The IRS and state of Hawai‘i recognize legal marriages between 2 individuals of the same sex
- 16 states and 16 countries currently recognize same-sex marriages
- Suggest employees consult with tax advisor and submit updated tax forms as needed