

**EISE Project Meeting Notes
Eastern Illinois University**

Team/Group: Human Resources Process Team

Date: 08-03-06

Time: 10:00 – 12:00 a.m.

Place: VPAA Conference Room, Room 1019

Attendees: Joy Craft, Marla Belden, Sandy Bingham-Porter, Nancy Dole, Candace Flatt, Carol Galey, Jamie Hackett, Linda Holloway, Karen Johnson, Frank Kingery, Steve Lane, Nina Milliner, and Donna Noffke

Note Author: Joy Craft

Agenda and discussion item

- Linda, etc. to report on Banner Testing – For Insurance Amount #1, we will use excel to report the difference to CMS. U of I does this on a quarterly basis.
- Joy to report on ARGOS reporting access – Joy sent HR Team instructions for Argos
- Candace to report on HR Banner Training – Handed out “New Person Records” & “Benefits” for Joy & Linda to review
- Julia to report on “Reports and Forms” Sub-Committee – Handed out sample spreadsheet
- Carol to Report on Lump Sums Process Sub-Committee – Developed procedure, is waiting on Internal Auditing to respond.
- IT Issues – Donna gave Sandy Calc for deferred pay
- Review the Task Log research assignments – All the address data cleansing is completed except for students.
- Our next training/consulting visit is August 8, 9, and 10 in Old Main, Room 2231
- Our next HR Team meeting will be August 17th

Decisions Made

Decisions for referral

Tabled/Future discussion Items

Ongoing Task List, Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status
AIHR001	Employee Class Rule Form (PTRECLS) Complete the Employee Class Rule as discussed with Bob. Back feed	Nina and the E-class table building team	02-09-06	Milestone completed

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	in the eligible earning block earning codes when available.			
AIHR002	Position Class Rule Form (NTRPCLS) Review Position Class Rule & create codes as needed to insure only one employee class is associated with the position class code. (F-T & P-T positions)	Steve and the P-class table building team	01-25-06	Part-time & Full-time added. Milestone completed
AIHR003	Benefit Category Rule Form (Benefit's Part) (PTRBCAT)	Benefits table building team	1-12-06	Keyed in Test Instance
AIHR004	Payroll Calendar Rule Form (PTRCALN)	Payroll table building team	12-08-05	One year keyed into Test Instance.
AIHR005	Benefit Category Rule Form (PTRBCAT) (Payroll's Part)	Payroll table building team	1-12-06	Keyed in Test Instance
AIHR006	Position Group Rule Form (PTRPGRP)	P-class table building team	12-6-05	Keyed in Test Instance
AIHR007	EEO Skill Code Validation Form (PTRESKL)	P-class table building team	12-6-05	Keyed in Test Instance
AIHR008	Life Insurance Calc Process Parameter Rule Form (PTRLIFE)	Benefits table building team	12-6-05	Keyed in Test Instance
AIHR009	Life Insurance Rule Form (PTRLIFI)	Benefits table building team	12-6-05	Keyed in Test Instance
AIHR010	Life Insurance Premium Rule Form (PTRPREM)	Benefits table building team	12-6-05	Keyed in Test Instance
AIHR011	Beneficiary Relationship Rule Form (PTRBREL)	Benefits table building team	12-6-05	Keyed in Test Instance
AIHR012	Benefit Payroll Frequency Rule Form (PTRBDFQ)	Benefits table building team	12-6-05	Keyed in Test Instance
AIHR013	Leave Reason Rule Form (PTRLREA)	Benefits table building team	12-6-05	Keyed in Test Instance
AIHR014	Leave Code Rule Form (PTRLEAV)	Benefits table building team	12-6-05	Keyed in Test Instance
AIHR015	Leave Code Rule Form (PTVLCAT)	Benefits table building team	12-6-05	Keyed in Test Instance
AIHR016	Leave Category Rule Form (PTRLCAT) Complete the Leave Accrual Rule as required & discussed with Bob.	Linda & the Benefits table building team	02-27-06	Keyed in Test Instance
AIHR017	Benefits/Deductions Rule	Linda & the	02-27-06	Keyed in Test Instance.

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	Form (PTRBDCA) (Benefit's part) Complete the Benefit/Deduction Calculation Rule, with preclusions, exclusions, priority, and type code 25 for calc rule 50 for employee paid BDCA codes.	Benefits table building team		
AFHR018	Benefits/Deductions Rule Form (PTRBDCA) (Payroll part)	Payroll table building team	1-12-06	Keyed in Test Instance
AIHR019	Earning Code Rule Form (PTREARN) Complete the Earning Code Rule based on codes used now, leaves type codes and based on premium earning code requirements.	Payroll table building team	02-10-06	Completed pending Testing
AIHR020	Complete on a spreadsheet the labor distribution overrides for first employee class only for each BDCA code.	Linda & the Benefits table building team with Finance	02-27-06	Worksheet completed
AIHR021	EEO Salary Level (PTREEOS)	Karen Johnson & P-class team	1-5-06	Keyed in Test Instance
AIHR022	Back Routing Number Validation Form (GXVDIRD)	Candace Flatt & others from HR team.	12-14-05	Keyed in Test Instance
AIHR023	Complete the Premium pay set-up on PTVPCAT, PTRPPAY, & PTRPCAT as discussed with Bob.	Donna & Linda & the Benefits table building team	02-27-06	Continuing (See AIHR33)
AIHR024	Determine the FTE use on NBAPBUD and NBAJOBS. Review annualized FTE budgeting documentation.	Julia & Candace and HR Team	02-27-06	Julia will use the FTE on the NBAPBUD for reporting.
AIHR025	Create a spreadsheet with an employee from each employee class. This will serve as our test cases. (Test Matrix)	Nina & Carol with the HR Team	02-27-06	Test Matrix developed - More than one will be developed – some general & some more specific.
AIHR026	Input a few of the test employees non-student monthly only as practiced. Use start date on 7-1-06. On NBAPBUD use beginning of fiscal year 7-1-06 also.	HR Team-ALL	02-27-06	Keyed in Test Instance
AIHR027	Develop new address type for HR only to use, called W-2.	Joy & CFCG	02-13-06	Done.
AIHR028	Position Number Scheme	Candace & the	02-27-06	Status position numbers will

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	Configuration.	Position Number team		remain the same – adding a zero at the beginning and end.
AIHR029	Develop training on web for end-users creating employees.	Candace	02-23-06	Candace will work with Linda Barter, etc. in training, when Linda has time.
AIHR 030	Complete the input (in sets of 2 or 3) of the employees identified from the ECLS spreadsheet above on PPAIDEN, PEAEMPL, PDABDSU/PDAEDN, NBAJOBS, (use start date of 070106 except for deferred pay employees start at the beginning of accrual period), and NBAPOSN/NBAPBUD. On NBAPBUD, use fiscal year 2007 with a beginning of fiscal year 7-1-06. Also, set up direct deposit records on GXADIRD as applicable.	Nina, Carol, Candace, Jamie & Linda with HR Team.	04-09-06	Completed. We will add new employees into Test as needed to Test benefits, etc.
AIHR 031	After a set of unit test employees transaction input is complete from above task, process the employees into Banner payroll through the calculation process, PHPCALC. Audit the gross, leave accruals, and benefit/deductions results against current system. If in error, make corrections as required to the rules and/or transactions and re-process through Banner payroll calculation process until correct.	Linda and HR Team	04-09-06	Continuing
AIHR32	PTRBDCA Spreadsheet to ITS	Linda & Benefits Team	5-1-06	Gave spreadsheet to ITS on 4-20-06
AIHR33	Employment Web Training	Candace, etc.	3-30-06	Completed
AIHR34	Benefits/Payroll Web Training	Candace, etc.	Timely manner	Continuing

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AIHR35	Add premium code to employee class as needed	Linda & Payroll Team	Timely manner	Completed by Donna on May 10 th . This completed the Payroll tables.
AIHR36	Add Premium code to NBAJOBS records as needed	Nina & Carol	Timely manner	Adding to e-class and NBAJOBS
AIHR37	Basic life insurance needs rules added to calculate employer portion	Linda & Benefits Team	Timely manner	Continuing
AIHR 38	Continue running test payrolls & testing benefit, deduction and leave set-up	Linda & Payroll & Benefits Team	Timely manner	Continuing
AIHR 39	Complete Job Progression Validation Form (NTVJOBP) And Job Progression Rule Form (NTRJOBP)	Steve	Timely manner	Completed 4-12-06
AIHR40	Meet with Student Team, etc. to determine if we use Faculty Load	Karen & Carol & Student Team	Meet by July before Student Team begins scheduling training	Continuing
AIHR 41	Complete Seniority Adjustment Reason Code Validation Form (PTVSARC)	Joy & Nina	8-30-06	Done. Joy to visited U of I on 8-4-06 and reviewed the seniority rule form.
AIHR42	Input Suspense liability account as appropriate on the PTRBDCA labor distribution override block	Linda	8-9-06	Continuing
AIHR43	Establish 4-5 NRA Tax rules. Complete the transaction input for a few of these NRA for payroll testing next visit	Linda	8-6-06	Done
AIHR44	Verify PTRLCAT rules by auditing the unit test employees on PHIACCR.	Linda	8-6-06	Continuing
AIHR 45	Lump Sum Processing	Carol & others	Timely Manner	A Procedure is established.

New Action Items

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Attachments and/or meeting Handouts listed: