

**EISE Project Meeting Notes
Eastern Illinois University**

Team/Group: Human Resources Process Team

Date: 10-19-06

Time: 10:00 – 12:00 a.m.

Place: VPAA Conference Room, Room 1019

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

Note Author: Joy Craft

Agenda and discussion item

- Up-date on Conversion (IT) – Linda & Joy reported that SQL changes can be made for the Salary group on all forms needed and the Timecard org. can also be changed thru SQL. SunGard said since we have not ran a payroll yet in Production, it is unused data, therefore, we can make the changes needed.
- Up-date on entering over JOBS into Banner Production (Employment areas)- All jobs are entered in Production. We had a discussion regarding how the Team was going to handle the faculty pay raises (paid in P-P by Nov. 30) and still meet our go-live date.
- Human Resources will have an on-site audit from the State Universities Civil Service System on Nov. 6-9. Joy will attend to them, while others in Employment will attend to Banner and Faculty raises.
- Up-date on Banner Testing and Conversion (Benefits)- Continuing conversion and cleanup of data, getting ready for parallel testing with Bob.
- Up-date on Reports and Forms (Committee)- Forms are up-dated and routed for all to review.
- ODS Training- October 24-26 at 9th Street Hall
- Our next consulting visit with Bob Harwood is the week of October 30 to run parallel payrolls. We will meet in the Payroll Office. Enter through Student Payroll.
- Our next HR Team meeting will be November 30.

Decisions Made

Decisions for referral

Tabled/Future discussion Items

Ongoing Task List, Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status
-----------------	------------------	-------	------------------------	--------

**EISE Project Meeting Notes
Eastern Illinois University**

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 in the eligible earning block earning codes when available.	Nina and the E-class table building team	02-09-06	Milestone completed
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	Linda & the Benefits	02-27-06	Keyed in Test Instance

**EISE Project Meeting Notes
Eastern Illinois University**

Item Identifier	Item Description	Owner	Target Completion Date	Status
	(PTRLCAT) Complete the Leave Accrual Rule as required & discussed with Bob.	table building team		
AIHR017	Benefits/Deductions Rule 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.	Linda & the Benefits table building team	02-27-06	Keyed in Test Instance.
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	HR Team-ALL	02-27-06	Keyed in Test Instance

**EISE Project Meeting Notes
Eastern Illinois University**

Item Identifier	Item Description	Owner	Target Completion Date	Status
	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.			
AIHR027	Develop new address type for HR only to use, called W-2.	Joy & CFCG	02-13-06	Done.
AIHR028	Position Number Scheme Configuration.	Candace & the Position Number team	02-27-06	Status position numbers will 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/PDADEDN, 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	Linda and HR Team	04-09-06	Continuing

**EISE Project Meeting Notes
Eastern Illinois University**

Item Identifier	Item Description	Owner	Target Completion Date	Status
	in error, make corrections as required to the rules and/or transactions and re-process through Banner payroll calculation process until correct.			
AIHR032	PTRBDCA Spreadsheet to ITS	Linda & Benefits Team	5-1-06	Gave spreadsheet to ITS on 4-20-06
AIHR033	Employment Web Training	Candace, etc.	3-30-06	Completed
AIHR034	Benefits/Payroll Web Training	Candace, etc.	Timely manner	Continuing
AIHR035	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.
AIHR036	Add Premium code to NBAJOBS records as needed	Nina & Carol	Timely manner	Adding to e-class and NBAJOBS
AIHR037	Basic life insurance needs rules added to calculate employer portion	Linda & Benefits Team	Timely manner	Continuing
AIHR038	Continue running test payrolls & testing benefit, deduction and leave set-up	Linda & Payroll & Benefits Team	Timely manner	Continuing
AIHR039	Complete Job Progression Validation Form (NTVJOBP) And Job Progression Rule Form (NTRJOBP)	Steve	Timely manner	Completed 4-12-06
AIHR040	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
AIHR041	Complete Seniority Adjustment Reason Code Validation Form (PTVSARC)	Joy & Nina	7-30-06	Continuing
AIHR042	Input Suspense liability account as appropriate on the PTRBDCA labor distribution override block	Linda	8-9-06	Continuing
AIHR043	Establish 4-5 NRA Tax rules. Complete the transaction input for a few of these NRA	Linda	8-6-06	Done

**EISE Project Meeting Notes
Eastern Illinois University**

Item Identifier	Item Description	Owner	Target Completion Date	Status
	for payroll testing next visit			
AIHR044	Verify PTRLCAT rules by auditing the unit test employees on PHIACCR.	Linda	8-6-06	Continuing
AIHR045	Lump Sum Processing	Carol & others	Timely Manner	Done
AIHR046	Continue to process the unit employees (at least one from each employee class) 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.	HR Team- All/Linda/Dona/Payroll folks	8-7-06	Open
AIHR047	Practice using leave reporting function	HR Team – Linda & Payroll	On-going	Open
AIHR048	Practice using web time entry	HR Team – Linda & Payroll	On-Going	Open
AIHR049	Identify special situations and extra pay requirements for addressing during visit of 6-12-06 week	HR Team – Linda & Benefits	6-12-06	Done
AIHR050	Input suspense liability account as appropriate on the PTRBDCA labor distribution override block	HR Team – Linda & Benefits	8-9-06	Open
AIHR051	Verify PTRLCAT rules by auditing the unit test employees on PHIACCR. Correct as needed.	HR Team – Donna , etc.	8-6-06	Open
AIHR052	Input the direct deposit data on GXADIRD for the unit test employees.	HR Team – Linda, etc.	9-11-06	Continuing
AIHR053	Send a test direct deposit file PHPDIRD to the bank as a test to determine if file is acceptable. If not change file as required and retest.	HR Team – Linda, etc.	9-11-06	Continuing
AIHR054	Identify reporting requirements that are not in	HR Team & Reports & Forms Sub-Committee	11-1-06	Continuing

**EISE Project Meeting Notes
Eastern Illinois University**

Item Identifier	Item Description	Owner	Target Completion Date	Status
	Banner HR. Define requirements and submit to IT.			
AIHR055	Practice payroll adjustments and re-distributions types of transactions. Identify types and if questions address at next session in September.	HR Team – Linda, etc.	9-11-06	Continuing
AIHR056	Practice mass salary increase function using NTRJINC and NBPMASS	HR Team – Steve, etc.	9-11-06	Questions are answered and this function is mainly used for rolling jobs. Salary Planner will be our best friend, according to Dawn.
AIHR057	Determine how to implement web time entry and leave reporting.	HR Team – Joy, Linda, Bill, Paul, etc.	11-1-06	Work with management to determine roll out date and training resources.

New Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status

Attachments and/or meeting Handouts listed: