AGENDA

SLU Business Manager Meeting
February 9, 2012
Young Hall
9:00a.m.-10:30a.m.

1) Announcements – Allison Grapperhaus
   • Sign in Sheets
   • January and February What’s New?
   • Who’s New?
   • Future Business Manager Meetings
     ➢ Solicit input to enhance/expand meeting topics
     ➢ agiger@slu.edu or 7-2393

2) Salary Planner/HR Process Improvement Initiatives – Patty Haberberger, Human Resources

3) Employment Compliance Tips – Ellen Harmon, Human Resources

4) Benefit Eligibility Change – Elisabeth King, Benefits & Compensation
Meeting minutes of the Saint Louis University Business Managers held at 9:00 a.m. on Thursday, February 9, 2012 in Young Hall.

**Business & Finance Staff Present:**

Bruce Andres  Annaliese Giordano  
Anne Becker  Dave Grabe  
Jim Fugel  Allison Grapperhaus  
Sharon Gajewski  Janet Strader  
Peter Galazka  Josh Walters

**Attendance:** 75  
**Number of Guests:** 6  
**Number of Business and Finance Representatives Present:** 10

Allison Grapperhaus welcomed everyone to the meeting and went over the agenda.

**Discussion of Future Business Manager’s Meetings:**

- Contact Allison Grapperhaus (agiger@slu.edu) with suggestions and or/ideas for the meetings going forward.

**Patty Haberberger (Human Resources) – Salary Planner Guidelines & Process Improvement Initiatives in Progress (the presentation given can be found following the minutes):**

- FY13 budget does not contain merit or lump sum increases.  
- The University will not be approving individual position reclassifications, except for reorganizations approved by the President.  
- **Schedule**
  - 02/01/12 Salary Planner screens open for date input and reporting  
  - 03/01/12 Performance Evaluations are to be released to employees for acknowledgment  
  - 04/02/12 Salary Planner screens will be closed (excluding VP Medical Affairs, which close 04/09/12)  
- **Performance Evaluation**
  - University online performance evaluation (UOPE) is located in Banner Self-Service, under Employee tab, UOPE menu.  
  - Comments for Staff are limited to 150 characters (no character limitation for faculty in salary planner comments).  
  - A performance rating and comment are both required in the Salary Planner Comments section.  
- **Other Change Percent Field**
  - Used for base pay adjustments other than merit.
• Additional Amount Field
  o For additional anticipated compensation above primary base salary or in addition to any current active supplemental pay assignments already in Salary Planner.
• Question: The lump sum field was used last year; will employees still receive the amount?
  o No, the lump sum is funded out of the merit pool and there is no merit for FY13.
• Question: Since the deadline is March 1st for evaluations to be released to employees for acknowledgement, if employee is on leave or does not acknowledge, will that hold up the process?
  o No, do not need employee’s acknowledgment to move forward to the next steps in the process.
• Process Improvement Initiative in Progress
  o I-9 Outsourcing
    ▪ HR is still in the process of trying to integrate a process to streamline new hires and limit paperwork. Any additional questions/concerns to contact Patty Haberberger or Marsha McBride.
  o Winstar software for Non-Resident Alien tracking.
  o Banner Self Service
    ▪ Updates are in process for current employees to be more responsible for completing their own direct deposit and W-4’s.
    ▪ There will be a new employee tab for all new hires to complete applicable information such as benefit enrollment and direct deposit.
  o Off Boarding
    ▪ Staff exit interview automation
      ▪ This will be triggered by the termination EPAF.

Ellen Harmon (Human Resources) – Employment Compliance Tips (the presentation given can be found following the minutes):
• FMLA Employer Implications and Employee Obligations
  o Employee must follow policies and should be specific about need for time off.
  o Excessive leave without proper notice or extraordinary reason may be cause for discipline.
  o Employer may inquire, but NOT harass.
• Curbing Abuse
  o This tends to be difficult for managers to deal with because it creates potential liabilities
    ▪ Staffing
    ▪ Deadlines
    ▪ Discrimination
    ▪ Retaliation
• Employee Protections
  o FMLA laws protects worker from retaliation.
  o Job is protected until a final determination has been made.
  o Cannot be disciplined or terminated because of FMLA related absences.
• Overlapping Issues
  o FMLA applies to employees with “serious health conditions” and to conditions of their family members.
  o More retaliation cases are being filed.
  o Restricted to employees who have worked greater than one year.
  o Recent ADA amendments are making it easier for employees to be successful plaintiffs.
• Notice Requirements
  o FMLA leave should be automatic if employee is qualified.
  o Any questions on FMLA, refer employees to HR.
  o After notice of a qualifying event:
    ▪ Saint Louis University requires employees to use all paid leave prior to taking unpaid leave time.
    ▪ Employees must still adhere to notice and attendance requirements.
    ▪ Employees must be able to perform the essential functions of their job.

Elisabeth King – Benefit Eligibility Change (the presentation given can be found following the minutes):
• Effective January 1, 2012, benefit eligibility will begin on the first day of the month following date of hire. Thereafter, the termination date will then be end of month in which employment is terminated.
Business Manager Meeting
February 9, 2012

Human Resources
FY 13 Salary Planner Guidelines

• FY 13 budget does not contain merit or lump sum increases
• University will not be approving individual position reclassifications, except for reorganizations approved by the President
• Faculty promotions in rank are authorized and funded effective July 1, 2012
• If staff member applies and competes for a posted position that is considered a promotion, the staff member will be eligible for a promotional increase on the effective date of the promotion
FY 13 Salary Planner Guidelines

Schedule

• 2/01/12 - Salary Planner screens will be open for data input and reporting.

• 3/01/12 - Performance evaluations are to be released to employees for acknowledgement.

• Submission deadlines for Academic Affairs units to be communicated by VP Academic Affairs office.

• 4/02/12 – Salary Planner screens will be closed excluding the VP Medical Affairs.

• 4/09/12 – Salary Planner screens will be closed for VP Medical Affairs units
FY 13 Salary Planner Guidelines

Performance Evaluation

• University online performance evaluation (UOPE) can be found in Banner Self-Service, under the Employee Tab, and under the UOPE menu.

• Upon completion of the UOPE and release to the employee, the following will migrate to Salary Planner (these fields cannot be edited in Salary Planner):
  o The overall assessment rating.
  o Overall assessment rating comments, limited to 150 characters.

• Comments for staff can still be added in Salary Planner, but these will also be limited to 150 characters, similar to the UOPE comments. There is no need to repeat the information that will migrate from Salary Planner.

• Note for non-UMG faculty: a performance rating and comment must be added in the Salary Planner Comments Section. For UMG faculty the comment must include the 80/20 salary split. No character limitation for faculty in salary planner comments.
Other Change Percent

- Used for base pay adjustments other than merit. Such as:
  - Promotional increases, if approved
  - Job reclassifications, if approved and results in pay grade change where salary needs to move to the minimum of the new pay grade.
  - FTE adjustments
  - Phased retirements of employees
  - Faculty returning from or going on sabbatical

Additional Amount Field in Salary Planner

- For additional anticipated compensation above primary base salary or in addition to any current active supplemental pay assignments already in Salary Planner. These include:
  - Adjunct, overload, secondary, summer school or research assignment, and acting appointments that are not already included in a separate, active position as of July 1, 2012. Please provide the amount of the additional anticipated compensation in the additional amount field and an explanation in the Salary Planner comments.

- Additional amount field format should follow general rounding rules mentioned above. Do not enter $ sign or commas and use two decimal points. (999999.00)

- The Additional amount field can be accessed by going to List by Employee, Employee Detail and click on Comments. You will see both a “Comments” free text field and an “Additional Amount” field.
Job Comments

Name and ID:
Position-Suffix and Title:
Last Updated by:
Last Updated on:
Comments:

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Additional Amount:
Format-999999.99

Overall Performance Assessment: Rating and comments pending the completion of the Online Performance Evaluation

Save  Reset
QUESTIONS?
Process Improvement Initiatives in Progress

Human Resources
February 9, 2012
On boarding

• I-9 Outsourcing
  o Compliance
  o Record Retention
  o User-Friendliness

• Winstar software for Non-Resident Alien tracking
  o Tax Compliance

• Banner Self Service
  o Current Employees
    - Direct Deposit
    - W-4’s for Federal and State
  o New Employee Tab
    - Biographical and Demographical information
    - Benefit Enrollment
    - Direct Deposit
    - Tax Withholdings
On boarding

• New Hire/Rehire Notification Form
  o For faculty, staff, students hired/appointed outside of PeopleAdmin

• HR website
  o New relocation guide
  o Checklists for New employees, Managers, etc.

• PeopleAdmin
  o Applicant tracking upgrade
  o Position Management (new)
  o On boarding (new)
Off boarding

• Staff exit Interview automation
  o Triggered by termination EPAF!
  o Now utilizing Qualtrics survey tool
  o Updated content
QUESTIONS?
Employment Compliance Tips

Presented By:
Ellen Harmon, JR, RN, MBA
Sr. Human Resources Consultant
Human Resources presents Employment Compliance Tips

• Pro-active resources for managers
• Provide managers with tools to deal with problematic issues
• Manage employee relations issues
FMLA Employer Implications and Employee Obligations

- Consider if the employee gave notice of an FMLA eligible event
- After notice – employer has obligation to follow-up for specifics
- Inquire, but do not harass

- Employee must follow policies
- Should to be specific about need for time off
- Excessive leave without proper notice or extraordinary reason may be cause for discipline
Family Medical Leave Act: Curbing Abuse

• One of the most difficult employment issue for managers to deal with

• Creates potential liabilities
  – Staffing
  – Deadlines
  – Discrimination
  – Retaliation

Specific problem areas:
  – Intermittent leave
  – Extended leave
  – Employees who abuse the privilege and claim more time than their medical certification allows
Employee Protections

• FMLA laws protect the worker from retaliation;

• Job is protected until a final determination has been made;

• Managers cannot try to persuade employees to exercise FMLA rights;

• Cannot be disciplined or terminated because of the FMLA related absences; but...

• Does not mean that the employee cannot be disciplined or terminated for reasonable causes not related to their FMLA leave.
Overlapping Issues

- **FMLA** applies to employees with “serious health conditions” and to conditions of their family members.

- More retaliation cases are being filed.

- FMLA is restricted to employees who have worked >1 year.
  - Be careful – if the employee has worked less than one year, they may be entitled to medical leave under ADA.

- **ADA** applies to all employees with “disabilities.” Duration of employment unrelated.

- Recent ADA amendments make it easier for employees to be successful as plaintiffs.
FMLA leave should be automatic if and employee is qualified.

- Be diligent in referring employees to HR if you become aware of a medical condition they have that might qualify for FMLA
  - >3 days continuous
  - Repeat medical treatments
  - Family member issues

- They do not have to specifically request FMLA, it is the employers responsibility to notify them of their rights once they have notice of a qualifying condition.
Curbing Abuse

After notice of a qualifying event:

- Require employees to use all paid leave prior to taking unpaid leave time
- If hourly, it can be taken in increments as small as 15 minutes
- Employees still have to adhere to notice and attendance requirements – if they are aware of an upcoming medical appointment, they should provide you with notice.
- They must be able to perform the essential functions of the job – if the absences prevent them from doing their job, call Human Resources for assistance in determining next steps.
Excessive Absences

• For employees with intermittent FMLA, if you suspect they are abusing their leave:
  – Contact Human Resources to discuss the issue with the employee’s provider;
  – Make sure they identify their leave as FMLA or sick;
  – Looking at trends can be helpful; and
  – Weigh alternatives to intermittent leave.
Benefit Eligibility Change

- Effective January 1, 2012, benefit eligibility will begin on the first day of the month following date of hire. Thereafter, the termination date will then be end of month in which employment is terminated.
- This is to simplify the enrollment and disenrollment and to give new hires substantial time to review and enroll for their University benefits.