

UMIS PAYROLL the minimal introduction

Supporting Documents:

U of P. Data Warehouse (documentation). <http://www.upenn.edu/computing/da/dw>
U of P. Handbook for Faculty and Academic Administrators
U of P. A User's Guide to the Penn Personnel/Payroll System

Forthcoming:

Web page(s) for documentation, faq, etc.
Listserve for e-mail questions and information.

Key: Blue text is entered by business administrators.
Pink text is to be checked by business administrators; Wharton is not the source of this information.
Green text is system-supplied (automatic).

Always fill these in. Important for labels and salutations.

Faculty Field only: enter MON/YY (May or Jan only)

F=eligible for benefits w/ university contribution

P=part-time; some are eligible to by into benefits

IS0403P
PERSONNEL
999999999 TEST, TESS
NAME SUFFIX:

UNIVERSITY OF PENNSYLVANIA
PERSONNEL ACTION DATA

DATE: 09/20/99
TIME: 16:21:23

NAME PREFIX: DR
--STATUS INFORMATION--

EMPLMT STATUS: A

STATUS DATE: 10/01/99

EMPLMT DATE: 10/01/99 **Date of Hire**

SEPARATN RESN:

LOA RETURN DATE: / /

LOA RESN: **7 Scholarly Lv; 8 Emplmnt Elsewhere (FAC)**

REG OR TEMP: R

FULL/PART TIME: F

EMPL TYPE(E/N): E **Exempt (Monthly); Non-Exempt (Wkly)**

PAY STATUS: S

NEXT REVIEW: / /

BARG UNIT IND:

SENIORITY DATE: / /

ANN(BENE)BASE RATE:

ORIGIN HIRE DATE: 10/01/99 **Unchangeable**

ORG NUMBER: 9999

SPECIAL STAT TENURE: 1

SPEC STATUS DATE: 07/84

PROV S/M DATE: / /

TENURE PROB DATE: 07/79

ACADEMIC BASE: **(FAC)PROVOST-APPROVED BASE SALARY**

SUPERVISOR: Y

SUPV TRAIN DATE: 19/07

REGION ID:

DIVISION ID:

COMPAN:

CORPORATION:

--INFORMATIONAL DATA--

LAST CROSS-REF: 20

LAST ACTN DATE: 07/23/99

MINIMUM RCRD: OK **TX, then changes to OK. Means tax**

TRANS: 003 ID: 999999999

LAST PAY PROCESS: 08/31/99

PRIOR DATE: 07/31/99 **status has cleared; can be paid.**

PF6=FHELP

PF9/21=HELP

JOB: ORG I.

CODES FROM PAYROLL MANUAL

Source: Benefits Office

Source: Provost Office

R unless Temporary Extra or Student

Tenure... tenure clock start date

Spec Status... date tenure expected

Special Stat... 1 = tenured; 5 = tenure-track

null = not in tenure track

Hourly/Salaried

Hiring or Tenure-granting department

Required: Fac = N

Most Staff = N

Y = notify about Penn Supervisor Trng

Faculty job data is based on the PSC-approved minute for Standing, Secondary Appts, & Associated Faculty, and on the Deputy Deans letter for the Academic Support Staff. Contingent appts. must have PSC approval for the satisfied contingencies. For example, Lecturer Cs with PhD documentation may not be changed to Asst. Prof. prior to PSC approval.

Staff job data is based on the approved HR1.

None for Faculty or Temp. Get from HR1. Call/email with position number and org to re-activate.

Faculty Appointments have Begin & End Dates

IS0404P
PERSONNEL
999999999 TEST, TESS A

UNIVERSITY OF PENNSYLVANIA
JOB ASSIGNMENT DATA

DATE: 09/20/99
TIME: 16:23:08
JOB(S): 1,2

JOB #: 1
POSITION #: 0
PAY PER.AMT/RATE:
% FULL-TIME: 100.00
JOB ORG:
XXXXXXXXXXXXXXXXX OFFICE
EMP TYPE: 1

BEGIN DATE: 07/01/93
JOB CLASS: 216000 - PROFESSOR A
RATE CODE: P
TERM: 0
TIME RPT CODE: E
HOURLY RATE: 0.000

END DATE: 99/99/99 **Null for all appts exc. fixed period appts.**
CLASS ENTRY DATE: 07/01/99 **Date of entry into job class**
PAY CYCLE: M1
COMPA-RATIO: 0.330
HOURS: 35.00

CNAC	ORG	B/C	FUND	OBJ	PGM	REF	ERN	PER.AMT
1								0.000
2								0.000
3								0.000
4								0.000
5								0.000
6								0.000
7								0.000
8								0.000

TRF SORT CD: **Alpha char to sort payroll checks or blank for single sort**

Calculated: either Monthly Sal/12 or Weekly = Sal/52 or Hourly Rate
Summer research=4
Summer teaching=4; else ignore

Weekly=% of paying account (totals 100% for screen)

PERCENT	START	STOP
0.00	/	/
0.00	/	/
0.00	/	/
0.00	/	/
0.00	/	/
0.00	/	/

TRANS: 004 ID:
PF6=FHELP PF9/21=HELP

JOB: 1 ORG ID:

Must be an Academic Dept Org for Faculty

Faculty Job Class codes will be posted on web site
CALCULATE Total Distributions-add up all the distributions for the year

Name=Tax Name; Professional Name=Name for all other university purposes (make sure your faculty and staff understand the implications of this distinction!)

IS0405P UNIVERSITY OF PENNSYLVANIA DATE: 09/20/99
PERSONNEL ***PERSONAL DATA FORM*** TIME: 16:23:33

PROFSNL NAME: SUFFIX: PREFIX: DR
--CONTACT DATA--
CURRNT ADDR1: CURRNT ADDR2:
CURRNT CITY : PHILADELPHIA CURRNT STATE: PA CURRNT ZIP:
CURRNT PHONE:
PERMNT ADDR1: PERMNT ADDR2:
PERMNT CITY : PERMNT STATE: PERMNT ZIP:
PERMNT CNTRY:

WORK PHONE1: WORK PHONE2: / - WORK ADDR: 6364
EMERG CONTACT: RELATIONSHIP:
CONTACT PHONE: - AFFIL CODE: PUBLIC MAIL CODE:
--PERSONAL DATA--
SEX: t DATE OF BIRTH...: TRUE MARITAL ST...: M
EDUC LEVEL: EDUC LEVEL YEAR: PAY DISBURSE/DISP: A D
CTZNSHP/VISA: COUNTRY.....: VISA EXP DATE: / PRSD:
TRANS: 005 ID: JOB: 1 ORG ID:
PF6=HELP PF9/21=HELP

Can be changed for check delivery, but dept name will not change. Mail distrib is usually by name, not code

Consistent with Penn Phone Book

Do not use terminating punctuation where the field always terminates in the punctuation. eg. SUFFIX: MR MRS or CURRNT CITY (no comma after Philadelphia).