Smartsheet Faculty Contract Generator

User Group Webinar 10/14/20
Agenda

➔ Recap
  ◆ Deadlines for on-cycle & off-cycle payroll processing
  ◆ Managing Approval Process
➔ Daily reports & Payroll Notes
  ◆ Updating Processed contracts
  ◆ Updating Unprocessed contracts via *Dynamic View - Update Details*
➔ Q & A
Deadlines for Payroll

**On-Cycle Regular Payroll**: 😊
- Ready about 1 week before payroll processing
  - Green = Ready added to regular monthly payroll
  - $ = Processing Monthly Payroll

**Off-Cycle Emergency Payroll**
- After on-cycle to 15th of next month will be paid via off-cycle; ⏰ Ready 2 days prior
- 15th or later will be paid on next on-cycle
  - Yellow = Ready added to off-cycle payroll
  - $ = Processing Off-Cycle Payroll

### Oct-Nov 2020

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Managing Approval Process

- Reminders
  - Faculty will not be paid until they accept their contract & they will not be able to accept contract until all approvers have approved it
  - **Obtaining Approvals remains responsibility of Submitting Official**
  - **Internal Audit and best practice requires dual control (2-approvers)**
Managing Approval Process, con't

- **Dashboard** (1-stop resource *available 9/9*)
  - **Dynamic View - Manage Approvals** (*available 9/9*)
    - Users update email addresses & resend requests (Pending Approval status only)

✅ Follow your campus’ Approval process; backup will be extremely important for your own reference❗
User Faculty Contract Dashboard

Contact Information:
Email payroll@maine.edu
Vocemall while working remotely 581-9104
https://umspayroll.youcanbook.me

Ideally, this would display your live Report of contracts

Embedded Form

Cancellation Form

Link to DV: Approvals

Link to DV: Updates (new)
1) Click a filter to view subsets of data

2) Scroll right to see approval statuses in the sheet

3) Click a row to open Details

4) Update Approver email addresses (if not already approved) and update Reset Status- select Resend to send another request

5) Click Save at bottom
Agenda/Discussion Topics:

→ Recap
  ◆ Managing Approval Process
  ◆ Deadlines for on-cycle & off-cycle payroll processing
→ Daily reports & Payroll Notes
  ◆ Updating Processed contracts
  ◆ Updating Unprocessed contracts via Dynamic View - Update Details
→ Q & A
Updating Processed Contracts

- Payroll Notes
  - Duplicate Request
  - Incorrect Union - fixed by Payroll
  - Invalid Account for Faculty
  - Invalid Accounting ID or Account for Faculty
  - Invalid Amount
  - Invalid EmplID
  - Invalid Rank - Missing Job Code
  - Invalid Start or Stop Date
  - Invalid email address or approver
  - Late Approval/Processing
  - Mismatch Number of Pmts and Payroll Dates
  - Missing Class Description
  - Missing Credit Hours
  - Name Does Not Match HR Record
  - Paid Below Minimum

- Payroll Notes from daily report require your attention
  - See confluence site for details

- Payroll will process as submitted regardless
  - Will reach out for clarity if necessary

- Paid Below Minimum - submit a new contract “Adjustment”
Updating Processed Contracts, *continued*

- **If Paid More Than Should Have**
  - Cancel original contract
    - Enter prorated amount already paid (let them keep it)
  - Submit new contract
    - Subtract amount already paid in original contract

**EXAMPLE:**
Original Contract $6,000 @ $1,500 \times 4 \text{ mo} \\
Paid $1,500 in 1st month \\
Correct Contract $4,500 @ $1,125 \times 4 \text{ mo} \\

**RESOLUTION:**
- Cancel Original Contract with $1,500 prorated amount
- Submit new $3,000 ($1,500 already paid) @ $1,000 \times 3 \text{ mo}
Introducing **Dynamic View - Update Details**

- Displays “Pending Approval” HR Status only
- Click on a row to open Details panel on right side of screen
  - Update details as necessary
- After making changes in Details Panel, click Save
- Use DV-Manage Approvals to resend updated contract

✅ Follow your campus’ Approval process; backup will be extremely important for your own reference ❗
UPDATE DETAILS
DYNAMIC VIEW

1) Click a filter to view subsets of data

2) Scroll right to see all fields including Payroll Notes

3) Click a row to open Details

4) Update information as desired

5) Click Save at bottom
Recap Dynamic View - Update Details

● In addition to
  ○ ability to edit via declined contracts > Request Update
  ○ ability to cancel and resubmit a new contract

● New functionality allows edits to contracts in Pending Approval status
  ○ Note - Audit history exists on every field in Smartsheet
Questions?