How to Process Faculty Related Payments via Smartsheet

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Current Changes

- Faculty Hiring Workflow
- MaineStreet Access to Student Data (Campus Solutions)
- Reminders will be sent periodically to approvers/faculty members for contracts in Submitted status.

Tips for optimal service:

- To avoid delay in payment, users/submitters are responsible for following up on missing approvals.
- To avoid duplication of payments to faculty members, please do not send signed contracts to payroll if information is submitted via Smartsheet.
- To avoid overpayments for PATFA/AFUM who hold academic year appointments, include in the Smartsheet process ONLY contracts that are considered overload and/or above their regular workload.

Modification Timeline

- 09/17/20 - added extra field/info to Cancellation Form
  - Prorated Teaching Contract Pay Owed (to notify Payroll if a portion of the original contract should be paid)
  - Added Note near submission to submit a separate form to terminate employment, if appropriate
- 09/15/20 - added Other Compensation earnings type
- 09/09/20 - webinar discussion and recording
- 09/09/20 - updated faculty email address to allow multiple faculty email addresses to be entered; separate by comma
- 08/31/20 - added Other Compensation earnings type
- 08/27/20 - Form updated AYA Form field in Payment Details section
- 08/23/20 - added Law School to Union indicator so Law School payments can be submitted
- 08/20/20 - updated form field PATFA Academic Year Appointment to clarify to select first option for all AFUM payments.
- 08/19/20 - added "Alert" to Submitter when faculty accepts the contract
- 08/14/20 - removed class times from Agreements for web/online courses
- 08/11/20 - Faculty Hiring Workflow (revised 8/14/20)
  - MaineStreet Access to Student Data (Campus Solutions)
- 08/10/20 - duplicate approval requests resolved
- 08/10/20 - added class room, building, campus, meeting time and days to faculty contract
- 08/06/20 - color-coded changes to the Smartsheet daily report to make it easier to manage submitted faculty contract
- 08/04/20 - confirmed that minimum pay for PATFA should be determined by using the Service Credit balance earned at the beginning of each semester/term
- 07/27/20 - changed owner from aprilm@maine.edu to payroll@maine.edu
- 06/27/20 - Reminders will be sent periodically to approvers/faculty members for contracts in Submitted status.

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• Off-Cycle Emergency Payroll
• Earnings Types > Earnings Codes
• Optional Spreadsheet Upload Process
• Additional Information for users of the USM Faculty Contract Generator
  • Key Dates/Timeline for Processing

Training Resources:
• UMS Academy Training Guide:
  • Once you are logged into your campus portal, you can find the training available in the on-line training venue of UMS Academy at this link: https://learnit.hoonuit.com/1009207/learnit?cn=umaine
• USM Training Materials
  • The recorded webinar from May 29, 2020 about the new Faculty Contract & Overload Processing process
  • The Working Guide tool covered in the training. You’ll see that the Working Guide tool has been updated somewhat from the training (minor) to include answers to questions you’d asked about the Smartsheets component during the training.
• Dashboard with Dynamic View
  • Webinar from September 9, 2020 introducing Dashboard & Dynamic View

Link to Dashboard with Dynamic View
• **Dashboard** - Users 1-stop resource for all things Smartsheet Contracts related
  1. Click **Login with Smartsheet Account;**

  ![Dashboard login](image)

  2. then click Log in with **Google**

  ![Login with Google](image)

  3. **Dynamic View - Manage Approvals**
Link to Smartsheet Contract Generator Form:
https://app.smartsheet.com/b/form/6a6d5bd7d99430597d8dcb5d977c7c

Tips for best practice...
- Enter valid @maine.edu email addresses (including your own)

Revisions and Cancellations

1. If you notice a mistake after submitting, you may have the 1st Approver decline the contract. The decline workflow will notify the submitter and allow submitter to make edits and resubmit.
   a. If you receive a request to update and you revise the information and want to re-trigger the workflow, you must check the box “Update and Resend Workflow” just above the Submit Update button.

1. You may also submit the cancellation form which will automatically stop further workflow and notify payroll.
Link to Smartsheet Cancellation Form:

https://app.smartsheet.com/b/form/d05e3fe71bbc46fdafbf96d74f07f7c3

- Use the Cancellation Form to cancel a Smartsheet contract with or without a cancellation fee.
- All contracts that should not be paid or are no longer valid must be cancelled.

Form Field Definitions

_Italicized means the information is hidden and calculated from other fields._

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Required</th>
<th>Format</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Preparer and Approver Emails</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email address of Submitting Official</td>
<td>valid @maine.edu email address of person submitting contract</td>
<td>Y</td>
<td>valid @maine.edu</td>
<td>Notifications and reporting</td>
</tr>
<tr>
<td>1st Approver Email</td>
<td>valid @maine.edu email address of first approver</td>
<td>Y</td>
<td>valid @maine.edu</td>
<td>Automated Approval Workflow</td>
</tr>
<tr>
<td>2nd Approver Email</td>
<td>valid @maine.edu email address of 2nd approver</td>
<td>Y</td>
<td>valid @maine.edu</td>
<td>Automated Approval Workflow</td>
</tr>
<tr>
<td>3rd Approver Email</td>
<td>valid @maine.edu email address of 3rd approver</td>
<td>N</td>
<td>valid @maine.edu</td>
<td>Automated Approval Workflow</td>
</tr>
<tr>
<td>4th Approver Email</td>
<td>valid @maine.edu email address of 4th approver</td>
<td>N</td>
<td>valid @maine.edu</td>
<td>Automated Approval Workflow</td>
</tr>
<tr>
<td><strong>Faculty Member Information</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faculty Email</td>
<td>valid @maine.edu email address of faculty member teaching class; separate multiple email addresses by comma</td>
<td>Y</td>
<td>valid @maine.edu</td>
<td>Automated Acceptance Workflow</td>
</tr>
<tr>
<td>Employee ID</td>
<td>7-digit faculty member's employee ID</td>
<td>Y</td>
<td>00xxxxx</td>
<td>Addl Pay, Distribution Detail</td>
</tr>
<tr>
<td>Last Name</td>
<td>Legal last name of faculty member</td>
<td>Y</td>
<td>characters</td>
<td>verification purposes</td>
</tr>
<tr>
<td>First Name</td>
<td>Legal first name of faculty member</td>
<td>Y</td>
<td>characters</td>
<td>verification purposes</td>
</tr>
<tr>
<td>Union</td>
<td>Select from valid Union list</td>
<td>Y</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Rank | Select from valid Rank list | Y | • Instructor  
• Lecturer  
• Lecturer I  
• Lecturer II  
• Lecturer III  
• Assistant Professor  
• Associate Professor  
• Professor  
• Research Professor  
• Asst Research Prof  
• Assoc Research Prof  
• Faculty Associate  
• Visiting Professor  
• Clinical Asst Faculty  
• Clinical Assoc Faculty  
• Clinical Senior Faculty  
• Cooperating Asst Professor  
• Cooperating Assoc Professor  
• Cooperating Professor  
• Asst Research Professor  
• Extension Instructor  
• Asst Extension Professor  
• Assoc Extension Prof  
• Extension Professor | verification of minimum pay & reporting purposes |
| Work Year (Part of Rank/Title) | Select from valid Work Year list | Y | • AY  
(academic year appointment or semester basis)  
• FY (select if faculty is currently on a fiscal year appointment)  
• BParttime (PATFA grandfathered +$25) | verification of minimum pay & reporting purposes |
| Union+Rank k+WY | Hidden column to designate appropriate Job Code for payroll purposes | | | Job Code used in Addl Pay |
| Job Code | Hidden column for Job code; will auto-populate | Y for MaineStreet | Numbers only - based on union and rank | Addl Pay |
| Service List | Hidden column provides Service List (May 2020) | | | verification of minimum pay & reporting purposes |

**Class Information**
<table>
<thead>
<tr>
<th>CLASS INSTITUTION</th>
<th>Institution where course is being offered</th>
<th>Y</th>
<th>lookup of class description updates Part-Time Faculty service list</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term</td>
<td>Academic term</td>
<td>Y</td>
<td>updates Part-Time Faculty service</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CLASS NBR</td>
<td>Course Number (must be unique by Earnings Type)</td>
<td>Y</td>
<td>numbers</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>lookup class description</td>
</tr>
<tr>
<td>CLASS INSTITUTION+TERM+CLASS_NBR</td>
<td>Hidden column to designate 1) appropriate Earn code for payroll purposes and 2) Class Description</td>
<td></td>
<td>included in approver emails and faculty agreement</td>
</tr>
<tr>
<td>CREDIT HOURS</td>
<td>Service/Academic Course Credits; use for Teaching Earnings Type</td>
<td>Y for Teaching</td>
<td>x.xx</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Addl Pay; used for confirming minimum rate is paid updates Part-Time Faculty service history</td>
</tr>
<tr>
<td>LAB CREDIT HOURS</td>
<td>LAB Service/Academic Course Credits; used with Teaching Earnings Type for Lab credit</td>
<td>N</td>
<td>x.xx</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Part-Time Faculty; used for confirming minimum lab rate is paid updates Part-Time Faculty service history</td>
</tr>
<tr>
<td>Payment Details</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PATFA Holding Academic Year Appointment</td>
<td>By default, Faculty member will be paid as determined by payroll pay period dates indicated below. Select Yes ONLY if this class is included in the PATFA unit member’s Academic Year Appointment (must be HOLDING an AYA), Payroll will pay faculty member in accordance to separate AYA memo that must be sent to <a href="mailto:payroll@maine.edu">payroll@maine.edu</a>.</td>
<td>Y</td>
<td>No (default) Yes used to avoid overpayment; if payment is part of AYA and/or regular appointment, payroll will not process as additional compensation</td>
</tr>
</tbody>
</table>
| Earnings Type | Earnings Type - see separate below for earnings code determination | Y | • Teaching  
• Independent Study  
• Cancellation Fee  
• Preparation Fee  
• Music Lessons  
• Early College  
• Adjustment (used for Distance Ed and other adjustments)  
• Other Compensation (used for extra/unique compensatio n linked to a class number) | Addl Pay, Distribution Detail |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Earnings Type</td>
<td>Earnings code will be determined by payroll based on Earnings Type and Union</td>
<td>N</td>
<td>hidden - used by payroll</td>
<td>Addl Pay, Distribution Detail</td>
</tr>
<tr>
<td>Total Salary for this Contract</td>
<td>Total salary earned for contract</td>
<td>Y</td>
<td>xxxxx.00 (no comma or dollar sign)</td>
<td>Addl Pay</td>
</tr>
<tr>
<td>Monthly</td>
<td>Will calculate Total Salary / Number of monthly payments</td>
<td>N</td>
<td>xxxxx.00 (no comma or dollar sign)</td>
<td>Addl Pay</td>
</tr>
<tr>
<td>Number of monthly payments</td>
<td>Number of months to be paid (should coincide with start and stop dates)</td>
<td>Y</td>
<td>number</td>
<td>Addl Pay</td>
</tr>
<tr>
<td>Payroll Start Date</td>
<td>Start Date of Pay; must be first date of month (should coincide with NUM PAY)</td>
<td>Y</td>
<td>mm/dd/yyyy</td>
<td>Addl Pay</td>
</tr>
<tr>
<td>Payroll End Date</td>
<td>End Date of Pay; must be last day of month (should coincide with NUM PAY)</td>
<td>Y</td>
<td>mm/dd/yyyy</td>
<td>Addl Pay</td>
</tr>
<tr>
<td>Unique Skills</td>
<td>Does the Faculty possess skills and experience that are not available in the Department?</td>
<td>Y</td>
<td>check box if answer is yes</td>
<td>shared with approvers but not faculty member</td>
</tr>
<tr>
<td>FT Full</td>
<td>Do all other Department Faculty have full workloads?</td>
<td>Y</td>
<td>check box if answer is yes</td>
<td>shared with approvers but not faculty member</td>
</tr>
<tr>
<td>Pay Above Min</td>
<td>Are you paying above the minimum credit hour rate for their service level?</td>
<td>Y</td>
<td>check box if answer is yes</td>
<td>shared with approvers but not faculty member</td>
</tr>
<tr>
<td>Other Justification</td>
<td>Provide other justification</td>
<td>N</td>
<td>free form comment</td>
<td>shared with approvers but not faculty member</td>
</tr>
<tr>
<td>Minimum Payment Type</td>
<td>hidden calculated field that determines if AFUM or PATFA are paid at, above or below minimum based on rank, service list, credit hours.</td>
<td></td>
<td>displayed on daily reports for review</td>
<td></td>
</tr>
<tr>
<td>Financial Information</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>POSITION_NBR</td>
<td>Enter the position number created for the specific HR department used to pay overloads and temporary part-time faculty. If left blank, this will default from Primary Job.</td>
<td>N</td>
<td>000xxxxx</td>
<td>Addl Pay &gt; General Ledger (budget reporting)</td>
</tr>
<tr>
<td>Accounting Type</td>
<td>Select either Accounting ID or Chartfields; form will open one or the other for further data entry</td>
<td>Y</td>
<td></td>
<td>Form condition; if Accounting ID is selected, only that one field opens; if Chartfields is selected, the chartfields open</td>
</tr>
<tr>
<td>Accounting ID</td>
<td>HR Combo Code</td>
<td>Y</td>
<td>xxxxxxxxxxx</td>
<td>Distribution Detail</td>
</tr>
<tr>
<td>BUSINESS_UNIT</td>
<td>GL business unit</td>
<td>Y</td>
<td>UMSxx</td>
<td>Distribution Detail</td>
</tr>
<tr>
<td>DEPTID_CF</td>
<td>GL department code</td>
<td>Y</td>
<td>numbers</td>
<td>Distribution Detail</td>
</tr>
<tr>
<td>ACCOUNT</td>
<td>GL account code (should coincide with employee type)</td>
<td>Y</td>
<td>numbers</td>
<td>Distribution Detail</td>
</tr>
<tr>
<td>CLASS_FLD</td>
<td>GL Class</td>
<td>N</td>
<td>numbers</td>
<td>Distribution Detail</td>
</tr>
<tr>
<td>FUND_CODE</td>
<td>GL Fund Code</td>
<td>Y</td>
<td>numbers</td>
<td>Distribution Detail</td>
</tr>
</tbody>
</table>
1. After submission or spreadsheet upload, the first approver will receive an email requesting review and to either approve or deny the request.
   a. Subject: Faculty Contract Request for First Name Last Name, From: automation@smartsheet.com
   b. First approver should click View Request to complete the approval process. A new window will open with the details of the contract. Scroll all the way to the bottom and click Approve or Decline.
      i. If the request is approved, an email will be sent to the second approver.
      ii. If the request is denied, an email will be sent to the user/submitter who can make changes and resubmit.
   c. Process repeats for second approver and if a third and fourth approver are provided, they will also have the process repeated.
2. After all approvals are received, the final agreement is sent to the faculty member for acceptance.
   a. Subject: Faculty Contract Agreement, From: automation@smartsheet.com
   b. Faculty member should click View Request to complete the acceptance process. A new window will open with the details of the contract. Scroll all the way to the bottom and click Approve or Decline.
      i. If the request is denied, an email will be sent to the user/submitter.
Approver Status

Approver and Faculty member statuses defined:

- Approved: received and approved the contract
- Declined: received and declined the contract
- Submitted: email notification has been sent

Reminders will periodically be sent to those approvers in Submitted status

Managing Contract Processing via Daily Reports

Upon request, daily reports can be generated to Submitters/Users to monitor the approval workflow process. Those who submit contracts will be responsible for tracking the workflow process and following up with approvers to ensure timely processing. Submitters will also receive alerts in the workflow process.

Color/Shading of Cells

Colors are used to highlight different items as follows:

- Yellow identifies changes in the past day
- Pink identifies invalid information
- Blue calls attention to the approver status columns
- Gray is a calculated field or contains a formula

HR Status

HR Statuses defined:

- Pending Approval: Faculty member has not approved the contract

Reminders will be sent to those approvers in Submitted status

- Ready: Faculty member has approved the contract and it’s ready for payroll processing; Payroll will process no less than once per week.
- Processed: Payroll has processed the contract in MaineStreet including the setup of the Additional Pay, Distribution Detail and PATFA service history, if applicable.
- Cancelled: form was submitted to cancel the contract.

Payroll Notes

Also included in the report will be audit/review notes in a column labeled Payroll Notes.

Duplicate Request

Contract is flagged as a duplicate request with multiple entries have the same EmplID, Class Number and Earnings Type. One should be cancelled unless it’s an adjustment. If it’s an adjustment, please notify payroll@maine.edu to update the message accordingly.

Invalid Account for Faculty

5 digit Account is not a valid account for faculty. Except Graduate Assistants who teach; they can use a student account 53xxx.
Invalid Accounting ID or Account for Faculty

Accounting ID is not a valid 10-digit number or 5 digit Account is not a valid account for faculty.

Invalid Amount

Goal Amount or Total Salary is not a valid number

Invalid EmplID

Employee ID is not valid or does not match name.

Invalid Rank - Missing Job Code

Mismatch between union, rank and work year; Job Code is used to determine minimum pay as well as future retroactive earnings if union contracts are executed retroactively.

Invalid Start or Stop Date

Contracts are expected to be paid in accordance with the monthly pay period start and stop dates. These dates will be used to set up the payroll record. The Start Date should be the first of a month and the Stop Date should be the last day of the month. Invalid dates may not pay correctly.

Invalid email address or approver

Email address does not contain @maine.edu

Mismatch Number of Pmts and Payroll Dates

Payroll will review the Payroll Start and Stop dates to ensure it aligns with the number of payments. If there is a mismatch identified, either the start or end date needs to be updated or the number of payments.

Missing Class Description

Contracts should correspond to a specific class for appropriate reporting. The class number, along with Institution and Term will allow Smartsheets to add the class description to the contract. If the Class Description is missing, it’s likely that one of those three fields has been incorrectly entered. The Class Description will also be available to faculty members via Employee Self-Service.

Missing Credit Hours

Teaching pay should have corresponding credit hours so the appropriate minimum rate can be analyzed. Credit hours are also reported as part of a PATFA unit member's service history. Credit hours are used to calculate a PATFA unit member's full-time equivalent status making them eligible or ineligible for benefits and impacts FTE reporting. Credit hours are also used to calculate any retroactive pay increases as a result of collective bargaining.

Name Does Not Match HR Record

Verify last name, first name and Employee ID were entered correctly. If there’s a legal name change, follow these steps How to Change a Name

Paid Below Minimum

An analysis of Teaching pay to determine if the payment is:

1. paid exactly at the minimum required,
2. paid above the minimum required,
3. paid below the minimum required.
   a. Since we cannot pay below the minimum required, an update must be done to correct the record before payroll is processed.

Here's how the analysis is completed:

1. Rank is determined by combining the Rank and Work Year fields
2. Service Credits balances is determined by EmplID and Institution as of the end of the previous semester.
3. Based on Rank and Service Credits balance, minimum credit hour rate (MCHR) is determined by referencing current rate schedules
4. MCHR x the number of credit hours + MCHR x 50% x the lab credit hours = Minimum Owed
5. If Total Amount is less than Minimum Owed, it is marked as Paid Below Minimum.

Individuals have a primary relationship with UMS - 1) student or 2) employee. Primary relationship determines FICA taxation, unemployment earnings, etc. Graduate Assistants are generally considered to have a primary relationship of student and if they teach, they will not be provided PATFA service credit and are not subject to FICA/unemployment reporting.
Wrong Union

Union must represent the type of employee being paid; union will determine what earnings code to use and will also be used to determine minimum pay. See Earnings Types > Earnings Codes below.

Payroll Processing

Payroll will process all the contracts that are ready to be processed before each on-cycle/regular and off-cycle/emergency payroll. See Payroll Schedule for dates.

On-Cycle Regular Payroll

- Contracts in "Ready" status will be downloaded about 1 week before payroll processing date and set up in MaineStreet in preparation for payroll processing.

Off-Cycle Emergency Payroll

- After on-cycle payroll is processed and up to the 15th of next month, any contracts that have a start date for a month in which payroll has already been processed will be paid via off-cycle; Contracts in "Ready" status will be downloaded about 2 days prior to each off-cycle payroll processing date.
- Contracts in "Ready" status on the 15th of the month or later will be paid on next on-cycle.

Earnings Types > Earnings Codes

<table>
<thead>
<tr>
<th>Earnings Type</th>
<th>Earnings Code</th>
<th>Union</th>
<th>Reg/Temp</th>
<th>Payroll Term</th>
<th>Other Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Study</td>
<td>656</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cancellation Fee</td>
<td>659</td>
<td></td>
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<td></td>
</tr>
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<td>Preparation Fee</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teaching</td>
<td>660</td>
<td>001 (AFUM)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teaching</td>
<td>651</td>
<td>009 (PATFA)</td>
<td>Temporary</td>
<td>Fall or Spring xx10, xx20</td>
<td>Should include credit hours</td>
</tr>
<tr>
<td>Teaching</td>
<td>652</td>
<td>009 (PATFA)</td>
<td>Temporary</td>
<td>Summer xx30</td>
<td></td>
</tr>
<tr>
<td>Teaching</td>
<td>653</td>
<td>009 (PATFA)</td>
<td>Temporary</td>
<td>May xx25</td>
<td></td>
</tr>
<tr>
<td>Teaching</td>
<td>654</td>
<td>009 (PATFA)</td>
<td>Temporary</td>
<td>Winter xx15</td>
<td></td>
</tr>
<tr>
<td>Teaching</td>
<td>670</td>
<td>Not 009 or 001</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teaching</td>
<td><strong>658</strong></td>
<td>009 (PATFA)</td>
<td>Regular</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Music Lessons</td>
<td>655</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Early College</td>
<td>229</td>
<td>001 (AFUM)</td>
<td>Regular</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Distance Education Adjustment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>same as Teaching</td>
</tr>
</tbody>
</table>

*658 only submit those payments not already included in academic year appointment.

Optional Spreadsheet Upload Process

How to Process Faculty Related Payments via Spreadsheet

Follow these steps to submit faculty-related teaching payments via spreadsheets to the Payroll Center for processing.

- **Teaching payments** - use this template spreadsheet for both PATFA & AFUM (download)

By utilizing the spreadsheet, payroll is able to merge the information directly into Smartsheet Faculty Contractor system to leverage approval workflow, payroll processing and reporting purposes. Approved Smartsheet contracts will be extracted and processed in MaineStreet allowing the payroll office to work more efficiently and accurately with a more favorable outcome for the faculty member.

Spreadsheets can be submitted if the following requirements are met:
1. Approvers are identified with @maine.edu email address
   a. Approvers may have already approved the contract via another authorized method (see template instructions tab for details)

2. A minimum of 10 rows per spreadsheet; otherwise enter one at a time via Smartsheet Form

   It is not recommended that contracts that are ready to be processed be delayed... therefore, if you have less than 10 that are ready to go, please use the Smartsheet Form link above to submit right away so as not to hold up the approval and/or payroll process.

3. Spreadsheet must be in accordance with the template. See Instructions tab of template for requirements.
4. Spreadsheets should be uploaded directly to payroll's secure Box account:
   a. Secure Upload Instructions
      i. You may only submit one document at a time. You cannot upload a folder. File names cannot contain special characters. Such as the following " / | : * 
      ii. All uploads must include a description.
      iii. Either drag and drop the file into the Box below or click “Browse” to choose the name of the file you wish to upload.
      iv. IMPORTANT: Only enter the employee's name, University ID number, and a brief description in the “File Description” field in the box below (limit 100 characters).
      v. After submitting a file, you should see a screen that says, “Success! Your file has been uploaded.” This confirms that we have received your document.
      vi. There is no need to contact our office to confirm receipt.

5. Spreadsheets will be uploaded to Smartsheet by payroll team within 2 business days.
6. If approval status(s) are not “Approved”, the Smartsheet will trigger the workflow.

Query to get you started....

An HR query can be run by Term and Institution that includes classes scheduled to be taught (from Campus Solutions) along with the individual faculty member's HR information such as rank and service list. The query also is the format required by the Smartsheet Upload process - just fill in the blanks. The public query name is: UMS_PR_TEACHING_CLASS_LIST

Tips for optimal service...

- To avoid duplication of payments to faculty members, please do not input contracts manually in Smartsheet and send payroll a spreadsheet.
- To avoid overpayments, do not include on the spreadsheets any payments that are included in academic year appointments.

Additional Information for users of the USM Faculty Contract Generator

Use of the Contract Generator (CG) allows payroll to leverage that data to automate processing of payments resulting in an overall better experience for faculty members. All contracts entered in to the Contract Generator will be converted in to a spreadsheet uploading into Smartsheet.

The USM Faculty Contract Generator is a Web-based Teaching Contract processing tool (for USM Staff Only) it is available here - USM Faculty Contract Generator. The tool is managed by Tamara Saarinen - tamaras@maine.edu, 207/581-5439 who should be contacted with access or function questions.
Tips for optimal service...

All editing/deleting/updating contracts must be entered into the Contract Generator and/or Smartsheet depending on where in the process the contract currently resides.

To avoid duplication of payments to faculty members, please do not send signed contracts to payroll or add manually to Smartsheet and CG.

Cancellations: should be cancelled in the CG AND Smartsheet to avoid payment errors and duplication.

Important: The number of payments indicated will be spread over the class dates for payroll processing. For example, if the class dates are 1/22/2019 - 3/5/2019 and number of payments is 3, the payment will be spread over January, February and March. Here are some other examples:

<table>
<thead>
<tr>
<th>Pmts</th>
<th>Start</th>
<th>Stop</th>
<th>Payroll Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>3/14/2019</td>
<td>5/2/2019</td>
<td>March-May</td>
</tr>
<tr>
<td>5</td>
<td>1/1/2019</td>
<td>5/31/2019</td>
<td>January-May</td>
</tr>
<tr>
<td>3</td>
<td>1/1/2019</td>
<td>5/31/2019</td>
<td>January-March</td>
</tr>
<tr>
<td>2</td>
<td>1/23/2019</td>
<td>2/20/2019</td>
<td>January-February</td>
</tr>
<tr>
<td>4</td>
<td>2/5/2019</td>
<td>5/3/2019</td>
<td>February-May</td>
</tr>
</tbody>
</table>

Key Dates/Timeline for Processing

Faculty Contract Generator (FCG) Activity: Create contracts per usual. All editing/deleting/updating contracts must be entered into the Contract Generator and/or Smartsheet depending on where in the process the contract resides.

Download: All activity completed in the Faculty Contract Generator will be converted to a spreadsheet weekly on Thursdays and sent to payroll for uploading into Smartsheet system.

See additional information regarding Smartsheet processing.

Related articles

- Forms
- How to Process Faculty Related Payments via Smartsheet
- How to Process Faculty Related Payments via Spreadsheet
- How to Submit Paperwork, Forms and Spreadsheets
- 1170.21 Valid Data Field Elements