Payroll: Curriculum Plan
Johns Hopkins University

Panel Members:

Mike Alexander, University Administration
Mary Lisa Dean-Price, Medicine
Lee Ann Falbo, Medicine
Marcy Halvorsen, Medicine
Rick Inglis, University Administration
Dawn McKinney, Medicine
June Miller, Arts and Sciences
Julia Nardi, Homewood Student Affairs
D. Lynn O’Neil, Homewood Student Affairs
Rose Ratajczak, Homewood Student Affairs
Clarissa Riley, Medicine
P. Lynn Stein, Homewood Student Affairs
Sharon Veatch, Engineering
Julie Voss, University Administration
Barry White, Office of Internal Audits, University Administration

Facilitator: Penny Jung, DACUM Resource Center

Date: November 12, 1999
<table>
<thead>
<tr>
<th>Course Title</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction to Payroll Processing</td>
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<td>ENTL Mechanics</td>
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<td>Payroll Processing for International Visitors</td>
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<td>Payroll Processing for Faculty and Staff</td>
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<td>2</td>
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</tbody>
</table>
The panel was asked to identify the tasks and Knowledge and skill from the functional analysis chart that would be covered as core content. As they reviewed the materials they made a few adjustments to the content that is reflected in the following:

**Core Content:**

- Two Payroll Cycles: semi-monthly & weekly
- Basic JHU Personnel and Payroll Policies & Procedures (Resources)
- Basic Employment Laws
- Broad Classifications of Employees (including definitions)
- Payroll is Governed by Federal Regulations and Agreements
- Personal Changes- Who to Contact?
- Ethical Issues for Payroll

**Outcomes:**

Upon completion of this course the participant will be able to:

- Identify the two payroll cycles
- Locate JHU websites and find policies and procedures for Human Resources and Payroll.
- Locate electronic time and attendance system (E210) on the web and explain how to complete it* and when it is used.
- Describe the difference between exempt and non-exempt employees
- Identify the three principle classifications of employees (faculty, staff, student)
- Explain the necessity for confidentiality of payroll
- Identify security forms required to gain access to electronic payroll documents*
- Identify contacts/offices for payroll issues. (Dept. Administrator, Divisional Business Office, Divisional H.R. Office, Central Payroll Office)
- Identify three forms typically required by federal and state laws related to payroll. (I-9, W-4, MW 507)

Knowledge and Skills:
The following knowledge and skills from the chart will be covered as core content:

KS - 4 Basic employment laws
KS - 8 Ethical issues in processing payroll
KS -13 JHU policies, procedures and practice
KS-14 Federal laws/I-9 laws, Insurance Laws (a basic overview of these laws only)
KS-25 Knowledge of the employment process (school, university)
The following knowledge and skills identified on the Payroll chart will be covered in the core content in sections other than Payroll:

KS-3 Basic accounting principles
KS-16 Basic Math
KS-26 CUFS

* Added by the panel

**Student Profile:**

The courses in this document were designed for employees who meet the following criteria:

- Any employee new or existing who is responsible for payroll
- Employees responsible for hiring (may select any of the modules that meet their specific needs)
- Have completed the core Module
- Prior to taking a specific the employee will have completed the Introduction to Payroll Processing course
- Employees familiar with Account Codes
- Employees with basic math and accounting skills
INTRODUCTION TO PAYROLL PROCESSING

TASKS

Integrated Payroll Chart
A-1 Verify job requisition/appointment and budgets (F, S, B, ST) +
A-3 Refer international employees and student to international office ^ +
A-4 Complete I-9 and tax forms (F, S, ST, B)
A-6 Complete special check request, if past payroll cutoff (F, S)
A-7 Create and maintain personnel payroll file(s) in department (F, S, ST, B)
A-8 Serve as a resource for new hires/students (benefits) (F, S, ST, and B)
D-3 Verify that documents have been finalized ^
H-4 Serve as a resource/advisor to department payroll administrators for problem resolution (F, S, ST, B)
H-5 Resolve problems (ST, B)

Bargaining Unit Chart
J-2 Forward CP200 to new department or divisional Human Resources Office

Staff Chart
A-1 Prepare job requisition
A-11 Verify that checks match check distribution list
A-12 Research and resolve missing and/or incorrect checks
A-13 If paid weekly, add to weekly voucher

KNOWLEDGE AND SKILLS

KS-2 University’s account code/system
KS-12 Record keeping skills
KS-18 Payroll Formulas
KS-22 Impact of Payroll Processing and the Impact of Errors/Problems to the System
KS-24 Personnel policies, payroll policies, and Bargaining Unit contract (school, university, state, federal)
*-2 User guides and web forms
*-3 Introduction to electronic forms
*-4 Identify security access forms
*-5 PCN and object code
<table>
<thead>
<tr>
<th>Learning Outcomes</th>
<th>Performance Indicators: The employee will demonstrate the ability to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upon notification of a new employee the participant will be able identify and obtain all required information and documentation to complete an ENTL and setup a personal payroll file. A-1, A-4, A-7, KS-12</td>
<td>• A copy of the necessary information is in the personnel payroll file i.e. IA, Appointment letter, job registration numbers.   • All required approvals have been obtained</td>
</tr>
<tr>
<td><strong>While performing the payroll functions for a division/department the participant will be able to identify various interfaces and process required payroll transactions. H-4, H-5</strong></td>
<td>• Resolve problems   • Prepare a job requisition   • Serve as liaison for information referral  • Coordinate the receipt and distribution of payroll checks  • Identify the appropriate security access forms for payrolls main frame access</td>
</tr>
<tr>
<td>**Given the various employee classifications/status the participant will be able to determine the payroll process specific to each classification. A-1, H-4, J-2, A-13, <em>2, <em>5, KS-18, KS-2</em></em></td>
<td>• Describe each employee classification  • Identify the PCN and it’s components as it applies to specific employee categories  • Determine eligibility for benefits based on PCN status</td>
</tr>
<tr>
<td>*<em>When processing payroll the participant will be able to distinguish the appropriate payroll cut-off dates that apply to payroll transactions and pay dates. A-6, J-2, <em>3, KS-22, KS-24</em></em></td>
<td>• Identify resources to determine payroll cut-off dates (division, department, etc.)  • Identify the payroll documents needed to complete the transaction  • Identify when a special check request is needed to complete the transaction  • Identify that duplicate types of document have not been prepared in the same pay cycle</td>
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</tbody>
</table>

* = Added by panel  
+ = Amended by panel  
^ = Duplicate card
Introduction to Payroll Processing continued . . . .

<table>
<thead>
<tr>
<th>Learning Outcomes</th>
<th>Performance indicators: The participant will demonstrate the ability to:</th>
</tr>
</thead>
</table>
| Upon notification of a new employee, the participant will be able to identify and obtain all required information and documentation to complete an ENTL and set-up personnel payroll files. A-1, A-4, A-7, KS-12 | - Verify the required information is in the payroll file (i.e., I-9, appointment letter, job req. numbers)  
- Ensure demographic information has been obtained  
- Verify required approvals have been obtained |
| While performing the payroll functions for a division/department, the participant will be able to identify various interfaces and process required payroll transactions A-1, A-3, A-8, A-11, A-12, H-4, H-5, *3, *4, KS-24 | - Resolve problems  
- Prepare a job requisition  
- Serve as a liaison for information referral  
- Coordinate the receipt and distribution of payroll checks  
- Identify the appropriate security access forms for payroll mainframe access |
| Given the various employee classifications/status, the participant will be able to determine the payroll process specific to each classification A-1, A-13, J-2, H-4, *2, *5, KS-2, KS-18 | - Describe each employee classification  
- Identify the PCN and its components as it applies to specific employee categories  
- Determine eligibility for benefits based on PCN status |
| When processing payroll, the participant will be able to distinguish the appropriate payroll cut-off dates that apply to payroll transactions and pay dates A-6, J-2, *3, KS-22, KS-24 | - Identify payroll cut-off dates (division, department, etc.)  
- Identify the payroll documents needed to complete the transaction  
- Identify when a special check request is needed to complete the transaction  
- Identify that duplicate types of documents have not been prepared in the same pay cycle |
ENTL MECHANICS

TASKS

Integrated Payroll Chart
A-1 Verify job requisitions and budgets
A-2 Prepare ENTL (F, S, ST, B)
A-5 Verify that ENTL has been finalized (F, S, ST, and B)
D-1 Serve as a resource to determine LOA (F, S, ST, B) +
D-2 Upon receipt of notification of approval of an LOA prepare an ENTL (F, S, ST, B)
D-4 If retroactive and leave without pay then determine how the over payment will be handled (F, S, ST)
D-5 Resolve change in LOA agreement (e.g., budget) (F, S, B)
D-6 At completion of leave, prepare an ENTL to reinstate, terminate or extend (F, S, ST, B)
D-7 Submit documentation to divisional Human Resource office (F, S, B)
G-1 Upon notification of termination complete an ENTL (F, S, ST, B)
G-2 If termination date is near or after cutoff date, contact divisional HR office (F, S ST)
H-1 Verify that form is completed consistent with documentation (F, S, ST, B)

Faculty Chart
A-5 Complete a special check request, if past payroll cut-off
C-1 Conform to school policies for paying supplements

Staff Chart
A-2 Verify job requisition
G-2 Verify that E 210 is properly completed

Student Chart
C-7 Resolve problems
G-3 Check for over-payment
<table>
<thead>
<tr>
<th>Learning Outcomes</th>
<th>Performance indicators: The participant will demonstrate the ability to:</th>
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</thead>
</table>
| Upon notification of new hire, the participant will be able to take gathered information to correctly complete an INTL document. A-2 [verify job requirement], A-5, C-1 | • Verify I-9 is completed and have reached payroll office  
• Complete special check request if past payroll cut-off date  
• Process lump sum payment for new hire/termination and conform to school guidelines for supplemental pay  
• Verify job requisitions and budgets |
| Upon notification of LOA, the participant will be able to determine type and reason of LOA and accurately complete ENTL. D-1, D-2, D-4, D-5, D-6 | • Use E210 to determine when LOA unpaid  
• Identify status of employee benefits to determine amount of pay (if any)  
• Serve as an information liaison resource for LOA employee  
• Identify overpayment possibility (if any) and notify payroll office  
• Reinstate, terminate, or extend LOA  
• Resolve problems and changes in LOA |
| Given the various services (i.e. new hire, termination, etc.) the participant will be able to accurately complete the ENTL document. A-2 [prepare ENTL], A-5, C-7, D-7, H-1 | • Resolve various problems related to the document  
• Submit appropriate documentation to various offices (i.e. Human Resources, Business Office)  
• Verify ENTL is finalized |
| Upon notification of termination the participant will be able to identify payroll cut-off dates and correctly complete ENTL G-1, G-2 [termination date, verify E210 completed], G-3 | • Identify overpayment possibility (if any) and notify payroll office  
• Identify E210 is properly completed approved and proper number of vacation days indicated on ENTL  
• Verify correct mailing address is in system |

+ = Amended by panel
PAYROLL PROCESS FOR INTERNATIONAL VISITORS

TASKS

Integrated Payroll Chart
A-3 Refer international staff, faculty, etc. to international office (F, S, ST, B)

Student Chart
A-4 Refer international students to Tax Office
A-6 For international students, identify Visa termination date and monitor throughout appointment
K-1 If international student, verify eligibility of international student to receive supplements
K-2 Monitor annual amount of supplement, to verify that it does not exceed guidelines
L-4 Upon notification of a change in SSN, prepare a CP200 and forward to payroll

KNOWLEDGE AND SKILLS

KS-5 Basic understanding of differences in the payroll process for International Faculty

<table>
<thead>
<tr>
<th>Learning Outcomes</th>
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</thead>
</table>
| Upon hire of international employee participants will be able to identify necessary information needed to complete ENTL A-3, A-4, A-6 | • Serve as resource and provide direction to international employees  
• Identify where to obtain necessary VISA information |
| Upon change in existing international employee payroll information participants will be able to collect necessary information and determine correct procedure to update information. A-4, A-6, L-4 | • Track VISA status and update forms if necessary  
• Complete CP200 for change in =social security number |
| Given various VISA types and treaties participants will be able to utilize policies and procedures for processing payroll. K-1, K-2, KS-5 | • When processing ESUP’s international guidelines are checked |
**PROCESSING PAYROLL FOR FACULTY AND STAFF**

**TASKS**

**Integrated Payroll Chart**
- **H-2** Analyze salary equity (F, S)

**Faculty Chart**
- **B-1** Supply salary history to administration (chair/deans) to determine pay increase
- **C-3** Verify supplements per budget/ supplemental plan
- **E-5** Determine if change in salary is outside of budget limitation

**Staff Chart**
- **D-3** Verify that the E 210 is properly completed
- **J-1** Acquire hours from supervisors

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Upon notification of a change for faculty/staff the participant will be able to complete the necessary tasks to integrate the change. (i.e. demographics promotion, etc.)</td>
<td>• Identify the necessary forms required to make the change</td>
</tr>
<tr>
<td>E-5, H-2, B-1, C-3, J-1, D-3</td>
<td>• Identify the appropriate office to forward documentation</td>
</tr>
<tr>
<td></td>
<td>• Verify salary changes which includes supplemental pay are within university/divisional guidelines and budget limitations as they apply to faculty/staff</td>
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<tr>
<td></td>
<td>• Verify faculty appointment</td>
</tr>
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<td>• Identify the appropriate approval process</td>
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<td>• Verify change has occurred</td>
</tr>
</tbody>
</table>

| Upon notification of hiring new faculty/staff the participant will be able to complete the process/steps to establish the participant in the payroll system | • Identify the appropriate approval process                                 |
| H-2, E-5                                                                           | • Verify the appointment for faculty                                       |
|                                                                                  | • Obtain and verify the approved salary                                    |
|                                                                                  | • Identify the classification and status of faculty/staff                  |
|                                                                                  | • Payroll is processed for faculty/staff members                           |
|                                                                                  | • Copy of required information in payroll file (I-9, tax forms, appointment letter and demographic information) |
|                                                                                  | • Identify the appropriate office to forward documentation                |
|                                                                                  | • Obtain approved job requisition number for staff                         |
## Tasks

**Student Chart**

- A-2 Verify student status
- B-1 Upon notification of an increase, verify budget allocation
- B-3 Verify that increase is within school guidelines
- B-7 Resolve problems
- C-1 Acquire hours from students supervisors (time cards)
- C-3 If hours exceed guidelines, obtain justification from supervisor for additional hours
- C-4 Verify hours on time cards and match hours posted to voucher (B, S, ST)
- C-5 For work study students, verify payments haven’t exceeded award
- D-1 Serve as a resource to students to determine LOA options
- D-6 Submit documentation to appropriate office
- E-1 Upon notification of change in status, and/or salary, prepare an ESAL
- J-1 Verify change in appointment
- L-2 Notify student of the change and inform them of ramifications
- L-3 Complete necessary tax forms and/or I 9
- *6 Identify overtime as premium hours on voucher or time card
- *7 Must obtain Federal Work-Study form

## Learning Outcomes

The participant will demonstrate the ability to:

<table>
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<tr>
<th>Upon notification of a new employee/postdoctoral fellow in your department, the participant will be able to identify the appropriate payroll form and obtain all required documentation to complete the process (forms: ENTL, ESAL, ESUP) A-2, A-3, D-6, L-2, L-3</th>
<th>• Verify the required information is in the payroll file (i.e., I-9, FWS form, appointment letter, tax forms, etc.) • Verify eligibility/determine current status (i.e. registration, current employment status) • Identify appropriate office to forward all documentation • Ability to complete retro ESAL for weekly or CP200 for semi-monthly employee employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Given the various payroll frequencies, the participant will be able to identify the appropriate record keeping process C-1, C-3, C-4, C-5, *6</td>
<td>• Implement a system to acquire hours from employees’ supervisors (time cards) and submit timecards • Identify if overtime is classified or premium hours</td>
</tr>
<tr>
<td>Action</td>
<td>Details</td>
</tr>
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<td>------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Monitor earnings for FWS employees</td>
<td>Identify wage and hours allowed in compliance with JHU and federal regulations</td>
</tr>
<tr>
<td>Identify wage and hours allowed in compliance with JHU and federal regulations</td>
<td>Verify hours on timecards and match hours posted to voucher (excluding Homewood employees)</td>
</tr>
<tr>
<td>Verify hours on timecards and match hours posted to voucher (excluding Homewood employees)</td>
<td>When notified of change(s) in current payroll arrangements, the participant will be able to verify the specific change(s) and obtain appropriate documentation and/or approval. B-1, B-3, E-1, J-1, L-2</td>
</tr>
<tr>
<td>Process an ESAL and/or EB.15</td>
<td>Verify budget allocation and assure increase is within federal and JHU guidelines</td>
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<tr>
<td>Identify and process appointment changes</td>
<td>Process CP200 for transfers between primary department codes</td>
</tr>
<tr>
<td>Process CP200 for transfers between primary department codes</td>
<td>When a problem is indicated, the participant will be able to identify the problem and determine the appropriate resources available for referral and/or resolution B-7</td>
</tr>
<tr>
<td>Determine the validity of the problem</td>
<td>Identify resources available for problem resolution</td>
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<tr>
<td>Identify resources available for problem resolution</td>
<td>Resolve problem</td>
</tr>
</tbody>
</table>

* = Added by panel
PROCESSING WEEKLY PAYROLL
(Excluding Homewood Students)

TASKS

Bargaining Unit
C-1 Acquire hours from bargaining unit supervisors (time cards)
C-2 Transfer hours from time cards to vouchers
C-3 Identify over-time as premium/standard hours on voucher
C-7 Revise weekly voucher for corrections (B, S)
J-5 Add new employee to weekly voucher

Student Chart
C-2 Transfer hours from time cards to vouchers/disk
*-1 Prepare weekly voucher

BARGAINING UNIT CONTENT

A-7 Upon completion of probationary period, complete an ESAL (PCN, object code, status, and benefits base)
C-5 Maintain time and attendance records (E210)
C-6 Sign and forward voucher/disk (B, S, ST)
E-1 Upon notification of change in status, shift, and/or salary, prepare an ESAL
E-2 Verify that increase follows bargaining unit contract
G-4 Pay remaining vacation hours on weekly voucher

<table>
<thead>
<tr>
<th>Learning Outcomes</th>
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</thead>
</table>
| Upon notification of a new hourly employee (excluding Homewood employees), the participant will be able to enter employee into payroll system J-5 | **Performance indicators:**
| | **The participant will demonstrate the ability to:**
| | • Verify the required information is in the payroll file
| | • Identify appropriate office to forward all documentation
| | • Identify and process all payroll documents including the weekly payroll voucher
| | • Verify eligibility
| Given the various weekly payroll classifications, the participant will be able to maintain, monitor, and process employee’s hours B-7, C-1, C-2, C-3, C-5, C-6, C-7, G-4, *1 | **Performance indicators:**
| | • Gather time cards from supervisors
| | • Verify hours and transfer to weekly payroll voucher, including vacation advance
| | • Determine and calculate overtime and/or differential pay
| | • Verify and maintain time and attendance
| When notified of change(s) in current payroll arrangements the participant will be able to verify the specific change(s) and obtain appropriate documentation and/or approval. A-7, C-5, E-1, E-2 | • Identify wage and hours allowed in compliance with JHU, federal, and Bargaining Unit regulations  
• Analyze and resolve problems  

| • Verify and process appropriate change  
• Verify change is in compliance with JHU, federal, and Bargaining Unit regulations  
• Process CP200 for transfer between divisions  
• Process an ESAL to change PCN upon completion of probation period. |

* = Added by panel
PROCESSING ESAL AND EB-15

TASKS

Integrated Payroll Chart
B-1 Verify salary increase (F, S)
B-4 Resolve problems (F, S, B)
E-1 Receive notification of change in salary (F, S, ST,)
E-2 Prepare an ESAL (F, S, ST B)
E-3 Verify that percent of salary follows school's guidelines (percent for grant vs. general funds) (F, S)
E-4 If retroactive prepare paper form (CP-200) (F, S, ST)
F-1 Upon notification of change in funding complete an ESAL (F, S, ST, B)
F-2 If retroactive prepare an EB 15 for prior periods (F, S, ST)
F-3 Verify that documents is finalized (F, S, ST, and B)
G-3 Submit documentation to divisional HR office (F, S, B)

Bargaining Unit Chart
J-1 Upon notification of transfer, prepare CP200 (or ESAL if within the same department)

Staff Chart
B-1 Verify that annual performance appraisal has been completed
B-2 Verify that increase adheres to university guidelines
F-3 If no “control salary” and line drops, prepare a special check request
F-4 Verify that calculated actual equals new actual (F, S)
F-5 Recalculate distribution modify ESAL, and resubmit (F, S)
K-1 Verify changes in hours with supervisor or job requisition
K-2 Determine if a new job requisition or documentation is required and obtain approval if needed
K-5 If going from benefit to non-benefit status, pay outstanding vacation (through ESAL)

Student Chart
B-4 If retroactive, for weekly payroll reflect on weekly voucher or disk (B, ST)
D-3 Verify that documents have been finalized
E-2 Follow process for new hire or change in salary
F-2 If change in salary, follow regular change in salary process
J-2 Upon notification of transfer, prepare CP200
J-3 Forward CP200 to new department
J-4 Forward completed CP200 to office for verification
<table>
<thead>
<tr>
<th>Learning Outcomes</th>
<th>Performance Indicators: The participant will demonstrate the ability to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upon notification of change in distribution of salary participants will be able to prepare an ESAL F-2, F-3</td>
<td>• ESAL finalized after verification of availability of funds (falls within account period)</td>
</tr>
<tr>
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<td>• If retroactive EB15 prepare</td>
</tr>
<tr>
<td>Upon notification of the change in salary distribution, the participant will be able to complete the forms necessary to apply the change. F-2, F-3, E-1</td>
<td>• Identify reason code</td>
</tr>
<tr>
<td></td>
<td>• Identify time frame</td>
</tr>
<tr>
<td></td>
<td>• Calculate salary to be transferred for time frame as it complies with University and federal guidelines</td>
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<td></td>
<td>• Identify account number to be charged and account number to be credited</td>
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<td></td>
<td>• Verify through mainframe systems that credit being applied does not exceed</td>
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<td></td>
<td>• Verify through mainframe system that dates on account are being charged on EB15 fall within account period.</td>
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<td></td>
<td>• Submit EB15 to appropriate office in a timely manner</td>
</tr>
<tr>
<td></td>
<td>• Verify that document has been finalized</td>
</tr>
<tr>
<td>Upon notification of change in salary for employee the participant will be able to determine the proper reason code and verify generation of ESAL B-1 Verified salary increase, annual performance appraisal, E-1, E-2, E-3, F-1, F-3 Documents finalized, G-3, B-2, F-4, D-3, B-4, E-4</td>
<td>• Complete CP200 if retroactive salary increase</td>
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<tr>
<td></td>
<td>• Verify increase adheres to university and sponsored fund guidelines</td>
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<td></td>
<td>• Prepare an ESAL using proper reason code</td>
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<td></td>
<td>• Documentation forward to appropriate office (i.e. performance appraisal, Deans Letter, control salary form, etc.)</td>
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<tr>
<td></td>
<td>• ESAL is finalized</td>
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<tr>
<td></td>
<td>• Identify if calculated actual equals new actual (weekly, only)</td>
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<tr>
<td></td>
<td>• Submit retroactive ESAL documentation for salary increase</td>
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<tr>
<td></td>
<td>• Submit retroactive hours on weekly vouchers</td>
</tr>
<tr>
<td>Upon notification of transfer or status change the participant will be able to prepare an ESAL within university guidelines. E-2 Process new hire students, K-1, K-2, K-5, J-2, J-3, J-4, D-3</td>
<td>• Completion of job requisition, if necessary</td>
</tr>
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<td></td>
<td>• Text field completed on ESAL to pay out benefit to non-benefit</td>
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<td></td>
<td>• Standard hours changed or ESAL</td>
</tr>
<tr>
<td></td>
<td>• CP200 forward to appropriate office if transferred between divisions</td>
</tr>
</tbody>
</table>
^ = Duplicate card
**PROCESSING EDEM**

**TASKS**

**Integrated Payroll Chart**

I-1  Upon receipt of notification from the individual, prepare an EDEM (F, S, ST, B)
I-2  Submit documentation to divisional HR office, if needed (F, S)
I-3  Verify that document (EDEM) id finalized (F, S, ST< B)
I-4  Refer the individual to HR office, if needed (F, S, B)
I-5  Obtain new tax forms if needed (F, S, ST, and B)

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<thead>
<tr>
<th>Learning Outcomes</th>
<th>Perform Indicators: The participant will demonstrate the ability to</th>
</tr>
</thead>
</table>
| Upon notification of change in employee demographic information the participant will be able to prepare an appropriate documentation. I-1, I-2, I-3, I-4, I-5 | • Process CP200 if change in social security number  
• Process EDEM for all other changes  
• Identify and forward necessary documentation to proper office  
• Serve as liaison/resource to employee  
• Verify EDEM finalized |
PROCESSING ESUP

TASKS

Integrated Payroll Chart
C-1 Conform to school policies for paying supplements and processing reductions (F, S, ST)
C-2 Upon receipt of notification of supplement/reduction, prepare ESUP (F, S) +
C-3 Verify that ESUP is finalized (F, S)
*-5 Process hourly payments for semi-monthly students *

Staff Chart
C-2 Verify overtime/reduction/ supplement budget number

<table>
<thead>
<tr>
<th>Learning Outcomes</th>
<th>Performance indicators: The participant will demonstrate the ability to:</th>
</tr>
</thead>
</table>
| Upon notification of supplemental pay/reduction, the participant will be able to complete an ESUP C-1, C-2 notification of preparation – budget number, C-2, C-3, *5) | • Make sure ESUP conforms to school and federal policies
• Process ESUP according to payroll cut-offs
• Identify applicable reason codes
• Define the various types of supplements/reductions
• Verify correct budget number/object code is being used
• Verify ESUP has been finalized |

+ = Amended by panel
* = Added by panel
Issues and Suggestions:

1. The panel recommended the development of a web-based E210 course that would be targeted to administrators, supervisors, etc. those employees who verify or approve payroll forms and/or are responsible for hiring students.
2. Should the Preparation of PAR’s Course be included in the Payroll or the Sponsored Projects sequence?
3. The Payroll Tracking Systems course needs to be addressed.