# HR Liaisons Network Meeting Agenda

**DATE:** April 4, 2019  
**ATTENDING:** HR Liaisons and HR Staff

<table>
<thead>
<tr>
<th>Topic</th>
<th>Speaker</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>I. Welcome &amp; Announcements</strong></td>
<td>Karla McCormick</td>
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<tr>
<td><strong>II. HRL Updates</strong></td>
<td>Linda Maxwell-Evans</td>
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</tbody>
</table>
| A. HRL Updates  
  i. Next meeting – currently scheduled May 2, 2019  
  ii. Kim Brown – new HRL for some units within Chief Operating Office & Office of the President (Pat Harris retired April 1, 2019)  
  iii. Debbie Knight – retirement May 1, 2019 |  
| B. HRL Resources Advisory Council  
  i. Call – April 1, 2019  
    1. Verbal Contingent Offers  
  ii. Next Meeting – April 22, 2019  
    1. Supervisor Approvals in Fast-Train (HRD)  
    2. New Hire & transfer Paperwork project update (Records)  
    3. TBD |  
| **III. Employee Relations** | Linda Maxwell-Evans |
| A. Employee Appreciation Week  
B. Volunteer Sign-up |  
| **IV. Academic Advisors – Performance Evaluation & Promotion** | Ruthie Spiers |
| A. Dates and Processes |  
| **V. Human Resource Development** | Bill Shannon  
Penny Houston |
| A. Faculty NEO Sessions – Fall Schedule  
B. Performance Management Process Review |  
| **VI. Intern Presentations** | Anna Durrett  
Claudia Seckinger |
| A. ACES – Anna Durrett  
B. Student Affairs – Claudia Seckinger |  
| **VII. Records Updates** | Brittany Saliba |
| A. Out of Class Pay EPAF illustration  
B. Updated HR Banner Tipsheet – available on HRL Resources webpage |  
| **VIII. Employment Services** | Chris Thompson |
| A. Verbal Contingent Offers |  
| **IX. Compensation/Classification** | Shelly Murray |
| A. Job Family Promotion Q & A  
B. OIT Project Update |  
| **X. Q&A** | Karla McCormick |
HR Liaisons Network Meeting Minutes, April 4, 2019

Welcome and Announcements – Karla McCormick
McCormick announced that there still three openings in AU Human Resources:

- Specialist I, Compensation;
- Specialist III, Compensation; and
- Assistant Manager, Benefits.

She said that applications are still being accepting for the Specialist III, Compensation, and Assistant Manager, Benefits, openings. She encouraged the audience to share this information with potential applicants.

HR Liaison Updates: Linda Maxwell-Evans
Maxwell-Evans reminded the audience that the next meeting is scheduled for Thursday, May 2, at 2:45 in the AU Administrative Complex, Room 1204. She also provided an update on a couple of HRL changes:

- Pat Harris, who had served as an Executive Assistant in Samford Hall, recently retired. Kim Brown will take over Liaison duties for several areas, including:
  - Chief of Staff/VP Economic Development & Industry Relations;
  - Chief Operating Officer; and
  - Office of President.
- Maxwell-Evans recognized Debbie Knight, HR Liaison for Development, who is retiring by the end of this month. Knight received a nice ovation and thanked the audience for their support through the years.
- The HR Advisory Council met on April 1, and is scheduled to meet again on April 22.

Employee Relations: Linda Maxwell-Evans
Maxwell-Evans reminded everyone that April 22-26 is Employee Appreciation Week. She summarized the events that are planned, adding that all AU employees can attend any of the events:

- Monday, April 22, Department Appreciation Day: Maxwell-Evans encouraged Liaisons and Network members to support or encourage events within their respective departments or units. She added that the events do not have to be anything major, but something to show employees that they are appreciated.
- Tuesday, April 23, Walk at Lunch: Walks will be held at four locations: the AU Employee Pharmacy, Facilities, the Vet School, and the AU Administrative Complex. Walks are scheduled to begin at noon. In a separate event, the Alumni Association will provide popcorn to employees across campus. Additional information will be forthcoming.
- Wednesday, April 24, Administrative Professionals’ Day Conference: Thom Gossom, Jr., and Jamie Brown are the keynote speakers for this year’s conference, which will occur from 7:30 a.m. until 1:30 p.m. at the Student Center. Maxwell-Evans reminded Liaisons that lunch only is considered a personal expense and not allowable with CHART A (state) funds. She also said that volunteers are still needed to assist with the event.
- Thursday, April 25, Employee Recognition Program: The program will begin at 2:30 p.m. at The Hotel at Auburn University. Liaisons should have already received information about which employees in their respective departments/units will be recognized. Maxwell-Evans asked Liaisons to encourage those employees’ supervisors to attend the program.
- Friday, April 26, Employee Appreciation Picnic Lunch: The picnic will occur from 10:30 a.m. until 12:30 p.m. at the Facilities Management pond. Event sponsors include Facilities Management, the Vice President for University Outreach, and Flowers Baking.
Academic Advisors: Performance Evaluation and Promotion: Ruthie Spiers

Spiers, with assistance from Bailey Ward, offered a brief overview on the Performance Evaluation and Promotion process for Academic Advisors. Of note:

- Training on a Pay Evaluator form that is unique to Academic Advisors will be occur on May 3.
- An updated review form for advisors, which was created in Excel, includes a five-point rating scale and verbiage that is consistent with other rating forms. Ratings will be given by job function in core values.
- A self-assessment worksheet will also be made available to advisors, in place of the self-appraisal form.
- Training has been offered to supervisors.
- A new Professional Development Plan has also been created for supervisors to use with their direct reports.
- Supervisors who are submitting promotion requests must submit them to the HR Liaison by the internal deadline established by the department/unit. The Liaison will then submit promotion materials to Compensation by June 18. Compensation will then submit reviews and requests to Kerry Ransel by June 25.
- For advisors who are not receiving a promotion, the deadline for their reviews to be submitted to their Liaison will be the same as other employees.

Human Resource Development: Bill Shannon, Kim Graham, and Penny Houston

Shannon shared several updates and reminders about the Performance Review Process. Of note:

- This year, HR will not announce a deadline for supervisors/managers to submit reviews to HRLs However, Liaisons should work with their internal leadership to determine an appropriate deadline for their departments/units, and then share that deadline in their respective departments. Performance reviews are due to HR on July 19.
- Vice Presidents and Deans will make the decision or delegate the choice as to which form will be used within their respective department/unit. To maintain fair and consistent administration of the performance process, it is essential that all employees whose merit increases would be determined by the same supervisor/manager/department head be evaluated using the same performance review form.
- A Division Performance Ratings Spreadsheet (DPRS) has been sent to Liaisons and includes all full-time and part-time employees in their division. Liaisons should save a copy of the original DPRS to prior to entering any ratings, and then verify information, alphabetize reviews, input information on the DPRS, and then submit alphabetized and verified reviews, along with the DPRS, to Houston. The reviews must include the date and signature of the supervisor, second-level manager, employee, and HR Liaison.
- HR has created online training for Supervisors and Managers. The training is available through Fast-Train. Graham showed an example of the training that is available to employees. It is strongly recommended that supervisors and employees complete their respective training course.
- AU Human Resources will also offer in-person training to supervisors and employees. Additional information will be forthcoming, and Liaisons should contact HR Development if they are interested or have additional questions.
- The Department of Internal Auditing has begun to request reports of completed versus non-completed reviews by department.
- In a non-Performance Management item, Houston shared Fall NEO dates for faculty. (Seven sessions will be offered to new faculty members between Aug. 14 and 22.)

Intern Presentation: Anna Durrett

Durrett, a senior who is majoring in management, is serving as an intern with ACES this semester. She shared information about a recruitment toolkit project she recently created that is designed to streamline the work that HR needs to perform. She also shared an applicant score form she created which includes selection criteria, comments, and candidate summary in one place.

Records Updates: Brittany Saliba

Saliba shared with the audience a new step-by-step illustration that she created to assist with out-of-class pay Electronic Personnel Action Forms (EPAF). Of note:
• The Out of Class ‘OOC’ (C% suffix) must be approved by Compensation per memo from the department. Once approved, the department initiates the EPAF and sends supporting documentation to Records via email.
• The default earnings tab on the job record drives the out-of-class payments for an exempt employee. The hours entered into Kronos drive the out-of-class payments for a non-exempt employee.

Saliba also referenced a new HR/Banner tip sheet that is now available on the HR Liaison Network website, under “Important Links”.

Employment Services: Chris Thompson

Thompson discussed a worksheet that Employment Services created regarding the process for Verbal Contingent Offers. The process includes a timeline of required actions, along with the responsible party(ies):

1. **Finalist identified**, Department/Search Committee
2. **Pay Evaluator discussion/salary development**, Supervisor/HR Liaison
3. **Form B completion/approval and Pay Evaluator support obtained from the department and HR**, Employment/AAEEO/Supervisor/HR Liaison
4. **Provide finalist a verbal contingent offer**, Supervisor
5. **Finalist contacted for background check**, Employment
6. **Employment notifies department/HR Liaison when background check is clear**, Employment
7. **Send finalist formal offer letter**, Supervisor

The goals of the new process is:
• Transition away from contingent offer letters.
• Eliminate the need for the department or HRL to generate a contingent offer followed by an official offer.
• Discourage finalists from making decisions about current employment until background check is complete and all administrative approvals have been obtained.

Thompson also reminded the audience that when utilizing the Pay Evaluator, the completer should note if the salary includes an upcoming merit increase.

Compensation/Classification: Bailey Ward

• Ward touched briefly on the FLSA overtime rule threshold, which is proposed to increase from $23,660 to $35,308. Ward said that AU Human Resources would share information as it becomes available regarding the proposed threshold.
• Ward touched briefly on the Job Family Promotion process and asked the audience if the worksheet was working OK for them. The audience agreed that it was working well.
• She also gave an update on the OIT project of updating job titles for info tech specialists, as the MA14-Spec Info Tech description is being eliminated. Ward gave a summary of how the updates would occur:
  o Supervisors will review job descriptions created by HR and OIT and then identify the appropriate job description for each employee based on the employee’s current duties and responsibilities. This information should be submitted to Cindy Selman no later than May 10.
  o Compensation will use updated resumes to evaluate employee qualifications based on identified jobs utilizing the Pay Evaluator.
  o No salary adjustments will be made with these changes unless incumbent salaries are greater than or equal to the minimum of the pay range.
  o Results will be provided to OIT leadership, Deans, AVPs, etc. to develop a plan for additional salary adjustments, if warranted and if funds are available.
  o Reclassifications will take effect around Oct. 1

Closing

There were no other comments or questions from the audience. Therefore, McCormick adjourned the meeting just before 4 p.m.
Thank you, Auburn employees!

Learn additional information about each event:

[aub.ie/employee-appreciation](aub.ie/employee-appreciation)

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**Monday, April 22**

**Department Appreciation Day**
Times and locations vary; Check with your department for additional information

**Tuesday, April 23**

**Walk at Lunch,**
12-1 p.m., AU Employee Pharmacy, Facilities, Vet School, and AU Administrative Complex

**Wednesday, April 24**

**Administrative Professionals’ Day Conference,**
7:30 a.m. - 1:35 p.m., AU Student Center, Ballroom A-B and rooms 2222, 2223, and 2225

**Thursday, April 25**

**Employee Recognition Program,**
2:30 p.m. - 4 p.m., The Hotel at Auburn University and Dixon Conference Center

**Friday, April 26**

**Employee Appreciation Picnic Lunch,**
10:30 a.m. - 12:30 p.m., Facilities Management (by the pond) Sponsored by Facilities, VP for University Outreach and Flowers Bakery

Presented by Auburn University Human Resources
Thank you, Auburn employees!

Learn additional information about each event:

[aub.ie/employee-appreciation](aub.ie/employee-appreciation)

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Presented by Auburn University Human Resources
Academic Advisor Performance Evaluation & Promotion Update for 2018-2019

HR Liaison Meeting
April 4, 2019
Objectives

• Brief overview for anyone new
• Review updates to form
• Review timeline
• Review criteria for eligibility for promotion
• Answer questions
Brief Overview

• Unique performance evaluation form = comprehensive excel workbook
• Self assessment worksheet in place of self appraisal form
• Ratings by job function in core values
Academic Advisor Performance Evaluation Workbook

**Academic Advisor I**
- Under immediate supervision, advises students on course selection, requirements for selected areas of concentration & post-college plans to help meet their educational needs & realize student scholastic goals.

**Academic Advisor II**
- Under close supervision... This position typically demonstrates proficient & comprehensive knowledge of defined skills areas & applications. Develops & oversees advising functions, applies specialized knowledge & may serve as mentor/trainer of new Advisors & support staff.

**Academic Advisor III**
- Under minimal supervision... Serves as a team leader and may supervise other Advisors in the absence of or at the request of the direct supervisor, but serves as an actual Advisor the majority of the time.

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**Job Summary**

1. Advises students in matters related to goals, policies, choice of curriculum, course load, study habits, course scheduling, academic action and problem resolution.
2. Interprets University policies, procedures, and curriculum to students, faculty, and staff.
3. Works with others in order to provide students timely information on educational options and University policies.
4. Assists with student orientations.
5. Makes appropriate referrals.
6. Verifies, certifies, and/or completes appropriate student-related forms and processes.
7. Maintains student and advising records in accordance with State/Federal law and University regulations.
8. May clear students for graduation.
9. Maintains student data security.
10. Utilizes appropriate technology to support effective advising.
11. Actively involved in professional development opportunities at the campus level (at minimum).
12. Develops contacts with departments and faculty.

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**Essential Functions**

- Job duties 12 – 15 in Academic Advisor I description:
  13) Participates in professional development program at the Regional or National level, or demonstrates leadership at the campus level

- Job duties 1 – 15 in Academic Advisor II & III descriptions:
  16) Develops goals and objectives for improvement of the advising unit in conjunction with direct supervisor. Implements the plan for improvement of advising functions and models within the college.
  17) Provides leadership for campus-wide advising projects.
  18) Networks with other departments and colleges and the Office of the Director of Advising to ensure a coordinated approach to advising and retention.

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**Education Requirements**

- Four-year college degree
- 0 years

**Experience Requirements**

- 3 years (must be FT advising in Higher Ed)
- 5 years (must be FT advising in Higher Ed)

*Related and relevant graduate degree may substitute for two (2) years' experience.*
Updates to Form

• Moved to campus-wide verbiage
**Employee Information**

- **Employee Name:** Aubie Tiger
- **Employee Banner ID:** 90212345
- **Current Job Title:** Advisor I, Academic
- **Start Date in Current Title:** 1/20/2018
- **Supervisor’s Name:** Ruthie Spiers
- **Supervisor’s Banner ID:** 90213654
- **Rating Period:** 2019
- **Earliest Date of Promotional Consideration:** work w/ supervisor

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**Job Functions**

<table>
<thead>
<tr>
<th>Job Function</th>
<th>Accountability</th>
<th>Communication Skills</th>
<th>Initiative and Adaptability</th>
<th>Inclusion</th>
<th>Professional Integrity</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advising</strong> (score 1-5, 5 highest)</td>
<td>Unsatisfactory in all areas</td>
<td>Meets some expectations but not all</td>
<td>Meets expectations</td>
<td>Exceeds expectations</td>
<td>Exceptional in all areas</td>
<td>3.0</td>
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</tbody>
</table>

- 1. Advises students in matters related to goals, policies, choice of curriculum, course load, study habits, course scheduling, academic action and problem resolution.
- 2. Interprets University policies, procedures, and curriculum to students, faculty, and staff.
- 3. Works with others in order to provide students timely information on educational options and University policies.
- 4. Assists with student orientations.
- 5. Makes appropriate referrals.

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**Supervisor Comments**

- No comments provided.
Information copies from performance evaluation worksheet to self assessment worksheet for corresponding year (except highest degree)

*more space to type

*advisor completes separate excel sheet each year and emails it to supervisor, eliminates need to email workbook back and forth
The Professional Development Plan is used by the supervisor to identify several areas:
1) Supervisors may use this section to list job duties necessary for improvement over the course of the next year. Supervisors should label these duties as "mandated."
2) Supervisors may also list job duties that will allow the advisor to demonstrate performance at the next level to support pursuit of promotion. These duties are labeled as "recommended."
3) Supervisors may use this section to list aspirational goals for the upcoming year, which will support pursuit of exceptional performance but are not essential to effective performance. These duties are labeled as "goal."

<table>
<thead>
<tr>
<th>Professional Development Plan</th>
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<tbody>
<tr>
<td><strong>Job Duty</strong></td>
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☐ Indicate here with a check if this employee has a Performance Improvement Plan (PIP) on file.
### Performance Review Approval Signatures

<table>
<thead>
<tr>
<th>Signature</th>
<th>Date</th>
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<tbody>
<tr>
<td>Supervisor Signature</td>
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<tr>
<td>Manager (Second Level Review) Signature</td>
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### Performance Review Completed

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<th>Signature</th>
<th>Date</th>
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<tbody>
<tr>
<td>Supervisor Signature</td>
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<tr>
<td>Advisor Signature</td>
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This annual performance review will become part of your personnel file. Your signature above indicates that you and your supervisor discussed this document. Your signature above does not necessarily mean that you are in agreement with this performance review.

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<tr>
<th>HR Liaison Signature</th>
<th>Date</th>
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Timeline

**Performance Year Period**

- **March/April**
  1. Update Sessions for advisors;
  2. Pay evaluator training in April for supervisors and HR Liaisons

- **May**
  1. Self-Assessments due to supervisor by internal deadline;
  2. Supervisors complete performance evaluation sheets and submit to HR Liaisons for review

- **May/June**
  1. Performance evaluation meetings;
  2. Supervisors submit promotion materials to HR Liaisons by internal deadline
     - Performance workbook
     - Current resume/vita
     - HR34-A
     - Pay evaluator w/ recommended salary
  3. HR Liaisons submit promotion materials to Shelly Murray and Bailey Ward by June 18

- **July**
  1. Performance evaluation meetings;
  2. All remaining (non-promotion) performance evaluation workbooks due to HR Liaison by internal deadline
  3. Performance evaluation campus wide due to HR by July 19

- **October 1**
  Promotions take effect

**Compensation**

- Compensation will review and submit to Kerry Ransel by June 25
Who is eligible to promote to Academic Advisor II or III?

To be eligible to promote to **Academic Advisor II**, an advisor must have at **minimum**:

- 3 years’ experience with at least 2 years including full-time primary duties of advising in higher education
- A graduate degree may substitute for 2 years’ experience but does not override the requirement for 2 years full-time primary duties of advising in higher education
- **Evidence of consistent and effective advisor II activity while serving in current role, additional job duties at level II include**
  - Leadership role in on-campus professional development and/or participation in professional development at regional or national level
  - Facilitation of college and/or university level advising projects
  - Participation on university committees, caucus leadership, and/or teaching courses

To be eligible to promote to **Academic Advisor III**, an advisor must have at **minimum**:

- 5 years’ experience with at least 4 years including full-time primary duties of advising in higher education
- A graduate degree may substitute for 2 years’ experience but does not override the requirement for 4 years full-time primary duties of advising in higher education
- **Evidence of consistent and effective advisor III activity while serving in current role, additional job duties at level III include**
  - Development of goals and objectives for improvement of the advising unit in conjunction with direct supervisor; implementation of plans for improvement of advising functions and models within the college
  - Leadership for campus-wide advising projects
  - Networking with other departments and/or colleges and the Office of the Director of Advising to ensure a coordinated approach to advising and retention
Pay Evaluator Training

Items to be discussed:

• Brief pay evaluator training (for supervisors)
• Consistent criteria for pay evaluator for academic advising positions
• Consistent stance on relevant experience
Auburn University Human Resources is pleased to announce the 2019 New Employee Orientation HR and Benefits special sessions for faculty.

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
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<tbody>
<tr>
<td>Wednesday, August 14</td>
<td>8 a.m. – 12 p.m.</td>
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<td>Wednesday, August 14</td>
<td>1 p.m. – 5 p.m.</td>
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<td>Friday, August 16</td>
<td>8 a.m. – 12 p.m.</td>
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<td>Friday, August 16</td>
<td>1 p.m. – 5 p.m.</td>
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<td>Monday, August 19</td>
<td>First Day of Classes</td>
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<td>Wednesday, August 21</td>
<td>8 a.m. – 12 p.m.</td>
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<td>Wednesday, August 21</td>
<td>1 p.m. – 5 p.m.</td>
</tr>
<tr>
<td>Thursday, August 22</td>
<td>1 p.m. – 5 p.m.</td>
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All of the orientation sessions are held in Room 1206 of the AU Administrative Complex located at 1550 E. Glenn Ave. It should be noted that the Special Faculty HR/Benefits sessions cover the same information as our other New Employee Orientation sessions. They are held on days and times different from the standard Thursday morning and prior to the start of classes on August 19. The purpose of these sessions is to accommodate the volume of new faculty members and their schedules. The Biggio Center orientation (held this year on Thursday, August 15) is a completely separate event, and is not a substitute for a HR/Benefits orientation session.

All new faculty members who will be hired at full-time status for at least 1 year (9 or 12 months as appropriate to the appointment) must attend a New Employee Orientation session within the first 30 days of their full time appointment. If a faculty member begins employment earlier in the summer prior to their full time appointment for the fall, they may contact Human Resources regarding health insurance and the mandatory retirement plan enrollment for summer term.

Due to the recent security requirement of DUO-Mobile, new hire paperwork will be due to HR Records no later than three days prior to the scheduled session.

To register a faculty member for orientation, please send the following information to orientation@auburn.edu

- Date and time of preferred orientation session:
- Name and title (Mr. Ms. or Dr.):
- Current e-mail:
- Department:
- Job title:
- Immediate supervisor:
- Will they supervise other full-time employees:
- Birth date:
- Salary:
- Pay cycle:
- Date of employment:
- Hiring manager:

Please direct questions to Penny Houston, Coordinator, HR Development, at orientation@auburn.edu
Today’s Refresher

• Thanks for your help
• The newly-developed Performance Review Form
• Refresher session on the PR Submission Process
• Noteworthy topics
• Q&A
Today’s Refresher

- This year, HR will not announce a deadline for supervisors/managers to submit reviews to HRLs.
- However, you should work with your internal leadership to determine an appropriate deadline for your departments/units, and then share that deadline in your respective departments.
- Performance Reviews are due to HR on Friday, July 19, 2019.
Newly-developed Performance Review Form

<table>
<thead>
<tr>
<th>Job Duties / Responsibilities / Position Goals / Previously Identified Development Needs</th>
</tr>
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<tbody>
<tr>
<td>Setting expectations:</td>
</tr>
<tr>
<td>• List as few as five and up to ten job duties, responsibilities, position goals, or previously identified development needs.</td>
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<tr>
<td>Conducting the review:</td>
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<td>• Add comments on how well the employee performed these pre-established expectations.</td>
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<tr>
<td>• Identify one or more behavior, process or client, that contributed to the resulting outcome. For suggestions, visit the Observed Behavior website.</td>
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<td>• Add any development opportunities to optimize output for the upcoming year.</td>
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<td>• Finally, rate each pre-established expectation.</td>
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| Example:                                                                 |
| Performance is consistently superior and significantly exceeds the expectations for the job. |
| This employee consistently meets expectations for the job. |
| Performance Review Form:                                                                 |

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1. Job Duty/Responsibility/Position goal/Previously Identified development need:  
   • How well was this performed?  
   • Behavior: Observed  
   • Performance Development for 2019-2020

2. Job Duty/Responsibility/Position goal/Previously Identified development need:  
   • How well was this performed?  
   • Behavior: Observed  
   • Performance Development for 2019-2020

3. Job Duty/Responsibility/Position goal/Previously Identified development need:  
   • How well was this performed?  
   • Behavior: Observed  
   • Performance Development for 2019-2020
Important Information

• Vice Presidents and Deans will make the decision or delegate the choice as to which form will be used within their respective department/unit.

• To maintain fair and consistent administration of the performance process, it is essential that all employees whose merit increases would be determined by the same supervisor/manager/department head be evaluated using the same performance review form.
A Division Performance Ratings Spreadsheet (DPRS) has been sent to HRL’s and includes all full time and part time employees in their division.

Save a copy of the original DPRS to prior to entering any ratings.

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<th>DI</th>
<th>Division Des</th>
<th>Title</th>
<th>Department</th>
<th>Last Name</th>
<th>First Name</th>
<th>ID</th>
<th>Review Date</th>
<th>Rating</th>
<th>Comment</th>
<th>FT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arlene Brown</td>
<td>152</td>
<td>Library</td>
<td>Exec Support Asst II</td>
<td>Library Administration</td>
<td>Moody</td>
<td>Cindy</td>
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Process-in-brief

1. Verify information
2. Alphabetize Reviews
3. Input information into DPRS
4. Submit alphabetized and verified reviews, and DPRS to Penny Houston
HRL Action Steps

• Verify that the review contains
  1. Employee Name as listed on the DPRS
  2. Employee Banner ID as listed on the DPRS
  3. Division code
  4. Supervisor Name
  5. Supervisor Banner ID
  6. Overall Rating Score
  7. Signature and Date of Supervisor
  8. Signature and Date of 2nd Level Manager
  9. Signature and Date of Employee
  10. HRL signature validates all of the above
HRL Action Steps (continued)

- If all information is included and accurate, sign and date and proceed to next step
- If information is missing or inaccurate:
  - Record the performance review rating in the Division Performance Ratings Spreadsheet
  - Return to supervisor for correction
  - Supervisor should then return the corrected review to the HRL for submission to HR
- If any content or ratings are changed after the employee has signed the review, it must be reviewed, signed, and dated once again by the employee
• Verify the names and Banner ID’s are identical to their listing on the DPRS
• Enter the date of review, and overall rating
• Alphabetize Performance Reviews
• If the Performance Review Form does not have a division code field, add it to the top left hand corner
• Save a copy for your HRL records
Who Needs a Review?

- A performance review is not required if the employee
  - Terminates
  - Retires
  - Passes Away
- Notate these employees with a 9 in the overall rating column and add comment in the section provided
- Transfer employees should have review from previous supervisor. Current supervisor uses it and Initial Training Review (90-day) as applicable.
Who Needs a Review? (continued)

- A performance review is required if the following criteria occurs during the performance year. (June 1, 2018 – May 31, 2019)
  - A hire date prior to December 1, 2018
  - Post December 1 hires for whom a merit increase has been submitted
Date to Remember

- July 19th - Deliver to Human Resources/Penny Houston alphabetized paper copies of performance reviews, and a paper copy of the DPRS
- July 19th - Email the electronic copy of the DPRS to Penny Houston
Noteworthy

- Direct supervisors/managers to the Performance Management website
- If there is an employee missing from DPRS add their information
- If there is an employee on your DRPS that is not reviewed by your department indicate with a 9 in the ratings column
- The 2nd level manager signature is required prior to the face to face with the employee
• The Division of Internal Auditing has been requesting reports of completed vs. non-completed reviews by department
Questions

Penny Houston
pdh0007@auburn.edu
844-1693

Bill Shannon
wps0012@auburn.edu
844-1602
ABOUT ME

Management major with Human Resource minor

Graduating in May

Favorite classes:
- HR Legislation
- Selection and Placement
Step 1: Supervisor Completes Staffing Request Form

Tuesday, November 27, 2018  2:03 PM

It is always an exciting time to bring a new employee on board. The first step in the ACES recruitment process for all employee hires is to complete the online staffing request form found on the ACES intranet.

I. Take a look at the Staffing Request PowerPoint and ZOOM Training for directions on filling out the Staffing Request Form.

II. Below is a list of commonly recruited for Approved Job Descriptions. If specific job duties need to be added, update and attach to the Staffing Request. Otherwise, the generic job description will be used. Contact ACES HR for additional job descriptions not listed below.

- Admin Support Associate
- 4-H Agent Assistant
- SNAP-ed Agent Assistant
- EFNEP Agent Assistant

III. Staffing Requests (please complete the form using Google Chrome Web Browser)

- Full-Time/Part-time Staff Request (includes limited term)
## Applicant Score Form

**Position Name:**

**County:**

### Selection Criteria

<table>
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<tr>
<th>Candidates</th>
<th>Minimum Salary Requirement</th>
<th>Acceptable Minimum Salary Requirement</th>
<th>Total</th>
<th>Candidate Strengths</th>
<th>Candidate Weaknesses</th>
<th>Interviewed</th>
<th>Reasons for Non-Selection for Interview</th>
<th>If Interviewed, reason for Non-Selection as the Finalist.</th>
<th>If Finalist, reason for Selection.</th>
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FUTURE

- SHRM- CP Exam
- HR Admin, HR Generalist, HR Coordinator, and more.
<table>
<thead>
<tr>
<th>Function</th>
<th>Form Name</th>
<th>Form Description</th>
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<tr>
<td>Find Employee Status, class, benefit/leave category, home dept, service date</td>
<td>PEAEMPL</td>
<td>Employee Information</td>
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<td>United States Regulatory Information for I-9 and 1042-S</td>
<td>PEAEMPL</td>
<td>Employee Information</td>
</tr>
<tr>
<td>Find Employee Leave Balance Information</td>
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<td>Employee Leave Balances</td>
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<td>Find Leave Balance History by Employee</td>
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<td>Find Employee Salary History</td>
<td>PEISALH</td>
<td>Employee Salary History Inquiry</td>
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<td>View Timesheet per Pay Period (Enter Year, Payroll ID (MN,BW, F9, or SF), Payroll Number), Rate of Pay, Gross Pay, FOAP, Earncodes, and Hours Per Job</td>
<td>PHA HOUR</td>
<td>Banner Time Sheet View</td>
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<td>View Leave Accrual per Pay Period (Enter Year, Payroll ID (MN, BW, F9, or SF), Payroll Number)</td>
<td>PHIACCR</td>
<td>Pay History Leave Accruals</td>
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<td>View Pay Events per Payroll (Gross vs Net Pay) for Specific Employee</td>
<td>PHILIST</td>
<td>Pay Event List</td>
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<tr>
<td>Quick employee search (enter known info &amp; press F8 or execute query)</td>
<td>POIDEN</td>
<td>Employee Search Form</td>
</tr>
<tr>
<td>Employee General Info (address, bio, email, contacts, alternate ID)</td>
<td>PPA IDEN</td>
<td>Identification</td>
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<tr>
<td>View All Available Earncodes</td>
<td>PTREARN</td>
<td>Earnings Code Rules</td>
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<td>Employee Job Title with Compensation &amp; Default Earnings-Labor Distribution by Effective Date (must enter Banner ID and Position using query)</td>
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<td>Employee Jobs and Labor Distribution</td>
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<td>Budget Allocation by Position</td>
<td>NBAPBUD</td>
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<td>Position attributes such as FTE, Title, Class, Group, Supervisor, Job Location</td>
<td>NBAPSN</td>
<td>Position Definition</td>
</tr>
<tr>
<td>Find Employee's Job List</td>
<td>NBIJLST</td>
<td>Employee Job Inquiry</td>
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<td>Listing of employees by position number</td>
<td>NBI INC</td>
<td>Position by Incumbent List</td>
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<td>Find all employees position number by specified position class</td>
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<td>Position List by Position Class</td>
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<td>Listing of positions by organization (dept)</td>
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<td>Position Listing by Org</td>
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<td>Labor Distribution List by specified period and FOAP combination (press F7 then F8, use scroll bar to see more info)</td>
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<td>Labor Distribution for a specified employee and period of time</td>
<td>NHIEDST</td>
<td>Employee Distribution Inquiry</td>
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**SELF SERVICE BANNER INFORMATION TO SHARE WITH ALL EMPLOYEES**

**Go to:** Employee Services Tab, Self-Service Banner Tab, then Employee Tab to find following info:

- **Benefits and Deductions:** Where to find employee Retirement, Health, Flex & Others benefit information
- **Pay Information:** Employee Direct Deposit Information; PAY STUB, Payroll History, Deductions Taken
- **Tax Forms:** Find Federal withholding information and taxes withheld by period
- **Job Summary Info:** shows jobs held since Banner was implemented
- **Leave Balances:** Find employee available Leave Balances

**Go to:** Employee Services Tab, Self-Service Banner Tab, Personal Information Tab to find following info:

- **View and Update your address and phone number**
- **View and Update your emergency contact information**
- **Obtain instructions on changing your name or social security number**

**Website to provide to your employees so they can understand SSB (find pay stubs, benefits, leave)**

Website for employee assistance: [https://fp.auburn.edu/banner/documents/hr_training](https://fp.auburn.edu/banner/documents/hr_training)

**PRINT REPORTS**

- Labor Distribution Report (select type of payroll, org, range of orgs) | PZIL  DST | Labor Distribution By Payroll Type and Period |
- Labor Distribution showing Contract & Grants and Cost Share Information -select all boxes, use all F or select box to find fund, fund-org or name. When printing make sure to select PAGE only or entire report will print. | PZILD CG | Labor Distribution for Contract & Grants and Cost Shares |
- Salary & Wage Transfer Report by Fund - run as needed | PZILD R1 | Labor Redistribution (SWT) |
- Salary & Wage Transfer Report by Organization - run as needed | PZILD RR | Labor Redistribution (SWT) |
- Salary & Wage Transfer Report by Organization - run as needed | PZILDA1 | Labor Distributions for Adjustments (Manual and True Voids) |

**EMPLOYEE CLASS TABLE**

<table>
<thead>
<tr>
<th>Applicable accounts in Banner</th>
<th>Payroll ID</th>
<th>EClass Code</th>
<th>Earn Code</th>
<th>Earn Code Description</th>
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<td>60100, 60120</td>
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<td>F9</td>
<td>R10</td>
<td>FT 9 mon Faculty</td>
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<td>FB</td>
<td>R26</td>
<td>FT BW Employee</td>
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<td>60100, 61012</td>
<td>MN</td>
<td>FF</td>
<td>R12</td>
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<td>60000, 60005, 60200, 60300, 60400, 60600</td>
<td>MN</td>
<td>FM</td>
<td>R12</td>
<td>FT 12 Month Non Faculty</td>
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<td>60500</td>
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<td>GS</td>
<td>STU</td>
<td>Graduate Student Employee</td>
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<td>60500</td>
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<td>GA</td>
<td>Graduate Assistants</td>
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<td>60100, 60120</td>
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<td>P9</td>
<td>PT9</td>
<td>PT 9 mon Faculty</td>
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<tr>
<td>61000, 61005, 61010</td>
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<td>PB</td>
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<td>PT 12 Month Faculty</td>
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<tr>
<td>60000, 60005, 60200, 60300, 60400, 60600</td>
<td>MN</td>
<td>PM</td>
<td>P12</td>
<td>PT 12 Month Non Faculty</td>
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<td>WSA</td>
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<td>61200</td>
<td>BW</td>
<td>WM</td>
<td>WSM</td>
<td>Work-Study @ Montgomery</td>
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</table>
Steps that departmental personnel should take to ensure accurate and timely pay for employees:

1. Meet EPAP AND PAYROLL DEADLINES. These dates are posted on the Employee Services tab of AU ACCESS. It is recommended that initiation of required documents not be left to the last minute. If a new employee begins work late in the pay period and the deadline cannot be met, be sure he or she understands that the first payment will be delayed until the next scheduled payroll. Verify job data on NBAJOBS for new employees and any changes made by EPAF.

2. CAREFULLY REVIEW THE MONTHLY AND SEMIMONTHLY PAYROLL VERIFICATIONS AND BIWEEKLY RECAP TIME SHEETS. If an employee who should appear there does not, or if an employee’s leave balance is incorrect, report any discrepancies to the Payroll & Employee Benefits Office by email at payroll@auburn.edu.

3. ENSURE timecards are APPROVED and all EXCEPTIONS have been ENTERED/CORRECTED PRIOR to payroll processing. Do NOT wait until the last minute to begin corrections.

4. CAREFULLY REVIEW THE COMPARISON REPORT TO BE SURE THE HOURS SHOWN FOR EACH EMPLOYEE ARE CORRECT. All employees to be paid are listed there. Immediately report any discrepancies to the Payroll & Employee Benefits Office by email at payroll@auburn.edu.

The following tables provide information on LEAVE ELIGIBILITY, VACATION LEAVE ACCRUAL INFO, and BANNER DATES DEFINED.
Add/Change Special Pay – OSPECP EPAF

Example: Out of Class

Description: Adding/Change Special Pay (typically) within the Department.

Out of Class ‘OOC’ (C% suffix) – must be approved by Compensation per memo from Department. Once approved, Department initiates the EPAF and sends supporting documentation to Records via email.

1. AU Access
2. Employee Tab -> Self Service

3. Employee Tab -> Electronic Personnel Action Forms

4. New EPAF

5. Enter the Banner ID number
   - Query Date – Will Default to Today’s Date
   - **TIP Use the beginning of pay period**
   - Approval Category – Add/Chg Special Pay OSPECP

6. Go

7. New Job
   - Type in the Position Number and suffix.
   - The position number should be the same, but the suffix would change to C1, C2, C3, C% (ex. Out of Class)

8. Go
**OSPEC EPAF has 3 sections:**

1. **Enter Values (ex. Out of Class)**
   - **Non-Exempt Employees:** DO NOT enter default Hours or Units Per Pay values for a non-exempt employee. Enter Start Date, OOC Earnings, ZERO for the Units, and an End Date.

2. **Labor Distribution**
   - Ensure the Effective Date is the beginning of pay period (if possible).

3. **Routing Queue and Comments**
   - Ensure to enter the proper routing specific to your department.

**Exempt Employees:**
- Enter Start Date, OOC Earnings, ONE for the Units, and an End Date.

**Remember:** the default earnings tab on the job record drives the out of class payments for an exempt employee. The hours entered into Kronos drive the out of class payments for a non-exempt employee.

Submit and please check for errors!
Supervisors will review job descriptions created by HR and OIT.

Identify the appropriate job description for each employee based on the employee’s current duties and responsibilities and need of department. Directors/Managers to submit selected job titles to Cindy Selman no later than **Friday, May 10th**.

- Employee names with identified titles
- Total number of years of relevant experience as defined on JD
- Updated employee resumes

Compensation & OIT Leadership will:
- Identify and analyze market data for each job
- Build a new salary structure
- Assign jobs to new salary grades
“Relevant experience as defined on JD”

**Auburn University Job Description**

**Job Title:** Sr Database Administrator  
**Job Code:** MA34  
**Job Family:** No Family  
**FLSA status:**

**Job Summary**

Under minimal supervision, the Sr Database Administrator is responsible for maintaining, backing up, and optimizing the University’s database and relational environments while ensuring that systems are scalable and available. Job requires seeking assistance only when necessary, and solves unanticipated problems related to application troubleshooting and system maintenance. Assists in various phases of database and server projects.

**Minimum Required Education and Experience**

<table>
<thead>
<tr>
<th>Education</th>
<th>Minimum</th>
<th>Focus of Education/Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>Four-year college degree</td>
<td>No specific discipline. Master’s degree in related field preferred.</td>
</tr>
<tr>
<td>Experience (yrs.)</td>
<td>8</td>
<td>Relevant IT experience with relational database management systems or database development. Experience with Oracle Enterprise Management and SQL Development.</td>
</tr>
</tbody>
</table>

Send to Cindy:

Jane Smith / Sr. Database Administrator / 10 years
PHASE 2

- Compensation will use updated resumes to evaluate employee qualifications based on identified jobs utilizing the Pay Evaluator.
- No salary adjustments will be made with these changes unless incumbent salaries ≥ minimum of the pay range.
- Provide results to OIT Leadership, Deans, AVPs, etc. to develop a plan for additional salary adjustments, if warranted and if funds are available.
- Reclassifications to take effect TBD (Near 10/1)
FAQ

- I like the current job description as it is. Do I have to reclassify my employees to the new titles?
  - Yes, the MA14- Spec, Info Tech job description will go away. All employees must convert to a new title.

- I need to hire a new employee. What job should I post?
  - Before approximately 9/1, use Spec, Info Tech. After approximately 9/1, post using the new titles. The new functional title may be used as a vanity title to help better define the job position and to assist with advertisement of role.
FAQ (continued)

- How will I determine new hire salaries after the implementation date for new hires?
  - The Pay Evaluator will still be utilized, and supervisors may need to work with Compensation to ensure internal equity until the project is fully implemented. (It is possible that implementation would take a phased approach. We would not want to bring external employees in at the new rates until current incumbents have somewhat ‘caught up’.)
FAQ (continued)

- If employees need assistance updating resumes who can they call?
  - Division HRL, HR Compensation, HR Employment

- What if there is more than one job that my employee could reasonably fit into?
  - Select the job title that most closely reflects the primary purpose for the employee’s position.
UPDATED PROCESS FOR FINALIST CANDIDATES
Transition to Verbal Contingent Offers

**Goals:**
- Transition away from contingent offer letters
- Eliminate the need for the department or HRL to generate a contingent offer followed by an official offer
- Discourage finalists from making decisions about current employment until background check is complete and all administrative approvals have been obtained