# HR Liaisons Meeting Agenda

**DATE:** October 4, 2018  
**ATTENDING:** HR Liaisons and HR Staff

<table>
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<th>I. Welcome &amp; Announcements</th>
<th>Karla McCormick</th>
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<td>B. Preferred Vendor – October 11th</td>
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<td>C. AUM Layoff employees</td>
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<td>D. Reports</td>
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<th>Shelly Murray</th>
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<td>B. Graduate Assistants Project Update</td>
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<th>V. Open Enrollment Update</th>
<th>Teresa Coker</th>
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<th>VI. TES Update</th>
<th>Abbi Brown</th>
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<th>VII. Foreign National Hiring Process</th>
<th>Karla McCormick</th>
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<td>A. Anticipated change in completion of the Foreign National Employment Form (formerly Alien Emp Form)</td>
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<th>Rod Kelly</th>
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<td>C. Moving forward with Gathering Performance Mgmt Feedback</td>
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| IX. HRD Updates | Bill Shannon  
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<td>A. HRL &amp; Supervisor Feedback high-lights – Performance Management</td>
<td>Penny Houston</td>
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<td>B. NEO – Adding a session in January 2019</td>
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| X. HRL Share/Best Practice | Leanne Fuller  
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<td>ACES</td>
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<tr>
<th>XI. Other, Q &amp; A, and Closing Remarks</th>
<th>Karla McCormick</th>
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Auburn University Human Resource Liaisons Network
Meeting Minutes
October 4, 2018, 2:45 p.m., Auburn University Administrative Complex

WELCOME AND ANNOUNCEMENTS
Karla McCormick (Associate Vice President, Human Resources)

ID CARD SERVICES
- Karla announced that ID Card Services will soon be moving to HR and we are preparing for additions by moving some offices
- Jennifer Gilliland will be transferring to HR and reporting to Dale Mann in Records

PREFERRED VENDOR FAIR
- It will occur October 11 at the AU Hotel and Dixon Conference Center.
- HRLs and anyone else that may have an interest are encouraged to attend.

POLICY & PROCEDURES
Tonya Dupree, Human Resources

EMPLOYEE AWARDS TEMPLATE
- Tonya shared a document of important things to know related to Employee Awards
- There are key items to know:
  - Identified Program Objectives
  - Award Themes and Selection Criteria, and Selection Committee
  - Award eligibility, Award types, and Award frequency
  - Nomination and Selection Process
  - Communication Plan and funding source
- She introduced a template form for use in submitting the award program to HR
- She emphasized that these procedures allow for consistency across campus
- She indicated that pre-existing award programs in the department/unit must still go through the process
- Award Procedures Guidelines are available on procedures website:
  [http://www.auburn.edu/administration/human_resources/procedures.html](http://www.auburn.edu/administration/human_resources/procedures.html)
- Helpful information in the Procedures (questions received after HRL meeting):
  - Obtain appropriate approval from the Department/Unit Awards Committee to issue specific award
  - Ensure appropriate department/unit approval if applicable
  - Notify award recipient of possible tax implications prior to presentation of award
  - For an award of tangible property:
    - Follow established University Spending Policies and Procedures for non-employee awards
    - Maintain a list of awards, value, and recipients for submission annually to University Payroll for processing
• Cash Awards:
  o An Electronic Personnel Action (EPAF) with all appropriate information must be completed and sent to the HR Records unit for processing. The employee’s position number with a suffix of A1 should be used and an earn code of AWD. Once received cash award payments will be processed on the next scheduled pay day for the recipient.

• Terminated Employees: If employee has received a tangible award then the award purchase price should be reported to University payroll with documentation for the last paycheck. An email with the employee name, Banner ID and amount of award should be submitted to the awards and incentive email address.

• Record Keeping:
  o Each department or unit is responsible for documenting all award recipients and award types. This report should include employee’s name, Banner ID and purchase amount of award. The documentation should be sent annually, no later than December 1, to University Payroll for review. The documentation must be sent to awardsprogram@auburn.edu

HRL UPDATES
Leanne Fuller, Human Resources

• Forestry and Wildlife Sciences – Leanne introduced the new Executive Coordinator who also serves in the HRL role, Sue Fuller. Sue joins Forestry after serving as Business Manager for the Office of Inclusion and Diversity.

• Exit Checklist (also known as Clearance Checklist and HR900 form) – the form is available on the HR Forms page. There are no changes to content, but we only updated the format.

• AUM layoff employees – AUM is going through some changes and the department/unit of Outreach is being closed. There are currently seven employees that will be laid off; it has been approved to allow them to apply for Auburn main campus jobs and to be given priority consideration for interview if meeting the minimum qualifications. We currently have two laid-off employees on main campus.

• Reports – Leanne shared a document that provides a list of reports/scripts which includes Name, Description, Fields Extracted, and Information to enter for the Requestor. She is working with Brittany to identify reports that may be helpful to HRLs in their daily work for their areas. Leanne also showed an illustration example that Brittany is creating for each report identified. The list of reports and each illustration will be shared and housed on the HRL Resource webpage as we build these resources. The group seemed pleased with the information thus far. Leanne asked that HRLs share any reports that they currently use and any information that is needed and she will assist in working with ISS for information through reports. Leanne also recommended that the HRLs attempt to run the reports, as needed, and let Brittany know if there are any problems with the access.

• AAEEO Email – Leanne asked the group if they received the email from Michelle Martin on the change to the short tag line. She indicated that she would share the email again when the minutes are sent out.

COMPENSATION/CLASSIFICATION
Shelly Murray, Human Resources

ADMINISTRATIVE SUPPORT ASST/ASSOC/SPEC DEVELOPMENT CHANGES

• A set curriculum of courses is no longer required; supervisors can set expectations of course completion and personalize in the development plans. This applies to the Executive Support Assistant and Specialist as well.

• Shelly indicated that the changes discussed only applied to the academic side of campus; the administrative side had the requirement removed in 2008.

• A website has been developed to capture the information regarding administrative support development plans: http://www.auburn.edu/administration/human_resources/hrd/admin-plans.html
- Shelly asked for feedback regarding communication to the supervisors. The suggestion was that the employees affected would not be directly communicated to regarding the changes, but would be communicated through the HRLs and Supervisors
- A “Good to Know!” communication is planned to be shared in the next week
- Shelly will provide a list of administrative support employees to HRLs
- Penny can be contacted to run a transcript of the courses taken for each employee, if needed

GRADUATE ASSISTANT PROJECT UPDATE
- All GRADA graduate assistants have been converted to a GRADN position class. Effective Jan. 1, most of those graduate assistants’ positions will be reconverted to a GRADA position if their assistantship is aligned with their educational program. These assistants will then be EXEMPT.
- Those whose work assignments are not aligned with their educational program will remain in a GRADN job, and their position number will change to a GN- format.
- Communication from the Graduate School will be sent to all affected graduate assistants around the first of November.
- Based on the timing of when tuition benefit is applied, taxes will not be assessed until fall 2019
- Julie Reece from the Graduate School indicated that a communication will be sent to the Supervisor and GPOs (Graduate Program Officers) of the job description process and the instructions to review and certify the job description. The deadline for returning to the Graduate School is October 19, 2018.
- Rod Kelly indicated that the job description and attestation must be signed by the Supervisor, Student, and Program Director. This signed document will remain on file for audit and compliance purposes

OPEN ENROLLMENT UPDATE
Teresa Coker, Human Resources
- This year we will offer an electronic open enrollment system
- A call center will be available for questions
- Benefit enrollers will be available as an option for face-to-face assistance in enrolling
- A communication will be sent next week about the Benefit Enroller option
- A request was made to include ZOOM as an option; Benefits would like to hold off on ZOOM since it is the first year
- The Benefits Fair will be held Nov. 14 from 7 a.m. until 5 p.m. at Beard-Eaves-Memorial Coliseum
- Benefit Enrollers will be available at the Benefits Fair

TES UPDATES
Abbi Brown, Human Resources
- She discussed the TES Service Rate for the new fiscal year.
- An email was sent to HRLs on Oct. 2. The new rate is 15.82 percent, an increase of .40 percent from the FY2018 rate

FOREIGN NATIONAL HIRING PROCESS
Karla McCormick, Human Resources
- There has been a recent development in changing the Foreign National Employment Form (formerly known as Alien Employment Form) completion by the Office of International Programs.
- The form is used by campus in completion of the Form I-9 and the Tax Compliance Office.
- Karla stressed that the change did not need to be disruptive to the employee.
• The HRLs indicated that they use the dates on the form to complete the Form I-9 and new hire paperwork to ensure that an employee does not work prematurely.
• A temporary solution is being developed and more information will be communicated as soon as it is available.
• Karla asked the HRLs about their opinions on the creation of Onboarding Centers (1-2 centers) which will be available for Form I-9 completions, ID cards, parking registration, direct deposit, other new hire paperwork to help with the challenge of not entering new employees into Banner without the I-9 completion, typically 3 days after hire. There was positive feedback from the HRLs in that Onboarding centers would be a great idea.
• One reservation communicated was that an onboarding center (and completion of new hire paperwork) would take the HRL or designee out of the loop and they would not know when information was completed.
• Karla indicated that more dialogue and planning would be coming and more information will follow.

TIGERTALENT UPDATE

Rod Kelly, Senior Director, Talent Management

• Rod reported that for five months, we have been working with PageUp and waiting on additional information regarding configuration possibilities.
• We will no longer implement PageUp as a vendor for the five modules.
• Implications – a new RFP will be launched in the next 2-3 weeks to accept proposals. It will likely be January 2019 before we begin reviewing RFP submissions.
• Auburn will no longer focus on 1 vendor to deliver all five modules; we will seek best in class as a vendor individually, if needed.
• The priority may change than the previous order of the modules; i.e., performance management will be in the first phase.
• All of the information gathered from the previous listening sessions, focus groups, HRLs, etc. will be valuable going forward as we launch another vendor evaluation process.
• We plan to keep branding the same as TigerTalent.
• We are still negotiating with the vendor.
• More information will be shared as soon as it is available.

MOVING FORWARD WITH GATHERING PERFORMANCE MGMT FEEDBACK

• We are working on a simplified, shorter version of a Performance Management Form for one-time use only during 2018-2019 performance year
  o There will be an option to use the new form or use the current form as it exists today
  o We anticipate that the new form will be communicated in the next few months
  o Training is being developed by HRD for the one-time use form
  o We plan to shift to a 5-point scale from a 4-point scale for this one time use form

HRD UPDATES

Bill Shannon, Human Resources

NEW EMPLOYEE ORIENTATION

• 2019 New Employee Orientation (NEO) dates will be shared at the November HRL meeting
• We are adding a NEO session on Jan. 7 to assist with the December hires.
• December 19, 2018 is the deadline to submit paperwork for the Jan. 7 NEO session.
• Bill thanked the HRLs for their involvement in their employees being DUO-MOBILE ready in this week’s orientation.
HRL and SUPERVISOR FEEDBACK HIGHLIGHTS – PERFORMANCE MANAGEMENT

- Bill shared PowerPoint slides that captured the summaries of the feedback received in the recent listening sessions.
- He asked HRLs to send further feedback to him if there was anything additional to provide.

HRL SHARE/BEST PRACTICE

Chris McClendon, Megan Sumners, and Kim Rogers, ACES Human Resources

- Leanne introduced the agenda item and encouraged HRLs to think about processes or other items that they could bring to the group to share
- Chris, Megan and Kim all presented on the history of the ACES, land-grant, best practice communication with their employees and supervisors, reports and metrics that are useful in their daily work as human resources professionals in serving their organization

CLOSING REMARKS

Karla McCormick, Human Resources

- Karla McCormick encouraged the HRLs to think about ways they could share and to think of information that they would like to know more about.

The meeting was adjourned at 4:40 p.m.
Email from Michelle Martin / AAEEO regarding abbreviated tag line change:
10/3/2018

In 2015, we made changes to the job announcement tag lines in order to comply with Executive Order 13672, which requires us to include sexual orientation and gender identity as protected classes. Effective today, we have modified the shortest tag line only; all others remain unchanged. You are welcome to choose from any one of the four versions listed below for your job announcements.

“Auburn University is an EEO/Vet/Disability Employer.”

“Auburn University is an EEO/Vet/Disability Employer and committed to building an inclusive and diverse community.”

“Auburn University is an Affirmative Action/Equal Opportunity Employer. It is our policy to provide equal employment opportunities for all individuals without regard to race, sex, religion, color, national origin, age, disability, protected veteran status genetic information, sexual orientation, gender identity, or any other classification protected by applicable law.”

“Diversity among its administrators, faculty, staff, and students is an Auburn University commitment. Auburn University is an Affirmative Action/Equal Opportunity Employer. It is our policy to provide equal employment opportunities for all individuals without regard to race, sex, religion, color, national origin, age, disability, protected veteran status genetic information, sexual orientation, gender identity, or any other classification protected by applicable law.”
EMPLOYEE AWARDS: WHAT YOU SHOULD KNOW

In response to campus requests, this policy provides a systematic approach in which departments/units can utilize local funds to recognize and encourage employees in carrying out the University’s mission with excellence.

- Auburn University promotes programs that recognize and encourage the dedication, support, and participation of employees in carrying out the University’s mission.

- Award programs for employees may be utilized provided:
  - They adhere to an approved competitive process and all applicable federal and state laws;
  - All award funding is provided through the local budget; and,
  - Awards are not used as adjustments to base salary, supplemental compensation, increased value of a position, or internal pay equity.

- All proposed employee award programs must be submitted to the Employee Awards Committee for review and approval prior to any award distribution. Programs must be submitted to the Chair of the Committee at awardsprogram@auburn.edu.

- The Committee will identify and review these elements for approval:
  - Identified Program Objectives,
  - Award Themes and Selection Criteria, and Selection Committee,
  - Award eligibility, Award types, and Award Frequency,
  - Nomination and Selection Processes, and
  - The Communication Plan and funding source.

- Awards may include cash, tangible personal property, and time-off (no more than eight hours per award, not to exceed 16 hours per calendar year to the same recipient.)

- Cash awards to employees constitute gross wages and are subject to payroll tax withholding, regardless of amount. Additionally, tangible property (items that can be moved, touched or felt such as plaques, pens, t-shirts) with an annual value of more than $100 are subject to taxation and the full value amount must be sent to payroll for tax withholding. http://www.auburn.edu/hr/procedures.html

- This policy and procedure will only apply to student awards when the award is based on the student’s employment with the University.

Visit https://aub.ie/employee-awards for more information.
EMPLOYEE AWARDS TEMPLATE

Employee Awards must be given through a competitive program that promotes the best interest of Auburn University and the purpose for which the University was created. All employee award programs must be submitted to the Employee Awards Committee for review and approval. Approval from this Committee is required prior to any award distribution. All award funding is provided through the local budget. Departments/Units are responsible for funding and continuation or dissolution of employee award programs.

The following template contains the necessary elements for an employee award program. The Department/Unit is responsible for the administration of the program and ensuring compliance with the Policy on Employee Awards, the Employee Awards Procedures, and any other applicable University policy. Submit employee award plans to awardsprogram@auburn.edu for approval.

<table>
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<tr>
<th>EMPLOYEE AWARDS QUESTIONS</th>
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<tbody>
<tr>
<td>1.) Department Name</td>
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<td></td>
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<tr>
<td>2.) Name and Contact Information for Award Program</td>
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<td></td>
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<tr>
<td>3.) Name of Award Program</td>
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<tr>
<td>4.) State the Business Purpose</td>
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<tr>
<td>What is the primary benefit to the University and its mission?</td>
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<tr>
<td>5.) Description of the Program</td>
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<tr>
<td>What is the goal of the recognition program and which positive outcome(s) are expected? What variety of strategies will you include? Identify the program objectives for the department.</td>
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<td>6.) Identify Award Themes and Selection Criteria</td>
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<tr>
<td>(a) Identify the award themes, such as “Exemplary Performance”, “Superior Customer Service”, “Teamwork”, “Employee Safety”, etc. (b) Identify selection criteria. The selection criteria may be linked to a department’s mission or core values or positive behaviors such as leadership, teamwork, productivity, innovation, or an unsung hero. Please define each as it relates to your department.</td>
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<td>7.) Identify Award Eligibility Criteria</td>
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<td>Who will be eligible to participate? How frequently can an employee win the award? Any exclusions to eligibility?</td>
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</table>
Master Contact List - Self Service Banner (SSB)

Data from the Master Contact List is available to export into Excel or filter within the application. The employee data is dynamic and extracted directly from Banner Admin. Based on the security class, the requestor may see varying options.

AU Access is a portal containing links to AU systems. Either method to access SSB data requires AU Authentication with 2-factor DUO.

Two-ways to access SSB:

1. **Self-Service Banner (SSB)**
   - ssbprod.auburn.edu

2. **Employee Tab**
   - [Image of Employee Tab]

3. **Master Contact List**
   - [Image of Master Contact List]

4. **Employee Info Tab**
   - [Image of Employee Info Tab]
Select Search Settings:

- Timesheet Org Number* i.e. HR441
- Timesheet Org Name* i.e. ISS
- Division Listing* i.e. 113 – VP for Bus-Fin & CFO
- Supervisor i.e. Enter Supervisor User ID or 90#

*Drop-down menus available

Search Options

- a. Include other department’s jobs for listed employees (multiple job employees’ secondary jobs) – especially useful for students and TES employees
- b. Show Labor Distributions for listed employees (Can cause multiple records per person to show) – Split funded employees will more than once
- c. Effective Date for Employee List – Today’s date will default. Change the date to view future dated records (i.e. new hires, rate changes, promotions, salary changes, etc.)

Additional Options:

- Submit

Check and Uncheck column selections*

*selections available based on security class

Export to Excel (bottom of page)

Sort and filter on column

Corrections?

- Submit EPAF
- Contact HR Records
PZPBO35 – Vacant Positions

Listing for all Vacant Positions within a selected division or org

1. **Banner Admin**
   erp.auburn.edu

2. **AU Authenticate and 2-factor DUO**

3. **Search Field Type PZPBO35**

4. **Select the result**

5. **Submission Control -> Go**
Parameter Values

1. Option Division or Orgn – i.e. Div, Orgn
2. All or Div/Orgn – i.e. 113
3. Fiscal Year – i.e. 2019

Submission Block
Cursor MUST click within the Submission Block. Either check the Save Parameter Set* OR click your cursor on the Name Field
*Save Parameter Set as will keep the values entered for future runs.

Save
Saving the form runs the script/report.
If the report was submitted with no errors, the runner will receive a sequence number.
If you save the parameter set, then you will also see message regarding default values.
*Check your email*

Downloadable CSV file

see attached list for vacant positions
PZRHJ04 – Employee Salary History

All Salary Change information for a selected employee from PLUS and Banner.

1. Banner Admin
   erp.auburn.edu

2. AU Authenticate and 2-factor DUO

3. Search Field Type PZRHJ04

4. Select the result

5. Submission Control -> Go

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BRJ 06-2018 Page 1
6. Parameter Values

1. Enter Banner ID

Value Hints

7. Submission Block

Cursor MUST click within the Submission Block. Either check the Save Parameter Set* OR click your cursor on the Name Field *Save Parameter Set as will keep the values entered for future runs.

8. Save

Saving the form runs the script/report. If the report was submitted with no errors, the runner will receive a sequence number. If you save the parameter set, then you will also see message regarding default values. *Check your email*

9. Downloadable CSV file

sysbanprodjs

pzrhj04 - employee history

pzrhj04.csv

5 KB
Listing for all supervisors (NBAJOBS -> Miscellaneous Tab) on the job record for employees. Supervisors are listed with email addresses and Divisions.

1. Banner Admin
   erp.auburn.edu

2. AU Authenticate and 2-factor DUO

3. Search Field Type PZRK012

4. Select the result

5. Submission Control -> Go
Parameter Values

1. AU or AUM Selection
   i.e. AU, AUM, or ALL.

Value Hints

Submission Block
Cursor MUST click within the Submission Block. Either check the Save Parameter Set* OR click your cursor on the Name Field.
*Save Parameter Set as will keep the values entered for future runs.

Save
Saving the form runs the script/report.
If the report was submitted with no errors, the runner will receive a sequence number. If you save the parameter set, then you will also see message regarding default values.

*Check your email*

Downloadable CSV file

see attached for superform listserv for kronos
PZRK142 – Earn Codes by Division/HR Location

This report is similar to the Payroll Comparison that is sent by Payroll during the payroll process. The data is pulled from PHAHOUR and can be ran on any payroll/pay period based on either the Division code or the HR Location (TKL) Timekeeping Location.

1. Banner Admin
   erp.auburn.edu

2. AU Authenticate and 2-factor DUO

3. Search Field Type PZRK142

4. Select the result

5. Submission Control -> Go

BRIS 08-2018
Page 1
### Parameter Values

1. Enter Payroll Year to Select  
e.g. 2018
2. Enter Pict Code to Select  
e.g. BW or MN or F9 or SF
3. Enter Payroll Number to Select  
e.g. 001, 012, 026
4. Enter the letters DIV or TKL  
e.g. type in TKL OR DIV
5-18. Div number or TKL  
e.g. 999 (division) or HR999 (tkl)

### Value Hints

7. Submission Block
   - Cursor MUST click within the Submission Block.
   - Either check the Save Parameter Set* OR click your cursor on the Name Field
   - *Save Parameter Set as will keep the values entered for future runs.

8. Save
   - Saving the form runs the script/report.
   - If the report was submitted with no errors, the runner will receive a sequence number.
   - If you save the parameter set, then you will also see message regarding default values.
   - *Check your email*

### Links in Email

9. Click the links within the email to open and download the reports. 2 files are available – one with the foap and one without the foap.

[Links: park142_foop.csv, park142_nofoap.csv]
PZRK146 – Leave Balances by Division/HR Location

Data is pulled from PEALEAV based on either the Division code or the HR Location (TKL) Timekeeping Location. Included in the report are Vacation, Sick and Compensatory balances, accruals, employee service dates and service years.

1. Banner Admin
   erp.auburn.edu

2. AU Access
   Search for Banner Admin

3. AU Authenticate and 2-factor DUO

4. Employee Tab -> Banner9 Admin
   Search Field Type PZRK146

5. Select the result

6. Submission Control -> Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field: enter your search criteria, and then press ENTER.
Parameter Values

1. Enter the letters DIV or TKL, i.e. type in TKL OR DIV
2-6. DIV number or TKL, i.e. 999 (division) or HR999 (tkl)

Value Hints

Submission Block
Cursor MUST click within the Submission Block. Either check the Save Parameter Set* OR click your cursor on the Name Field
*Save Parameter Set as will keep the values entered for future runs.

Save
Saving the form runs the script/report.
If the report was submitted with no errors, the runner will receive a sequence number.
If you save the parameter set, then you will also see message regarding default values.
*Check your email*

Downloadable CSV file

See attached list for ees annual leave balances
PZRK148 – Employees with Overage Codes per Division (OTP, OTS, CTE, and CTS) per Year

Data is pulled based on the overage earn codes for each employee for a selected division and year.

**OTP** = Overtime Paid @ 1.50
**OTS** = Overtime Paid Straight @ 1.0
**CTE** – Compensatory Time Earned @ 1.50
**CTS** = Compensatory Time Earned Straight @ 1.0

1. **AU Access**
   - erp.auburn.edu

2. **AU Authenticate and 2-factor DUO**

3. **Search Field Type PZRK148**

4. **Select the result**

5. **Submission Control -> Go**

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.
Parameter Values

1. Enter Year
   i.e. 2018

2. Enter Division Number
   i.e. 113

Submission Block
Cursor MUST click within the Submission Block. Either check the Save Parameter Set* OR click your cursor on the Name Field
*Save Parameter Set as will keep the values entered for future runs.

Save
Saving the form runs the script/report.
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*Check your email*

Downloadable CSV file
PZRK172 – Timekeeper Listserv

Email listing for all timekeepers within either AU, AUM or Both campuses.

1. Banner Admin
   erp.auburn.edu

2. AU Authenticate and 2-factor DUO

3. Search Field Type PZRK172

4. Select the result

5. Submission Control -> Go
Parameter Values

1. Enter Campus Code
i.e. ALL, AUM, or AU

Value Hints

Submission Block
Cursor MUST click within the Submission Block. Either check the Save Parameter Set* OR click your cursor on the Name Field
*Save Parameter Set as will keep the values entered for future runs.

Save
Saving the form runs the script/report.
If the report was submitted with no errors, the runner will receive a sequence number.
If you save the parameter set, then you will also see message regarding default values.
*Check your email*

Downloadable CSV file
see attached for Timkeepers listser
PZRLS10 – Active Employee Listserv

Listing for all active employees based on specific parameters (i.e. Faculty only, Full-time Employees only, etc.)

1. Banner Admin
   
   erp.auburn.edu

2. AU Authenticate and 2-factor DUO

3. Search Field Type PZRLS10

4. Select the result

5. Submission Control -> Go
Parameter Values

1. AU or AUM Selection – i.e. AU, AUM, or BOTH
2. Faculty Only - i.e. Y/N
3. Full Time Employees – i.e. Y/N
4. Part Time Employee – i.e. Y/N
5. TES Employees – i.e. Y/N
6. Grad Assistants – i.e. Y/N
7. GRAs – i.e. Y/N
8. GTAs – i.e. Y/N
9. Undergrad ST excluding Work Study – i.e. Y/N
10. Work Study – i.e. Y/N
11. AU Affiliated – i.e. Y/N (second page of parameters)

Value Hints
7. Submission Block
Cursor MUST click within the Submission Block. Either check the Save Parameter Set* OR click your cursor on the Name Field
*Save Parameter Set as will keep the values entered for future runs.

8. Save
Saving the form runs the script/report. If the report was submitted with no errors, the runner will receive a sequence number. If you save the parameter set, then you will also see message regarding default values.

*Check your email*

9. Downloadable CSV file
see attached for employee list serv
PZRLS12 – Terminated Employees

Listing for all terminated based on specific parameters (i.e. Faculty only, Full-time Employees only, etc.)

1. Banner Admin
   erp.auburn.edu

2. AU Authenticate and 2-factor DUO

3. Search Field Type PZRLS12

4. Select the result

5. Submission Control -> Go
Parameter Values

1. Term EEs after this date — i.e. date
2. AU or AUM Selection — i.e. AU, AUM, or BOTH
3. Faculty Only — i.e. Y/N
4. Full Time Employees — i.e. Y/N
5. Part Time Employee — i.e. Y/N
6. TES Employees — i.e. Y/N
7. Grad Assistants — i.e. Y/N
8. GRAs — i.e. Y/N
9. GTAs — i.e. Y/N
10. Undergrad ST — i.e. Y/N
11. Work Study — i.e. Y/N (second page of parameters)
12. AU Affiliated — i.e. Y/N (second page of parameters)

Value Hints

Submission Block
Cursor MUST click within the Submission Block. Either check the Save Parameter Set* OR click your cursor on the Name Field
*Save Parameter Set as will keep the values entered for future runs.

Save
Saving the form runs the script/report.
If the report was submitted with no errors, the runner will receive a sequence number.
If you save the parameter set, then you will also see message regarding default values.
*Check your email*

Downloadable CSV file

non-reply@auburn.edu  pzrls12 - terminated EEs list serv
Position history of incumbents

1. Banner Admin
   erp.auburn.edu

2. AU Authenticate and 2-factor DUO

3. Search Field Type PZRPIHD

4. Select the result

5. Submission Control -> Go
Parameter Values

Value Hints

1. Division – i.e. (1,2,3,4)
2. Report Begin Date – i.e. date

Submission Block
Cursor MUST click within the Submission Block. Either check the Save Parameter Set* OR click your cursor on the Name Field
*Save Parameter Set as will keep the values entered for future runs.

Save
Saving the form runs the script/report.
If the report was submitted with no errors, the runner will receive a sequence number.
If you save the parameter set, then you will also see message regarding default values.
*Check your email*

Downloadable CSV file

Report for Division 1 on/after 09/30/2018. See Attachment
PZRPOSN – Positions Created

Listing of positions created on or after a specific date

1. Banner Admin
   erp.auburn.edu

2. AU Authenticate and 2-factor DUO

3. Search Field Type PZRPOSN

4. Select the result

5. Submission Control -> Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.
Parameter Values

1. Position Begin Date – i.e. date
2. College Code (Optional) – i.e. 113, 102, etc.

Submission Block
Cursor MUST click within the Submission Block. Either check the Save Parameter Set* OR click your cursor on the Name Field *Save Parameter Set as will keep the values entered for future runs.

Save
Saving the form runs the script/report. If the report was submitted with no errors, the runner will receive a sequence number. If you save the parameter set, then you will also see message regarding default values.

*Check your email*

Downloadable csv file

PositionReport.csv
570 bytes

See Attachment
<table>
<thead>
<tr>
<th>Script Name</th>
<th>Report Description</th>
<th>Fields Extracted</th>
<th>Data Entered by Requestor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master Contact List*</td>
<td>All Employee Listing</td>
<td>Multiple Available Selections to include/not include on the report</td>
<td>Search Options by: 1. Timesheet Org Number 2. Timesheet Org Name 3. Division Listing 4. Supervisor (Drop down available on 1 - 3)</td>
</tr>
<tr>
<td>PZRK142</td>
<td>Earncodes by Division or Timekeeping Location per Pay Period (2 files are produced: FOAP and no FOAP)</td>
<td>Pay Periods, Banner ID, Name, Division, Division Description, Orgn Code TS, Orgn Code TS Title, Position Number, Suffix, Earn Codes, Hours, Amount, Special Rate, Fund, Orgn, Acct, Program, Activity, Labor %, Labor Hours, Labor Amount</td>
<td>Year, Payroll Type, Payroll Number, Division/TKL, Division Number or HR location number</td>
</tr>
<tr>
<td>PZRH04</td>
<td>Salary History by Employee</td>
<td>System, Banner ID, Name, Current Hire Date, Personnel Date, Position Number, Suffix, Title, Status, Effective Date, FTE, Time Sheet Orgn Description, Eclass, Annual Salary, Job Location Description</td>
<td>Banner ID</td>
</tr>
<tr>
<td>PZRK146</td>
<td>Leave Balances by Division or Timekeeping Location</td>
<td>Banner ID, Name, Ecls, Division, Division Description, TKL, TKL Description, Adj Service Date, Yrs of Service, Max Hours to Roll VACA, VACA Leave Balance, VACA Current Accrual, SICK Leave Balance, SICK Current Accrual, COMP Leave Balance, COMP Current Accrual, Last Accrual Date, Last Pay Period, Empl Email Address, Supv Email Address</td>
<td>Division/TKL, Division Number or TKL Number</td>
</tr>
<tr>
<td>PZRK148</td>
<td>Employees with Overage Codes: OTP, OTS, CTE and CTS per Division (2 files are produced: FOAP and no FOAP)</td>
<td>Pay Period, Banner ID, Name, Employee Status, TKL, TKL Description, Position Number, Suffix, Job Title, Earn Code, Hours, Amount, Fund, Orgn, Acct, Program, Labor %, Labor Hours, Labor Amount</td>
<td>Year and Division</td>
</tr>
<tr>
<td>PZRK172</td>
<td>Timekeepers Listserv</td>
<td>Division, Email Address</td>
<td>Campus Code (ALL, AUM, or AU)</td>
</tr>
<tr>
<td>PZRLS10</td>
<td>Listserv Active Employees by EE Type</td>
<td>Campus Code, Banner ID, Name (last,first), Name (first, last), Eclass, Eclass Description, <em>parameter settings</em> Faculty, Tenure, Tenure Effective Date, Job Title, Job location, Job Location Description, Job Location Address, Job Location City, Job Location State, Job Location Zip, Division, Division Description, Campus Code, TKL, TKL Description, Email Address, Current Hire Date, Supervisor Name, Supervisor Email</td>
<td>Campus Code (ALL, AUM, or BOTH), Faculty? (Y/N), Full Time Employees? (Y/N), Part Time Employees? (Y/N), TES Employees? (Y/N), Grad Assistants? (Y/N), GTAs? (Y/N), Undergrad ST excluding Work Study? (Y/N), Work Study? (Y/N), AU Affiliated? (Y/N)</td>
</tr>
<tr>
<td>PZRK012</td>
<td>Supervisor Listserv (Job Record)</td>
<td>Banner ID, Name, Email Address, Employee Status, Job Title, Division, Division Description</td>
<td>Campus Code (ALL, AUM, or AU)</td>
</tr>
<tr>
<td>PZRLS12</td>
<td>Terminated Employees by EE Type</td>
<td>AU/AUM, AU ID, Name (Last,First), Name (First, Last), ECLS, ECLS Description, <em>parameter settings</em> Faculty, Job Title, Job Location, Job Location Description, Job Location Address, Job Location State, Job Location Zip, Division, Division Description, Campus Code, TKL, TKL Description, Email Address, Term Date, Hire Date</td>
<td>Terminated EES after this Date, AU or AUM? (AU, AUM, BOTH), Faculty Only? (Y/N), Full Time Employees? (Y/N), Part Time Employees? (Y/N), TES Employees? (Y/N), Graduate Assistants? (Y/N), GTAs? (Y/N), Undergrad ST? (Y/N), Workstudy? (Y/N), AU Affiliated? (Y/N)</td>
</tr>
<tr>
<td>PZPBO35</td>
<td>Vacant Positions</td>
<td>Division, Budget Orgn, Orgn Title, Position, Position Type, Last Eff Date, Position Title, Name of Last Incumbent, PTOT Budget Amt, Fund Code, Orgn Code, Acct Code, Prog Code, Percent, FOAP Budget</td>
<td>Division or Org Number, Fiscal Year</td>
</tr>
<tr>
<td>PZRPIHD</td>
<td>Positions by Incumbent</td>
<td>Banner ID, Name, Position Number, Title, Job Begin Date, Job End Date, Emp Class Code, Reports to Supv, Job Location Number, Job Location Description</td>
<td>Division Number, Date</td>
</tr>
<tr>
<td>PZRPOSN</td>
<td>Positions Created on or after Date</td>
<td><em>Parameter Listing</em>, Position Begin Date, Position Code, Status, Type, Budget COAS, Budget Orgn, Budget Orgn Description, Position Title, ECLS, Salary Table, Salary Grade</td>
<td>Position Begin Date, College Code (Division)</td>
</tr>
<tr>
<td>PZRHO92</td>
<td>International Ees by Division or TKL</td>
<td>Banner ID, Employee Name, Emp Class, Current Hire Date, Division, Division Description, Job Location, Timekeeping Location, Timekeeping Location Description, I9 Form Indicator, I9 Expiration Date</td>
<td>Division Number, Timekeeping Location</td>
</tr>
</tbody>
</table>
PERFORMANCE MANAGEMENT AT AUBURN:

SUMMARY OF FEEDBACK FROM SUPERVISORS AND HRL’S

Bill Shannon, M.Ed., Director Human Resources Development
Information Collected

- 15 Focus Groups
  - 43 AU entities represented
  - 105 Attendees
- HRL Listening Session
## Focus Group Top Ten

<table>
<thead>
<tr>
<th>R</th>
<th>Comment/Advice/Opinion</th>
<th>Total</th>
<th>R</th>
<th>Comment/Advice/Opinion</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Increase or mandate ongoing dialogue btw supervisor and employee (Quarterly, mid-year, etc.)</td>
<td>63</td>
<td>6T</td>
<td>Increase the rating scale (+4)</td>
<td>33</td>
</tr>
<tr>
<td>2</td>
<td>Include/mandate developmental goals/plans</td>
<td>45</td>
<td>6T</td>
<td>Ensure consistency including senior leaders, instructions, ratings across campus*</td>
<td>33</td>
</tr>
<tr>
<td>3</td>
<td>Electronic form w/ e-signature, etc.</td>
<td>37</td>
<td>8</td>
<td>Merit connection unclear. No tie or little differentiation based on performance. System not understood</td>
<td>31</td>
</tr>
<tr>
<td>4T</td>
<td>Shorten, simplify the form</td>
<td>35</td>
<td>9</td>
<td>Allow feedback from others in the system</td>
<td>30</td>
</tr>
<tr>
<td>4T</td>
<td>Mandate training for supervisors</td>
<td>35</td>
<td>10</td>
<td>Concerns re: Calendar/timing/deadlines</td>
<td>29</td>
</tr>
</tbody>
</table>
## HR Liaisons’ Top Ten

<table>
<thead>
<tr>
<th>R</th>
<th>Comment/Advice/Opinion</th>
<th>R</th>
<th>Comment/Advice/Opinion</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Training a “Must” including upper level management*</td>
<td>5T</td>
<td>Include Developmental Goals</td>
</tr>
<tr>
<td>2T</td>
<td>Ensure consistency including senior leaders, instructions, ratings across campus</td>
<td>5T</td>
<td>Include Upper Level Signatures</td>
</tr>
<tr>
<td>2T</td>
<td>Electronic form w/ e-signature, etc.*</td>
<td>5T</td>
<td>Support from senior leadership/upper level</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>management</td>
</tr>
<tr>
<td>2T</td>
<td>Shorten, simplify the form*</td>
<td>9</td>
<td>Allow feedback from others in the system*</td>
</tr>
<tr>
<td>5T</td>
<td>Ability to “Weight” sections of the form</td>
<td>10</td>
<td>Year round access to form/system</td>
</tr>
</tbody>
</table>
Ideas and Quotes of Note

- Combine/keep merit at team level, not department/school/larger group
- Use “Standards” as a ratings descriptor
- Add an afternoon New Employee Orientation for Supervisors
- Create way to see rolled up summaries of ratings by unit in the system
- Create and train super-users across campus to mentor and answer questions throughout training and use of new system/process
Place the overall rating front and center on page 1 of the form

“Make it two pages, no more.”

“I’m required to take mandatory training to drive a golf cart on campus but not required to take training to write and conduct performance reviews and manage the livelihood of my employees.”
Anyone have more feedback for us?
- Qualtrics Survey “Deep Dive” for all Supervisors
- Performance Communication— Keep the dialogue going…
  - Set goals, have conversations
- President’s Cabinet Directive:
  - New Transitional Performance Management form in the works
  - RFP to follow for 2020 Process/System