OLD DOMINION UNIVERSITY RESEARCH FOUNDATION

ODU
Research
Foundation

Payroll Authorization
System User Manual

Quick Start Guide
2017

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Quick Start Guide

As part of our ongoing effort to collaborate with the university for the successful administration of sponsored programs, ODU Research Foundation has expanded the online PI Portal and developed an improved system for submitting requests for payroll authorization. The Payroll Authorization System (ePAS) was developed to replace the legacy paper "108" forms with an integrated web-based system which will assist you with the necessary requirements for capturing, validating and routing payroll authorization submissions.

The introduction of the new ePAS system has given opportunity to improve some of our terminology. Two key terms are important to highlight at the start of this Quick Start Guide.

Assignment
- An "assignment" refers to an individual who is hired to perform a specific job function for a period to time.
- An assignment refers to one <u>person</u> who is working on one <u>specific job</u>.
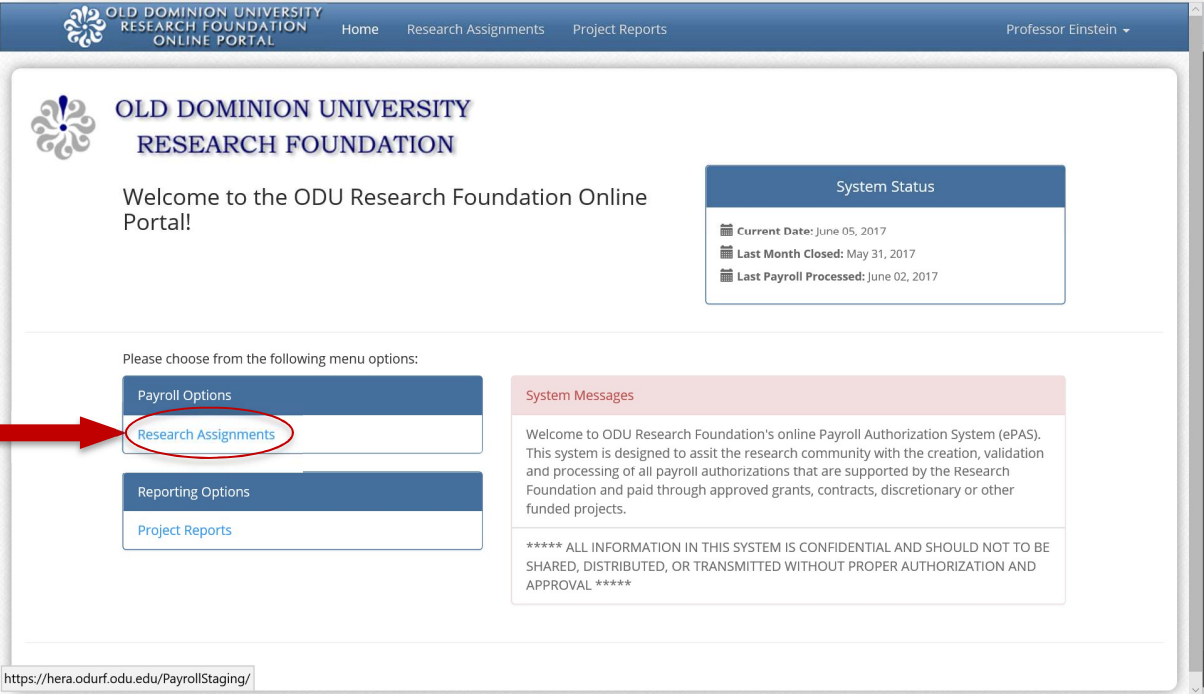- An assignment is valid for a given period as defined by the start and end date for that assignment.

Payline
- A "payline" identifies how an assignment is going to be funded over a period of time.
- One assignment can be funded by one or more paylines. There is no limit on how many paylines can be associated with one assignment.
- Each payline is active for a period of time as defined by its start and end date. The date range must fall within the assignment date range but it does NOT have to equal the entire assignment date range.
- Each payline must equal the pay rate as defined on the assignment. The system will assist in calculating hours or budget to make sure this condition is satisfied.
  - If you know the budget amount available for this project, ePAS can automatically calculate the number of hours per week that budget amount will fund over the payline date range (according the pay amount identified on the assignment).
  - If you know the number of hours the person is going to work under this project, ePAS can easily calculate the total budget amount required to fund those hours over the date range.
- On any given day of an assignment when an employee is working ePAS will check to ensure that the employee maintains a consistent hourly rate or salary equivalent rate. ePAS does this using a sophisticated logic model that checks each day of the assignment to ensure that this condition is true (for more information, refer to the "Pay Matrix" later in this document).

The following pages provide an illustrated guide to performing the basic steps for adding an assignment and paylines.

Getting Access to ePAS

- Visit ODU Research Foundation's website (http://www.researchfoundation.odu.edu/) and select the link under PI Portal.

- If you're not already signed on, the system will redirect you to a page where you can enter your MIDAS ID and password. (Note: You must have a valid Midas ID and password at gain access to ePAS).

- Once you are signed in, you will see a screen like the following:

Start a New Assignment

1. Click on "Research Assignments" to enter ePAS and begin the process.

   (Note: You can also select "Project Reports" from this page where you can access financial reports for sponsored, discretionary and other projects. Additionally, this part of the PI Portal will provide you with a variety of other report options which provide you with real-time data from our core systems. These reports were previously available separately through the Reporting Portal and other applications.)

2.   Click on "Add Assignment" to start a new payroll assignment (previously referred to as a "108").

3.   Click on the "Select" link to pick an employee.
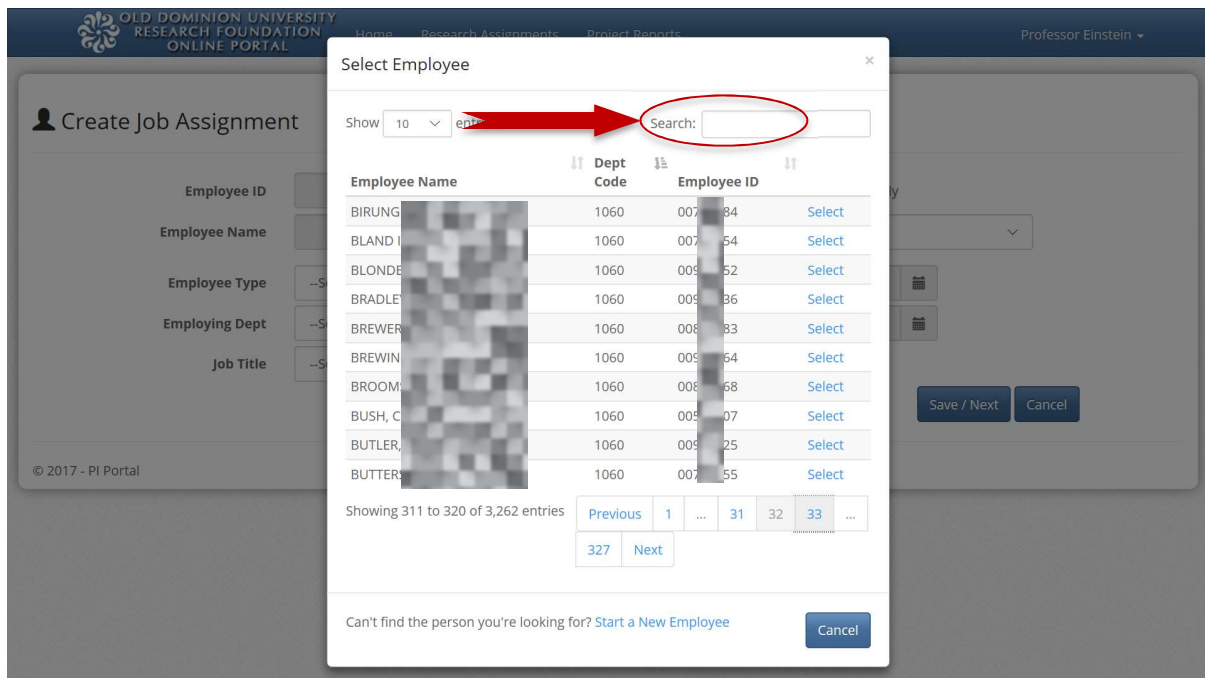
4. Use the "Search" function to quickly find and select an employee. You can search using a name, department, or employee id. As you type in the search field, the system interactively filters the displayed results. Once you find the person you are hiring, press "Select" next to their name to populate assignment data fields from current information on file.

   a. Information will be populated from the Research Foundations Accounting and Human Resource systems. This will reflect the most recent information for the selected employee **but it may not reflect accurate information for your current assignment**. Please pay close attention to this information.

   b. Can't find the person you are looking for? It is possible to enter an assignment for a new person who has not ever worked under the Research Foundation. To do this, you select the "Start a New Employee" at the bottom of the window. This function is covered in more detail later in this document.

Creating an assignment is a two-step process. Step one allows you to review, add or change information for the following fields before pressing "Save/Next".

1. **Employee Type** – choose the correct employee type from the following list. (Note: this selection will determine many of the available options and logic rules applied to this assignment)

    a. **Regular Employee** – scheduled to work full-time – 30 hours or more per week. Regular status employees are eligible to participate in all applicable fringe benefits programs.

    b. **Non-Student (Temporary)** - work is intermittent or irregular, or is ongoing and part-time (less than 30 hours per week), and cannot be readily fulfilled through use of a student employee.

    c. **GRA** - full-time graduate student of the University appointed through the University process and academic department and assigned to work on sponsored research or projects.

    d. **Student (Casual Employee)** - undergraduate or graduate student of the University who is assigned to work on sponsored research or projects. Employment is part-time during the academic term, generally not to exceed 20 hours per week. Employment may be full-time during semester breaks and summer periods. The PI makes casual student appointments.

    e. **Postdoctoral** - appointed by the University who have obtained their doctoral degree and are selected for training appointments anticipated to last one to two (1-2) years.

    f. **Faculty-Overload** - University faculty member who is employed part-time on a research overload basis during the academic year on sponsored

research or projects. Faculty generally performs services for the Research Foundation as the project director, PI, or co-PI of a sponsored project.

g. **Summer Faculty** - University faculty member who is employed during the summer period on sponsored research or projects. Faculty generally performs services for the Research Foundation as the project director, PI, or co-PI of a sponsored project.

h. **SSRP** – Self-Supporting Research Professionals (SSRPs) are individuals appointed by the University and employed by the Research Foundation generally as full-time regular employees. An SSRP may also have a faculty appointment at the University, if so designated through the University process.

2. **Employing Department** – choose the department that is responsible for the assignment. (Note: the actual funding for the assignment may be assigned to a different department. This is determined by the particular paylines).

3. **Job Title** – Select the appropriate job title from the dropdown list. The list of available job titles will change depending upon your selection in the Employee Type field above.

4. **Pay Type** – select Salary or Hourly option for this assignment. (Note: some Employee Types are restricted to either salary or hourly. If you need to change this option but cannot select a different value, consider whether you've selected the correct Employee Type.)

5. **Assignment Duration** – The assignment duration specifies a date range within which the employee might work and within which all paylines must fall. The dropdown selection will assist you with setting the assignment duration. Choose the appropriate selection from the dropdown list and you will see how the system automatically sets the Start Date and End Date of the assignment.

a. **Start Date**- represents the first day an employee may begin work on this assignment.

b. **End Date** - represents the last day the employee may work on this assignment.

Note: If you select "Other" from the dropdown list, the system will require you to manually enter a start and end date for the assignment. All other choices will automatically populate the start and end date fields.

6. Press "Save/Next". The system will perform some initial validation to ensure information is correctly entered. If there is another assignment already in the

system for this employee, the system will notify you and give you an opportunity to continue.

IMPORTANT TO REMEMBER – the assignment duration does not necessarily determine when the employee will be paid. See adding paylines (below) for payment instructions.

Step 2 Edit Assignment Detail

7. Review the information on the Edit Job Assignment screen and add/modify the remaining fields associated with the assignment including:
   a. Email address

b. ODU Employee (Yes or No)
c. Annual Salary or Hourly Rate (depending Pay Type selected)
d. Hours Per Week
e. Tuition Exemption (Yes or No)
f. Exemption Type (select from dropdown of available exemptions)
g. ODU Student (Yes or No)
h. Student Type (Undergraduate or Graduate)
i. Pay Per Period – calculated field based upon hours per week and salary/hourly rate entered.

Create Paylines

1. Click on the link to "Add Pay Line"

2. Select an appropriate project from the list of projects displayed.

Note: If the project you are looking for does not display in the list, ensure that the assignment date range overlaps with the active dates on the project. If the project is active during the assignment date range and the project does not display on your list, call the ODU Research Foundation for assistance getting your account connected to the missing project(s).

3. Review Project Budget, Expense, Encumbered and Available amounts to ensure available funding.

4. Enter "Hours Per Week" and press the "calc" link next to "Budget" to see how ePAS will calculate an appropriate budget amount for the payline
   OR
   Enter the "Budget" and press the "calc" link next to "Hours Per Week" to see how ePAS will calculate the number of hours per week to equal your desired budget. Either way, ePAS simplifies the process of matching each payline to the target assignment payrate and hours.

Note: When the "Actual" amount displays in a green font, the payline matches the assignment rate. If the amount displays in a red font, the payline is out of balance with the targets established on the assignment. To correct this situation, you can either recalculate to get these values in balance, or cancel the payline creation and change the assignment to new target values and recreate the payline.

When the Actual amount displays in green and the information looks correct, press "Create" to add the payline to the Assignment.

If additional paylines are required to fund the full assignment, continue to add paylines by clicking on the link to "Add Pay Line" and repeating the steps above as necessary until all funding sources have been completely identified.

Submit Payroll Authorization

When you have filled out the assignment and completed the addition of payline(s), press the "Save/Submit" button to route the assignment for approvals.

Note: the system will alert you if there are errors on the assignment or payline records. If this occurs, simply correct the errors and omissions and try again.

If you prefer to save your work and submit it later, simply press the "Save/Quit" button. The assignment will stay in the "Not Yet Submitted" section of your "My Approvals Tab" until you choose to submit it for review and approval.