PeopleSync Newsletter: Issue 17

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New Business Process: Change Work Space

Previously, updating a position's Work Space (building/room number where a person physically works and/or sits) required processing an Edit Position and selecting the Reason: Edit Work Space.

The new *Change Work Space* business process allows you to change the Work Space without going through the Edit Position process. This will also not require any approvals.

> **How to Access it:** You can find it by searching "Change Work Space" in PeopleSync. You can also find this on the Related Actions button next to an employee's position.
>
> **Who can initiate this process?:** HR Partner, HR Analyst.

Attention Security Partners: Change to Change Job Steps (US Only)

For each Change Job (transfer, promotion, lateral move, etc.) process, you have previously received an Assign Roles step.

We have replaced this with a To Do step - treat this item as an FYI asking you to review the role needs of the new position. Once you've determined what to do for the position, simply click 'Submit' to remove the item from your inbox - or keep it in your inbox as a reminder.

New Notification Alert for Fixed Term Jobs – (US Only)

To assist with managing your fixed term employee population, starting **on 3/12/18**, we have activated a new alert which will run weekly on Mondays and send you an email and notification alerting you to upcoming fixed term positions which are expiring.

You will be alerted **12 weeks** prior to the End Employment Date, and once more 1 week prior. This will be a single e-mail for all positions **found to expire in those time frames** (e.g. all Researchers set to end on the same date).

This alert will *include Fixed Term Professional Researchers, Faculty, Administrative/ Professionals, and Casual employees. It will* not include any Student, Adjunct or Additional Compensation positions.

For those who prefer to run reports ad hoc to regularly review your population, you will still have access to the End Date Report.

(For steps on how to extend a Fixed Term position (Non-Student), see the article in Issue 13 of the PeopleSync newsletter).

FY19 Annual Merit Increase (AMI) Process (US Only)

The following email was distributed to the HR Community on Feb. 20th form University HR and the Office of Budget and Planning. It includes important information on the upcoming AMI.

As we prepare for this year's Annual Merit Increase (AMI) process, University Human Resources (UHR) and the Office of Budget & Financial Planning wanted to share some important information. The primary reason for joint communications is due to the direct impact of AMI on the ongoing Position Management project. The Office of Budget & Financial Planning and UHR recognize the importance of working across departments to make the AMI process successful.

Below you will find an outline of key AMI dates. Similar to last year, the AMI process will be incorporated into the budget submission process. As a result, the dates below provide schools and units with adequate time to complete new activities related to Position Management. As usual, UHR will continue to communicate with you throughout the process.

Please stay tuned for more detailed information. If you have any questions in the meantime, please contact PeopleLink at askpeoplelink@nyu.edu or 212-992-LINK (5465).

PreAMI Launch Activities – To Be Completed by Respective School or Unit (in progress – see previous posts on the HR Blog (Restricted to the HR Community)

- **February 1 – February 28:** Validate Supervisory Organizations & Review/Update Merit Partner and Merit Approver Role assignments
- **February 1 – March 16:** Audit Population of AMI-Eligible Employees
- **February 1 – April 13:** Faculty & Researcher Pre-Launch Activities
  1. Fixed-term End Date Review
  2. Annual Work Disbursement Period Changes
  3. Return from Leave Action

AMI Training

May 22 & June 7: PeopleSync AMI training for HR Analysts, HR Partners, and Finance Executives

Merit Process/Deadlines

- **April 30:** Pool Capture Date
- **May 1:** Cut-off Date – Professional research personnel on grant, Administrative/Professional, and Non-Union Clerical and Service employees hired before May 1, 2018 are eligible for a September 1, 2018 AMI. Employees hired on or after May 1, 2018 are eligible for a merit increase on September 1, 2019. Professional Researchers, Administrative/Professional, and Non-Union Clerical and Service employees hired before May 1, 2018 are eligible for an annual bonus. Clerical, technical, and service employees promoted or transferred into administrative/professional positions before September 1, 2018 are eligible for a September 1, 2018 AMI.
- **May 21:** Pool Reports are available
- **June 6:** PeopleSync is officially open for AMI and Bonus data entry

- **June 11:** Budget submission process begins
- **July 13:** Deadline for AMI and Bonus Data to UHR Compensation & Office of Academic Appointments. PeopleSync system is closed for all Merit Partners and Approvers other than Compensation & OAA.
- **July 13 – August 6:** We strongly encourage that you avoid submitting transactions during this time for employees with an approved merit award. If you must process a transaction, please contact askpeoplelink@nyu.edu to request that the employee be removed from the Merit Process, including specifying the action reason, before processing the transaction.
- **August 1 – 6:** Final confirmation from Compensation & OAA

Post AMI & Position Management Activities

- **August 7 – 31:** As is customary, commencement of blackout period on submission of seated incumbent salary or job changes (role enhancements, promotions, transfers, continues for edit position, etc.) in PeopleSync for employees with an approved merit transaction (non-new hires) to allow for audit of annual merit increase, bonus submissions, and pay group changes. Any changes will require a request to PeopleLink to rescind the AMI before another transaction can be processed. The blackout period also allows for thorough review and approval of position budgets in PeopleSync. Blackout period is not applicable for new hire transactions.
- **August 7 – 31:** Initialize and approve encumbrances/pre-encumbrances in PeopleSync
- **August 8 – 23:** Budget Office activities in conjunction with Fiscal Officers: initialize, develop and distribute position budgets to Schools and Admin Units; review position budgets in PeopleSync; and make changes to contingency accounts. Changes to position budgets are independent from position edits and costing allocation changes. These transactions may require additional processing.
- **August 23 – 31:** FAME load of FY19 budgets

For more information, view this page on the HR Blog: FY19 Annual Merit Increase (AMI) Process (Restricted to the HR Community).

New Salary Grade Minimums for UCATS, Local 3882 available in PeopleSync (US Only)

The hourly rates for Local 3882 compensation grades for Office/Clerical and Laboratory/Technical employees effective September 4, 2017 have been updated in PeopleSync.

The Local 3882 Salary Grade Minimums reported in PeopleSync includes the hourly rates for all job profiles within each compensation grade. Validation rules have been updated in the Compensation step for employees in this Union and will check the submitted salary against these new rates.

Please refer to the posting on the HR Blog (Restricted to the HR Community) for more information.

Tips for Using PeopleSync – Most Popular Reports and Configuring Worklets

To find a list of our most popular reports, type "Most Popular Reports" in the search bar. This provides a wide range of frequently accessed reports, ranging from headcount to compensation/activity pay, end date, work authorization, position descriptions, GSOC eligibility etc.

You can add icons to your homepage by configuring worklets. These icons provide an immediate link to data types, reports, tasks, transactions that you may need to view regularly. To manage your display of these worklets navigate to the PeopleSync homepage. Mouse over the gear icon. (You will see the words "Configure this page" appear.) Select the icon. On the right hand you will see Optional Worklets. Add a row using the "+" then select a worklet.

Ticket Spotlight: How to check the status of a transaction

I submitted a transaction but it is not complete yet. How do I check on the status?

If you submit transactions it is helpful to become familiar with Worker History and the Process Tab so that you may review transactions that are in progress and, if needed, contact persons who are required to review or approve the transaction so that it successfully completes.

- To review "In Progress" transactions*****, review the Worker History. This shows all Business Processes (i.e. transactions) submitted for the Employee.
  - On the Employee's record, select Job. Next select More > Worker History. The Business Process column shows the list of transactions.
    - The Status column indicates "Successfully Completed", "In Progress", "Canceled" or "Rescinded". You can select the column header "Status" to filter by any of these values.
    - For "In Progress" transactions you will see person(s) in the "Assigned to" column. This indicates that the step(s) are currently awaiting completion, review and or approval by this party.
  - To find out more details about a transaction's status including who approved each step and when, select the transaction (in the Business Process column). You will be brought to an event page – at the top you will see "View Event" and the name of the transaction. (Example: "View Event Edit Job".)
    - You will see two tabs: Details and Process. Select Process. Scroll down to view all the steps, as well as who completed the step and when, reviewing those with Status "Awaiting Action" and Person(s) assigned.

Selecting the "View Worker History by Category" allows you to view the transactions organized by type including: Staffing, Organization, Personal Data, Compensation etc.