







Office of Budget and Finance

Payroll and Data Management
Instructions for Fiscal Year 2021

Overview:

All new hires/rehires joining the university should be initiated through an **ePAR action** – New Appointment. Similarly, if an employee is permanently leaving the university, it should be initiated through an **ePAR action** – Termination.

New Hires/Rehires:

Employee Classification:	Staff 	Faculty 	RA / TA / GA 	Student Workers 
Area Responsible:	Human Resources	Provost Office	Departments	Career Center
Start Date :	—	August 1st	August 16th	—

Note:
The new hire for lecturers I and II will be processed by the Provost Office with an effective date of **August 16th**

For new and existing employees with a start date **prior** to 09/01/2020, you will be able to use the two-year Department Budget Table (DBT) feature within ePAR to provide funding for the remaining days of FY20 and for all parts of FY21. **If the position was included in BPM, only a FY20 ePAR is needed. Please do not submit a two-year ePAR for this case. The FY21 funding will be loaded from BPM.**

ePAR New Appointment

Employee Information

Empl ID Name

Action

*Action Status

Request ID

Attachments

Explain Action

Appointment Type Org Relationship Eff Date **Current and Future Fiscal Year Funding**

Please review the additional training document if you have ePAR access that describes the new two-year DBT feature.

The scope of this process revolves around gathering job information on currently active employees in the following roles –

- Research Assistants
- Teaching Assistants
- Lecturers I and II
- Faculty and Staff
- Student employees including Federal Work-study



Office of Budget and Finance

Payroll and Data Management

Instructions for Fiscal Year 2021

Please submit your final short work break (SWB) reference spreadsheet to: rohan.nilekani@utdallas.edu and copy payroll@utdallas.edu

If you have questions or are concerned about the timing, you can always reach out directly to Rohan Nilekani. Also, you can contact your data management analyst through email or Microsoft-TEAMS.

The data management analyst for your area can be found using the tool "find your analyst": See Link below. <https://www.utdallas.edu/finance/payroll/>

Existing Employees


1. Research Assistants -

The fall assignment for RA starts **08/16/2020**. All currently active RAs will be sent out on a spreadsheet as a reference including the ones currently on short work break.

Action Item I –

- If an RA is currently on short work break and is expected to work in the fall – Please use the column highlighted in orange to mark them as 'R' on the file so that the payroll office can return them from work break.
- Similarly, if an RA is going to be on short work break in the fall please mark them as 'W'.

Please send the information back to the payroll office by **August 3rd**. The sooner the better.



Dept ID	ID	Empl Record	Job Code	Group	Eff Date	Planned Exit	Name	Payroll Status	Action
301000	20XXXXXXXX	1	S00634	MRA	5/16/2019	8/15/2019	Alibhai, AliAsgar Hussamuddin	A	
301000	20XXXXXXXX	1	S00634	MRA	5/16/2019	8/15/2019	Allred, Michael K	A	
301000	20XXXXXXXX	1	S00634	MRA	5/16/2019	8/15/2019	Arnold, Robert	A	
301000	20XXXXXXXX	1	S00634	MRA	5/16/2019	8/15/2019	Baig, Maryam	W	
301000	20XXXXXXXX	1	S00634	MRA	5/16/2019	8/15/2019	Bennett, Rodger	W	
301000	20XXXXXXXX	0	S00634	MRA	5/16/2019	8/15/2019	Berry, Tracey Ray	A	

Action Item II

If an RA is expected to work in the fall, please enter FY21 information using the ePAR cheat sheet below. We are not accepting any job data information from the spreadsheet.

If an RA is neither working nor on short work break in the fall - please submit an end assignment/Termination.

The deadline for fully approved ePAR fall assignments is **August 20th** - Monthly ePAR deadline.



Office of Budget and Finance
 Payroll and Data Management
 Instructions for Fiscal Year 2021

What if..?

Salary Basis Salaried Monthly

Now	Fall	ePAR Action	Notes
-	New Hire	New Appointment	New employee joining the university
-	Rehire	New Appointment - Rehire	Appointment type will be Rehire
RA	RA	Job Action Change (JAC)	Fall Assignment (Using Two year DBT option if starts prior to 09/01)
RA	TA	Job Action Change (JAC)	Fall Assignment (Using Two year DBT option if starts prior to 09/01)
RA	Hourly Worker	New Appointment - Secondary Assignment	End the RA assignment and then submit a secondary assignment
RA	Short Work Break	Indicate 'W' on the spreadsheet in Action Item 1	If you missed the spreadsheet process, Email payroll@utdallas.edu
Short Work Break	RA	Return from Work Break and Then JAC	Return from work break will be done via spreadsheet in Action item 1
RA	Leaving the University	Termination	When permanently leaving the university
Full RA	Split RA/TA	1. JAC on current assignment to reduce FTE & 2. Submit a secondary assignment for new role	Total FTE should not exceed 0.50

2. Teaching Assistants –

The fall assignment for TA starts **08/16/2020**. All currently active TAs will be sent out on a spreadsheet as a reference including the ones currently on short work break.

Action Item I

- If a TA is currently on short work break and is expected to work in the fall – Please use the column highlighted in orange to mark them as ‘R’ on the file so that the payroll office can return them from work break.
- Similarly, if a TA is going to be on short work break in the fall please mark them as ‘W’.

Please send the information back to the payroll office by **August 3rd**. The sooner the better.

Dept ID	ID	Empl Record	Job Code	Group	Eff Date	Planned Exit	Name	Payroll Status	Action
301000	20XXXXXXXX	1	S00061	MTA	5/16/2019	8/15/2019	Alibhai, AliAsgar Hussamuddin	A	
301000	20XXXXXXXX	1	S00061	MTA	5/16/2019	8/15/2019	Allred, Michael K	A	
301000	20XXXXXXXX	1	S00061	MTA	5/16/2019	8/15/2019	Arnold, Robert	A	
301000	20XXXXXXXX	1	S00061	MTA	5/16/2019	8/15/2019	Baig, Maryam	W	
301000	20XXXXXXXX	1	S00061	MTA	5/16/2019	8/15/2019	Bennett, Rodger	W	
301000	20XXXXXXXX	0	S00061	MTA	5/16/2019	8/15/2019	Berry, Tracey Ray	A	

Action Item II

If a TA is expected to work in the fall, please enter FY21 information using the ePAR cheat sheet below. We are not accepting any job data information from the spreadsheet.

If a TA is neither working nor on short work break in the fall - please submit an end assignment/Termination.

The deadline for approved ePAR fall assignments is **August 20th Monthly** ePAR deadline.



Office of Budget and Finance
Payroll and Data Management
Instructions for Fiscal Year 2021

What if..?

Salary Basis: Academic Monthly

Now	Fall	ePAR Action	Notes
-	New Hire	New Appointment	New employee joining the university
-	Rehire	New Appointment - Rehire	Appointment type will be Rehire
TA	TA	Job Action Change (JAC)	Fall Assignment (Using Two year DBT option if starts prior to 09/01)
TA	RA	Job Action Change (JAC)	Fall Assignment (Using Two year DBT option if starts prior to 09/01)
TA	Hourly Worker	New Appointment - Secondary Assignment	End the TA assignment and then submit a secondary assignment
TA	Short Work Break	Indicate 'W' on the spreadsheet in Action Item 1	If you missed the spreadsheet process, Email payroll@utdallas.edu
Short Work Break	TA	Return from Work Break and Then JAC	Return from work break will be done via spreadsheet in Action item 1
TA	Leaving the University	Termination	When permanently leaving the university
Full TA	Split RA/TA	Step 1. JAC on current assignment to reduce FTE & Step 2. Submit a secondary assignment for new role	Total FTE should not exceed 0.50

3. Lecturers I & II -

The fall assignment for lecturers starts **08/16/2020**. All currently active lecturers will be sent out on a spreadsheet as a reference including the ones currently on short work break.

Action Item I

- If a lecturer is currently on short work break and is expected to work in the fall – Please use the column highlighted in orange to mark them as ‘R’ on the file so that the payroll office can return them from work break.
- Similarly, if the employee is going to be on short work break in the fall please mark them as ‘W’.

Please send the information back to the payroll office by **August 3rd**. The sooner the better.

Dept ID	ID	Empl Record	Job Code	Group	Eff Date	Planned Exit	Name	Payroll Status	Action
301000	20XXXXXXXX	1	F00051	MOS	5/16/2019	8/15/2019	Alibhai, AliAsgar Hussamuddin	A	
301000	20XXXXXXXX	1	F00051	MOS	5/16/2019	8/15/2019	Allred, Michael K	A	
301000	20XXXXXXXX	1	F00051	MOS	5/16/2019	8/15/2019	Arnold, Robert	A	
301000	20XXXXXXXX	1	F00051	MOS	5/16/2019	8/15/2019	Baig, Maryam	W	
301000	20XXXXXXXX	1	F00051	MOS	5/16/2019	8/15/2019	Bennett, Rodger	W	
301000	20XXXXXXXX	0	F00051	MOS	5/16/2019	8/15/2019	Berry, Tracey Ray	A	

Action Item II

If a lecturer is expected to work in the fall, please enter FY21 information using the ePAR cheat sheet below. We are not accepting any job data information from the spreadsheet.

If a lecturer is neither working nor on short work break in the fall - please submit an end assignment/Termination.

The deadline for approved ePAR fall assignments is **August 20th** - Monthly ePAR deadline.



Office of Budget and Finance

Payroll and Data Management

Instructions for Fiscal Year 2021

For Lecturer new hires, please contact the Provost Office. Please do not submit information for Lecturers past 12/31/20.

What if..?

Salary Basis:

Now	Fall	ePAR Action	Notes
-	New Hire	New Appointment	New employee joining the university
-	Rehire	New Appointment - Rehire	Appointment type will be Rehire
Lecturer	Lecturer	Job Action Change (JAC)	Fall Assignment (Using Two year DBT option if starts prior to 09/01)
Lecturer	Short Work Break	Indicate 'W' on the spreadsheet in Action Item 1	If you missed the spreadsheet process, Email payroll@utdallas.edu
Short Work Break	Lecturer	Return from Work Break and Then JAC	Return from work break will be done via spreadsheet in Action item 1
Lecturer	Leaving the University	Termination	When permanently leaving the university

Existing Hourly Employees

- All existing hourly employees, **except for those that are C&G funded**, will be rolled forward by the payroll office into FY21 using their current Job Data and cost center information.
- **Existing hourly employees funded through a C&G cost center will require a FY21 ePAR to continue the assignment. These can be entered starting on September 8th.**
- This information will be in Job Data by September 8th.
- If the employee will not be working in your department in FY21, you will need to complete an End of Assignment or Termination ePAR.
- If you have changes that will be effective 09/01 (rate of pay, funding, etc.) then you will need to enter an ePAR starting on **September 8th**.

Work-study employees –

- Work-study does not start until 09/01/20.
- You **MUST** enter a **Job Attribute Change (JAC)** ePAR to move the employee to work study effective 09/01/20. You cannot enter these until September 8th.
- Please change the job code to (S09996) and enter the department cost center for funding as well as the designated cost center for work study.
- Reminder – Contact the Career Center for student worker new hires / Human Resources for classified temporary new hires.

Existing Faculty & Staff

- Faculty and Staff job information will be carried forward from current information (05/31 for faculty, 08/31 for staff).
- Faculty and Staff **FY21** funding will come from the Budget Planning Module (BPM). This information will be updated for **FY21** by September 8th.
- **Faculty Tenure Promotions will be loaded in Job Data from BPM.**
- **All other** 09/01 changes (promotion, salary change, FTE, funding, etc.) will need to be entered via ePAR. These changes can be entered starting on September 8th.

You can request an FY21 validation spreadsheet that will show current job data and funding information by sending an e-mail to payroll@utdallas.edu after September 8th.



Office of Budget and Finance
Payroll and Data Management
Instructions for Fiscal Year 2021

The ePAR deadline for September monthly payroll is September 21st.

Supplement Spreadsheet Verification

- Sent to department by August 10th , due August 24th
- Verify Supplement amounts and funding that were submitted in BPM.
- You may add additional Supplements to this spreadsheet.