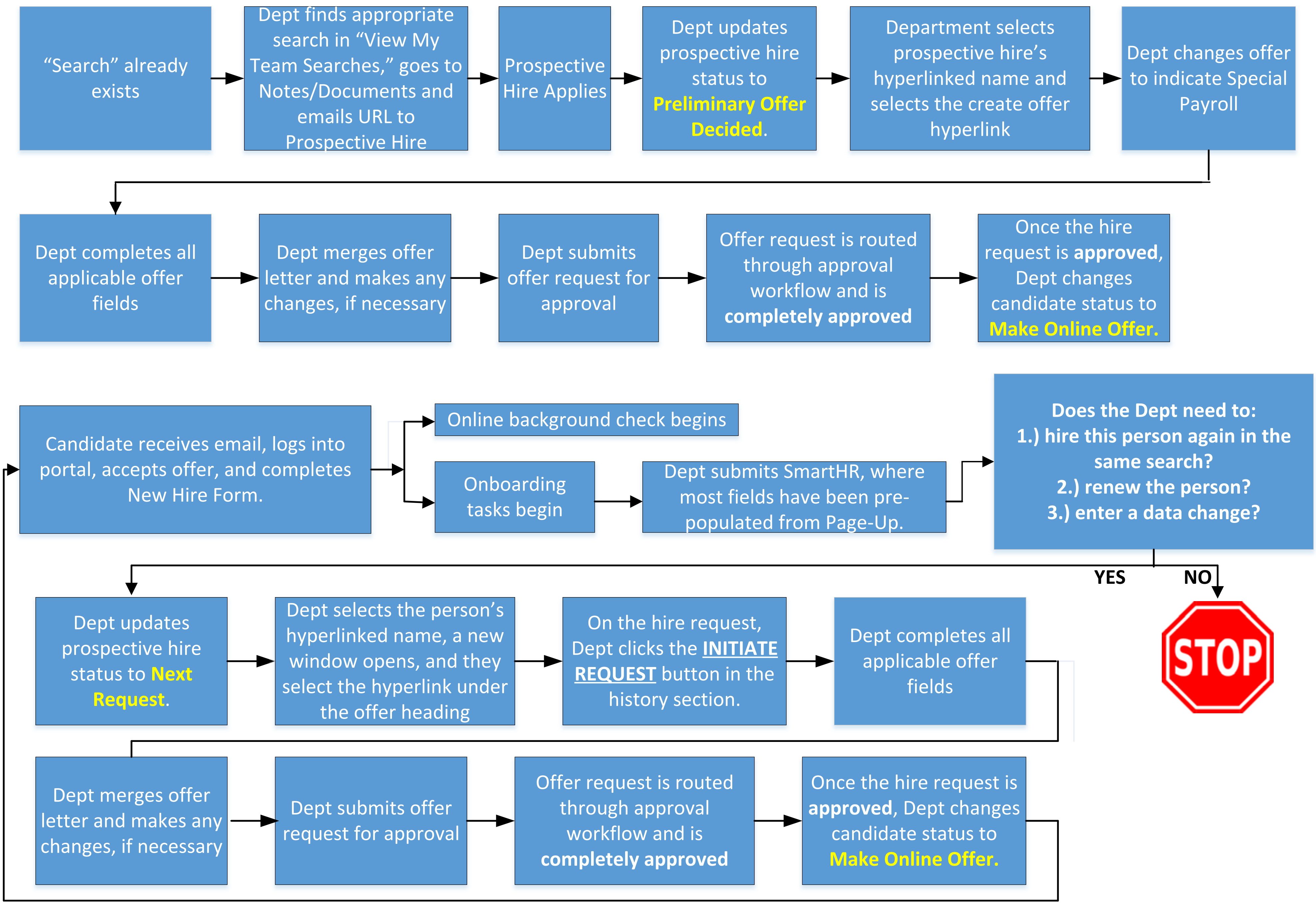
Special Payroll Workflow



Special Payroll Requests in PageUp

[Last Updated: December, 2020]

This help document provides instructions on the special payroll process within PageUp. It covers five primary areas and includes both technical and functional information:

INTRODUCTION

For PageUp, the preferred browser is Google Chrome.

To process special payroll in PageUp, you never need to create a "new search." Human Resources has most likely already created the job for you. You may have to send a link to the candidate to have your applicant apply.

A big picture outline of the special payroll process:

1.) Send the link to the candidate to apply (if applicable)
2.) Submit a hire request (follow steps for initial request or non-initial request)
3.) Upon HR approval, send the online offer through PageUp to the candidate.
4.) Upon hire's electronic acceptance, submit the SmartHR template.

GETTING STARTED

1. Determine which special payroll search to use by identifying the special payroll title for the appointment:

- **Teaching**
    - Titles: Adjunct Faculty or Special Payroll Lecturer
    - Use the search called **DEPARTMENT Special Payroll Teaching**
- **Instructional Support**
    - Titles: Instructional Specialist, Academic Technician, Academic Specialist
    - Use the search called **DEPARTMENT Special Payroll Instructional Support**
- **Graduate Assistant** in one of the graduate special payroll titles
    - Titles: Graduate Instructional Specialist, Graduate Student Technician, Graduate Special Payroll Lecturer, and Graduate Overload.
    - Use the search called **DEPARTMENT Special Payroll Graduate**
- **All Other Titles**
    - Titles: Temporary University Specialist, Project/Program Specialist, Public Service Technician/Specialist, Research Specialist/Technician, etc.
    - Use the search called **DEPARTMENT Special Payroll**

2. Do you have access to the search?

- Yes → proceed to question 3.
- No → contact Workforce@uconn.edu to see if a search needs to be added or if your account needs to be updated to have access to an existing search.
- I don't know → log into PageUp and locate the View Searches tile. Select 'View My Team Searches' and make sure the visibility has My Team Searches selected and that the Status has either All or Current selected. Identify whether the search you need from Step 1 is listed here.

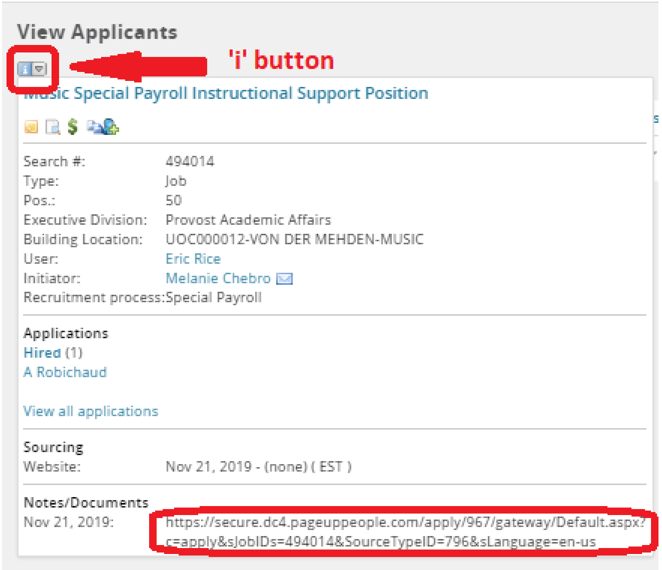
3. Has the person applied to the search?

a. Yes → proceed to question 4.

b. No → you will need to send the link to the applicant to have them apply:

   i. The preferred route is to find the Update Applicant Status tile on your dashboard, click the link '**Jobs have applicants for review,'** find the search you identified in step 1 and click View Applicants on the far right.

   ii. In the top left, click the 'i' button. You will find a link pasted under the Notes/Documents section. (image below)



   iii. Send the link to the applicant using your own email account. Below is a sample email with language you can send to the applicant.

> Dear Colleagues,
>
> Effective immediately, the University requires all applicants for Special Payroll positions to provide an up-to-date resume and to submit an application. By providing this information, departments will be able to issue electronic offer letters to new and reappointed Special Payroll employees.
>
> To apply and submit a resume, please visit PageUp at this link: [INSERT DEPARTMENT SEARCH LINK HERE – LINK FROM NOTES/DOCUMENTS].

This application does not guarantee appointment or continuation of appointment.

Thank you.

c. I don't know → to identify whether an applicant has applied to that search:
   i. On your dashboard, find the Update Applicant Status tile on your dashboard and click the link '**Jobs have applicants for review.'**
   ii. Find the search you identified in step 1, and click View Applicants on the far right.
   iii. Do you see the applicant listed here? You can click on any of the headers to sort.

4. Have you hired *that person* in *that search* in PageUp before?

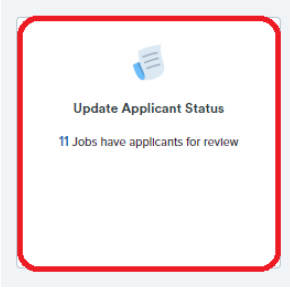
a. Yes → For a **rehire/renewal** or a **data change,** proceed to the instructions to submit a non-initial hire request.

b. No → Proceed to the instructions to submit an initial hire request.

c. I don't know → to identify whether the applicant has been hired through that search before:
   i. On your dashboard, find the Update Applicant Status tile on your dashboard and click the link '**Jobs have applicants for review.'**
   ii. Find the search you identified in step 1, and click View Applicants on the far right.
   iii. Is the applicant listed there? If yes, then answer "yes" to question 4. If no, then answer "no" to question 4.

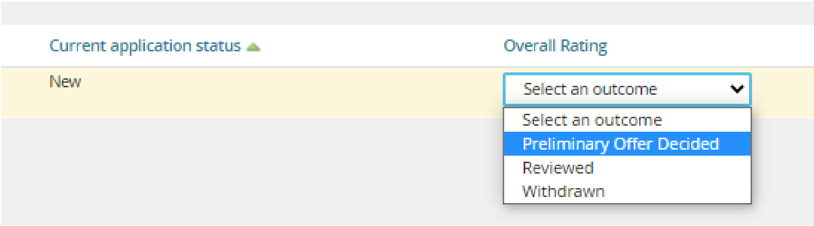
INITIAL HIRE REQUEST IN PAGEUP:

A. On your dashboard, find the tile called Update Applicant Status. Within that tile, select **Jobs have applications for review.**



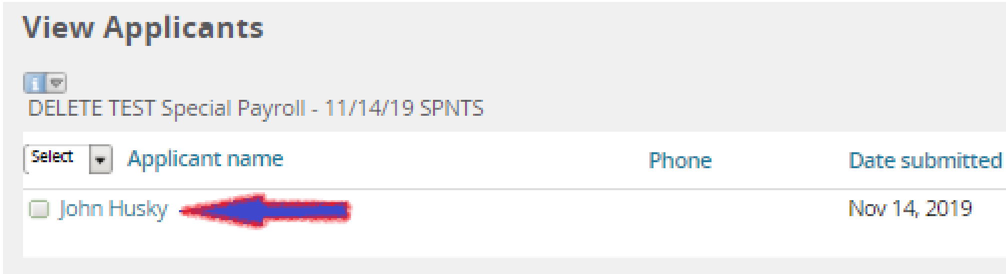
B. Find the search # you are working on (identified from Step 1) and click View Applicants on the far right.

C. Locate the person you are submitting a request for. In the Overall Rating dropdown, select **Preliminary Offer Decided**.

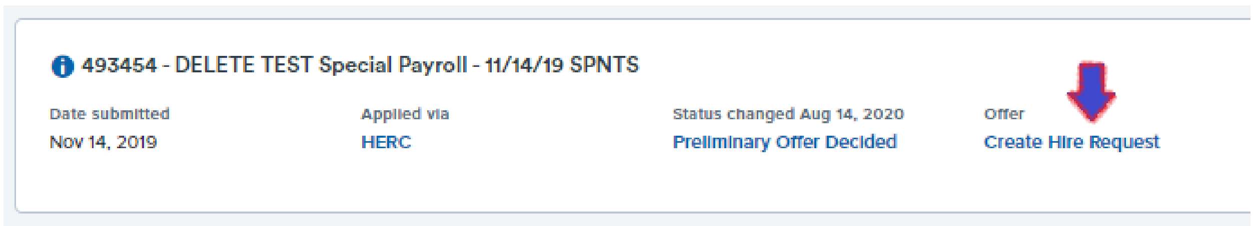


A. Select Submit at the top of the page.

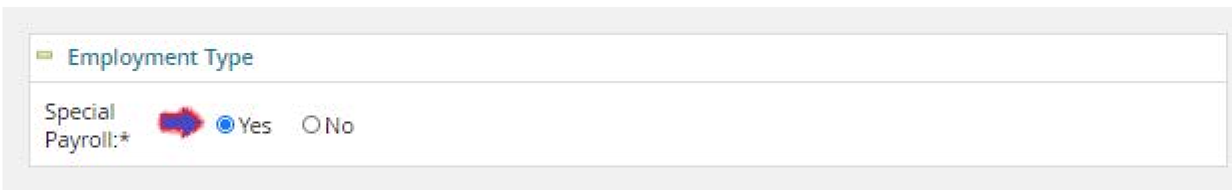
B. Click the candidate's name in the left column. The applicant card will appear in a new window.



C. Click the hyperlink under the *Offer* heading (the description may vary; most likely is Create Hire Request for these instructions).

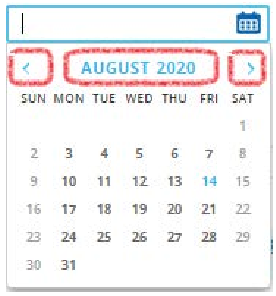


D. The hire request window will appear. Scroll to the third white box called Employment Type. Change the toggle to Yes to indicate that the request is Special Payroll.



E. Complete the required fields as appropriate:

Field	Details
POSITION DETAILS (REQUIRED)	
Payroll Title	This field will auto-populate using the most common title in this search. **However, you should adjust the title as appropriate.** See the Special Payroll Manual for assistance in selecting the appropriate title.
Is this request a data change where the appointment already exists in Core-CT?	'Yes' is the appropriate answer when you have submitted the SmartHR template and the appointment has been processed. 'No' is the appropriate answer when you have not submitted a SmartHR template for the appointment. For example, the hire accepted your appointment, but before submitting the SmartHR, you learned you need to increase the stipend. You would therefore answer no to this question because the appointment was not submitted on a SmartHR template and processed. For help identifying whether the request is a data change, review the "Type of Request Definitions" in the Special Payroll Manual.

Type of Work	From the dropdown, select the type of work. For help identifying what type of work to select, review the "Type of Work Definitions" in the [Special Payroll Manual]().
Start Date	Enter the appointment start date. Use the calendar look up and arrows < > or month/year drop downs and please do not type the date into this field as it will not appear correctly. 
End Date	Enter the appointment's end date. For an initial request, the request should not exceed 6 months. Use the calendar look up and arrows < > or month/year drop downs. Please do not type the date into this field as it will not appear correctly.
Funding End Date	If you have a funding end date for this appointment, enter it using the calendar look up and arrows < > or month/year drop downs. This is not a required field and should only be needed when there is a funding end date that is separate from the appointment end date.
School/College/Division	Select your School/College/Division. This field will determine the approval workflow options available to you.
Building Location	This field is auto populated based on the most commonly used building location for the department. Please update accordingly. You can only enter one building location per appointment.
If internal – please enter new hire's NetID	If your hire already has a NetID, please enter it here.
KFS for CBC	Please enter the KFS to be used for a background check (if applicable). It cannot be a grant/contract KFS. If not applicable, leave as default: 9999999-Special Pay Page Up
CONDITIONS OF EMPLOYMENT (REQUIRED)	
Employee Classification	You will most likely be using only one of these two categories: • Special Payroll • Special Payroll – Rehired Retiree
Summary of Duties	Please provide a brief summary of duties.
Minimum Qualifications	Please provide minimum qualifications for this appointment. Do not enter "N/A."
Justification	Please provide a justification to the necessity of this appointment.
COMPENSATION AND ANTICIPATED HOURS (REQUIRED)	
Is this appointment 100% grant funded?	Please answer yes or no depending on the funding for the appointment.
Payment Type	The job title chosen dictates how the appointment is paid. Please identify the payment type: • stipend (total amount divided over the appointment period) • hourly rate (paid per hour of work)

Total Stipend/Allotment	You will either enter the total stipend (if payment type = stipend) or the total allotment (if payment type = hourly rate). The total allotment should be a calculation that at least equals the hourly rate x the number of hours per week x the number of weeks within the appointment.
If applicable, enter hourly rate:	If payment type = hourly rate, please enter the hourly rate. Please note current minimum wage requirements.
Anticipated Weekly Hours	This field is required for all non-teaching appointments. Please enter the anticipated number of weekly hours. This field is used to determine Affordable Care Act eligibility.
TEACHING *(IF APPLICABLE)*	
Total Credits	Please enter the total number of credits for this appointment.
Lab Premium	If the adjunct is teaching a lab, please enter the lab premium amount.
Multi-Yr Contract Start Date.	If the adjunct is on a multi-year contract, or starting a multi-year contract with this appointment, please enter the multi-year contract start date. For a multi-year contract that began with the Fall semester, it should be August 23, YEAR. For a multi-year contract that began with the Spring semester, it should be January 1, YEAR.
Multi-Yr Contract End Date	If the adjunct is on a multi-year contract, or starting a multi-year contract with this appointment, please enter the multi-year contract end date. For a multi-year contract that ends with the Spring semester, it should be August 22, YEAR. For a multi-year contract that ends with the Fall semester, it should be December 31, YEAR.
Appointment Semester	From the drop down, select the current appointment semester.
Academic Department	If you are a non-academic department, please enter the academic department where the course is being taught. Only one academic department can be identified per appointment. For example, if a regional campus is submitting an Adjunct Faculty request, they would indicate the academic department where the course is being taught.
COMPLIANCE QUESTIONS (REQUIRED)	
Per the application, is the applicant a relative of a UConn employee?	If, to the best of your knowledge, including the appearance of flags based on applicant answers on the applicant card, this person has a relative that is a UConn employee, change the toggle to yes. You will need to attach a Conflict of Interest Form via the "Add Document" function.
Per the application, is the applicant a State of Connecticut retiree?	If, to the best of your knowledge, including the appearance of flags based on applicant answers on the applicant card, this person is a State of Connecticut retiree, change the toggle to yes.
Per the application, does this appointment result in dual employment?	If, to the best of your knowledge, including the appearance of flags based on applicant answers on the applicant card, this person has multiple, paid appointments within UConn or with other state agencies, change the toggle to yes. You should initiate the dual employment process, using the Dual Employment Request Form.
ONBOARDING (REQUIRED)	
Onboarding form	If this is a new appointment, select "All Hires Except Special Payroll Data Changes." If this is a data change as identified with a yes answer in the field "Is this request a data change where the appointment already exists in Core-CT?," select "For Special Payroll Data Changes ONLY."

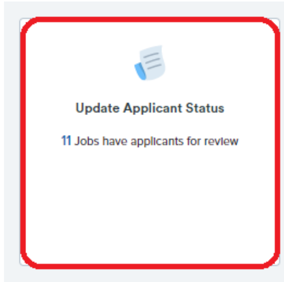
Onboarding workflow	Please select one of the Special Payroll onboarding workflows. The list identifies specific workflows for adjuncts, instructional specialists and Law School Special Payroll Lecturers, and non-teaching titles. You are then asked to identify whether the hire is a brand new hire or a rehire. • Special Payroll – Adjunct New Hire • Special Payroll – Adjunct Rehire • Special Payroll – Instr Spec & LAW SPL New Hire • Special Payroll – Instr Spec & LAW SPL Rehire • Special Payroll – Non-Teaching New Hire/Rehire "No onboarding" should be used sparingly. It is most acceptable for data changes.
Immediate Supervisor	Please identify the immediate supervisor. This should be the actual supervisor.
Search Initiator/Onboarding Access	This field auto populates. You can adjust if needed. This field provides access to the employee's onboarding tasks.
Onboarding Coordinator	This is not a required field. If the employees that need onboarding access have already been listed, leave this field blank. There is no need to repeat names.
Onboarding Delegate	This is not a required field. If the employees that need onboarding access have already been listed, leave this field blank. There is no need to repeat names.
COMMENTS	
Comments – It is recommended that you note in the comments the KFS account(s)	Here you can enter any comments related to the appointment. As the field title suggests, it is recommended to note the KFS account(s) charged for this appointment.
HR Status	This is an HR field where we will monitor appointments that are on hold due to needing more information, a dual employment form, or Conflict of Interest.
Offer Documents	**Please use the merge feature to create the offer contract to ensure that the most recent up-to-date offer letter is used.** Note: The Special Payroll Manual lists which offer letters are appropriate based on title.
APPROVAL PROCESS	
Approval Process	If you are a department processor, select an approval workflow that ends with DEPARTMENT: Special Payroll. If you are a Dean/Director/VP processor, select an approval workflow that ends with one of those labels: Special Payroll. For instance, Dean: Special Payroll.

F. Select Save/Submit to enter the request into the approval workflow. The workflow will go through the approval process.

G. For more information about the rest of the process, go to the Post HR Approval/SmartHR Submission section.

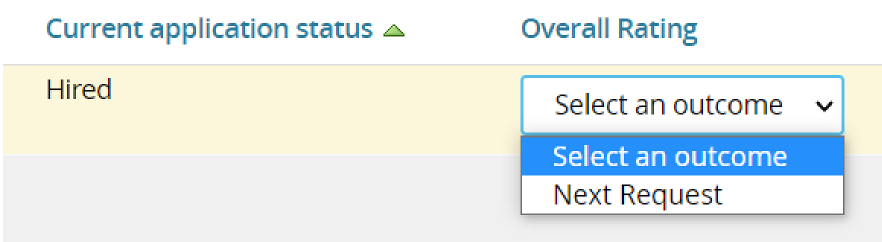
***NON*-INITIAL HIRE REQUEST IN PAGEUP:**

1. On your dashboard, find the tile called Update Applicant Status. Within that tile, select **Jobs have applications for review.**



2. Find the search # you are working on (identified from Step 1) and click View Applicants on the far right.

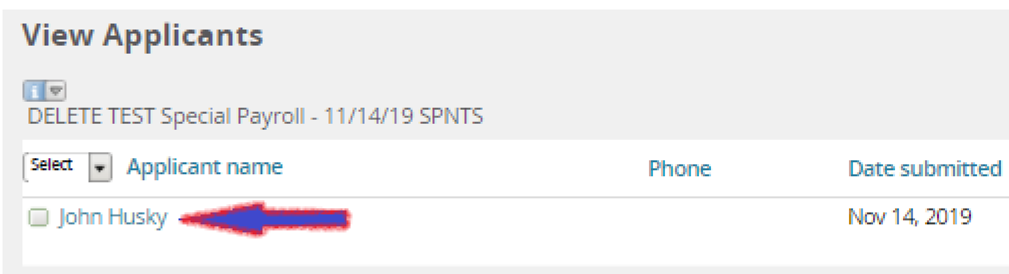
3. Locate the person you are submitting a request for. In the Overall Rating dropdown, select Next Request, even if it is a data change.



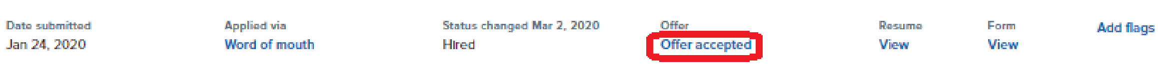
Note: If the Next Request option is not available for you to select, then you must wait until the person's current application status is updated to Hired.

H. Select Submit at the top of the page.

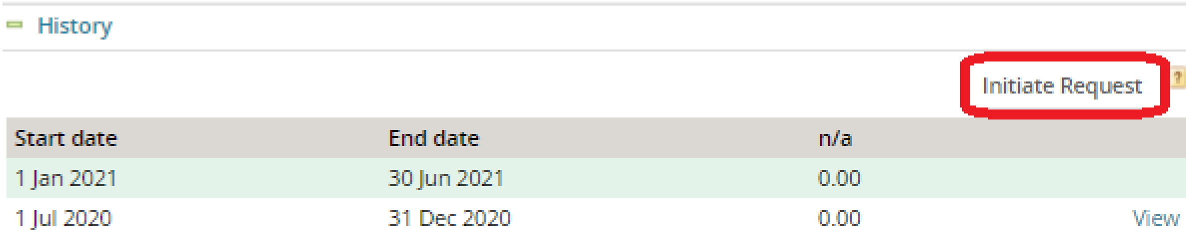
I. Click the candidate's name in the left column. The applicant card will appear in a new window.



J. Click the hyperlink under the *Offer* heading (the hyperlink description may vary; this example has offer accepted. It may also say new request accepted).



K. The hire request window will appear. Scroll to the History Section (fourth box down; row highlighted in green). **Select Initiate Request**.

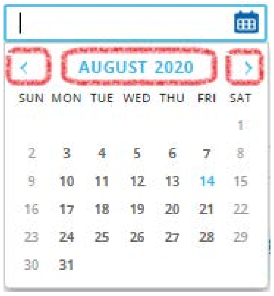


L. Give the page a moment to reload.

YOU MUST SELECT INITIATE REQUEST FIRST AS DESCRIBED IN "K" ABOVE BEFORE MAKING ANY CHANGES TO THIS PAGE. IF YOU DO NOT SELECT INITIATE REQUEST, THEN YOU WILL BE OVERWRITING THE INITIAL APPOINTMENT AND THAT IS PROBLEMATIC. IF YOU OVERWRITE THE REQUEST, HR WILL HAVE TO REVERT THE REQUEST TO ITS ORIGINAL STATE AND YOU WILL HAVE TO RESUBMIT THE REQUEST APPROPRIATELY, INCREASING THE PROCESSING TIME. ONCE YOU SELECT "INITIATE REQUEST" AND THE NEW REQUEST HAS POPULATED PER THESE INSTRUCTIONS, YOU CAN PROCEED.

M. Complete the required fields as appropriate:

Field	Details
POSITION DETAILS (REQUIRED)	
Payroll Title	This field will auto-populate using the most common title in this search. **However, you should adjust the title as appropriate.** For assistance in selecting the appropriate title, see the Special Payroll Manual.
Is this request a data change where the appointment already exists in Core-CT?	'Yes' is the appropriate answer when you have submitted the SmartHR template and the appointment has been processed. 'No' is the appropriate answer when you have not submitted a SmartHR template for the appointment. For example, the hire accepted your appointment, but before submitting the SmartHR, you learned you need to increase the stipend. For help identifying whether the request is a data change, review the "Type of Requests Definitions" section in the Special Payroll Manual.
Type of Work	From the dropdown, select the type of work. For help identifying what type of work to select, review the "Type of Work Definitions" section in the Special Payroll Manual.

Start Date	Enter the appointment start date. Use the calendar look up and arrows < > or month/year drop downs and please do not type the date into this field as it will not appear correctly. 
End Date	Enter the appointment's end date. For an initial request, it is most likely this request should not exceed 6 months. Use the calendar look up and arrows < > or month/year drop downs.
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Building Location	This field auto populated based on the most commonly used building location for the department. Please update accordingly. You can only enter one building location per appointment.
If internal – please enter new hire's NetID	If your hire already has a NetID, please enter it here.
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Payment Type	The job title chosen will dictate how the appointment is paid. Please identify whether the appointment will be paid by • stipend (total amount divided over the appointment period) • hourly rate (paid per hour of work)
Total Stipend/Allotment	You will either enter the total stipend (if payment type = stipend) or the total allotment (if payment type = hourly rate). The total allotment should be a calculation that at least equals the hourly rate x the number of hours per week x the number of weeks within the appointment.

If applicable, enter hourly rate:	If payment type = hourly rate, please enter the hourly rate. Please note minimum wage requirements.
Anticipated Weekly Hours	This field is required for all non-teaching appointments. Please enter the anticipated number of weekly hours. This field is used to determine Affordable Care Act eligibility.
TEACHING *(IF APPLICABLE)*	
Total Credits	Please enter the total number of credits for this appointment.
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Per the application, is the applicant a State of Connecticut retiree?	If to the best of your knowledge, including the appearance of flags based on applicant answers (see the help text below the header in the offer request), this person is a State of Connecticut retiree, change the toggle to yes.
Per the application, does this appointment result in dual employment?	If to the best of your knowledge, including the appearance of flags based on applicant answers (see the help text below the header in the offer request), this person has multiple, paid appointments within UConn or with other state agencies, change the toggle to yes. You should initiate the dual employment process, using the Dual Employment Request Form.
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Offer Documents	**Please use the merge feature to create the offer contract to ensure that the most recent up-to-date offer letter is used.** Note: The Special Payroll Manual lists which offer letters are appropriate based on title.
APPROVAL PROCESS	
Approval Process	If you are a department processor, select an approval workflow that ends with DEPARTMENT: Special Payroll. If you are a Dean/Director/VP processor, select an approval workflow that ends with one of those labels and “Special Payroll.” For instance, Dean: Special Payroll.

N. Select Save/Submit to enter the request into the approval workflow. The workflow will go through the approval process.

O. For more information about the rest of the process, go to the Post HR Approval/SmartHR Submission section.

Post HR Approval/SmartHR Submission:

A. Upon HR approval, you will receive an email that the request has been approved. It is up to you to determine the appropriate timing for when the electronic offer is sent. To send the offer, on your dashboard, go to the Update Applicant Status tile, find the search, and update the person's status from Ready for Dept to Make Offer to Make Online Offer. This sends the electronic offer.

B. You will receive communications once the person has accepted AND once the person has completed the UConn Hire Form. If you receive the communication that the UConn Hire Form is completed prior to 7pm EST, then you can submit the SmartHR template the next day. If you receive the communication that the UConn Hire Form is completed after 7pm EST, then you can submit the SmartHR template in two business days.
   - For **new/rehires**, use UC_PG_SPT (special payroll teaching), UC_PG_SPNT (special payroll non-teaching/time reporter), or UC_PG_SPNTS (special payroll non- teaching/non-time reporter) depending on your type of hire.
   - For **data changes**, use UC_TBH_DC_SPT_PAY, UC_TBH_DC_SPNT_PAY, UC_TBH_DC_FUND_SPE, UC_DC_DEPT_SPEC, or UC_DC_SUP_ID_SPEC.
   - The department must create and submit a SmartHR transaction for each **hire** and/or **data change** in order for Payroll to process compensation.
   - For more assistance, review SmartHR Job Aids.