OVPR&ED Administrative Support Staff Meeting

February 5, 2014
10:30 – 12:00
W401 PBB
Performance Reviews

- Using ‘My UI Career’
- Q & A Session with Karen Shemanski & Diana Leventry
Performance Reviews

- Deadline for P & S and Merit is March 31, 2014.
<table>
<thead>
<tr>
<th>Question</th>
<th>Best Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the basis for a department to have Call-In procedures?</td>
<td>The employer should use the University of Iowa Philosophy on Use of Leave and Benefits and Ethics and Responsibilities for Staff including Work Rules.</td>
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<tr>
<td>How do employees know of the expectation?</td>
<td>The employer is expected to advise the employee of unit Call-In expectations and process and advise of the University of Iowa Philosophy on Use of Leave and Benefits and Ethics and Responsibilities for Staff including Work Rules and their published location during the hiring or onboarding process</td>
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<tr>
<td>What is the Call-In expectation of When the employee is to contact the department?</td>
<td>The employers should have a written process of when the employee is to call.</td>
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</table>
## Best Practices: Calling in an unscheduled absence

### Handout

<table>
<thead>
<tr>
<th>Question</th>
<th>Best Practice</th>
</tr>
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<tbody>
<tr>
<td><strong>What is the Call-In expectation for Whom the employee is to contact?</strong></td>
<td>The employer should have a written process of who the employee is to call.</td>
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<tr>
<td><strong>What information is the employee to provide when he/she contacts the department?</strong></td>
<td>The employer should have a written description of what information is expected to be shared by the employee.</td>
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<tr>
<td><strong>Should there be an expectation to notify other employees of absence?</strong></td>
<td>The employer should notify applicable unit staff/faculty of an employee’s absence with necessary information about the absence; however, without sharing confidential information of the cause of the absence.</td>
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Recent Causes of Overpayments and Recommendations

- **Delayed approvals through workflow.** Change of status forms are not posted to the Human Resource system until they are completed through the workflow system. If the change of status form will create a reduction in pay and if the form will not be posted to HR until it has completed workflow, then the initiator, HR Unit Representative, or appropriate administrator should track approvals throughout the workflow system to ensure that all the approvals are complete prior to payroll cutoff.

- **Employees who are on leave of absence and didn’t return as anticipated.** The Overpayments Best Practice Guide encourages departments to put employees on leave through the 3rd of the following month and adjust the leave when the employee returns to work.

- **Supervisors and staffing offices not sending timely notification of employee status changes to transaction initiators.** Communication and training is the key to preventing overpayments.

- **Processing duplicate appointments.** Utilize the resources available within the HR Transaction System to identify duplicate payments. Search Finalized Forms, review Appointment History details in the appointment form, and when appropriate, review previous compensation payment details within the Special Compensation form.
The eForm is official documentation that an employee has authorized another employee to approve Forms on their behalf.

1. The individual requesting signature authority must initiate the eForm. The HR Delegation of Signature Authority eForm has been combined with the Accounts Payable, Purchasing, and Travel Office eForm.
2. The individual granting authority approves the form.
3. Replace paper document with this new eForm.
4. The department must annually review approvals to ensure accurate records.

- eForm link
- Training document link
UI LiveWell Programs
Personal Health Assessment (PHA) Utilization

In 2013, the participation breakdown by Job Classification is:

- 89% - Professional & Scientific
- 64% - Merit
- Merit Supervisory Exempt*
- Faculty*

*Not reporting Merit Supervisory Exempt Faculty participation as there are fewer than 10 individuals.
Health Snapshot from 2009 - 2013

Org 04 has made considerable improvements in the areas of stress, exercise, and nutrition over the past three to five years.

Improving individual health behaviors positively impacts the organization in a number of ways. A key factor to supporting healthy behaviors is the ongoing engagement of faculty and staff through formal programs and informal social connections and peer support.

For Org 04, sleep remains an area of focus as there were slightly upward trends from 2012 to 2013. Additionally, emphasis should continue in the areas of physical activity and nutrition which positively impact BMI.
2013 Health Snapshot
OVPR&ED and UI

Using 2013 PHA data, Org 04 (N=216) is compared to The University of Iowa (N=12,189) on six health-related lifestyle areas. These behavioral risk factors contribute to the leading causes of chronic illness and disease. Org 04 faculty and staff are generally similar to the overall University population with the most notable positive differences in exercise and unhealthy eating.
Individuals with multiple behavioral risk factors have higher healthcare utilization and are among the most costly members of a workforce from a health and productivity standpoint. The organizational goal is to provide programming that maintains low-risk individuals at low-risk, while moving those individuals at high-risk to lower risk categories. This figure shows risk profiles for the 145 people in Org 04 who took their PHA in 2011 and 2013.

University data indicate that individuals in high risk categories with multiple behavioral health risk factors report approximately 16-28 hours more sick leave per year as compared to lower risk individuals. Individuals moving to lower risk categories result in an estimated annual cost savings and cost avoidance of up to $3.28 million for the institution.
1. Continue to engage faculty & staff through the Wellness Ambassador Network.

2. Encourage units to submit a Wellness Grant with emphasis on a health risk area.

3. Offer Group Health Coach Service to faculty and staff within the department.

4. Support faculty and staff participation in the Live Healthy Iowa programs.
Have you taken your Personal Health Assessment in 2014?

- Valuable, personal feedback in areas like stress management, exercise and nutrition!
- Receive up to $65 on your next month’s paycheck!
- Entered annually for the 2 $500 monthly drawings!
- Access to free, Personal Wellness Modules to help with - weight management, stress, nutrition, physical activity, managing high blood pressure and cholesterol, and depression prevention.
- Access to a free Health Coach Service!
- Recreation Membership Incentive! - Receive 50% off a single, faculty/staff membership. This provides access to five campus facilities, aquatics, and group fitness classes.
Small Group Health Coaching

- **Why?**
  - Convenience—participate at work
  - Support—Social support is a critical component for long-term success
  - Synergy—An environment where healthy habits are encouraged creates an energy that assists in making good choices

- **When:** 5 sessions over 8 weeks, each 45 minutes

- **Where:** A convenient location for your work group

- **Eligibility:** UI staff and faculty in 50% or greater; regular positions who are not currently working with a health coach

- **Questions:** 353-2973
Budget Officers Meeting Notes
New Guidelines for Tracking Gift Accounts

- Guidelines for Tracking Gift Accounts added to the Grant Accounting website
  - Information on how to set up gift WhoKeys
  - Rules for moving gift funds and expenditures.
FY15 Changes Affecting Cash Handling

- A separate local cash handling procedure for each payment receipt location.
- A specific employee name for each required cash handling role.
- New role – Cash Handling Control Manager
- Org-level Budget Officers in approval path.
- Update every 3 years or as changes occur.
Food and/or Alcohol Reimbursements

- Departments will now be required to provide the following information:
  - What was the event?
  - Why was food required for the event?
  - Provide names and affiliations of the individuals who attended the event.

- These questions will also be applied to all eVouchers with an expense type of Food or Food & Alcohol.
Refunds and Reimbursements will now be separate Types of Expenses

A new field called “Type of Reimbursement” will display and the initiator will be required to choose one of the following:

- Food
- Food and Alcohol
- Computer (desktop, laptop or printer)
- Other
## Fringe Rate Trend

<table>
<thead>
<tr>
<th>Fringe Pool</th>
<th>FY12 Charge Rate</th>
<th>FY13 Charge Rate</th>
<th>FY14 Charge Rate</th>
<th>FY15 Charge Rate</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical Faculty</td>
<td>23.10%</td>
<td>22.60%</td>
<td>21.40%</td>
<td>22.40%</td>
<td>Increase in health costs, vacation/sick payout due to retirement of employees, lower prior year surplus; offset by decrease due to exclusion of OPEB costs.</td>
</tr>
<tr>
<td>NC Faculty</td>
<td>28.40%</td>
<td>27.70%</td>
<td>27.80%</td>
<td>29.20%</td>
<td></td>
</tr>
<tr>
<td>P&amp;S</td>
<td>38.50%</td>
<td>38.00%</td>
<td>34.50%</td>
<td>35.70%</td>
<td></td>
</tr>
<tr>
<td>SEIU</td>
<td>39.30%</td>
<td>38.00%</td>
<td>36.00%</td>
<td>36.90%</td>
<td>Increase in health costs, lower prior year surplus; offset by decrease due to exclusion of OPEB costs.</td>
</tr>
<tr>
<td>Merit</td>
<td>55.00%</td>
<td>57.00%</td>
<td>51.00%</td>
<td>46.50%</td>
<td>Decrease due to exclusion of OPEB costs and prior year’s surplus.</td>
</tr>
<tr>
<td>Post Grad</td>
<td>21.00%</td>
<td>19.50%</td>
<td>15.80%</td>
<td>12.50%</td>
<td>Decrease in rate due to prior year’s surplus.</td>
</tr>
<tr>
<td>Fellowship</td>
<td>10.50%</td>
<td>11.00%</td>
<td>10.00%</td>
<td>6.00%</td>
<td>Decrease in rate due to prior year’s surplus.</td>
</tr>
<tr>
<td>House Staff</td>
<td>20.00%</td>
<td>30.00%</td>
<td>32.00%</td>
<td>39.00%</td>
<td>Increase in health costs as transition continues to University health plan.</td>
</tr>
<tr>
<td>Temporary</td>
<td>11.00%</td>
<td>11.50%</td>
<td>11.70%</td>
<td>11.70%</td>
<td>Relatively stable rate in the long term</td>
</tr>
<tr>
<td>Students</td>
<td>9.00%</td>
<td>9.00%</td>
<td>8.50%</td>
<td>9.20%</td>
<td>Relatively stable rate in the long term</td>
</tr>
<tr>
<td>Misc</td>
<td>4.20%</td>
<td>3.80%</td>
<td>4.40%</td>
<td>4.80%</td>
<td>Relatively stable rate in the long term</td>
</tr>
</tbody>
</table>
Looking Ahead

- Career Changes with an effective date of July 1 need to follow the deadlines below:
  - To OVPR&ED by May 1\textsuperscript{st}
  - To UI HR by May 15\textsuperscript{th}

- This includes market adjustment, career development, career shifts, etc.