

## Re: HR Banner Update (January 2009)

### **Banner History:**

Going back to November 2007, the HR Banner core team realized that the University's nine-month implementation window would not accommodate the "go-live" deadline for three major Banner components: HR Banner database, E-Timesheets and E-PAF systems. To ensure a successful conversion of data and a timely pay schedule, the core team decided to roll out HR Banner in three phases: payroll and benefits conversion, E-Timesheet system and E-PAF; the latter two in Summer 2008. Other components involving benefits, budget and compensation, and the development of training materials for each module, were developed and implemented concurrently.

As we began to plan for HR Banner implementation, and even more so once it was implemented, we experienced the realities of a shared database between our Finance, Advancement, Human Resources, Student Services, and Financial Aid partners. As a result of a "shared system," decisions impact all Banner systems and require constant communication and consensus among the department stakeholders to ensure system viability.

### **Payroll System:**

- In January 2008, HR Banner converted the old Plus EPAF and timesheet modules into the HR Banner system to continue the processing of paychecks for over 3,000 faculty, staff and student employees in three separate payroll cycles.
- Regular vacation accrual audits are performed to ensure that Banner is accurately calculating vacation leave based on years of service. Adjustments of the accrual tables are an ongoing activity to ensure that employees accrue vacation appropriate to their employee class and years of service.
- Vacation balance audits continue for all employee groups. Employees whose balances require adjustments are contacted individually and adjustments are made to their vacation balances.
- To better serve end-users and improve efficiency, the new check distribution organizations were implemented in November 2008. As a result of this implementation, checks and direct deposit notices are now sorted by check distribution codes. In response to internal audit recommendations, paycheck security was enhanced with controlled listings for signature.
- Also in November, the implementation of the transmission of all payrolls processed to the financial aid system was completed. Tracking student payroll from the beginning of the 2008-09 academic year is required to track and monitor financial aid awards.
- Ongoing meetings with the Student Employment unit and large employers of student employees began in November 2008 to gather feedback on the

student pay process and refine the process prior to the Spring semester hiring surge.

### **EPAF [Electronic Personnel Action Form]**

- Construction of the Banner EPAF system began in February 2008. This required the development of 65-plus EPAFs, each for a specific employment action and employee group; i.e., new hire, change in pay rate, separations, etc. The objective was to develop an EPAF system that was as intuitive as possible and required the least amount of data entry. It should be noted that the original EPAF package came with over 200 different EPAF forms.
- During the period of April through August 2008, intensive EPAF training was provided to EPAF originators and approvers. EPAF training programs to over 200-plus employees were delivered for the different EPAF modules [staff, student, approvers]. This effort also represented collaboration with our colleagues at CIT who helped us present EPAF labs to our users. In addition to in-class training, an extensive online library of audio-visual EPAF tutorials was developed and is available on our HR website (<http://www.usfca.edu/hr/banner/epaf.html>).
- Drop-in clinics for EPAF users were offered through the summer and before the peak hiring times during August and September 2008.
- The Budget Manager Network (BMN) was created and BMN meetings were instituted to update users on the latest developments since implementation during Summer 2008.

### **E-Timesheet System (ETS)**

- During the period from February through May 2008, the Banner e-timesheet system (ETS) was completed. The ETS team, working closely with our Business & Finance partners, built the timesheet organizations. As the system was created, the training materials and documentation were developed and presented to employees and supervisors. These materials are also available online at our HR website (<http://www.usfca.edu/hr/banner/etimesheets.html>).
- In order to create the ETS, HR staff did extensive outreach to colleges, schools and departments to collect information which included supervisor-employee approval groups and check distribution locations. Several colleagues from ITS, CPS, and Arts & Sciences joined our team temporarily to assist in implementing ETS. Staff individually matched each timesheet submitter with their respective approvers.
- During May through August 2008, training and rollout of the ETS began with a training outreach to e-timesheet approvers and submitters. A total of 20 training sessions were delivered in partnership with CIT, 500-plus approvers/supervisors were trained, and 3,000-plus employees were added to the ETS. The addition of USF staff to the ETS has almost eliminated the need for paper timesheets.

### **Compensation**

- In June 2008, coordinating closely with the Budget Office, Salary Planner, a Banner component, was successfully implemented to upload the merit increases for administrative staff.
- With the ratification of the new OPE contract, HR and the Budget Office successfully uploaded the across-the-board increases and retroactive payments through Salary Planner in October 2008.

### **Benefits**

- In addition to the several benefit tables created early in the implementation phase, the new Fidelity Roth SRA benefit was built and implemented in March 2008.
- In coordination with OneStop, HR uploaded all tuition remission vouchers for the Intercession and Spring 2009 semesters.

### **Budget**

- In November 2008, the first test of labor distribution reports, using three departments as pilot groups, was completed.
- In December 2008, the first labor distribution reports to budget managers were distributed. This project was a collaborative effort with Budget and ITS.

### **Looking forward:**

With much of the “heavy lifting” done during 2008, we now look forward to enhancing existing HR Banner services. Here are some of the projects planned for 2009:

- Reduce paper use and processing time; Payroll and ITS are developing web-based direct deposit summaries (similar to the current paper pay vouchers). These are expected to be live in Spring 2009.
- Continue to refine the ETS for easier use based on continued feedback from our end-users.
- Continue to refine and enhance the EPAF system to increase processing efficiency and accuracy for our submitters and approvers.
- Develop more informational and control reports requested by department and division managers.
- Continue outreach and partnerships with end users and the campus community to resolve processing bottlenecks and to re-engineer current processes that are less than optimal.
- In collaboration with Institutional Research, develop the Faculty Data component of HR Banner.
- Continue to review and refine the entire payroll process to ensure an efficient and timely payroll process.

If you have any comments or questions about these processes or about what to expect in the future, please feel free to contact me at [HRBannerUpdate@usfca.edu](mailto:HRBannerUpdate@usfca.edu).

Thank you for your continued support; and happy 2009.