

# Magical PAF Machine (MPM) Getting Started Guide

*v. 07-24-2015*



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## Overview

The concept behind the Magical PAF Machine (MPM) is simple... automation!

MPM replaces the Excel “faculty salary calculator” (FSC) worksheet for most payroll actions and eliminates the need to handwrite carbon-copy personnel action form (PAF). The MPM significantly reduces the need for interoffice routing of approval by moving towards a post-audit process, relying on reports that highlight exceptions for review and approval.

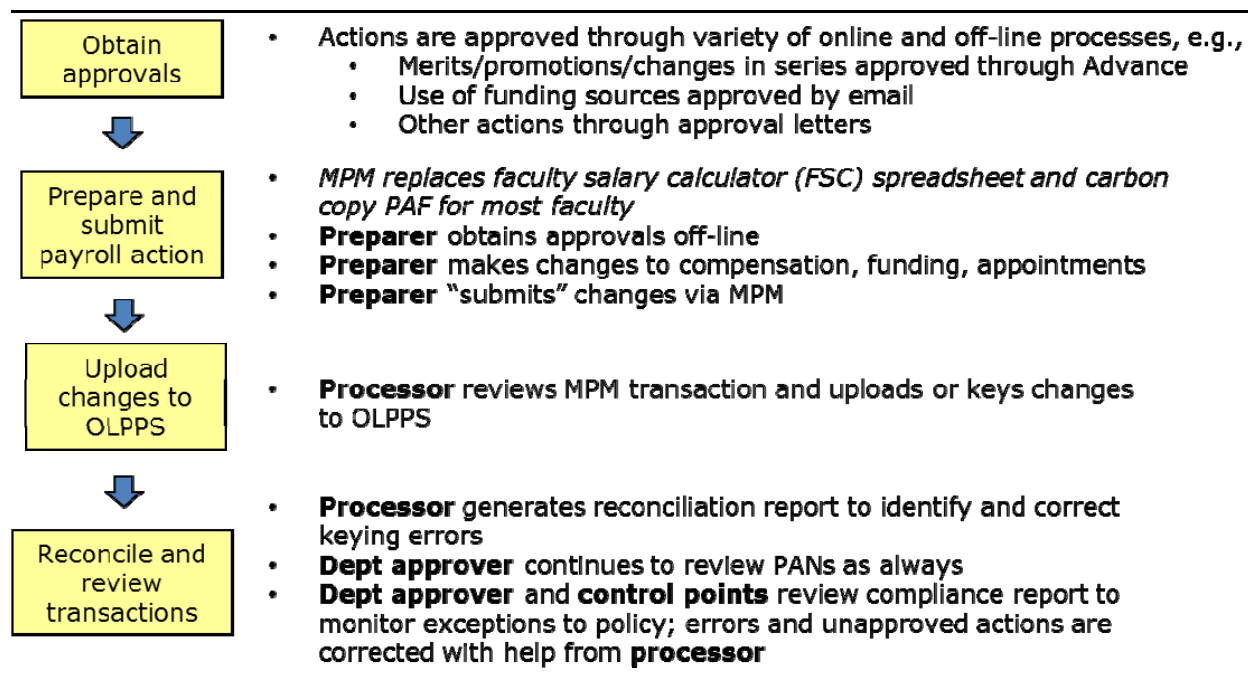
## Bridging Finance and HR

MPM is a processing tool that bridges the worlds of finance and human resources by performing the three essential functions of faculty payroll:

- 1) Allows Finance to plan and implement funding, appointment and compensation changes without requiring specific expertise in payroll rules
- 2) Facilitates compliance by performing automatic rule checks for financial, academic affairs and other policies
- 3) Enables HR to focus efforts on more value-added activities, such as reviewing policy exceptions and reconciliation mismatches (as opposed to transaction processing)

## Payroll Action Work flow

MPM enables a streamlined approach to processing faculty payroll transactions by changing current practice and shifting the review of faculty payroll changes to a post-key (but pre-compute), and reduced keying by enabling users to upload MPM payroll changes directly into OLPPS via web services.



## Login and Access

User can log into the MPM using their MyAccess credentials at: <http://myaccess.ucsf.edu> or <http://mpm.ucsf.edu>. Access is restricted by department ID. For access set up and changes, please email [MPMSupport@ucsf.edu](mailto:MPMSupport@ucsf.edu).

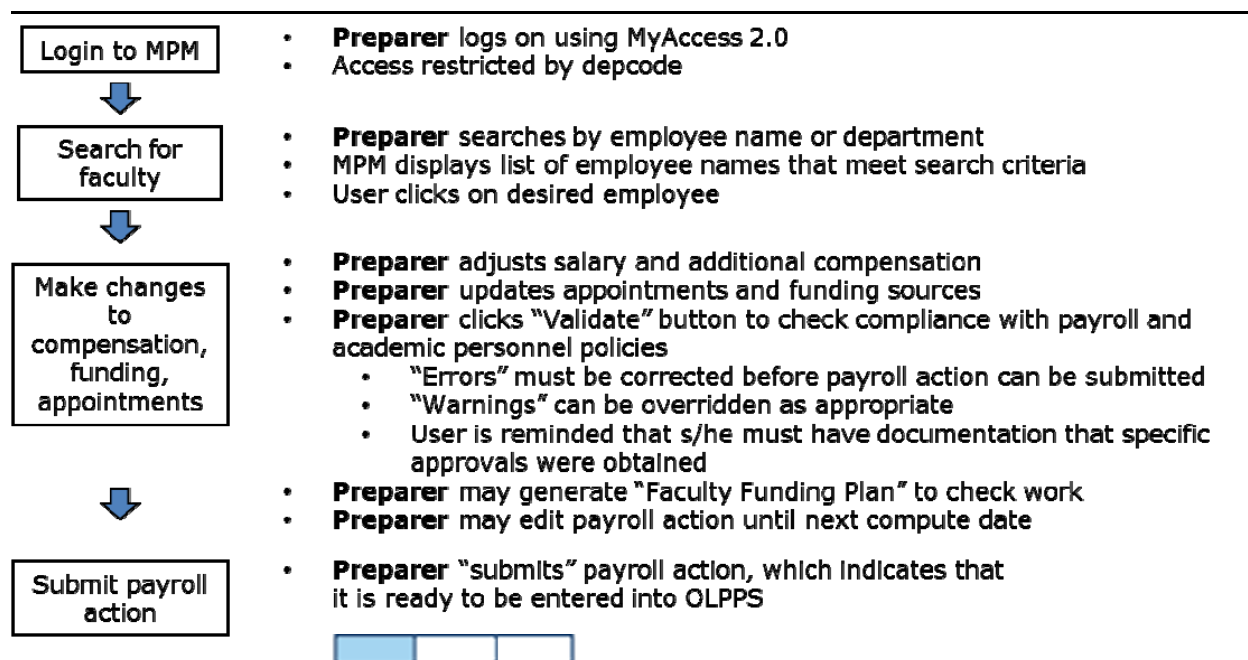
## Roles and Responsibilities

Departments, Schools and HR Shared Services units have different structures and processes, therefore actual roles and responsibilities will vary.

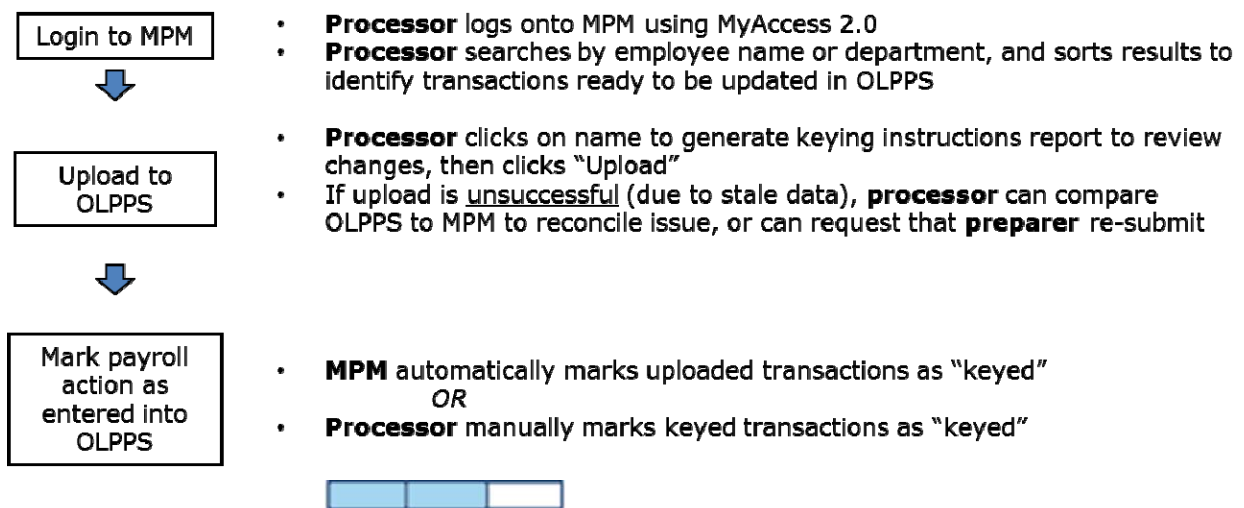
In general, users are:

- **MPM Preparer:** *someone familiar with the faculty's compensation and funding sources, and is responsible for preparing funding worksheets/FSCs (e.g., post-award analyst, finance analyst, MSO).*
- **MPM Processor (Keyer):** *must be OLPPS-certified and authorized to ensure that the payroll action is appropriate for keying or upload (e.g., HR generalist or HR transactional unit).*
- **MPM Quality Control:** *once processed in OLPPS, the payroll action must be reviewed for accuracy, approvals and policy compliance by Departments and Control Points (HR Shared Services, Dean's Offices, Academic Affairs).*

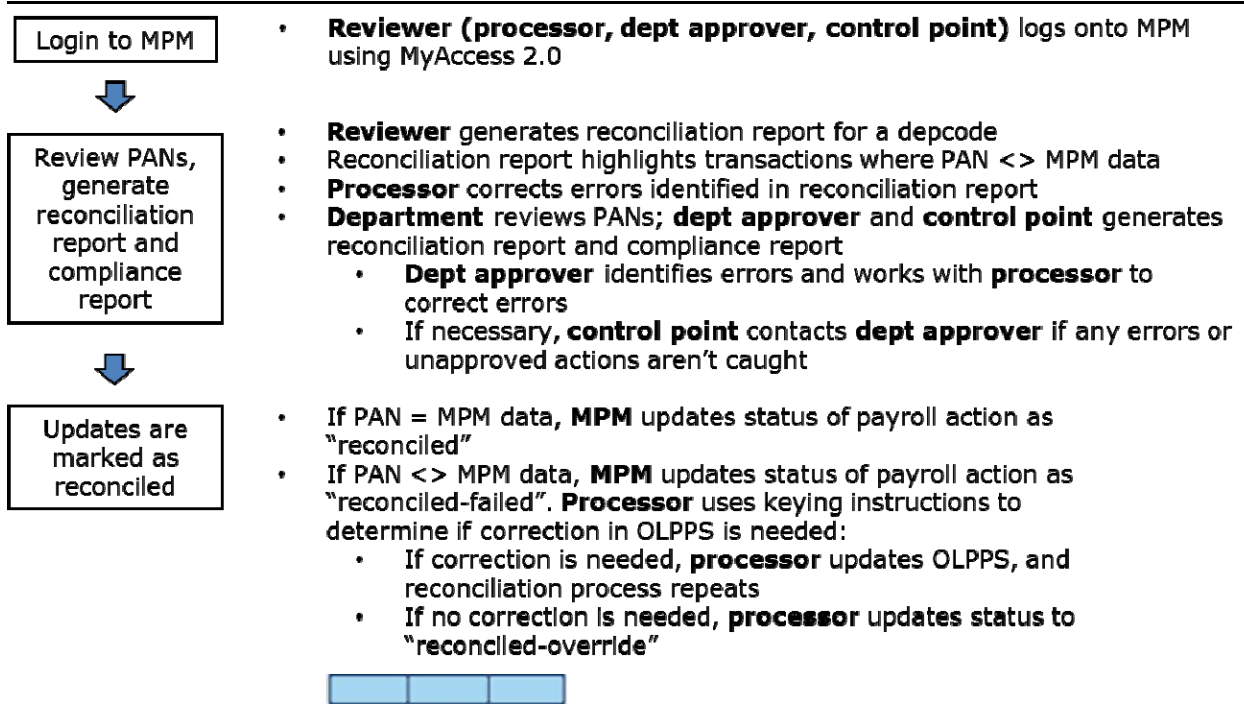
## Work flow for Preparer (post-award analyst, finance analyst, MSO)



## Work flow for the Processor (HR generalist or HR transactional unit)



## Work flow for Quality Control (Department, Control Points)



## MPM Functionality

MPM can process the vast majority of payroll actions for UCSF comp plan faculty. Below is a comprehensive summary of all MPM functionality.

<p><b>ANNUAL RENEWAL OF APPOINTMENTS</b></p> <ul style="list-style-type: none"> <li>Funding changes</li> <li>BSE changes</li> <li>Merits, promotions, change in series</li> <li>Salary changes (X, Y and scheduled Z payments)</li> <li>Appointment % changes</li> <li>Joint appointment (WOS) changes</li> <li>VAMC appointments</li> </ul> <p><b>MID-YEAR CHANGES</b></p> <ul style="list-style-type: none"> <li>Funding changes</li> <li>Appointment % changes</li> <li>Joint appointment (WOS) changes</li> </ul> <p><b>RETRO PAF CHANGES*</b></p> <ul style="list-style-type: none"> <li>Retroactive merits, promotions, change in series with or without salary changes (for July 1<sup>st</sup> effective date)</li> <li>Retroactive funding changes</li> </ul>	<p><b>RANGE ADJUSTMENTS (RAs)</b></p> <ul style="list-style-type: none"> <li>Batch-processing faculty RAs by selecting options to: increase X and reduce Y; increase X and leave Y unchanged</li> <li>Ability to update/RA individual records, if needed</li> </ul> <p><b>AUTOMATION</b></p> <ul style="list-style-type: none"> <li>Rule-checking for calculations, policy and compliance</li> <li>Batch processing of range adjustments</li> <li>Connection to Advance (checks approval of appointment changes)</li> <li>Batch upload to OLPPS</li> <li>Reconciliation process (to confirm data entry in OLPPS matches MPM)</li> </ul>	<p><b>REPORTS</b></p> <ul style="list-style-type: none"> <li>PAF keying instructions</li> <li>Faculty funding plan</li> <li>Compliance report</li> <li>Reconciliation report</li> <li>LX/RX and PET analysis (summary of DOS codes)</li> <li>Faculty compensation overview (summary of X, Y, Z salary)</li> <li>Metrics report</li> <li>Security access report</li> <li>Reports usage</li> <li>PAF archive</li> </ul> <p><b>SEARCH</b></p> <ul style="list-style-type: none"> <li>View transaction status</li> <li>Export faculty list to Excel</li> </ul> <p><b>SECURITY</b></p> <ul style="list-style-type: none"> <li>Set up access accounts</li> </ul>	<p><b>OUT OF SCOPE**</b></p> <ul style="list-style-type: none"> <li>Recall faculty</li> <li>Above scale/ Off scale faculty</li> <li>Non-faculty academics (e.g., Specialist series)</li> <li>Visiting and Acting titles</li> <li>Faculty ineligible for range adjustments (RAs)</li> <li>Mid-year (non-July 1st) appointment changes to rank, series, and step</li> <li>Mid-year (non-July 1st) Y salary renegotiations (outside of RAs)</li> <li>Paid-to-WOS, WOS-to-Paid</li> <li>New hires and initial faculty appointments (e.g., moving from Postdoc to Faculty)</li> <li>Separations/retirements</li> <li>Leave of absences</li> <li>Preparation of LX/RX and PETs for retroactive pay correction</li> <li>Connection to Web PAN</li> </ul>
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\*For retroactive changes, MPM does not include the preparation of LX/RX or PETs, though LX/RX PET Calculator provides some of the analysis needed to prepare PETs and LX/RXs.

\*\*For out of scope actions, manual processing outside of the MPM may be required. Submit changes through the HR Service Request System (SRS).

## MPM at a Glance

### Search Tab

User can search for a faculty member by name or search for multiple records by department ID or department name. The search results are sortable by clicking on the column headers allowing users to filter by appt %, series, rank, appointment end date, etc. The search screen displays the status bar allowing users to track the status of the payroll action.

Search by individual faculty by name or multiple records by Dept ID or Department

Sort search results by any of the columns (e.g., series, appt expiring; status)

Search results show PAF status

### Status Bars

Each status bar represents a stage in the payroll work flow process. Users can click on “Last PAF Update” column to sort by transaction date (e.g., newest or oldest transactions), and in conjunction with the “Status Bar” column, user can identify where their MPM request is in the payroll work flow.

- Request submitted in the MPM
- Request uploaded or keyed (processed) in OLPPS
- Request reconciled successfully

A red bar indicates a processing discrepancy in which the HR Shared Services will analyze and resolve the issue. User will see that the issue has been resolved when the red bar disappears.

- Upload Error: request was unable to upload to OLPPS
  - HR Shared Services will manually key payroll changes into OLPPS.
  - HR Shared Services will click “Keyed” button in the MPM, and after overnight reconciliation, the 2<sup>nd</sup> status bar in the MPM will change to blue.
- Reconciliation Error: MPM does not match OLPPS data
  - HR Shared Services will review keying instructions report against PAN or OLPPS to determine if the mismatch is intentional or a keying error. *E.g., Intentional keying could be that the*

keyer chose another appointment or distribution line other than what was instructed on the MPM keying instructions report.

2. HR Shared Services will click “Reconciled-Override” which will change the 3<sup>rd</sup> status bar in the MPM to gray.

- Reconciliation Override: request is complete. Any discrepancy or mismatch has been resolved and user can submit another payroll action.



## Reports Tab

MPM offers several types of reports to assist with planning, processing, and post-audit review. User can access most of the MPM reports on the Reports tab. User can search for multiple faculty records by selecting the type of report and inputting the search criteria. In the search results, the faculty’s name for most of the reports is a hyperlink to the selected report.

A screenshot of the MPM Reports tab interface. The top navigation bar has tabs for Search, Batch Range Adjustment, Reports (highlighted with an orange box), and Security. Below the navigation bar, there is a section titled "Please Select:" with radio buttons for Keying Instructions, FFP, Reconciliation, Compliance Report, Faculty Compensation Overview, and Metrics Report. Below this, there are input fields for Last Name, First Name, and Dept ID. There is also a dropdown menu for PAF Status with "Submitted" selected. At the bottom right, there are "Search" and "Clear" buttons.

- **Keying Instructions**  
Search by PAF Status to generate a list of records in ‘submitted’ or ‘keyed’ status. This function is useful for the HR Shared Services in identifying MPM transactions that have been submitted by departments and are ready for processing.
- **Faculty Funding Plan (FFP)**  
User can access FFP reports for the current or past fiscal year. The FFP reports in this section displays actual and projected information as reflected in DPE (distribution of payroll expense) and OLPPS. It does not include FFP reports reflecting pending updates on submitted transactions that have not yet been processed in OLPPS. Users can access the FFP report for submitted transactions on the Search tab by individual faculty record.
- **Reconciliation report**  
An MPM reconciliation process takes place nightly and compares MPM keying instructions with OLPPS PAN results. Any mismatches are highlighted on the reconciliation report. This does not replace the mandatory PAN review, but instead serves as a tool to help the HR Shared Services analyzed and resolve keying mismatches.
- **Compliance report**  
Designed to help Departments, HR Shared Services, and Deans’ Offices review faculty payroll actions to ensure that errors are caught and corrected before payroll is processed each month. This report also highlights payroll changes that may require approval by the Deans’ Offices and Academic Affairs, including faculty advancements, changes to assignments of state FTEs, and various policy exceptions.



- Faculty Compensation Overview**  
 Search by Dept ID for a list of faculty members and their compensation summary: X, Y, and Z salary breakdown. Also captured on this report is advancement action and effective date. This report is exportable to MS Excel.
- Metrics report**  
 This report allows review and analysis of MPM transactions. It captures transaction detail to better track users, volume, processing trends, turnaround times, and reconciliation status. The data can be exported to and analyzed in different ways in Excel.
- LX/RX PET Calculator (DOS code summary)**  
 This report is found on the Payroll Preparation screen once user clicks on a faculty record from the search results. This report provides a summary of the faculty's DOS code calculations and helps with some analysis needed to prepare PETs and LX/RXs.
- PAF Archive**  
 This is an archive of all keying instructions and LX/RX reports for transactions that have been submitted in the MPM since 5/1/2013. You can search by faculty or department and filter by 'PAF Status' to review transactions that are pending or processed.
- Reports Usage**  
 This is log that tracks when the MPM reports have been accessed. The report offers user a date range and will display the report name, user name, and date accessed. This report is to help gauge usage and allow Departments, HR Shared Services and the Dean's Offices to provide direct outreach efforts to those who should be regularly reviewing the various reports (i.e., compliance report).

## Payroll Preparation Screen

The preparation screen is pre-populated with the faculty member's current appointment and funding information from OLPPS. This interface allows user to prepare faculty payroll and funding changes all on one screen.

This replaces the FSC worksheet and replicates existing FSC functions:

- Calculates covered compensation (X+X') based on faculty's rank, step and scale
- Allows user to set additional negotiated compensation (Y)
- Performs and assigns appropriate DOS code calculations
- Calculates over-the-cap amounts
- Ensures salary is at or above minimum salary level

**Summary**

UCSB ID: 00 UC (Y+Y): \$246,930.00

Fiscal Year: 2013-2014 UC (Scheduled Other Comp): \$0.00

Appointment Begin: 07/01/2012 VA: \$0.00

Appointment End: 06/30/2014 HHC: \$0.00

Last PAF Update: 07/25/2013 Total Compensation: \$246,930.00

(Powered by % App)

Buttons (e.g., to validate, submit, etc.)

Reset Validate Submit Print Back to Search

LU (FY) - FET Calculator FFF (FY) 2013-2014: From OLPPS

**Appointment**

Appointment	Department	Effective Date	End Date	Series	Rank	Title Code	Step	APR/Scale	% UC App	Base Salary [X]	Additional Negotiated [Y]	Scheduled other Comp [Z]
Pharmacy 404	105-0405-0200-001		06/30/2014	Serial T	Assoc	1404-00000-0000-0000-0000	STEP 1	\$246.9	0.0000	\$246,930.00	\$0.00	\$0.00

WOS

Appointment	Fund	Dept ID	Department	Project	Func	Begin Date	End Date
Add New							

BSE

Appointment	Fund	Dept ID	Department	Project	Func	Step	Begin Date	End Date	End To
Add New									

**Funding Sources**

Funding Sources (X + Y) for primary (paid) appointment

Fund	Dept ID	Project	Func	Plan	Project/Fund Name	WOS Cap	Begin Date	End Date	End To
0	0014	000000	00		UC Central and Medical Center Plan	None	07/01/2012	06/30/2014	0.0000
0	0001	000000	00		A Multi-Center Group Study: Private Dermal	None	07/01/2012	06/30/2014	0.0000

By Month

Fund	Dept ID	Project	Func	Plan	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Ang 14
Add New																	

**Over-the-Cap (X)**

Over the cap funding source (X)

By Month	Fund	Dept ID	Project	Func	Plan	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Add New																		

**Over-the-Cap (Y)**

Over the cap funding source (Y)

By Month	Fund	Dept ID	Project	Func	Plan	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Add New																		

**Scheduled Z payments (e.g., monthly BYN)**

Scheduled other comp. (e.g., BYN, BYZ, STP, STI) Paid Monthly

Appointment	Fund	Dept ID	Project	Func	Plan	Dos Code	Begin Date	End Date	Reason	Description	Amount Monthly	Total
Add New												

**VAMC/HHM**

VAMC

VAC Percentage	Actual Annual Amount	Begin Date	End Date
Add New			

HMM

HMM Percentage	Actual Annual Amount	Begin Date	End Date
Add New			

**Comments**

COMMENTS (To appear on keying instructions report)

## Buttons

Buttons located on the preparation screen allow user to access reports and validate work. The buttons are located both on top and at the bottom of the screen. Certain buttons perform mathematical calculations while others validate compliance with academic and payroll policies. Best practice is to utilize the buttons after making changes to each section to ensure you are on the right track and before submitting a transaction.

BUTTON	WHAT IT MEANS
<b>Reset</b>	To clear all changes and start over.
<b>Validate</b>	To check calculations and compliance with academic and payroll policies. MPM will give you messages if there is incorrect or questionable data entered: <ul style="list-style-type: none"> <li>“Errors” (in red font) must be corrected before payroll action can be submitted.</li> <li>“Warnings” (in orange font) can be overridden as appropriate.</li> </ul>
<b>Submit</b>	To submit your payroll transaction. Submit will generate the keying instructions report and faculty funding plan (FFP) report.
<b>Print</b>	To print a paper copy.
<b>LX/RX PET Calculator</b>	To view a report of DOS code calculations. Helps with the analysis for PETs and LX/RXs. NOTE: This report is accessible only on the preparation screen, so print the report if needed for the preparation of PETs and LX/RXs.
<b>Back to Search</b>	To go back to the search screen.
<b>FFP for Current FY or Previous FY</b>	To view the FFP report to see actual and projected data. Calculations reflect OLPPS and Weblinks distribution of payroll expense.
<b>Calculate</b> (this button is located on the Funding Source section)	To update funding distribution percentages. The MPM will automatically open the 12-month grid reflecting the monthly distribution percentages and fund sources.
<b>Add New and Delete</b> ( ) (these buttons are located throughout each section)	To add a new appointment or distribution line of each section. To delete distribution line.

## Error and Warning Messages

Business rules were developed to capture payroll and policy compliance in the usage of DOS codes, title codes, salary scale, funding sources, NIH cap levels, assignment of 19xx and BSE, Z payments, etc.

The MPM will perform rule-checking and flag payroll actions that may contain potential mistakes before submit can take place. User will be alerted of these potential mistakes by displayed messages classified as “Error” or “Warning”.

**A Warning message** serves as an alert to the user to check areas that may be potential errors or warrant exceptions. Warning messages can be overridden as appropriate and the transaction can be submitted.

All warning messages appear in orange. Some examples are warning messages are:

- *APPROVALS REQUIRED*  
*- Inter-department Funding: 447190 PSYCHIATRY*
- *Warning: Please double-check that appropriate salary caps are being used for federal and federal flow-through funds.*
- *Warning: Total of distribution percentages does not equal appointment percentage.*

**An Error message** is strictly against payroll and policy compliance. Error messages must be corrected before the payroll action can be submitted. All error messages appear in red.

Some error messages will require OLPPS data correction and clean-up (e.g., APU, title codes, appointment begin and end dates, etc.) before an MPM payroll action can be processed. These types of messages will instruct users to contact their HR Shared Services before proceeding. Some examples are:

- *Error: Please contact your HR Shared Services. There are multiple appointments with the same title code. Data cleanup is required before you can use the MPM for this faculty member.*
- *Error: Please contact your HR Shared Services: the MPM cannot recognize base salary. Data cleanup is required before you can use the MPM for this faculty member.*

Other common error messages which will require the MPM Preparer to correct before submitting the transaction includes:

- *Error: Invalid Business Unit-Fund-DeptId-Project-Function-Flex combination/value(s).*
- *Please remove the salary caps for non-federal and federal flow-through funds.*
- *Error: Please increase effort on 19xx fund: At least 1/3 of a Ladder Rank faculty's FY base salary (Scale 0) must be paid by 19xx.*

## Processing Funding Changes

Make changes to funding sources, NIH salary caps, and distribution percentage throughout the year. Effective March 2014, the chart of accounts (COA) changes what we currently think of as DPA-Fund, expanding it into six chart fields: Business Unit - Fund - Dept ID - Project - Function - Flex Field.

MPM only accepts changes that begins on the first and ends on the last day of the month. To process mid-month changes (e.g. effective the 15<sup>th</sup> of the month), use an averaging methodology for the month.

To comply with HBS requirements, the begin date field is disabled and cannot be modified. Best practice is to always end a distribution line by setting an appropriate end date. Use the delete button (🗑️) located on the left side of the fund field if you want to eliminate a distribution line that has not yet started.

In the Funding Sources section, user will see a snapshot of historical and current funding distributions:

- Blue indicates current distribution data that exist in OLPPS
- White reflects historical distribution data that have ended

**1a** points to the Fund field. **1b** points to the End Date field. **2** points to the 'Add New' button. **3** points to the 'Calculate' button. **4** points to the 'Total' row in the 'Y By Month' grid.

Fund	Dept ID	Project	Func	Flex	Project/Fund Name	NIH Cap	Begin Date	End Date	Dist %
4400	138374	117705A	44		Immunologic Monitoring of GM-C/Private Contract	None	07/01/2013	06/30/2014	0.0500
4400	138374	118885B	44		Phase II Trial of Intratumoral/Clinical Drug Trial	None	07/01/2013	06/30/2014	0.0500
4300	138374	119812A	44		A Single Center, Open Label, P/Clinical Drug Trial	None	07/01/2013	06/30/2014	0.1000
4300	138374	112616B	44		Prostate Cancer Therapeutic C/Private Grant	None	07/01/2013	06/30/2014	0.1311
4301	138374	119126B	44		Randomized Phase II Trial of a/Private Contract	None	07/01/2013	06/30/2014	0.0400
5014	138423	1000000	45		MC clinical care/Medical Camp Plan	None	07/01/2013	06/30/2014	0.1289
4000	138374	111418A	44		Prostate Cancer Immunotherapy/Federal Gv Grant	20 - NIH \$179700	07/01/2013	06/30/2014	0.3000
4000	138374	119674A	44		Prostate and Prostate Cancer/Federal Gv Grant	20 - NIH \$179700	07/01/2013	06/30/2014	0.3000

Y By Month	Flex	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Avgth
5014 - 138423-1000000-46		0.1289	0.1289	0.1289	0.1289	0.1289	0.1289	0.1289	0.1289	0.1289	0.1289	0.1289	0.1289	0.1289
4301 - 138374-117705A-44		0.0500	0.0500	0.0500	0.0500	0.0500	0.0500	0.0500	0.0500	0.0500	0.0500	0.0500	0.0500	0.0500
4000 - 138374-111418A-44		0.3000	0.3000	0.3000	0.3000	0.3000	0.3000	0.3000	0.3000	0.3000	0.3000	0.3000	0.3000	0.3000
4400 - 138374-109812A-44		0.1000	0.1000	0.1000	0.1000	0.1000	0.1000	0.1000	0.1000	0.1000	0.1000	0.1000	0.1000	0.1000
4000 - 128374-119674A-44		0.2000	0.2000	0.2000	0.2000	0.2000	0.2000	0.2000	0.2000	0.2000	0.2000	0.2000	0.2000	0.2000
4301 - 138374-118136B-44		0.0400	0.0400	0.0400	0.0400	0.0400	0.0400	0.0400	0.0400	0.0400	0.0400	0.0400	0.0400	0.0400
4300 - 138374-112616B-44		0.1311	0.1311	0.1311	0.1311	0.1311	0.1311	0.1311	0.1311	0.1311	0.1311	0.1311	0.1311	0.1311
4400 - 138374-118885B-44		0.0500	0.0500	0.0500	0.0500	0.0500	0.0500	0.0500	0.0500	0.0500	0.0500	0.0500	0.0500	0.0500
<b>Total</b>	<b>1.0000</b>	<b>1.0000</b>	<b>1.0000</b>	<b>1.0000</b>	<b>1.0000</b>	<b>1.0000</b>	<b>1.0000</b>	<b>1.0000</b>	<b>1.0000</b>	<b>1.0000</b>	<b>1.0000</b>	<b>1.0000</b>	<b>1.0000</b>	<b>1.0000</b>

- [1a] Make changes by typing over fields if begin and end dates are within the period of your desired changes, OR
- [1b] Change the end date to end the existing distribution line.
- [2] Use “Add New” button to add new funding distribution line. Use “Delete (🗑️)” button to eliminate a distribution line that has not yet started.
- [3] Use “Calculate” button after making your funding changes. By clicking on the calculate button, MPM automatically opens a 12-month grid reflecting your changes.
- [4] Ensure that the total distributions add up correctly to match the faculty’s appointment %.

## Processing Renewal of Appointments

The annual faculty renewal process usually begins in April through July. For faculty renewals, the MPM payroll preparation screen will default to “Faculty Renewals” mode, which means the data in MPM is pre-populated with existing appointment and funding information and begin and end dates are automatically updated to reflect the new fiscal year.

Refer to the screenshot below, followed up the step by step guidelines on the next page.

**UCSF** University of California, San Francisco | About UCSF | Search UCSF | UCSF Medical Center

**MPM**

Search Batch Range Adjustment Reports Security

[Logout](#)

**John Smith**

UCSF ID: 2015-2016

Fiscal Year: 2015-2016

Appointment Begin: 07/01/2004

Appointment End: 12/31/9999

Last PAF Update: 04/10/2015

**RENEWALS 2015-2016**

UC (X + Y): \$241,600.75

UC (Scheduled Other Comp): \$44,160.12

VA: \$0.00

HMMI: \$0.00

Total Compensation: \$285,760.87

(Pro-rated by % Appt)

Reset
**Validate**
Submit
Print
Back to Search

LX/RX - PET Calculator
FFP (FY 2014 - 2015 ; from OLPPS)

- To process a renewal, make sure the Fiscal Year is set as 2015-2016 “Renewals”. You should finish submitting current year funding changes prior to entering the renewal.

Appointment	Department	Effective Date	End Date	Series	Rank	Title Code	Step	APU/Scale	% UC Appt	Base Salary [X]	Additional Negotiated [Y]	Scheduled other Comp. [Z]
Primary-1721	MED-INTD-CORE		12/31/9999	Ladder Rank	Full	1721-PROF-ACOMP	STEP 4	SCALE 3	1.0000	\$157,300.00	\$84,300.75	\$44,160.12
Additional-1110	Micro-General		06/30/2015	Ladder Rank	Full	1110-PROF-FY	STEP 4		0.0000			\$0.00

WOS

Appointment	BU	Fund	Dept ID	Department	Project	Func	Begin Date	End Date
Additional-1110	C	1900	129077	Micro General	1111111	40	07/01/2013	06/30/2015

Add New

BSE

Appointment	BU	Fund	Dept ID	Department	Project	Func	Step	Begin Date	End Date	Diet %
Primary-1721	C	1900	138321	MED-ADITH-CORE-GENERAL	1111111	43	STEP 4	07/01/2014	12/31/9999	1.0000

Add New

- Update information to appointment and salary. If faculty is approved for a merit or promotion, use drop-down menu to make the changes. Also update and renew any WOS joint appointment that the faculty may have. To change salary, adjust the “Additional Negotiated (Y)” box. Click ‘Validate’ to confirm data entry and review total compensation summary.

Funding Sources ( X + Y ) for primary (paid) appointment

BU	Fund	Dept ID	Project	Func	Flex	Project/Fund Name	NH Cap	Begin Date	End Date	Diet %
C	1900	138321	1111111	46		General Unspecific State educational appor	None	7/1/2015	6/30/2016	0.2000
C	1900	138321	1111111	45		General Unspecific State educational appor	None	7/1/2015	6/30/2016	0.0500
C	4300	138436	1172137	44		R613-CR11 ENGEL-Private Grant	24 - 10M \$183300	7/1/2015	6/30/2016	0.5000
C	4000	138436	120431A	44		R01A017/170 ENGEL-Federal Gv Grant	24 - 10M \$183300	7/1/2015	6/30/2016	0.2500

By Month: Flex Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Aug%

Add New

**Calculate**

- If faculty has a BSE, ensure appropriate funding effort is charged to 1900 funding source.

- Carefully review the funding sources and ensure that projects are capped correctly in the MPM. If faculty's salary rate is equal to a salary cap, then select none.

- Begin and end dates are automatically updated to reflect the new FY. When making changes to the dates, do not select mid-month end dates.

- Make sure you click ‘Calculate’ to view a full 12-month funding snapshot and ensure each month adds up to the faculty member's appointment effort.

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- Only use discretionary funds for over-the-cap (OTC) amounts. The one exception is using 19xx on XAC. Click "LX/RX PET Calculator" on the top of the screen to determine XAC amount and make sure you place 19xx fund on the first distribution line in the OTC X section.

- Pay extra attention if your faculty member has multiple fund sources for their OTC amounts.

- Scheduled other comp section is used when the faculty has a monthly payment associated with an administrative role, clinical incentive, etc. Be sure to set begin and end dates for the payment.

- Provide any relevant notes or details about the renewal in the Comments Section.

- When submitting in the MPM, you do not need to submit a ticket in the SRS.

#### Over the cap funding source ( X )

By Month	BU	Fund	Dept ID	Project	Func	Flex	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
O	C ▼	5014	138436	2001017	45		\$1,910.20	\$1,910.20	\$1,910.20	\$1,910.20	\$1,910.20	\$1,910.20	\$1,910.20	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$13,371.40
O	C ▼	5014	138436	2001017	45		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,804.41	\$1,804.41	\$1,804.41	\$1,804.41	\$1,804.41	\$9,022.05
Total:							\$1,910.20	\$1,910.20	\$1,910.20	\$1,910.20	\$1,910.20	\$1,910.20	\$1,910.20	\$1,804.41	\$1,804.41	\$1,804.41	\$1,804.41	\$1,804.41	\$22,393.45

[Add New](#)

#### Over the cap funding source ( Y )

By Month	BU	Fund	Dept ID	Project	Func	Flex	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
O	C ▼	5014	138436	2001017	45		\$1,747.93	\$1,747.93	\$1,747.93	\$1,747.93	\$1,747.93	\$1,747.93	\$1,747.93	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$12,235.51
O	C ▼	5014	138436	2001017	45		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,695.50	\$1,695.50	\$1,695.50	\$1,695.50	\$1,695.50	\$8,477.90
Total:							\$1,747.93	\$1,747.93	\$1,747.93	\$1,747.93	\$1,747.93	\$1,747.93	\$1,747.93	\$1,695.50	\$1,695.50	\$1,695.50	\$1,695.50	\$1,695.50	\$20,713.41

[Add New](#)

#### Scheduled other comp. (e.g., BYN, BYZ, STP, ST1) Paid Monthly

Appointment	BU	Fund	Dept ID	Project	Func	Flex	Doc Code	Begin Date	End Date	Reason	Description	Amount Monthly	Total
O Primary-1721 ▼	C ▼	5014	138436	2000000	45		BYN ▼	07/01/2014	06/30/2015	BYN - Leadership/Administrative Role ▼	DD Chief Bonus	\$1,666.67	\$20,000.04
O Primary-1721 ▼	C ▼	7710	138436	7500371	40	CM012	BYN ▼	07/01/2014	06/30/2015	BYN - Leadership/Administrative Role ▼	Director of WPHO Program	\$2,013.34	\$24,160.08
												Total =	\$44,160.12

[Add New](#)

#### VAMC

VA Percentage	Actual Annual Amount	Begin Date	End Date
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[Add New](#)

#### HHMI

HHMI Percentage	Actual Annual Amount	Begin Date	End Date
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[Add New](#)

#### COMMENTS (To appear on keying instructions report)

RENEWAL 7/15-6/30/16. FUNDING APPROVED.

Characters remaining: 160

[Reset](#) [Validate](#) [Submit](#) [Print](#) [LX/RX - PET Calculator](#) [Back to Search](#)

### Step by Step Guidelines for Renewals (FY16)

1. Access MPM via MyAccess: <https://myaccess.ucsf.edu>
2. On Search screen, search for faculty member and click on the name
  - If you're unable to click on the name:
    - i. This could mean that the current appointment end date is beyond 6/30/15 (e.g., faculty hired 9/1/14-8/31/15), so please wait after July 1<sup>st</sup> to make additional funding or payroll changes in the MPM
    - ii. This could also mean that the faculty member is out of scope (e.g., above scale faculty); please submit an SRS ticket for the renewal
3. Once you click on the name to get to the record, confirm fiscal year is set as 2015-2016 for "Renewals 2015-2016"
4. If merit/promotion is approved, use drop-down to select new rank, title code, and/or step
  - You can refer to the last column on the search screen "Action Approved, Not Yet Recorded" to verify if the 7/1/15 action is approved
  - Also update and renew any joint appointment (WOS) that a faculty member may have
  - Error message will appear if merit/promotion has not yet been approved
5. Adjust 'Y' (Additional Negotiated) salary up or down, as necessary
  - If you intend for the total negotiated salary to increase, then you will need to adjust the Y-salary to reflect the change
6. Click 'Validate' to confirm data entry and review total compensation summary
7. Review 'Funding Sources' section and make changes, as needed
  - Please carefully review the funding sources and ensure that projects are capped correctly in the MPM
  - Begin and end dates are automatically updated to reflect the new FY
8. Click 'Calculate' to view a full 12-month funding snapshot
  - Ensure each month adds up to the faculty member's appointment effort
9. Click 'Validate' and address any errors
  - Contact your AP Generalist if you cannot resolve the error
10. View reports (e.g., FFP, LX/RX – PET Calculator), as needed
11. Utilize the 'Comments' section
  - Provide any relevant notes or details about the renewal
12. Click 'Submit'
  - Your AP Generalist will be reviewing MPM regularly for submitted renewals
  - When submitting in the MPM, you do not need to submit a ticket in the SRS



## Best Practices and Reminders

### MPM Preparer

#### APPOINTMENT AND COMPENSATION

- Be sure to double check the faculty member's salary, effort, etc. to ensure accuracy
  - Total Compensation will increase anytime you change the rank, step, and APU/Scale because this affects the faculty member's base (X) salary

#### FUNDING SOURCES

- Make sure you have appropriate funding confirmation on file when processing a funding change/transaction that involves other department's funding
- Utilize the Delete and Add buttons (🗑️, [Add New](#)) rather than overwriting fields in the funding sources section
- No mid-month end dates
  - You should average the percent effort over the entire month and set the end date field to the end of the month
  - For visa purposes when you must set an end date other than the end of the month, please process outside of the MPM
- Know the NIH cap levels for your faculty member's funding
  - Warning messages will alert you of fund sources that may be subjected to NIH salary restrictions, however you determine the appropriate cap level
- Utilize the buttons (e.g., Validate, Calculate) after making changes and before you submit your transaction
- Utilize the Comments section to provide details about your transaction
  - Your notes will appear on the Keying Instructions report for the HR keyer

#### OVER-THE-CAP


- Only use discretionary funds for over-the-cap (OTC) amounts, with the exception:
  - 19xx can only be used to pay OTC associated with Scale 0 base salary (i.e., DOS code XAC)

#### MULTIPLE OTC FUND SOURCES:

- Pay extra attention if your faculty member has multiple fund sources for their OTC amounts.
- Prior to making changes, please take note of the existing over-the-cap distributions for your reference (*e.g., \$500 on FUND A, \$200 on FUND B*)
  - MPM will collapse the OTC distribution lines and put the entire OTC amount into the first fund source once you click "calculate" or "validate" (*e.g., \$700 entirely on FUND A*)
  - You will need to add the second funding source back into the MPM and reallocate the amounts, even if you made no funding changes involving OTC

## **MPM Processor**

### **HR Generalist**

- Run Keying Instructions report by “submitted” status on the Reports screen to generate a work list of transactions that are ready for keying or use the Search screen and sort by “Status Bar”
- Review keying instructions report for accuracy and look for obvious errors
  - Check for appropriate start and end dates
  - Calculate distribution % to ensure they all add up to the appointment effort
  - Check consistency of step, salary rates, cap level rates, and DOS codes
    - If you find errors, contact the preparer
  - Check exceptions to rules, Z payments, and approval sections
- Forward the keying instructions to the transaction services unit (TSU) for processing in a timely manner
- Track Status Bar to ensure transactions are being “keyed” 

### **Transaction Services Unit (for keying)**

- Key according to the keying instructions
  - Follow commands to END, ADD, UPDATE lines
  - Key in all action codes in OLPPS
  - Follow OLPPS best practices when keying payroll
  - Utilize the check box on the right hand side of the report to help track your work as you key each line
- Click “KEYED” button in the MPM after the transaction is processed in OLPPS

### **MPM Approver and Reviewer**

- Run and review appropriate reports
  - Ensure PAN review in a timely manner
  - Faculty funding plan (FFP) issues should be reported to the Preparer for correction
  - Compliance report issues may go to either the Preparer or HR Shared Services for resolution
  - Reconciliation report issues should be reported to the HR Shared Services for resolution
- Be mindful of Payroll deadlines so that corrections can happen prior to the monthly payroll compute date
  - Refer to the Compliance report homepage for important deadline dates

### **MPM Readiness - Data Consistency needed in OLPPS**

The MPM uploads data from OLPPS nightly. Users may encounter an error message preventing a payroll action to be initiated if the MPM detects data inconsistency in OLPPS. In these cases, users will be alerted in the error message to contact their HR Shared Services. This will require OLPPS data clean-up and a nightly upload to be performed before an MPM transaction can be initiated.

Here are the data consistent requirements needed in OLPPS:

#### Primary paid Appointment

All appointment sets for the primary paid appointment must be consistent.

- Begin and End dates
  - *E.g., cannot have one appointment end date be 06/30/12 and another be 99/99/99*
  - *End dates for all sets (APPT 10, 20, 30, etc.) must reflect the faculty member's actual appointment end date and not the distribution/funding end date associated to an appointment set*
- Appointment %
  - *E.g., cannot have one appointment % be 0.80 and another be 1.00*
  - *Appointment % for all sets (APPT 10, 20, 30, etc.) must not fluctuate and should display the faculty member's standard percent effort*
- Title code
- Duration code
  - *If using duration code, ensure consistency whether using "T" for Tenure, "I" for Indefinite, or "V" for Visa, etc.*

#### Step

- Step for joint appointment WOS distribution line(s) must match Primary paid appointment
- Consistent step for each distribution line
- No step for over-the-cap distribution lines (XAC, HBT, HSA, BYC)
- No step for PAF scheduled Z payment distribution lines (BYN, BYZ, BYK, STP, ST1)

#### Empty appointment lines (i.e., no distribution lines under an appointment set)

- To preserve appointment lines, all empty appointment lines should be deleted by setting the end date one day before the begin date to "force delete" the appointment line.

#### APU (salary scale)

- Must have correct APU in order for the MPM to calculate base salary (X)
- "EPER" screen in OLPPS must reflect the correct APU

#### Chair/Director/Dean Appointment

- STP/BYN/ST1 distribution lines for Chair's (or similar) role must be under the Chair (or similar) appointment lines (e.g., title codes: 1000, 1020, 1068, 1094, 1096, 1099)

### Joint Appointment

- If more than one joint appointment, must consolidate all joint appointment distribution lines under one single appointment set.
  - Distribution begin and end dates will be specific to those departmental appointments
  - Actual begin date of joint appointment date will be recorded in letter in file, rather than OLPPS (because start dates will change with promotions)
- Title code must be FY - no VCF title codes
- Title code must be FY version of primary title code
  - *E.g., if faculty member's primary paid appointment is 1726 Professor In Residence-HCOMP, then the joint appointment must be 3251 Professor In Residence-FY*
  - *Exception is Ladder-rank faculty, in which you can use either the FY- equivalent Ladder-rank or Adjunct title codes*
- Cannot be an indefinite end date; must change to fiscal year for all faculty (including Ladder-rank)
- Dept DPA-19xx will be the standard DPA-fund used for joint appointments