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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.

<table>
<thead>
<tr>
<th>Obtain approvals</th>
<th>Prepare and submit payroll action</th>
<th>Upload changes to OLPPS</th>
<th>Reconcile and review transactions</th>
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<tbody>
<tr>
<td>Actions are approved through variety of online and off-line processes, e.g.,</td>
<td>MPM replaces faculty salary calculator (FSC) spreadsheet and carbon copy PAF for most faculty</td>
<td>Processor reviews MPM transaction and uploads or keys changes to OLPPS</td>
<td>Processor generates reconciliation report to identify and correct keying errors</td>
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<tr>
<td>• Merits/promotions/changes in series approved through Advance</td>
<td>• Preparer obtains approvals off-line</td>
<td>• Dept approver continues to review PANs as always</td>
<td>• Dept approver and control points review compliance report to monitor exceptions to policy; errors and unapproved actions are corrected with help from processor</td>
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<tr>
<td>• Use of funding sources approved by email</td>
<td>• Preparer makes changes to compensation, funding, appointments</td>
<td>• Preparer “submits” changes via MPM</td>
<td></td>
</tr>
</tbody>
</table>
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.

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)**

| Login to MPM | • Preparer logs on using MyAccess 2.0  
|             | • Access restricted by depcode |
| Search for faculty | • Preparer searches by employee name or department  
|             | • MPM displays list of employee names that meet search criteria  
|             | • User clicks on desired employee |
| Make changes to compensation, funding, appointments | • Preparer adjusts salary and additional compensation  
|             | • Preparer updates appointments and funding sources  
|             | • Preparer clicks “Validate” button to check compliance with payroll and academic personnel policies  
|             | • “Errors” must be corrected before payroll action can be submitted  
|             | • “Warnings” can be overridden as appropriate  
|             | • User is reminded that s/he must have documentation that specific approvals were obtained |
| Submit payroll action | • Preparer may generate “Faculty Funding Plan” to check work  
|             | • Preparer may edit payroll action until next compute date |
|             | • Preparer “submits” payroll action, which indicates that it is ready to be entered into OLPPS |
Work flow for the Processor (HR generalist or HR transactional unit)

- **Processor** logs onto MPM using MyAccess 2.0
- **Processor** searches by employee name or department, and sorts results to identify transactions ready to be updated in OLPPS
- **Processor** clicks on name to generate keying instructions report to review changes, then clicks “Upload”
- If upload is unsuccessful (due to stale data), **processor** can compare OLPPS to MPM to reconcile issue, or can request that **preparer** re-submit

- **MPM** automatically marks uploaded transactions as “keyed”
  - **OR**
  - **Processor** manually marks keyed transactions as “keyed”

Work flow for Quality Control (Department, Control Points)

- **Reviewer (processor, dept approver, control point)** logs onto MPM using MyAccess 2.0
- **Reviewer** generates reconciliation report for a department
- Reconciliation report highlights transactions where PAN <> MPM data
- **Processor** corrects errors identified in reconciliation report
- **Department** reviews PANs; **dept approver** and **control point** generates reconciliation report and compliance report
  - **Dept approver** identifies errors and works with **processor** to correct errors
  - If necessary, **control point** contacts **dept approver** if any errors or unapproved actions aren’t caught

- If PAN = MPM data, **MPM** updates status of payroll action as “reconciled”
- If PAN <> MPM data, **MPM** updates status of payroll action as “reconciled-failed”. **Processor** uses keying instructions to determine if correction in OLPPS is needed:
  - If correction is needed, **processor** updates OLPPS, and reconciliation process repeats
  - If no correction is needed, **processor** updates status to “reconciled-override”
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.

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<th>MID-YEAR CHANGES</th>
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<tr>
<td>• Funding changes</td>
<td>• Retroactive merits, promotions, change in series with or without salary changes (for July 1st effective date)</td>
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<tr>
<td>• Appointment % changes</td>
<td>• Retroactive funding changes</td>
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<td>• Batch upload to OLPPS</td>
<td>• Ability to update/RA individual records, if needed</td>
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<tr>
<td>• Reconciliation process (to confirm data entry in OLPPS matches MPM)</td>
<td>• Ability to update/RA individual records, if needed</td>
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<th>SELECTIONS</th>
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<td>• Set up access accounts</td>
<td>• View transaction status</td>
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<td></td>
<td>• Export faculty list to Excel</td>
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</tbody>
</table>

*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.

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
  1. HR Shared Services will manually key payroll changes into OLPPS.
  2. HR Shared Services will click “Keyed” button in the MPM, and after overnight reconciliation, the 2nd status bar in the MPM will change to blue.

- Reconciliation Error: MPM does not match OLPPS data
  1. 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 3rd 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.

- 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 analyze 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

<table>
<thead>
<tr>
<th>Summary</th>
<th>Buttons (e.g., to validate, submit, etc.)</th>
<th>Appointment</th>
<th>Joint Appt (WOS)</th>
<th>BSE distribution</th>
<th>Funding Sources</th>
<th>Over-the-Cap (X)</th>
<th>Over-the-Cap (Y)</th>
<th>Scheduled 2 payments (e.g., monthly BYN)</th>
<th>VAHC/HIM</th>
<th>Comments</th>
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<tbody>
<tr>
<td>Table of Values</td>
<td>Buttons (e.g., to validate, submit, etc.)</td>
<td>Appointment</td>
<td>Joint Appt (WOS)</td>
<td>BSE distribution</td>
<td>Funding Sources</td>
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<td>Over-the-Cap (Y)</td>
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<td>Buttons (e.g., to validate, submit, etc.)</td>
<td>Appointment</td>
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<tr>
<td>Details</td>
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<td>Joint Appt (WOS)</td>
<td>BSE distribution</td>
<td>Funding Sources</td>
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<tr>
<td>Note</td>
<td>Buttons (e.g., to validate, submit, etc.)</td>
<td>Appointment</td>
<td>Joint Appt (WOS)</td>
<td>BSE distribution</td>
<td>Funding Sources</td>
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<td>Scheduled 2 payments (e.g., monthly BYN)</td>
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</tr>
</tbody>
</table>
**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.

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>WHAT IT MEANS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reset</td>
<td>To clear all changes and start over.</td>
</tr>
</tbody>
</table>
| Validate | To check calculations and compliance with academic and payroll policies. MPM will give you messages if there is incorrect or questionable data entered:  
  - “Errors” (in red font) must be corrected before payroll action can be submitted.  
  - “Warnings” (in orange font) can be overridden as appropriate. |
| Submit | To submit your payroll transaction. Submit will generate the keying instructions report and faculty funding plan (FFP) report. |
| Print  | To print a paper copy. |
| LX/RX PET Calculator | 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. |
| Back to Search | To go back to the search screen. |
| FFP for Current FY or Previous FY | To view the FFP report to see actual and projected data. Calculations reflect OLPPS and Weblinks distribution of payroll expense. |
| Calculate (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. |
| Add New and Delete (_Delete) | 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 15th 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] 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.
- 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.
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 1st 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
   • Your 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