New Signature Process Rollout
Process & Tools Training

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July 29, 2021
Agenda

- Why we are doing this
- What is included
- Hiring Actions & Guidelines
- PageUp Updates
- Form Updates
- Compensation Overview
- Processing Logistics
- Go-Live reminders!
Why we are doing this

1. We listened to our customers
2. Continuation of HR Transformation – efficiencies
   • Decrease processing time
   • Eliminate paper forms
   • Automate approval process
   • Increase authority and accountability
   • Enhance compensation review to ensure equity
What is included

- Removed the President/EVP/SVP from most hiring actions
- Eliminated P3 paper form for hiring actions
- Increased review threshold from 10 percent to 20 percent
- Authority and accountability given to Deans and VPs
- Took advantage of electronic actions provided in our new ATS
- Compensation review added to ensure appropriate salaries for all job types
What is included (details)

- PageUp
  - Job Card – Hiring Range required
  - Offer Card – New Signature Workflow Approval Selections
  - TUPs
- Forms Updates
  - P144 – Eliminated form
  - P3A Form
    - Removal of actions performed in PageUp
    - Signature updates
    - Combined –S & -F forms
    - Moved leave content to P4B
- Expansion of compensation review
- New compensation reports for senior managers
Refresher – Types of Actions & Hiring Guidelines

Search Exemption- Bringing brand new benefited employee to VT. 1-1 applicant/hire. OEA must be included

Non-Competitive- promotion, voluntary transfer, re-assignment, role change

Role Change- current benefited Virginia Tech employee assumes additional duties/responsibilities as the position grows over time. No change in organizational level or span. Movement into a higher pay band. Same position number. Pay may or may not change.

Reassignment – current benefited Virginia Tech employee moved to a different position based on operational needs. New position number. Pay may or may not change.

Transfer Voluntary – current benefited Virginia Tech employee moved into a different position at the request of the employee. New position number. Pay may or may not change.

Promotion– current benefited Virginia Tech employee assumes new duties with greater levels of authority and responsibilities. Typical promotions including adding direct reports (increasing span) and adding organizational levels. Pay increase required. New position number required.

Change of duties- current benefited Virginia Tech employee assumes additional duties/responsibilities over time. No change organizational level or span. Non-competitive. Same position number. Pay may or may not change.

Competitive- advertised to All, University Only or Departmental Only (must meet criteria) applicants, use PageUp as the ATS system

https://www.hr.vt.edu/content/dam/hr_vt_edu/hiring-and-employee-transactions/hiring-guidelines/Competitive-Non-competitiveSearches_Staff-AP.pdf
PageUp vs P3 Form Actions

**PageUp Actions**

*Actions WITH position change (mostly)*
- Competitive Searches
- Non-Competitive Searches
- Search Exemptions
- Staff/Faculty & Faculty/Staff Conversions
- Staff Role Changes (even if same posn because offer update needed)

**P3 Form Actions**

*Actions with NO position change (mostly)*
- Org Transfer
- Changes in Appointments
- Admin stipends
- Temp pay
- Cost of Living Adjustment (COLA)
- Mobile Communications
- In-Band Adjustments
- Discipline/Perf/Demotion (even if new posn)
# New Offer Card Workflows

## Approvals

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During Transition Competitive with Blank Hiring Range = Competitive Outside Hiring Range
The Anticipated Salary Range (Internal use only) field has been renamed to: **Internal Hiring Range (Internal Use Only)** field

- This field is now marked mandatory
- Contact your Compensation Delegate, your Role 4, or your Divisional Director for any questions when determining the internal hiring range that will be placed in this field.
PageUp Job Card Changes – Non-Competitive Reasons

- Non-competitive drop-down reasons in the Search Exemption/Non-Competitive Information section of the Job Card have been updated to correspond with the changes to the P3A form.
The Non-Competitive (Faculty/Staff) Workflow has been reduced to two levels and the senior management level has been removed. This action was approved by the HR Advisory Council in June 2021.
PageUp Offer Card Changes – Mapped over fields

- The renamed Internal Hiring Range (Internal use only)* field value from the job card will map over to the Offer Card in a read-only format.
- The Non-Competitive reason field value selected on the job card will map over to the Offer Card in a read-only format.
  - If a non-competitive action is not occurring, this field will be blank on the offer card.
Two new fields have been added to the Offer Card:

- **Current Employee Salary (if non-competitive action) field**
  - The HR practitioner would locate this salary in Banner.

- **% Change in Salary field (if non-competitive action) field**
  - The HR practitioner would manually calculate the % change between the current salary and the annual salary in new offer. The formula is provided in the training materials.
PageUp Offer Card Changes – Offer Card Workflows

- To align with the changes in signature approvals and the changes with the P3A forms, we have implemented seven new offer card workflow approvals. The original offer card workflow will be archived.
Comp Overview

Who is doing Comp review?
- **Compensation Team** – Evans Lusuli, Mike Copper, and Alicia Eaton
- **HRDDs** – Stephanie Brown, Steve Filipiak, Sandra Burk, Roslyn Garrison, Patricia Wooten, Leah Taylor, Greg Beecher, and Dan Taggart
- **HRGs** – Mike McCoy, Monica Crouse, and Marisela Garza
- **Provost's Office** – Jack Finney and Leah Taylor
- **OVPRI** - Lynn Byrd (Sandra)

What is the PageUp routing procedure?
- PU Comp Approval request routed to appropriate DHR (DDs and HRGs) team member based on Sr Mgmt Area.
- DDs and HRGs reassign Teaching Faculty to Provost Office (Jack Finney & Leah Taylor) for Comp review and approval
- DDs and HRGs reassign Research Faculty to OVPRI (Lynn Byrd/ Sandra) for Comp review and approval
- DDs and HRGs provide Comp review and approval for AP Faculty & Staff
Comp Overview

- Where do role 2s & 3s get their Comp numbers
  - Comp Delegates are HRDDs, HRGs, Lynn Byrd (or Sandra) for Research, and Jack & Leah in Provost for Teaching have access to external salary market data and internal salaries that help them review and determine compensation numbers
  - Roles 2s and 3s get their comp numbers from Comp Delegates
  - DHR Comp Team will also be accessible and available to assist
Form Updates - P3A

- P3A-S/F are combined into one form and elimination of P144.
- What has changed?
  - All competitive and non-competitive actions will no longer require a P3A form
  - PageUp system number field added (if required)
  - Additional fields added to accommodate staff in-bands/bonuses
  - Added guidance for approval/documentation requirements (indicated with an * or +)
  - Added text box space to for market comparison data
  - Expanded funding area
  - Faculty leave requests with pay has been relocated to the P4B form
Form Updates – P4B

What has changed?

- Faculty research assignment and study research leave requests added
  - Added field for requested salary while on leave with pay
- Return from leave field added (previously on P3A)
- Added Provost signature line
Processing Logistics & Quality Control

- Payroll Calendar & HR Transaction Deadline
- HRDD, HR Generalist, & Role 4s: Experts for your Departments
  - Making sure the correct process is followed
    - P3 Actions vs PageUp Actions
    - Correct approval workflows & approvers
  - Making sure actions are completed on time (reports to help!)
- When there are errors:
  - Catching them early will minimize rework/delay
  - Rejections are to ensure compliance!
  - Divisional Directors & HR Generalists will work with departments to help with correction … AND teach/coach for next time!
• HR approvals may take 2-5 business days from HR drop box submittal, depending on action type

• All actions, to include HR and Comp approvals, must be complete by the HR transaction deadline

• Payroll schedule can be located [here](#)
Understanding & Planning for HR Transaction Deadline

**PageUp**

*Requires completion of New Hire form by successful candidate!*

- PU Offer Card Approvals
  - Per Workflow depending on Offer specifics

- PU NewHire Report
  - Runs Nightly
  - Only included AFTER New Hire form is completed!

- HR Transaction Deadline
  - 2 days before Payroll Processing start date

- EA Processing

**P3 Form**

*Requires completion of Comp approvals. Depending on specifics, could take 1-5 days after HR dropbox submittal.*

- Dept P3A Form Approvals
  - DH
  - Sr Mgmt
  - OVPRI (if applicable)
  - DDs (if applicable) complete Comp approval

- Dept Submits to HR Dropbox
  - Initiates Comp approval for forms submitted without

- HR Generalist Review/Approve
  - Complete & route to appropriate next step (HR Comp or EA)

- HR Comp team Review/Approval
  - As needed
  - Length of time depends on complexity & prior HR Comp team involvement

- HR Transaction Deadline
  - 2 days before Payroll Processing start date

- EA Processing

Completing Comp approval (if needed)
• "Comp Team" Approval pending queue

For Comp/HRDDs/HRGs/Role4

• PageUp Offer Card Approval Status Report - How to find a slow or "stuck" Offer Approval

For Senior Management

• Monthly pay change and hiring activity
Offer Card Approval Status - Role 4 Report

Providing visibility into in-process Offer Cards for your Sr Mgmt Area so you can nudge/facilitate stuck or slow offers to meet HR Transaction timelines.

... through Approver 6
Important Things …

• VERY important to pick the right workflow
• How to tell & escalate if workflow or Form is stuck
• Phone a friend … who can help if you have questions
• What will happen if you submit a form instead of PageUp action?
• Transition Timeline:
  • PageUp - Effective Aug 11th
  • P3A & P4B – please start using for all new actions effective Aut11th. Please submit any in process forms by Sept 3rd.
Timeline

- **April-May**: Develop
- **June – July**: User Testing
- **July – Aug**: Workshops/Training in process
- **Aug 11**: Go-Live
- **Aug 11 – Sept 3**: Transition to New Forms

95% in process
Appendix
Non-competitive (internal) hires

Current

- < 10%
  - Regular process

- 10% or higher
  - SVP or EVP
  - President

Future

- Up to 20%
  - Regular process

- > 20%
  - VP or Dean
# PageUp vs P3 Form Actions

<table>
<thead>
<tr>
<th>Type of Action</th>
<th>PageUp Actions</th>
<th>P3 Form Actions</th>
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<tr>
<td>Competitive Action (External)</td>
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<td>Competitive Action (Internal)</td>
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**PageUp**
Actions associated with position changes

**P3 Form**
Administrative actions with current positions
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