PRISM TRKS Final Data Collection – November 2009
Definitions and Action Steps

The information provided on the data collection spreadsheet has been extracted from the PRISM HR/Payroll system. This information has been verified with you during the prior two PRISM TRKS data collections and updated appropriately.

Please take appropriate action on the spreadsheet for those fields listed below that have the text **Action Needed**. Please be aware that changing these fields **will not replace the need to process an employee record**.

Please note: all other fields below include definitions only and should **not** be changed on the spreadsheet. Changes to these fields **will not** be updated in the PRISM HR/Payroll system. If discrepancies are identified with these particular fields please contact your assigned Compensation Analyst to discuss appropriate actions necessary.

- **Weekly Schedule**: Full-time, regular staff employees are considered to have a ‘Standard’ weekly schedule if they work 7.5 or 8 hours a day Monday through Friday. All other schedules are considered ‘Non-Standard’, including all part-time staff employees.
  
  **Action Needed**: Update the spreadsheet only if there is a change in the staff employee’s weekly schedule according to the definition above. You will need to pay special attention to staff that have changed percentage of effort since the last data collection.

- **Actual Working Hours**: The number of hours the staff employee is scheduled to work in a week.

- **FTE (Full-Time Equivalent) Working Hours**: The number of hours the staff employee would work in a week if full-time. This will be either 37.5 or 40.

- **Assignment Status**: Identifies whether a person is Active, on Leave, or Terminated at the University as of 12/31/2009.
  
  **Action Needed**:
  - If the staff employee has terminated or is scheduled to terminate prior to January 1, 2010 and is listed on the spreadsheet, please update the Assignment Status to TERMINATED and do not complete the remaining blank fields.
  - If the staff employee has transferred to another staff position outside of your responsibility center or is scheduled to transfer prior to January 1, 2010 and is listed on the spreadsheet, please update the Assignment Status to TRANSFERRED and do not complete the remaining blank fields.
  - If the staff employee has an assignment status of paid or unpaid leave, data collection of balances will still be required.

- **FLSA**: Associated with the staff employee’s job classification and will be either exempt or non-exempt.

- **Accrued Comp Time Hours Balance**: DO NOT ENTER ANY COMPENSATORY TIME BALANCES. For directions on Compensatory use and submission, please see below.
  
  - Compensatory time earned in November must either be paid out on the HPCR (due by November 25, 2009) or scheduled to be used by the end of December 31, 2009.
  - Compensatory time earned in December must either be paid out on the HPCR (due by January 5, 2010) or scheduled to be used by January 31, 2010.
  - Additional instructions regarding Comp Time will be sent out within the next few days.

- **Supervisor Name**: The name of the staff employee’s supervisor.
  
  **Action Needed**: Verify that the supervisor listed on the attached spreadsheet is the individual with primary responsibility for the majority of the following tasks:
- Interview/selection/hire
- Orientation/training/development
- Establish/monitor work schedule
- Work assignment/review
- Performance Appraisal
- Personnel Actions
- Approval of time off

Update the supervisor name only if there is a change in the staff employee’s supervisor from the one on the spreadsheet.

- If the supervisor is a Pitt employee, please enter the full legal name with last name first.
- If the supervisor is not on the spreadsheet, is not in a staff position at the University or is a non-Pitt employee (UPMC or UPP), refer to http://accounts.pitt.edu/Public/ for assistance.

**Note:** It is extremely important to document the actual “true” supervisor, even though they may not be the person who will actually approve time in PRISM TRKS. PRISM TRKS will allow the “true” supervisors to delegate time card review and approval responsibility on a temporary or permanent basis to others if necessary.

- **Supervisor Emp Number:** The employee number associated with the supervisor of the staff employee.
  
  **Action Needed:** Update the supervisor emp number only if there is a change in the staff employee’s supervisor from the one on the spreadsheet.

  - If the supervisor is a Pitt employee, please enter the employee number associated with the supervisor listed on this spreadsheet. If you are unable to locate the supervisor’s employee number on this spreadsheet enter PITT.
  - If the supervisor is a UPP or UPMC employee, please enter UPP/UPMC.

- **Vacation Balance (hours):** The staff employee’s vacation balance in hours as of **12/31/2009**.
  
  **Action Needed:** Enter the staff employee’s projected **12/31/2009** vacation balance in hours by taking the balance as of 11/30/2009 in hours, adding their hourly accrual for December and subtracting any vacation hours scheduled to be taken for December (round to three decimals).

- **Vacation Balance (days):** The staff employee’s vacation balance in days as of **12/31/2009**. Days will not be converted or used in PRISM TRKS.
  
  **Action Needed:** Enter the staff employee’s projected **12/31/2009** vacation balance in days by taking the balance as of 11/30/2009 in days, adding their accrual in days for December and subtracting any vacation days scheduled to be taken for December (round to three decimals).

- **Vacation Accrual Start Date:** Date used to determine the staff employees vacation accrual rate.

- **Vacation Plan:** Established based on University Policy / Practice. Will be effective 1/1/2010.

- **Monthly Vacation Accrual Rate (hours):** Number of vacation hours the staff employee will accrue per month.

- **Monthly Vacation Accrual Rate (days):** Number of vacation days the staff employee will accrue per month.

- **Vacation Accrual Max:** Established based on University Policy / Practice.

- **Vacation Band Years:** Established based on University Policy / Practice. Will be effective 1/1/2010.

- **Sick Balance (hours):** The staff employee’s sick balance in hours as of **12/31/2009**.
**Action Needed:** Enter the staff employee’s projected 12/31/2009 sick balance in hours by taking the balance as of 11/30/2009 in hours, adding their hourly accrual for December and subtracting any sick hours scheduled to be taken for December (round to three decimals).

- **Sick Balance (days):** The staff employee’s sick balance in days as of 12/31/2009. Days will not be converted or used in PRISM TRKS.
  
  **Action Needed:** Enter the staff employee’s projected 12/31/2009 sick balance in days by taking the balance as of 11/30/2009 in days, adding their daily accrual in days for December and subtracting any sick days scheduled to be taken for December (round to three decimals).

- **Sick Accrual Start Date:** Date used to calculate years of service for payout eligibility.

- **Sick Plan:** Established based on University Policy / Practice. Will be effective 1/1/2010.

- **Monthly Sick Accrual Rate (hours):** Number of sick hours the staff employee will accrue per month.

- **Monthly Sick Accrual Rate (days):** Number of sick days the staff employee will accrue per month.

- **Personal Day Balance (hours):** The staff employee’s personal day balance in hours as of 12/31/2009.
  
  **Action Needed:** Enter the staff employee’s projected 12/31/2009 personal balance in hours by taking the balance as of 11/30/2009 in hours and subtracting any personal hours scheduled for December (round to three decimals). Please note, part-time staff are eligible for one day (7.5 hours) each fiscal year.

- **Personal Day Balance (days):** The staff employee’s personal day balance in days as of 12/31/2009. Days will not be converted or used in PRISM TRKS.
  
  **Action Needed:** Enter the staff employee’s projected 12/31/2009 personal balance in days by taking the balance as of 11/30/2009 in days and subtracting any personal days scheduled for December (round to three decimals).

- **Personal Day Plan:** Established based on University Policy / Practice. Will be effective 1/1/2010.

- **Personal Day Annual Accrual Rate (hours):** Number of personal day hours the staff employee will receive at the beginning of each fiscal year.

- **As Of Date:** Date the staff employee balances are to be reported for this data collection (12/31/2009).