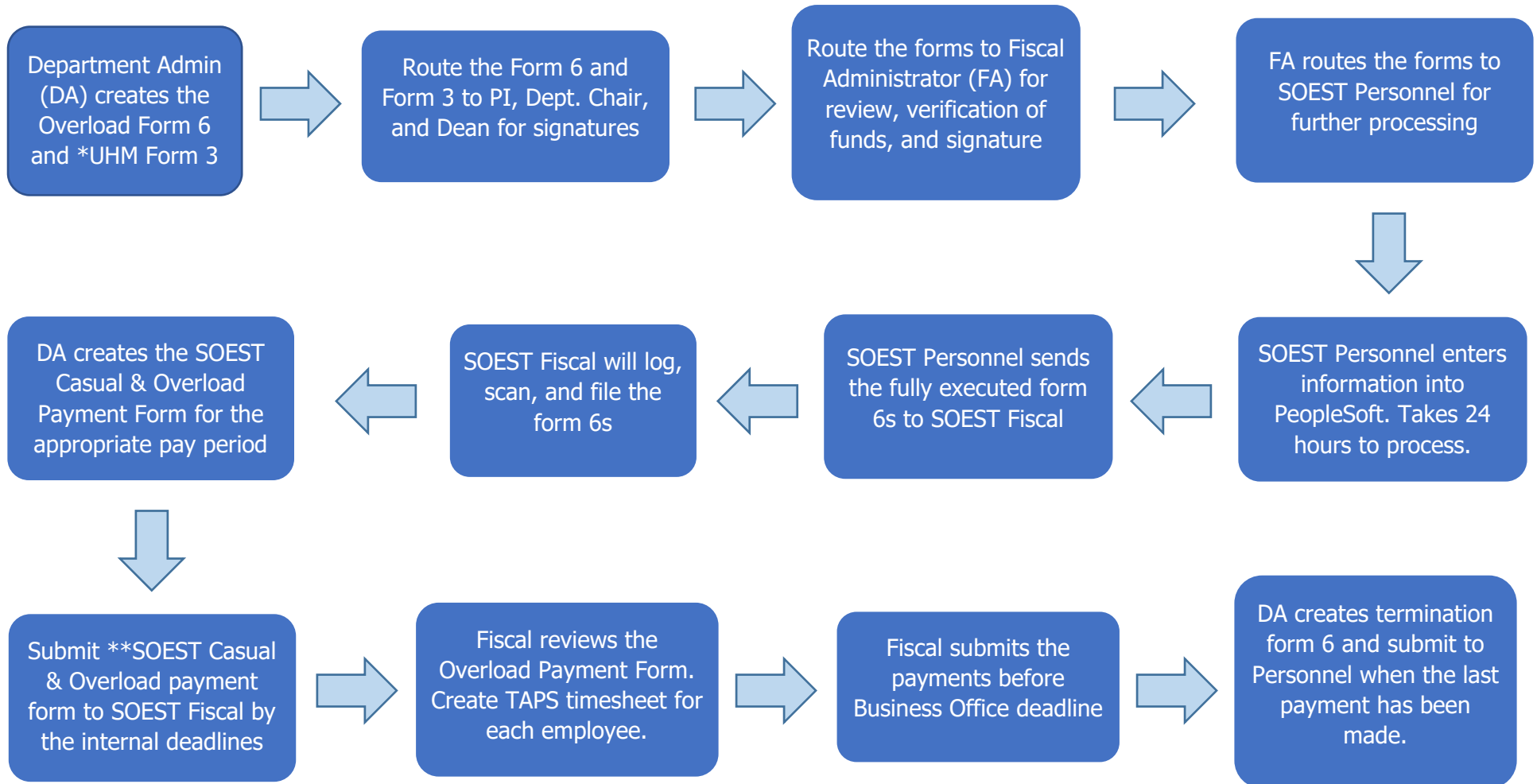


Overload Training Agenda

Wednesday, May 1, 2019

- Overload Document Flow
- Preparing the Overload Form 6
 - What documents are required for
 - Faculty
 - Form 3 must be attached
 - Graduate Assistant
 - Submit Request for Personnel Action (RPA) form to extend appointments as needed. A PNF must be on file that covers the entire overload period.
 - Submit RPA for FICA code changes as needed
 - GAs coded with FICA K0 (Not Exempt) must enroll in the PTS Deferred Compensation Plan. Submit enrollment form to SOEST Personnel.
 - Casual Hire
- Overload TAPS Chart
- Overload Payments
 - Prepare SOEST Casual & Overload Payment Form
 - Follow the Overload Payment Form Instructions
 - Submit the payment form by the SOEST Fiscal Internal Deadlines
 - Overload Payment process
 - Fiscal review payment form
 - Fiscal create the payment on TAPS
 - Fiscal submit the payments by Business Office deadline
 - 2019 TAPS/CURE Deadlines, Casual Overload schedule
 - The schedule will provide the deadlines and pay dates for each pay period
- Overload Form 6 Adjustments
 - Bargaining Unit Increase
 - 11-month faculty – increase will be effective July 1, 2019
 - 9-month faculty – increase will be effective August 1, 2019. Higher pay rate may be used to calculate overload from July 1, 2019.
 - Correction
 - Please notify Fiscal BO to ensure payments will be submitted correctly
- Terminations
 - Submit Termination Form 6s for all overloads after the last payment has been made
- Open Discussion/Questions

Overload Document Flow:



Notes:

- *Request for Authorization of Overload (UHM Form 3) – For Faculty only. Submit with the Form 6.
- UH Overload & Casual (UH Form 6)
- SOEST Casual & Overload Payment Form (Pink Form) – aka Overload payment form
- **UH Individual Daily Time Record (UH Form 23) – For Casual Hires only. Submit with SOEST Casual & Overload Payment Form.

Overload TAPS Chart

	Employing Agency	Account to be charged	Creating Form 6 and Form 3	PeopleSoft	Fully Executed Form 6	SOEST Overload Payment Form	TAPS BO to Enter Payments
1	SOEST Employee	SOEST Account	1) DA creates the form 6 and form 3 2) Route the forms to PI, Dept Chair, Dean, and FA for signatures 2) FA submits the forms to SOEST Personnel for processing	1) SOEST Personnel enters appointment into PeopleSoft 2) It takes 24 hours for it to process	1) SOEST Personnel sends the executed form 6 to Fiscal 2) Fiscal scan, log, and file the form 6	1) DA submits overload payment form for each pay period	1) SOEST BO enter and approve payment
2	SOEST Employee	Outside Account (Not SOEST)	1) DA creates the form 6 and form 3 2) Route forms to PI, Dept Chair, Deans, and outside FA for signatures 2) DA submits the signed form 6 and form 3 to SOEST Personnel for processing	1) SOEST Personnel enters appointment into PeopleSoft 2) It takes 24 hours for it to process	1) SOEST Personnel sends the executed form 6 to Fiscal 2) Fiscal scan, log and file the form 6 3) Provide a copy to the Non-SOEST department	1) Do not submit the SOEST Overload Payment Form to the BO of the account. This is for our own internal process. The BO of the account will have their own overload process.	1) BO for the account to be charged to will enter and approve payment. (SOEST Fiscal does not have access to the BO of the account)
3	*NON SOEST Employee	SOEST Account	1) Outside and/or SOEST DA creates the form 6 and form 3 2) Route forms to PI, Dept Chair, Dean, and SOEST FA for signatures. 3) SOEST FA - Make a copy of the pending form 6 and inform SOEST BO about the overload appointment. Return forms to outside DA. 4) Outside DA submits the form 6 to their Personnel for processing 5) SOEST FA request for a fully executed copy for Fiscal files	1) Outside Personnel enters appointment into PeopleSoft 2) It takes 24 hours for it to process	1) SOEST FA provide a fully executed form 6 to Fiscal 2) SOEST Fiscal scan, log, and file the form 6	1) Request the department to submit a SOEST overload payment form to Fiscal	1) SOEST BO enter and approve payment
4	SOEST Employee	SOEST Account + Outside Account	1) SOEST DA creates the form 6 and form 3 2) Route to PI, Dept Chair, Dean, and FAs for signatures. (Required both SOEST and non-SOEST FA's signature) 3) SOEST FA submits to SOEST Personnel for processing	1) SOEST Personnel enters appointment into PeopleSoft 2) It takes 24 hours for it to process	1) SOEST Personnel sends the executed form 6 to SOEST Fiscal 2) SOEST Fiscal scan, log, and file the form 6	**Please contact SOEST BO before confirming a payment process with the outside school	
5	*NON SOEST Employee	SOEST Account + Outside Account	1) Outside and/or SOEST DA creates the form 6 and form 3 2) Route to PI, Dept Chair, Dean, and FAs for signatures. (Required both SOEST and non-SOEST FA's signatures) 3) SOEST FA - Make a copy of the pending form 6 and inform SOEST BO about the overload appointment. Returns forms to outside DA. 4) Outside DA submits the form 6 to their Personnel for processing 5) SOEST FA request for a fully executed copy for Fiscal files	1) Outside personnel enters appointment into PeopleSoft 2) It takes 24 hours for it to process.	1) SOEST FA provide an executed form 6 to Fiscal 2) SOEST Fiscal scan, log, and file the form 6	**Please contact SOEST BO before confirming a payment process with the outside school	

Notes:

The chart is an internal guide to help facilitate the overload payment process. To help ensure that all payments are being paid on time and accurately due to the large volume of payments we receive each pay period.

*For #3 and #5: There may be situations where the NON-SOEST employee does work for SOEST. If the NON-SOEST employee works for SOEST, then the SOEST DA will create the form 6, route for signatures, and submit to SOEST Personnel. Personnel will input into PeopleSoft. The SOEST DA should also send Personnel a copy of the NON-SOEST employee's current PNF to process form 6.

**To process an overload appointment with a SOEST account and outside account, please contact the SOEST BO before confirming a payment process with the outside school.

SOEST CASUAL & OVERLOAD PAYMENT FORM



PAYEE'S INFORMATION

NAME (Last Name, First Name): Doe, John

UH ID NUMBER: 12357896

PAYROLL NUMBER: F2 (Casual Hire)

WARRANT DISTRIBUTION: 460

DEPARTMENT NAME: SOEST FISCAL

PAYMENT INFORMATION

CHART CODE & 7 DIGIT ACCT #	<u>MA 6108908</u>	AMOUNT	<u>\$ 901.43</u>
*If payment should be split amongst different accounts		AMOUNT	
please list each account separately		AMOUNT	

Check Pay Rate Basis (Hourly OR Salary - Choose only one)

HOURLY BASIS SALARY BASIS

	Rate	Hours Worked	Gross Amount
Regular Hourly Rate:	21.21	42.50	\$ 901.43
Night Hourly Rate:			\$ 0.00
Overtime Hourly Rate:			\$ 0.00
Gross Amount Total:			\$ 901.43

REMINDER:
PLEASE COMPLETE & ATTACH
THE UH FORM 23 (INDIVIDUAL
DAILY TIME RECORD)

Current Pay Period: From: 05/16/19 To: 05/31/19

*No. of Pay Periods (If more than one): _____ *If prior pay periods are included in the current gross amount, please attach an additional UH Form 23 for each prior pay period.

SIGNATURE OF CERTIFYING OFFICER (PI, CHAIR, DEPT HEAD, OR DEAN):

signature _____ 06/03/19

I certify that the above services were received for the benefit of the University of Hawaii and that payment for such has not been previously made. DATE

FORM PREPARED BY: Ya-Yun Hsueh

FISCAL OFFICE USE ONLY Attached: Email Signing Authority Calc Sheet

Date Received: _____	FINAL OR PARTIAL # _____
Entered By: _____	Payment Amount: \$ _____
Entered Date: _____	OL Total Paid: \$ _____
FO Code: _____	Remaining Balance: \$ _____

UNIVERSITY OF HAWAII INDIVIDUAL DAILY TIME RECORD

Name: Doe, John

Last, First Middle

General Instructions:

*Use ink or indelible pencil

*Workweek = 12:01 AM Sunday to 12:00 PM Saturday

*For Supervisors of CWSP (F1) Student assistants: Federal regulations specify that individual Daily Time Records must be kept for a period of 5 years following a completed audit.

Hourly worked for
Partial week on Last
Time Record

0 Account Code Federal (F) & Trust (P-280-F) Funds Only
MA 6108908

Month: May 16-31 Year: 2019

Hourly Rate: 21.21 Warr. Distr. Code: 460

	Date	CLOCK TIME (Indicate AM & PM hours)				REGULAR Hours & Minutes	NIGHT Hours & Minutes	OVERTIME Hours & Minutes	NT-OVERTIME Hours & Minutes
		Start	Stop	Start	Stop				
Sunday						0:00			
Monday						0:00			
Tuesday						0:00			
Wednesday						0:00			
Thursday	05/16/19					0:00			
Friday	05/17/19	8:00 AM	4:00 PM			8:00			
Saturday	5/18/2019					0:00			

SUB TOTAL HOURS

8:00

	Date	CLOCK TIME (Indicate AM & PM hours)				REGULAR Hours & Minutes	NIGHT Hours & Minutes	OVERTIME Hours & Minutes	NT-OVERTIME Hours & Minutes
		Start	Stop	Start	Stop				
Sunday	05/19/19					0:00			
Monday	05/20/19	8:00 AM	4:00 PM			8:00			
Tuesday	05/21/19					0:00			
Wednesday	05/22/19	8:00 AM	4:00 PM			8:00			
Thursday	05/23/19					0:00			
Friday	05/24/19	12:00 PM	3:00 PM			3:00			
Saturday	5/25/2019					0:00			

SUB TOTAL HOURS

19:00

	Date	CLOCK TIME (Indicate AM & PM hours)				REGULAR Hours & Minutes	NIGHT Hours & Minutes	OVERTIME Hours & Minutes	NT-OVERTIME Hours & Minutes
		Start	Stop	Start	Stop				
Sunday	05/26/19					0:00			
Monday	05/27/19	8:00 AM	4:00 PM			8:00			
Tuesday	05/28/19					0:00			
Wednesday	05/29/19	8:00 AM	3:30 PM			7:30			
Thursday	05/31/19					0:00			
Friday						0:00			
Saturday						0:00			

SUB TOTAL HOURS

15:30

GRANT TOTAL HOURS

42:30

****CONVERTED HOURS**

42.50

Casual Hire's signature

Signature - Employee
** I certify that this student has worked the number of hours stated, and has performed the work satisfactorily **

Supervisor/PI's signature

Signature - Supervisor

****CONVERTED HOURS: Convert partial hours to decimal fractions using the following table:**

Minutes	Fractions	Minutes	Fractions
:05	0.08	:35	0.58
:10	0.17	:40	0.67
:15	0.25	:45	0.75
:20	0.33	:50	0.83
:25	0.42	:55	0.92
:30	0.50		