

Navigating SmartHR

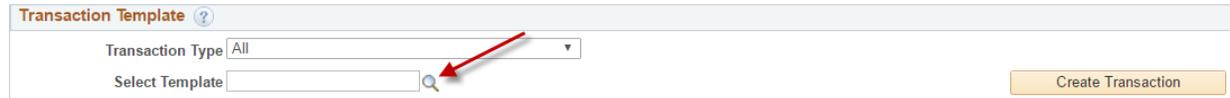
Searching for SmartHR Graduate Assistant Template:

1. Click magnifying glass next to Select Transaction
2. Click on Advanced Lookup
3. In the Description field change criteria to contains and type in grad and click the Look Up button.
See below for example

<u>Hire / Rehire</u>	<u>UC TBH GA (new as a GA or Rehire after a break in service)</u>
<u>Data Change</u>	<u>UC TBH DC GRAD DAT</u>
<u>Pay Change</u>	<u>UC TBH DC GA PAY (Stipend level change only)</u>
<u>Department Change</u>	<u>UC DC DEPT GRD</u>
<u>Supervisor ID Change</u>	<u>UC DC SUP ID GRD</u>
<u>Funding Change</u>	<u>UC TBH DC FUND GAI (KFS change only)</u>
<u>Termination</u>	<u>UC DC TERM GRD</u>

Smart HR Transactions

Select a template and press Create Transaction.

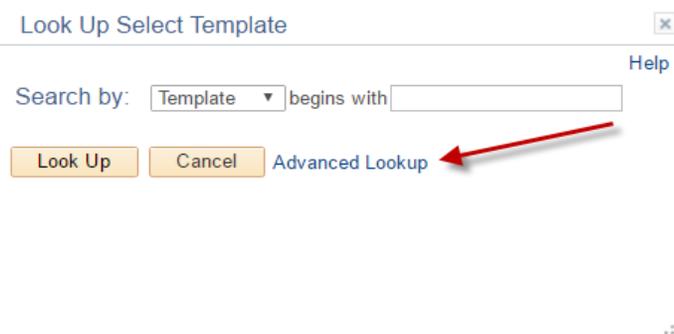


Transaction Template ?

Transaction Type: All

Select Template: 

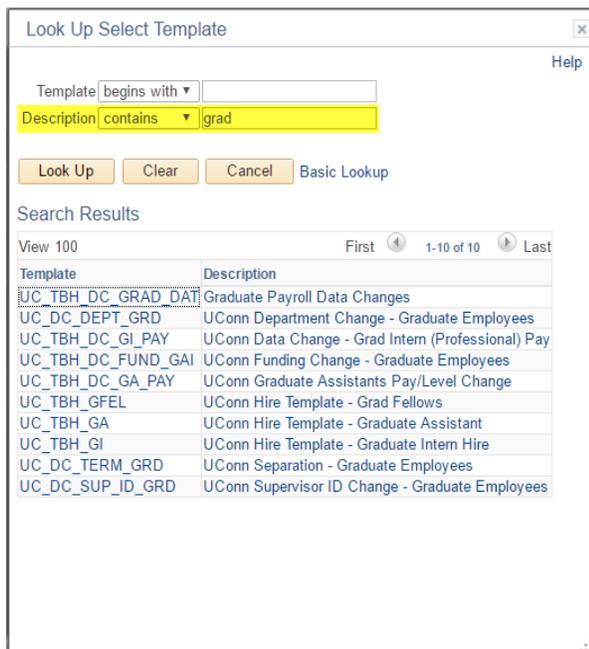
Create Transaction



Look Up Select Template

Search by: Template begins with

Look Up Cancel [Advanced Lookup](#)



Look Up Select Template

Template: begins with

Description: contains

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-10 of 10 Last

Template	Description
UC_TBH_DC_GRAD_DAT	Graduate Payroll Data Changes
UC_DC_DEPT_GRD	UConn Department Change - Graduate Employees
UC_TBH_DC_GI_PAY	UConn Data Change - Grad Intern (Professional) Pay
UC_TBH_DC_FUND_GAI	UConn Funding Change - Graduate Employees
UC_TBH_DC_GA_PAY	UConn Graduate Assistants Pay/Level Change
UC_TBH_GFEL	UConn Hire Template - Grad Fellows
UC_TBH_GA	UConn Hire Template - Graduate Assistant
UC_TBH_GI	UConn Hire Template - Graduate Intern Hire
UC_DC_TERM_GRD	UConn Separation - Graduate Employees
UC_DC_SUP_ID_GRD	UConn Supervisor ID Change - Graduate Employees

Job Effective Date: This date will default to today's date, however it should be updated to the actual effective date of the transaction. For example, if you are processing a continuation from the fall semester to the spring semester, and 'today's date' is 11/4/2016, the correct Job Effective Date in this case would be 01/06/2017.

Smart HR Transactions

Enter Transaction Details

The following transaction details are required.

Template UConn Hire Template - Graduate Assistant

Net ID

*Job Effective Date 

Action Hire

*Reason Code

Reminder:

- 1) The earliest Job Effective Date that can be entered into CoreCT system is 09/16/2016. This is the date UCONN converted from the UCONN Genesys system to the State of Connecticut CoreCT system.
- 2) In some instances it may be necessary for Payroll to submit a correct history action to have a Job Effective Date reflect a date that is earlier then the SmarthR transaction. If you get an error message when processing a 'retroactive' transaction call the payroll manager to discuss this issue.

UOC Appointment Date: This field drives the GA tuition waiver. These dates should reflect the true timeline of the assistantship, and not subsequent changes such as funding, percent of funding, percent of employment, stipend, or continuation date changes. If the original UOC Appointment date ends prior to the end of the fall or spring semester, and you are processing a continuation transaction, change just the END DATE. Leave the appointment start date as 8/23/2016.

UConn Dates		Personalize	Find	View All			First	1-5 of 5	Last
Date Code	Start Date	End Date							
1 UOC Appointment Date	<input type="text" value="08/23/2016"/> 	<input type="text" value="01/05/2017"/> 							
2 UOC Funding Date	<input type="text"/> 	<input type="text" value="01/05/2017"/> 							
3	<input type="text"/> 	<input type="text"/> 							

Funding Code Change: Use the Funding Change template [UC_TBH_DC_FUND_GAI](#) whenever you are changing the KFS code within an *existing UOC Appointment Date range*. This Template is **NOT** to be used to extend or continue a GA appointment term. It is a funding code change ONLY. For example; if the UOC Appointment Date is 08/23/2016 to 12/31/2016 a KFS change will be between those dates. (A Data Change template will need to be processed to extend the appointment end date and change the KFS account number if necessary.) REMINDER: Enter a comment explaining your transaction. The UOC Funding start date will be equal to the Effective Date entered at the start of the Template creation. Therefore a UOC Funding Start Date is not entered on the worksheet.

KFS coding that has an end date earlier than the UOC Appointment End Date should use the UOC Funding Date field to update the end date field. Additional/subsequent transactions will need to be processed to change or continue the funding to equal the UOC Appointment End Date.

Example of Funding Change Only:

Smart HR Transactions

Enter Transaction Details

The following transaction details are required.

Template **UConn Funding Change - Graduate Employees**

*Employee ID

*Employment Record Number

*Job Effective Date

Action Data Change

Reason Code General Data Change

Funding Change

Work Location - Job Fields
 *Department UOC01298 Department Entry Date 09/16/2016

Job Information - Job Code
 Job Code 4154GA

Job Labor - Bargaining Unit and Labor Agreement
 Bargaining Unit UGR

UConn Dates Personalize | Find | View All | First | 1-5 of 5 | Last

Date Code	Start Date	End Date
1 UOC Appointment Date	08/23/2016	01/05/2017
2 UOC Funding Date		01/05/2017
3		

UConn Payroll Distribution Personalize | Find | View All | First | 1-5 of 15 | Last

Account Number	Sub Account Number	Distribution Percentage
1 2553000		50.000000
2 4156410		50.000000
3		

Comments
 Comments Originally on 2553000, effective 10/1/16 to 1/5/17 split coding

Note of Importance: Transactions for KFS accounts that have an expiration date that precedes the semester end date will not receive an error message. Departments will be responsible for processing additional funding code transactions to signify what account will replace the expired KFS account. The GA will continue to receive their stipend even if the KFS account has expired.

Future dated KFS accounts can be processed in SmartHR provided the Job Effective date is the same future date or after.

Pay Change: [UC_TBH_DC_GA_PAY](#) Stipend Level Increase template Use this template for stipend level increase. You can also include other changes such as Location Code, Supervisor ID, FTE, KFS and dates range. Not to be used exclusively for percent of employment change (FTE). However, FTE changes can be included with the stipend pay change if applicable.)

REMINDER: Use the comment field to explain your transaction.

Stipend Level:

Beginner (B) = 1

Master's (M) = 2

PhD (P) =3

Job - Salary Plan
Step <input type="text" value="1"/>

Change security access: Department Change: [UC_DC_DEPT_GRD](#) This template is used when one department is giving up access to a GA's CoreCT record so another department can process the payroll transaction. Changes with this template include Department access and Location Code ONLY.

Supervisor ID Change: [UC_DC_SUP_ID_GRD](#) This template is used when the only change to a GA record is to designate who the GA reports to for supervisory reasons. This is not the same thing as changing security access for the purpose of entering GA payroll transactions.

New Hire/Rehire (rehire after a break in service): [UC_TBH_GA](#) This template is to be used for first-time new hires (never employed as a GA before) and GA's that took time off from their assistantship and are true Re-hires. **Do NOT use this template for continuations and Fall Semester Renewals.**

Data Change: [UC_TBH_DC_GRAD_DAT](#) This template is used for GA continuation (extending end dates). All other changes such as FTE, KFS, supervisor, employee classification (teaching to research), and location changes can be processed at the same time as the continuation Data Change Transaction.

If multiple changes are needed that do not neatly fit any of the other more specific templates then this template should be used. Call the Graduate Payroll Manager if unsure which template to use.

Percent Employed.

FTE equates to % employed, any percent of time between 100% - 50%

100% = 1.0 FTE

75% = .75 FTE

50% = .50 FTE

Job Information - Standard Hours
FTE <input type="text" value="1.000000"/>

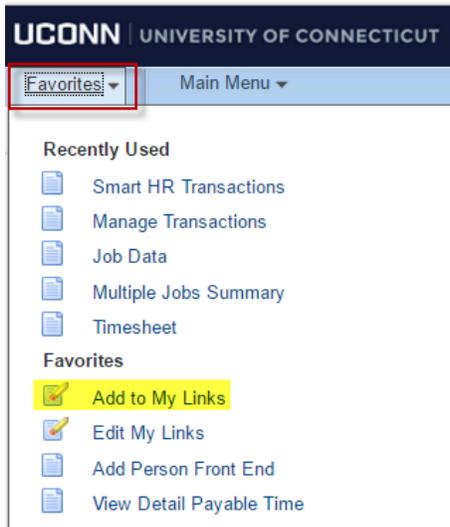
Termination: [UC_DC_TERM_GRD](#) Use this template to stop payment to a GA at the end of their assistantship or when they complete their program prior to the end of the academic term. Please note the job effective date (effective date of separation) should be the first day they are no longer on the payroll, or no longer on a leave of absence. For example, Fall only GA's last day is 1/5/2017, the term date should be 1/6/2017. Full year assistantships or spring semester assistantships should have a separation effective date of 8/23/XX.

There is no CANCEL TERMINATION transaction in Core-CT. For example, if a GA is termed at the end of the Fall semester (1/6/2017), and then subsequently decides to continue for one more semester, the department will need to either 1) contact the Graduate Payroll Manager to manually cancel the separation in Core. At that point the department can process a Data Change [UC_TBH_DC_GRAD_DAT](#) to continue and extend the UOC Appointment End Date, or 2) leave the termination action and process a rehire action. In both cases use the same effective date as the term action, in this case use 1/6/2017.

Job Classifications: Teaching, Research, Teaching & Research The new CoreCT Job Classification Codes are UT, UR, US. The old GA-Graduate Assistant is not to be used in this field.

Job Information - Employee Classification	
*Employee Classification	UR - UConn Grad Assist Res ▼
Job Information - Stand	SA - Special Appointment Higher Ed ▲
Standard Hours	SD - Selective Service
Job Labor - Bargaining	SL - Seasonal
Bargaining Unit	TA - Temp Prv Pending Agency
Job Compensation - Pay	TD - Temp Day No End Date
Comp Rate Code	TN - Tenured
Currency Code	TP - Trainee-Initial WTP complete
	TS - Temp Prov Pending State Wide
	TT - Temp 6 months or less
	TV - Temp/Prov Pending Open Comp
	UA - University Assistant CSU
	UR - UConn Grad Assist Research
	US - UConn Grad Assist R&T
	UT - UConn Grad Assist Teach

Create your list of Favorites: To save time instead of navigating through all the lists of menu options. Navigate to the area you want to save to favorites, click the Favorites arrow, click ADD TO MY LINKS. You can add Smart HR Templates, Manage Transactions, your own timecard, View Paycheck Information, any of the many CoreCT areas that you frequent.



Or you can click on the Add to My Links at the top of the toolbar. It adds your favorites to the My Links tab



Manage Transactions

Looking up Manage Transactions: The Manage Transaction feature will default the Effective Date From and TO date to be a rolling 20 day period. In order to find past transactions or future transaction you must update the effective dates. The earliest Effective Date From will be 09/16/2016 and the TO date should be past the effective date of the transaction. After you update these dates you can click REFRESH and you will see your list of past, present, or future transactions.

Effective Date: is the date the transaction will be effective once it is activated and 'pushed to job'.

Transaction Status: **Completed** – payroll has activated and pushed to job and the transaction is complete. **Action Required** – 2 meanings, 1) requires approval from department, 2) waiting for Payroll to review and activate. **Draft** – waiting for further action from department prior to approval. **Error** – a problem occurred and further action is required, or possibly the transaction will need to be deleted and reenter.

Sorting Transactions: Click on the heading above any of the columns and the transactions will be sorted in order. The NAME sort will list employees alphabetically by first name.

Deleting Transactions: If a mistake was made with a transaction for any reason, and a new transaction is necessary, click the box to the left of the transaction you wish to delete. Then click the CANCEL TRANSACTION button at the bottom of the screen. Caution: once a transaction is deleted it cannot be reactivated. Transactions that are in the COMPLETED status should not be deleted by the department. A new transaction should be entered to correct the issue.

Manage Transactions

The following people have transactions ready to be processed.

*Transaction Type Employee ID Manually Completed

*Transaction Status Employee Name

Effective Date From To Template

Transactions to Process <input type="button" value="Q"/>									
Select	Transaction Type	Request ID	Effective Date	Transaction Status	Name	Person ID	Employment Record Number	Action	Submitted By
<input type="checkbox"/>	Hire/Rehire		11/30/2016	Hired				0 Hire	

Select All

Professional Internships: The following two Templates are to be used exclusively for **Professional Internships**. All other templates can be used for the Professional Internship employees for all other changes.

Professional Internship Hire [UC_TBH_GI](#)

Professional Internship Pay Change [UC_TBH_DC_GI_PAY](#)

Professional Internships. Job code and Empl Class are specific to this population of Grad Students and shouldn't be used for the majority of graduate assistantships.

Job Information - Job Code
*Job Code <input type="text" value="4154GI"/>

Job Information - Employee Classification
Employee Classification <input type="text" value="GI - Graduate Intern"/>