

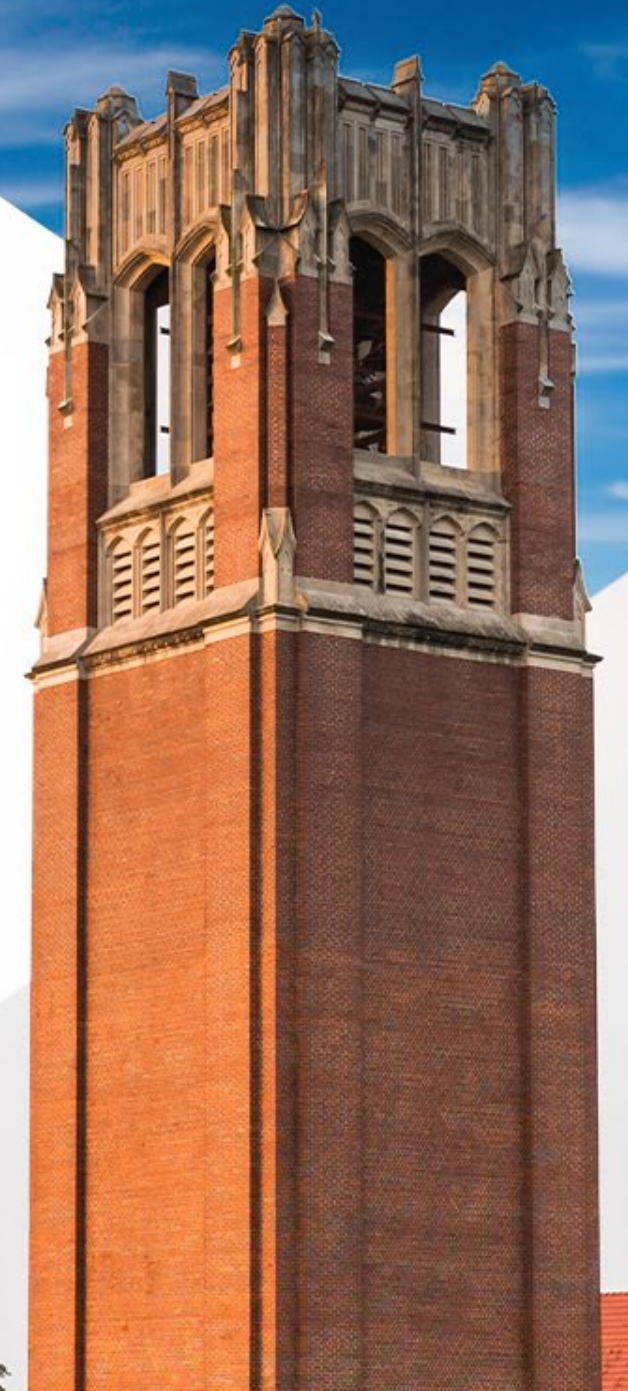


Human Resources

HR Forum

March 1, 2023

903 W University Ave. Gainesville, FL 32601-5117
HR.UFL.EDU | (352) 392-2477



Agenda:

- Talent Acquisition & Onboarding
- Communications & Worklife
- Strategic Initiatives
- Employment Operations & Records
- Classification & Compensation
- Benefits
- UF GO
- Important Dates




Talent Acquisition & Onboarding

Christina Salva



PageUp - Applicant Progress Board

- An updated view(s) of the applicant pool
 - List view and Card view options
 - Card view – aggregate view of the progress of all the applications for a job sorted by application status
 - Quick and easy way to identify the best talent and move them through the hiring process
 - Easier access to key links and applicant documents
 - Anonymized profiles
- 

PageUp - Applicant Progress Board

List View Option

Note: Users can easily switch between the two views by clicking either the List view or Card view buttons.

PageUp

BETA

JobsPeopleReportsSettingsRecent itemsQuick searchChristina?

515920 - Administrative Support Assistant IIJob status: ApprovedPosition: 1Owner: John SunView JobGuided tour

Filters

Search by name, location, email

Switch to card view

Table Settings

Applicant name	Flags	Application status	Documents	Actions
<div>NOV 2 2021</div> <div><div></div><div>Christopher Robin</div><div>test.christopher.robin_1111@gmail.com</div></div>		Group - Moderately Relevant	Form	<div>Progress</div> <div>Decline</div> <div></div>
<div>NOV 2 2021</div> <div><div></div><div>Winnie Pooh</div><div>Test.winnie.the.pooh.12345@gmail.com</div></div>		Offer made	Form	<div>Progress</div> <div>Decline</div> <div></div>
<div>OCT 28 2021</div> <div><div></div><div>Spider Man</div><div>Test**SpiderMan**@yahoo.com</div></div>		Interview	Resume Form	<div>Progress</div> <div>Decline</div> <div></div>
<div>OCT 28 2021</div> <div><div></div><div>Alli Gator</div><div>testAlligator@yahoo.com</div></div>		Interview Unsuccessful*	Resume Form	<div>Progress</div> <div>Decline</div> <div></div>

PageUp - Applicant Progress Board

Card View Option

Note: Users can easily switch between the two views by clicking either the List view or Card view buttons.

515920 - Administrative Support Assistant II ▾ Job status: Approved Position: 1 Owner: John Sun [View job](#) [? How to use](#) [Manage Applications](#)

Quick filters

- ☐ Statuses with Applications
- ☐ Shortlisted Applicants
- ☐ Current Application Statuses
- ☐ Internal Applications
- ☐ Flags ▾

Application status [Select all](#)

- ☐ Unsorted applications (1) ?
- ☐ Group - Highly Relevant (0)
- ☒ Group - Moderately Relevant (1)
- ☐ Group - Least Relevant (1)
- ☐ Hiring Manager Review Unsuccessful* (0)
- ☐ Phone screen (0)
- ☒ Interview (1)
- ☒ Interview Unsuccessful* (1)
- ☐ Reference Collection (0)

Group - Moderately Relevant... ▾ ▾ ▾ ▾

- Christopher Robin ...
- Form
- Unsuccessful ▾ Progress ▾ ▾ ▾ ▾

Interview (1) ▾ ▾ ▾ ▾

- Spider Man ...
- Form Résumé
- Unsuccessful ▾ Progress ▾ ▾ ▾ ▾

Interview Unsuccessful* (1) ▾ ▾ ▾ ▾

- Alli Gator ...
- Form Résumé
- Unsuccessful ▾ Progress ▾ ▾ ▾ ▾

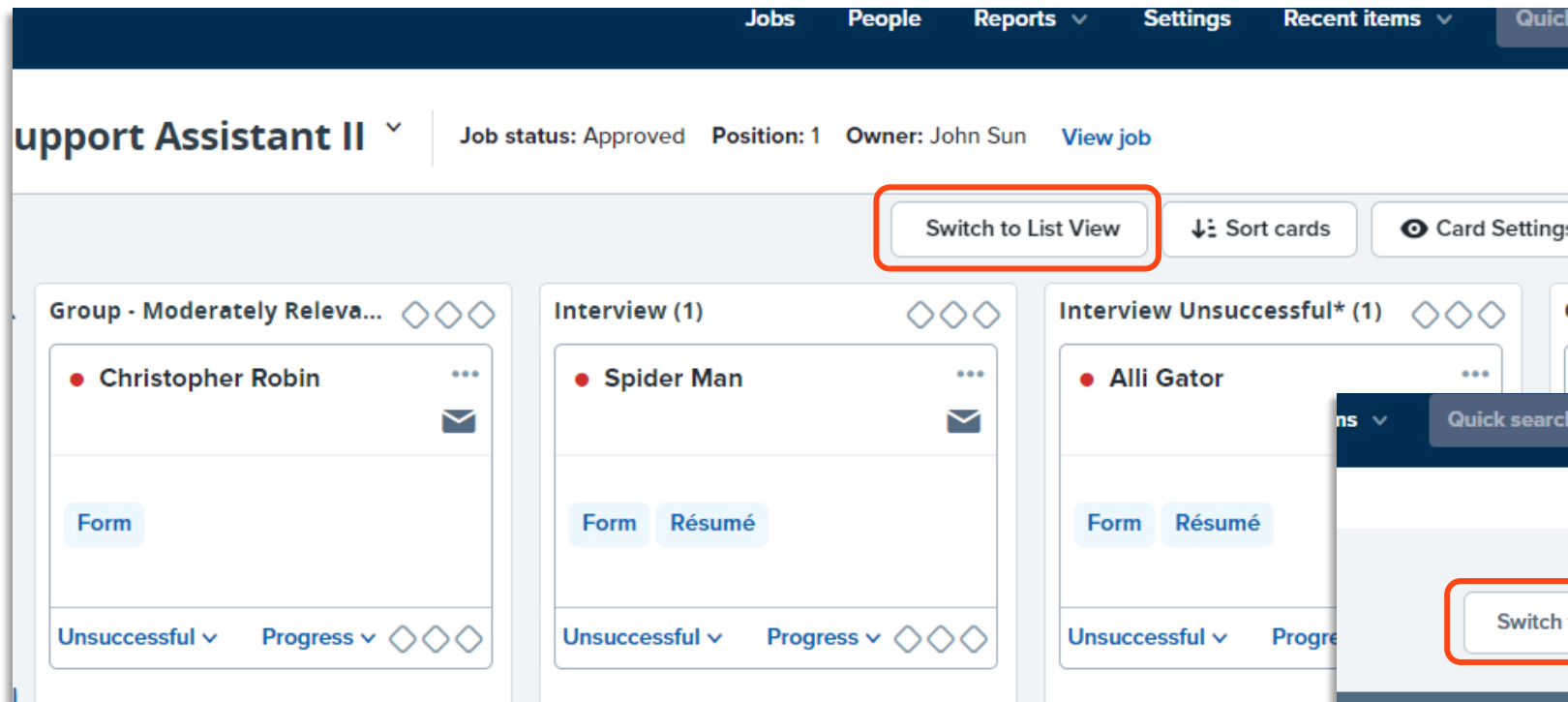
Offer made (1) ▾ ▾ ▾ ▾

- Winnie Pooh ...
- Form
- Unsuccessful ▾ Progress ▾ ▾ ▾ ▾

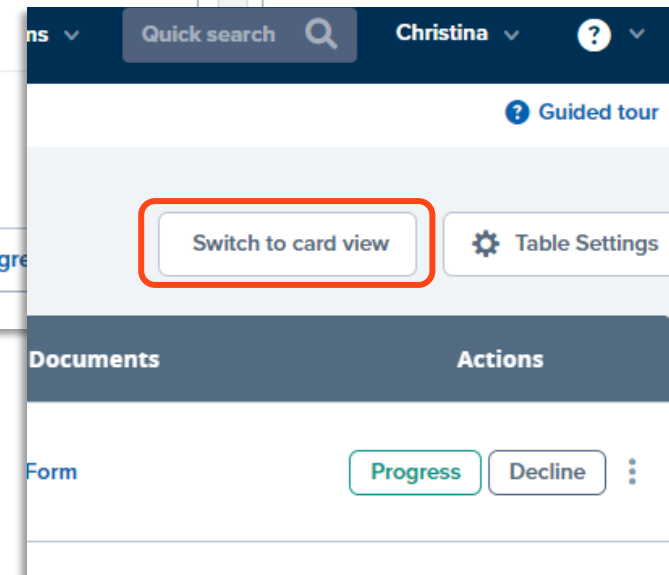
[Switch to List View](#) [Sort cards](#) [Card Settings](#) ☐ Anonymize Profiles [<](#) [>](#)

Users can click and drag applicant “cards” from one column to another to update the status.

PageUp - Applicant Progress Board



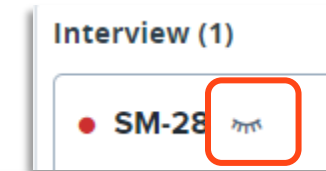
Users can switch between the two views by clicking either the **List view** or **Card view** buttons.



Key Features

Anonymized profiles

- If enabled, names and contact details will be hidden with a 'click to reveal' icon.
- Available in both List and Card view



PageUp

Jobs People Reports Recent items Quick search Mandy ?

514184 - Senior Project Manager (MD) Job status: Sourcing Position: 4 Owner: Mandy Manager View Job

Filters

Switch to card view ☒ Anonymize profile

Applicant name	Flags	Application status	Screening activities	Score	Documents	Actions
<div>SEP 27 2022</div> <div>PS-89</div> <div>Me*****</div> <div>ma*****</div> <div>+6*****</div>		Interview (Cronofy)	<div>Invited</div> <div>Invited 1 day ago</div> <div>+ New activity</div>	<div>Assessment</div> <div>91%</div> <div>Application</div> <div>89%</div>		<div>Progress</div> <div>Decline</div>
<div>MAY 24 2022</div> <div>CR-96</div> <div>Sy***</div> <div>ar*****</div> <div>04*****</div>		New	<div>Invited</div> <div>Invited 1 day ago</div> <div>+ New activity</div>	<div>Assessment</div> <div>90%</div> <div>Application</div> <div>96%</div>		<div>Progress</div> <div>Decline</div>

PageUp - Applicant Progress Board

- Feature available Monday, March 6th
- Hiring managers, Originators, and Level 1 Approvers

Questions?

Talent@hr.ufl.edu

352-273-2841



Communications & Worklife

Angie Brown



Resilience & Mindfulness at Work

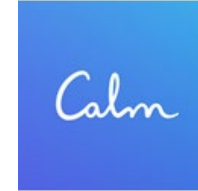
New full-day workshop (it's free!)

- Tuesday, March 28, lunch provided
- A holistic approach to physical, cognitive and emotional aspects of resilience at work
- Find greater alignment with individual purpose and values
- Develop self-awareness and strengthen resilience through reflection and mindfulness practices
- One hour of pre-work includes self-assessment
- Register today via myTraining; limited to 30 participants



Limited app subscriptions still available

Try an app for added support



- Available to all faculty and staff (non-student)
- Designed to support wellness and personal goals:
 - **Noom** for weight management (2,500 licenses)
 - **Calm** for stress reduction and sleep (5,000 licenses—also includes 5 for dependents)
 - **SPOTLYFE** for making micro-changes (1,500 licenses)
- Choose either a Noom or Calm subscription at:
<https://worklife.hr.ufl.edu/get-support/noom-and-calm-for-2023/>
- Faculty and staff may also subscribe to SPOTLYFE:
<https://worklife.hr.ufl.edu/get-support/spotlyfe-for-2023/>

Strategic Initiatives

Amber Wuertz



Let's Try This Again!

Process Improvement

- In the past, once a UFID was created department admins would send a separate email to the new employee/affiliate providing them with their UFID
- Moving forward the system will generate an email to these new employees/affiliates.
 - Except for students
- This enhancement will go live on Monday, **March 6th**

Email

From: IT-ES No-Reply IAM <ES-NoReplyIAM@ad.ufl.edu>

Sent: Monday, January 30, 2023 10:51 AM

To:

Subject: Welcome to UF! Here is your UFID

Welcome to the University of Florida!

You have been assigned a UFID. Your UFID is an eight-digit number used to identify who you are. Your UFID is **XXXXXXXX**.

Next, you will receive an email invitation for you to create a GatorLink. A GatorLink account is an individual's computer network identity at the University of Florida. Your GatorLink username will also serve as your email address with @ufl.edu. Once you receive the email, please follow the instructions closely. You will need your UFID to complete the GatorLink registration.

If you need assistance, please contact the UF Computing Help Desk at 352-392-4357.

Go Gators!



Employment Operations & Records

Johannes Traster



Courtesy Faculty Review File Now Open!

File Specifics

- ☐ Opens: March 1, 2023
- ☐ Closes: March 31, 2023
- ☐ Termination rows will load on April 3, 2023, with an effective date of March 31, 2023
- ☐ File will include courtesy appointments from year 2 (day 366 and greater) to year 5 and will have the box checked for termination
 - ☐ The appointments that the college/unit does not want to termination will need to be **unchecked**
- ☐ Appointments 1 year or less will not be included in the file

Courtesy Faculty Review File

File Specifics Cont.

- ☐ All courtesy appointments older than 5 years will be set to term in the file.
If appointment is needed beyond 5yrs then it must be renewed w/letter
 - ☐ Reappointments **must be** entered via Hire ePAF effective 3/31/23 since current appointment will be set to term in file
 - ☐ March 31st reappointments can be entered as early as now and highly encouraged once approved offer letter is obtained

Courtesy Faculty Review File

File Specifics Cont.

- ☐ Calendar Year: 2023
- ☐ Department ID: Your unit(s)
- ☐ Termination Date: 03/31/2023
- ☐ Salary Plan: CTSY

Navigation: Main Menu > Human Resources > Workforce Administration > Job Information > UF Appointment Review



Courtesy Faculty Review File

Additional Info & Resources

To review your current population and to identify those who may have an active courtesy faculty appointment greater than 5 years, please navigate to the report below:

- ☐ Main Menu > Enterprise Analytics > Access Enterprise Analytics > Team Content > Human Resources Information > Workforce Information > Job Information for UF
 - ☐ The review file will assess the rehire date of this report if there was a break in service on that Empl Rec

[Courtesy Faculty Policy Webpage](#)

[Offer Letter Template](#)

[Frequently Asked Questions](#)

[Courtesy Faculty](#)



Reminder—Sabbaticals

Sabbatical Rows

- ❑ Use caution when approving job transactions for those faculty on sabbatical
 - ❑ For time to auto-populate, the sabbatical row must always remain as the top row during their time on leave
 - ❑ Approving transactions such as supervisor ID changes or other updates during one's sabbatical will cause their time to not auto-populate
 - ❑ If the transaction(s) cannot wait until they return from sabbatical, then EOR will need to be contacted in order to readd the sabbatical row on top




Classification & Compensation

Kenya Williams



Additional Pay Code Updates

In December, the Board of Trustees (BOT) approved UF regulation 1.202 University Bonus Plans.


- The bonus regulation includes three bonus plans.
 - Work Performance Bonus Plan
 - Recruitment Bonus Plans
 - Retention Bonus Plans
 - To ensure we can accurately report bonuses to the BOT, several existing codes are being repurposed. Moving forward, these payments should be coded using the bonus earnings code using the following reason codes.
 - Work Performance
 - Recruitment
 - Retention
- 

University Benefits

Crystal Roncek



Services Following Retirement

- As we mentioned in the February HR Forum, the State of Florida Division of Retirement (DOR) has been informing retirees about restrictions on services that can be provided by retired employees and emeritus faculty.
 - An employee cannot prearrange or accept a role (paid or unpaid) that provides services in any capacity for 12 months after receiving a retirement distribution or benefit.
 - A notice of restrictions for services after retirement will be shared with HR Liaisons.
 - UFHR is working with UF Government and Community Relations to lobby the legislature on services following retirement.
- 

Finance & Accounting

Victoria Peprah-Asante

UNIVERSITY *of* FLORIDA




TRAVEL & PCARD SYSTEM

UF GO

What is UF GO?

- Overview

How does UF GO impact HR?

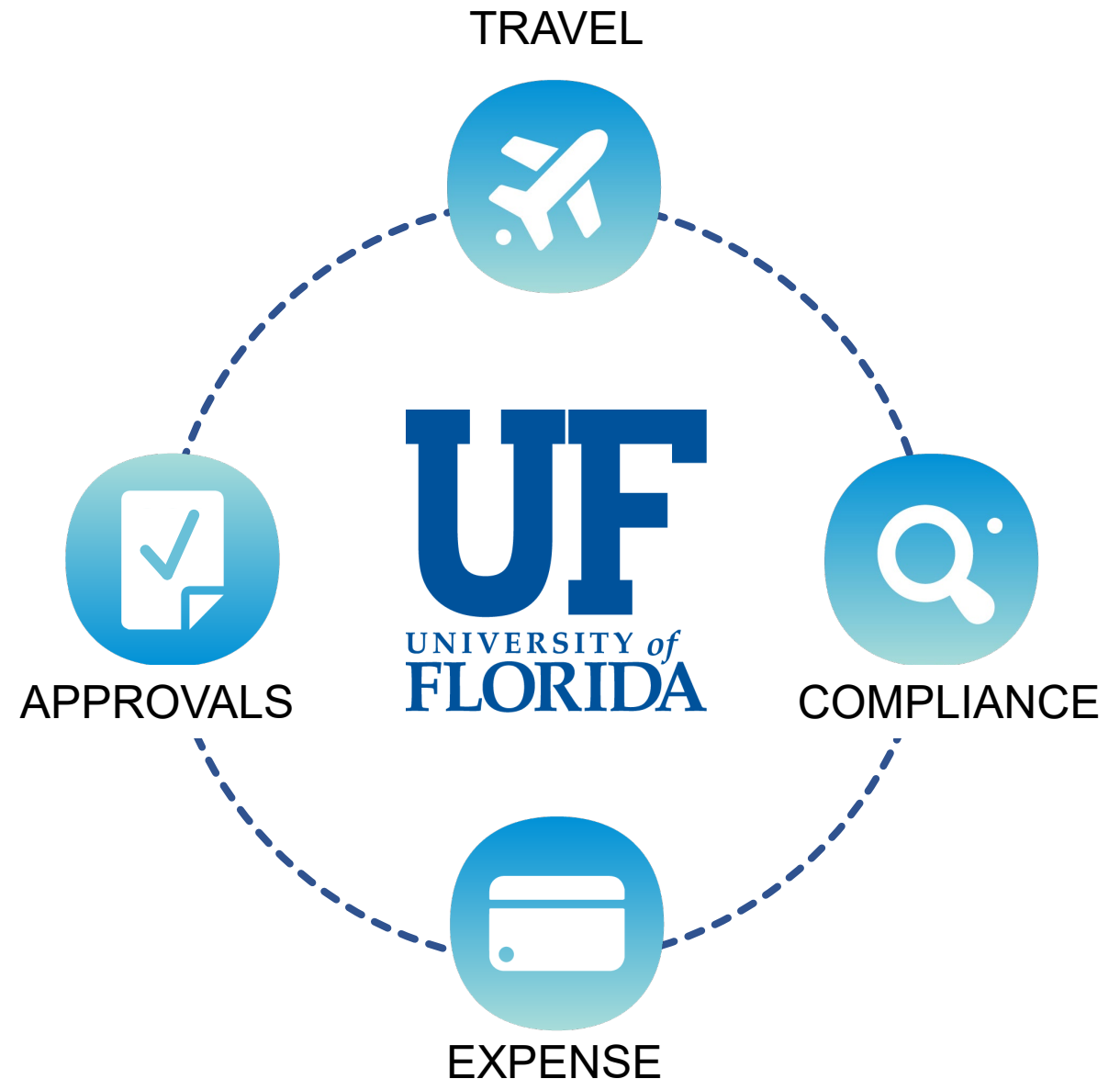
- Security Roles
 - Name
 - Supervisor
 - Guest Process
- 

WHAT IS UF GO?

An **integrated** cloud-based **Travel and PCard system** that will enable faculty and staff to upload, review and report Travel and PCard expenses **on the go**.

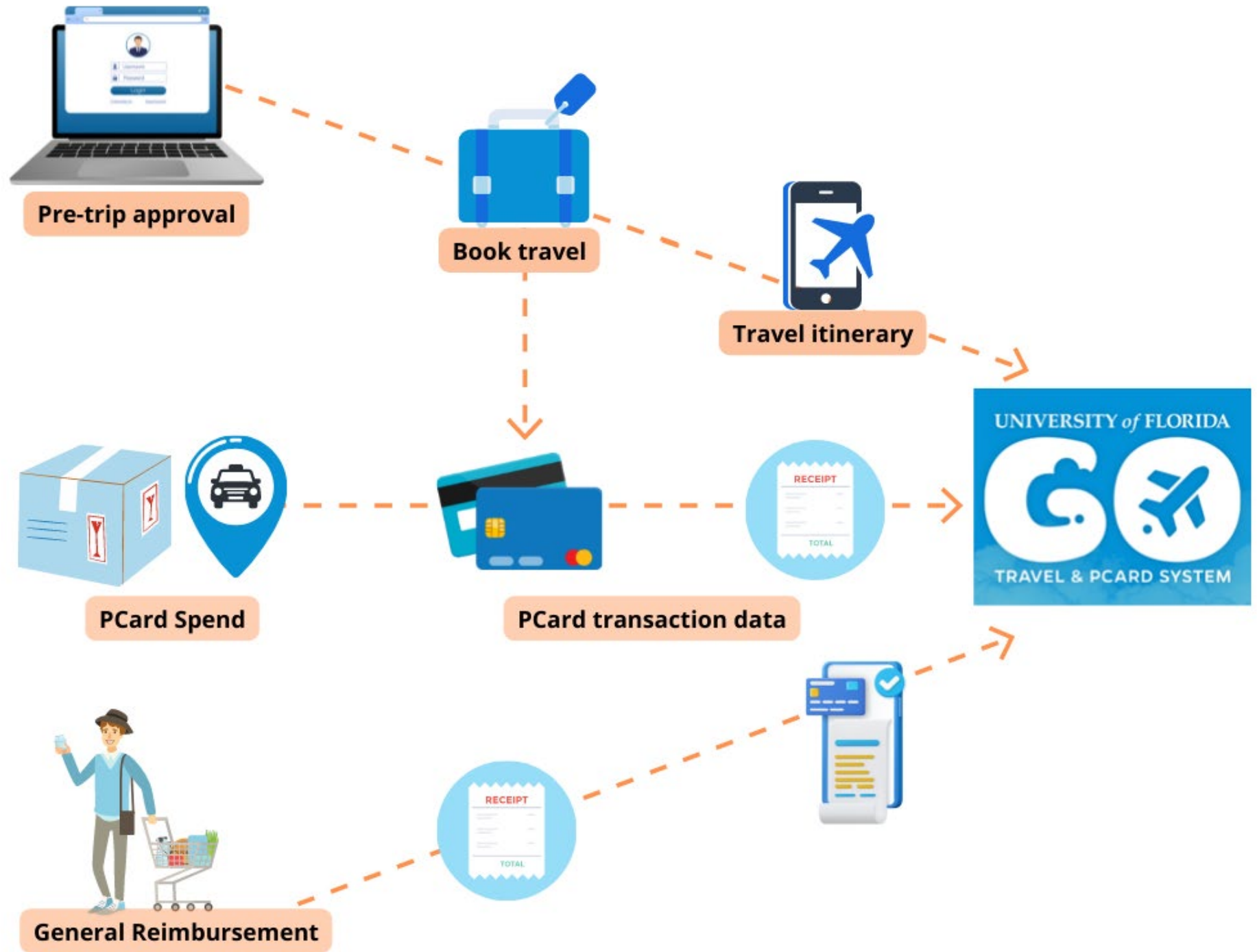
Project Goals

- **Redefine** the campus travel and reimbursement experience
- Seamless **P**Card integration
- **Streamline** and **simplify** processes
- Elevate **compliance**
- Increase transparency and **spend visibility**
- **Identify cost savings** opportunities

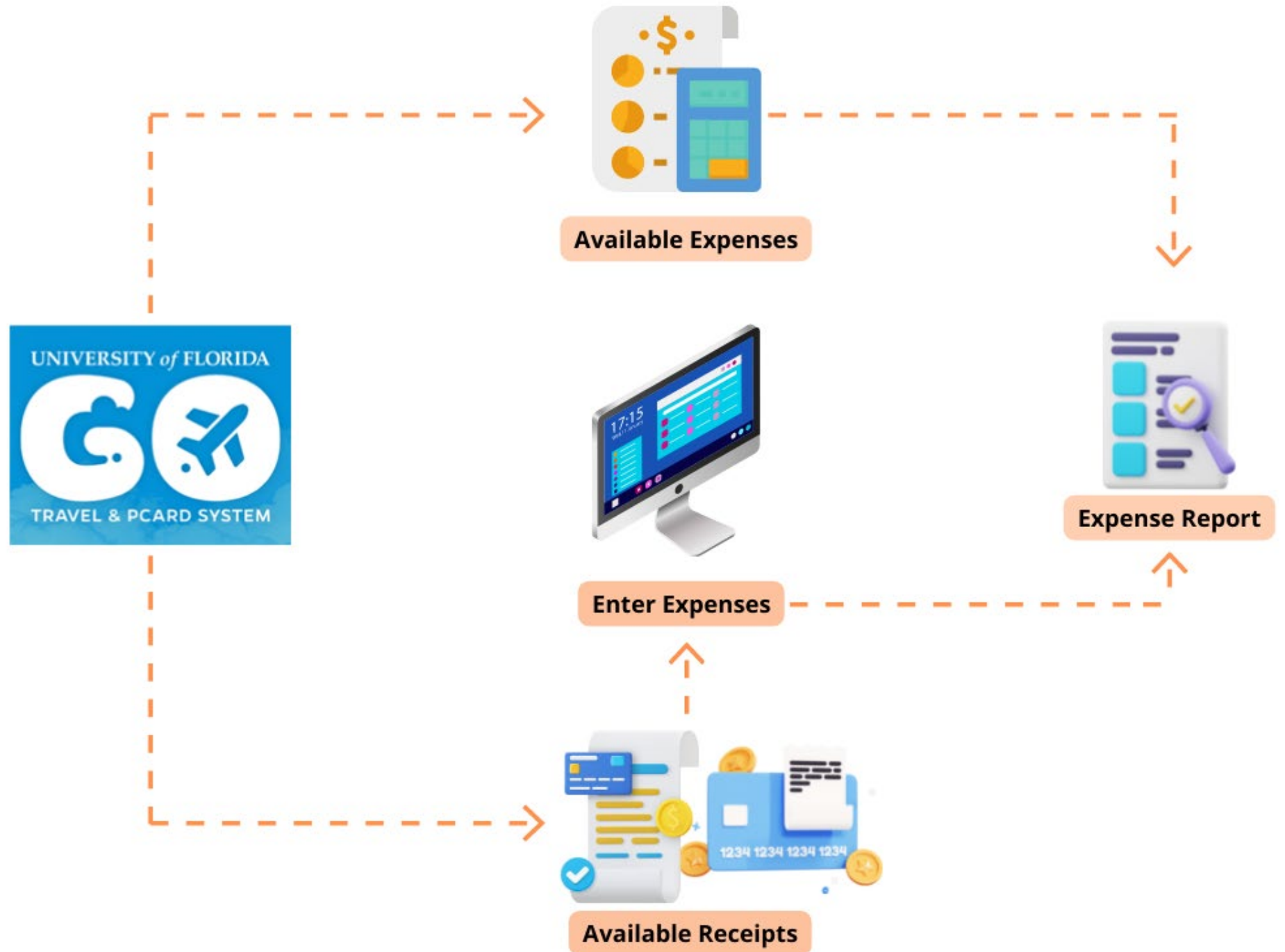


UF GO:

How Does it Work?



UF GO: How Does it Work?



Primary User Modules

UF GO supports all Travel, PCard, and General Reimbursement transactions



REQUEST

Submit a Travel Request



TRAVEL

Book travel on Concur platform, supported by World Travel Services



SUBMIT EXPENSES

Submit Travel, PCard Employee Reimbursement expense report



APPROVALS

Review and approve Requests and Expense Reports

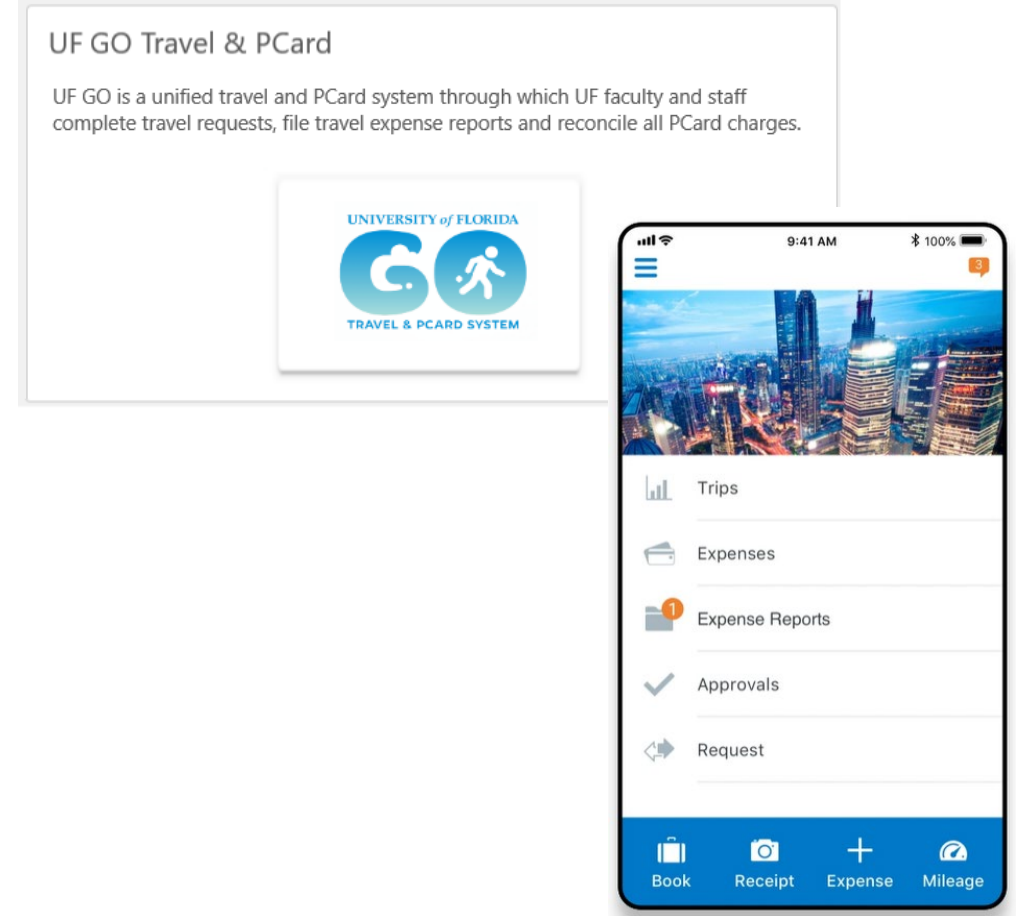
HOW DOES UF GO IMPACT HR?



SECURITY ROLES

Access to UF GO

- Login via myUFL and One.UF
- All users must complete training to access the system
 - Standard User Training (20 minutes)
 - Staff and Faculty
 - System will auto-provision access
 - Approver Training (60 minutes)
 - Financial Approvers
 - DSA will need to request security role for access
- Training available in March











LEGAL NAME


Integrated Booking Tool


The screenshot displays the SAP Concur Travel interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel' (circled in green), 'Expense', 'Approvals', 'Help', 'Profile', and a user icon. A green arrow points from the 'Profile' dropdown to the 'Profile Options' panel on the right. This panel lists 'Personal Information' (circled in green) as an option to customize the user profile. The main content area is divided into 'TRIP SEARCH' and 'ALERTS'. The 'TRIP SEARCH' section features a 'Rule Class' dropdown set to 'Business Travel Class', a toggle for 'Booking for myself' (selected) and 'Book for a guest', and icons for flight, train, car, hotel, and rental. A red tip box states: 'TIP: For the broadest range of flights change your search parameters from +/-8 hours to +/-12 hours.' Below this is the 'Mixed Flight/Train Search' section with buttons for 'Round Trip', 'One Way', and 'Multi City'. A green arrow points to the 'TRIP SEARCH' header. The 'ALERTS' section contains 'COMPANY NOTES' with the heading 'KNOW BEFORE YOU GO' and a message from 'WORLD TRAVEL SERVICE' welcoming the 'UNIVERSITY OF FLORIDA' to Concur Travel, providing contact information for reservations and ticket changes.


SAP Concur  Requests **Travel** Expense Approvals Help  Profile 






  

Profile Options
Select one of the following to customize your user profile.
Personal Information
Your home address and emergency contact information.

TRIP SEARCH 

Rule Class
Business Travel Class 

 Booking for myself | [Book for a guest](#)

TIP: For the broadest range of flights change your search parameters from +/-8 hours to +/-12 hours.

Mixed Flight/Train Search

[Round Trip](#) [One Way](#) [Multi City](#)

ALERTS

COMPANY NOTES

KNOW BEFORE YOU GO

WORLD TRAVEL SERVICE welcomes UNIVERSITY OF FLORIDA to Concur Travel

For **reservations or ticket changes**, please call (865) 288-1901 or email blueteam@worldtrav.com during our normal business hours. (Monday – Friday, 8:00am to 6:00pm ET)

Personal Information: Legal Name



Important Note

Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

***Please confirm that the name on your frequent traveler accounts match your legal ID as well as the name listed in your Concur profile. This will ensure that your accounts are credited properly and that TSA information is entered properly in your record.**

Title	First Name[Required]	Middle Name[Required]	Preferred Name	Last Name[Required]	Suffix
<input type="text" value=""/>	<input type="text" value="Cynthia"/>	<input type="text" value="Maria"/> <input type="checkbox"/> No Middle Name	<input type="text" value=""/>	<input type="text" value="Mendoza"/>	<input type="text" value=""/>

- Employee name information feeds directly from HR system
- If first or last name change is needed, it must be completed through the process developed by UF HR
- Nightly system update

Want to learn more? View Timely Topics **Session 4** at <https://cfo.ufl.edu/initiatives/uf-go/outreach/>



SUPERVISOR

UF GO User Types



Delegate

Prepare (optional)

myUFL

**Admin, Originator,
Proxy, Reconciler**



User

Prepare/Submit

myUFL

**Traveler,
PCard holder**



Supervisor

Approve

myUFL

**Supervisor listed
in HR data**



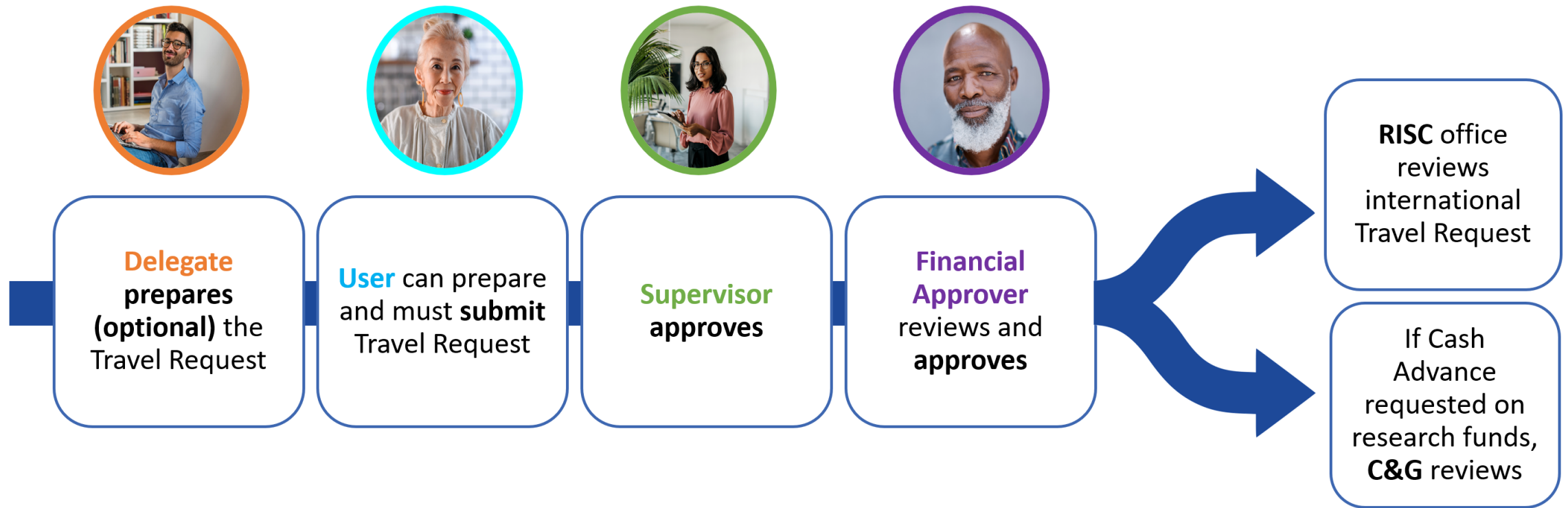
Financial Approver

Approve

myUFL

**Approver for Travel,
Approver for PCard**

Travel Request Approval Workflow



UF GO User Types

- Supervisor is part of the standard process for pre-trip approval
- Pulling from HR Job Data
 - Supervisor ID listed in primary appointment
 - Ad-hoc approvers can be added
- Support in UF GO
 - Approver Delegate: Delegation to someone who can make the decision (ex. Director, manager, vice-chair)
 - Temporary or permanent assignment



Supervisor

Approve

Want to learn more? View Timely Topics **Session 1** at <https://cfo.ufl.edu/initiatives/uf-go/outreach/>



GUEST PROCESS

UF GO System Populations

Profiled Users

Individuals with an employment-related or like affiliation

- Faculty
- Staff (USPS, TEAMS, OPS)
- Graduate Assistants (not Grad Students)
- Student assistants (STAS/FWS)
- Post Docs
- Courtesy and Emeritus
- Fellows

Guests

- Job Candidates
- Speakers
- Consultants
- Students on study abroad programs
- *Non-employed students (grad and undergrad)

Alert! Study abroad programs will continue using the processes established by UFIC

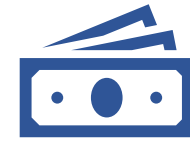
Guest Process is used when...



Travel

Individual is sponsored by a UF employee to travel on UF official business AND is **not** part of UF GO's profiled user population

Example: Job interviews, speaking engagements, conferences, etc.



General Reimbursement

Individual is receiving reimbursement for expenses incurred while on official UF business AND is **not** part of UF GO's profiled user population

Example: last-minute purchase for an event, services, licenses, etc.

UF GO Guest Process



In myUFL: Create POI

- Step must be completed even if the individual has a UF ID
- New Travel POI Type: **00016**
- Overnight process for information to be available in UF GO



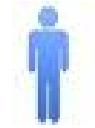
In UF GO: Enter Transaction

- Travel Request
- Book Travel
- Expense Reports: Travel & General Reimbursement

myUFL: POI Process

- Leverage current system
- Does not require SSN
- POI is active for a year. It will expire after 365 days
- Must select new POI type:
00016
 - If the individual has a POI that is not for POI type: 00016, a new POI must be entered

Start a New electronic Personnel Action Form (ePAF)



Add a Person of Interest

Use this form to add a new person of interest such as an External Trainee.

[Add a Person of Interest](#)

[Return to Electronic Personnel Action Form \(ePAF\) Home Page](#)

CREATING A PERSON OF INTEREST

A Person of Interest is someone who is not employed by UF. This individual is not on the University payroll, but required to have access to the myUFL system to enroll in training or perform another myUFL function. The individual therefore needs a UFID and this instruction guide gives the procedure for obtaining the UFID through Add a Person of Interest ePAF.

You will need the following Security Role for ePAF actions:

**UF_EPAF_DepartmentAdmin or
UF_EPAF_Level 1 Approver** **UF_EPAF_POI_Coordinator**

myUFL: POI Process

Add a Person of Interest

Step 4 of 5: Person Of Interest Information

Personal Info

Name: Alligator, Albert Empl ID: 29999958

Cit Status: Personal Data

Email Address: Person Organizational Summary

Documents

Person Of Interest Information

eForm ID: 1554847

POI Type: 00016 Travel Related

*Dept ID: 64101000 FA-CONTROLLER-ADMINISTRATION

POI Expiration Date: 12/6/2023

ACH Bank Information

Comments

Your Comment:

Cancel Submit

- Optional feature: **Gather ACH information** for direct deposit payment for guests
- Guest information is available in UF GO after an overnight process
- POI information will feed to **Guest Traveler** list in UF GO to reduce duplicative work



POI ACH Page

Request Direct Deposit

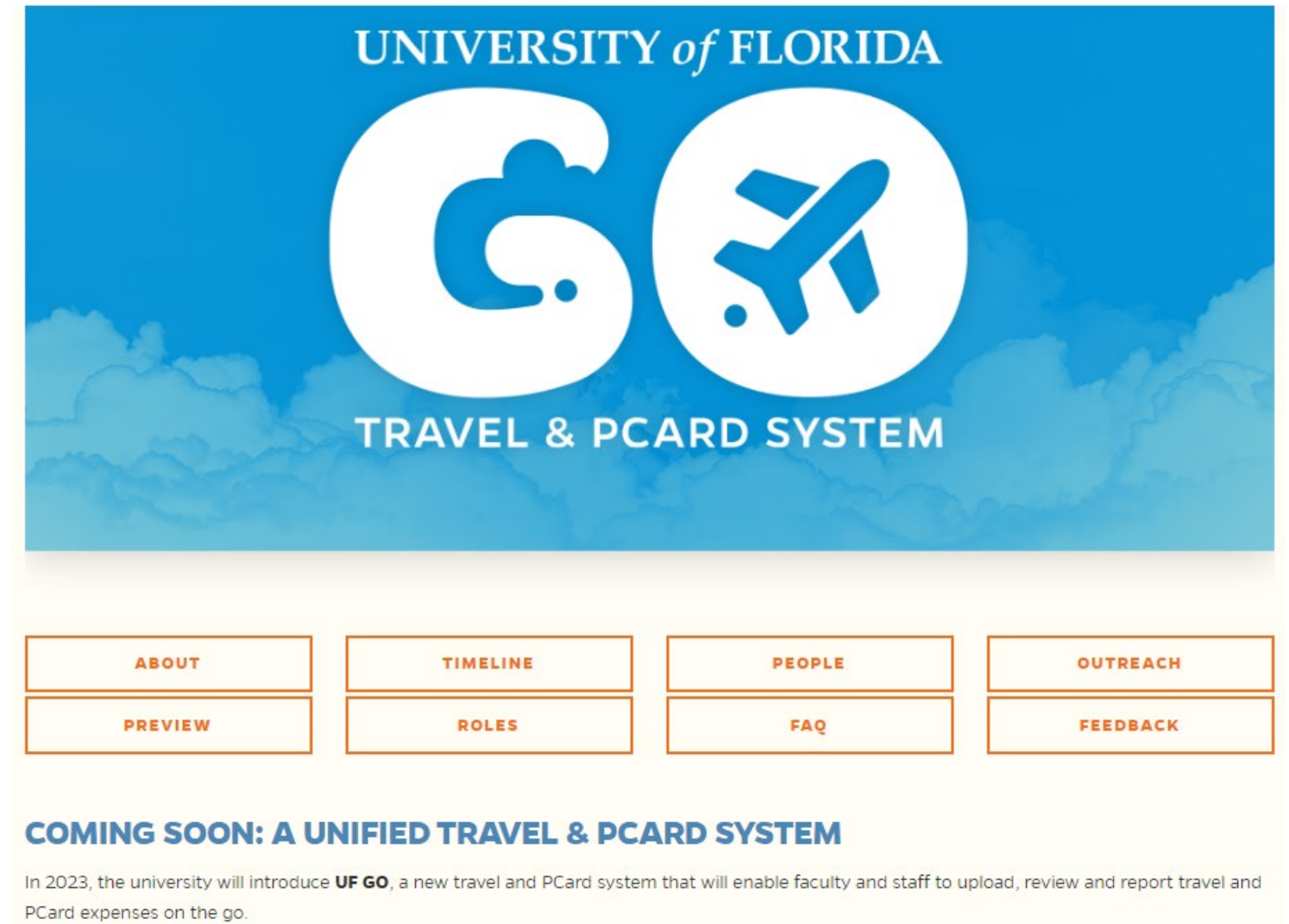
*Account Type: Checking

*Bank ID: 063107513

*Account Number: 12345234346231

OK Cancel

Project Website



<https://cfo.ufl.edu/initiatives/uf-go/>

QUESTIONS?

Victoria Peprah-Asante
Associate Controller – Disbursements
vpa@ufl.edu

Cynthia Mendoza
Project Manager
cmmendoza@ufl.edu



Important Dates

March 6 – Applicant Progress Board

March 31 – Courtesy File Closes

April 5 – Next HR Forum

April 25 – GBAS Spring Institute